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Supervisor: xxxxxxxxxxx

To what extent should Costa Rica's tourism strategy be imitated by Nicaragua?

Word count: 7483

CONTENTS PAGE

INTRODUCTION

Despite being neighbours, Costa Rica and Nicaragua have developed at different rates and there is much one can learn from the other. For decades, Costa Rica has lead in the areas of: economy; infrastructure; societal wellbeing; and overall development. Resulting largely from 20th Century politics, the two have also evolved divergent cultures. Such differences extend to the field of tourism which, for Costa Rica, has proven both a cause and effect of country development. It seems unjust that Costa Rica, now a world-renowned ecotourism destination, has benefitted so from this virtuous cycle, while Nicaragua remains relatively obscure.

As the poorest country in Central America and the second poorest in the Western Hemisphere, tourism offers opportunities for Nicaragua in terms of investment, world recognition and GDP growth. Moreover, the country has huge tourism potential in its immense natural resources, adventure activities, colonial culture and beyond. It seems a waste for Nicaragua to attempt to build a tourism strategy without learning in some way from a world leader in ecotourism with which it shares a border. By studying Costa Rica's tourism model, the Nicaraguan industry and government's limited financial resources could be invested more efficiently and effectively.

What remains undetermined is *how* Nicaragua can imitate Costa Rica: where should it copy the tourism strategy directly and where should it develop its own strategy given the differences between the countries? This paper attempts to answer this question using a framework derived from interviewing industry professionals and tourists as well as examining existing literature.

CHAPTER 1: LITERATURE REVIEW

1.1 Costa Rica's tourism appeal

According to Instituto Costaricense de Turismo (ICT), Costa Rica's national tourism board, almost three million tourists visited Costa Rica in 2017. As early as 1986, tourism was the third

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foreign exchange earner and the country has received the highest number of international tourists in Central America since 1990. According to Mok (2006), tourism has strengthened the economy every year since the early 90s when it became the country's biggest export, leaving agricultural revenue 'in the dust' (Palmer and Molina, 2009-). It is now one of the world's most popular eco-tourism destinations.

Figure 1: Distribution of attractions in Costa Rica

Natural attractions

Beach attractions

Cultural and rural attractions

Port attractions
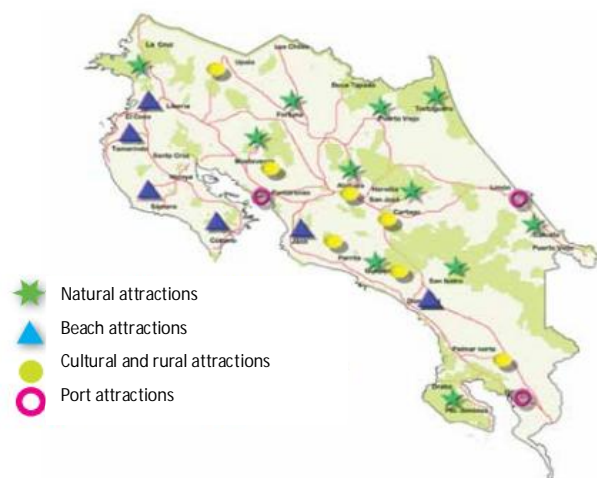
Source: *ICT*, 2010, p.12

ICT has launched four tourism development plans, each highlighting natural attraction as the country's unique selling point. The 2010-2016 plan maintains four categories of attraction: 'Nature' (national parks), 'The Coast', 'Live culture' and 'Sustainability' (p.13).

Natural and coastal attractions dominate (Figure 1). Costa Rica also boasts 8,000 plant species, 305,000 reptile and amphibian species and 800,000 species of bird (Mendoza, 1986), making it one of the planet's most biodiverse regions (Mok 2006). Ecotourism is its strongest tourist appeal (Mok 2006; Mendoza 1986; Liu *et al*, 2008; Whelan 1988; Florek 2007) and it has extended this to include a unique, human-made adventure activity: canopy zip-lining, which is widely recognised as being created in Costa Rica (Kahler, 2015).

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'Security, safety and health' ranks third of all tourism drivers (Assaf and Josiassen, 2011, p.390) and Costa Rica boasts higher levels of safety than its neighbours. It is Central America's safest country and 34th in the world (Vision of Humanity, 2017). In 2006, the CIA referred to it as a 'Central American success story', (cited in Florek, 2007) due to its relatively peaceful history: while the 1948 civil war lasted 44 days and killed approximately 2,000 people (Høivik and Aas, 1981), it led to the disintegration of the army and meant the country had almost no part in the Central American crisis of the 70s and 80s that wracked Nicaragua and El Salvador in particular (Leiken and Rubin, 1987).

1.2 Current environment of Costa Rica's tourism industry

1.2.1: The Tourist Profile

In 2001, Stanley Plog created a scale of traveller 'Personality Types': *Venturer; Near-Venturer; Centric-Venturer; Centric-Dependable; Near-Dependable* and *Dependable*; from adventurous lone explorers to cautious, comfort seeking tourists, and placed Costa Rica's tourists as *Near Venturer*, together with Australia, Ireland and China's big cities (see Figure 2).

Figure 2: Psychographic positions of destinations (2001)
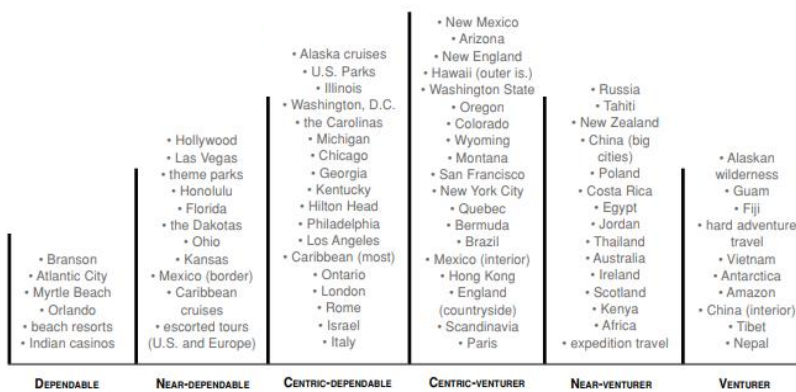
Source: *Plog*, 2001, p.21

In 2008, Liu *et al* conclude Costa Rica's tourist profile had shifted towards the *Mid Centric* section seven years after Plog's original placement. Nine years on, an email conversation with an author of the 2008 paper, Dr Judy Sigauw, revealed 'it would be the norm that Costa Rica continue to evolve along Plog's continuum': the Costa Rican industry will look to host a more dependable tourist than ever.

1.2.2: Infrastructure

Often, 'front of country' places with good infrastructure are more attractive than rural, 'back country' options (Kearseley, Hall and Jenkins, 1997; cited in Weaver, 1999). Hearne and Salinas (2000) found that modern infrastructure was the most sought preference in the context of Costa Rica's ecotourism development. While it has a wide spread of roads, according to the *Global Competitiveness Index* (World Economic Forum, 2017), Costa Rica's infrastructure is inconsistent: it ranks 64th on air transport infrastructure but 123rd in quality of roads, far below neighbours.

1.2.3: Marketing

The importance of entertainment and media in the Strategic Image Management of a country to attract tourists is emphasised by Kotler and Gertner (2002). They state: an effective image must be 'close to reality, simple, appealing and distinctive' (p.254) as well as audience-specific. This is a process Costa Rica has successfully followed long term as in 1987, Mendoza speculated that scientific papers, film and TV had given Costa Rica a 'good international reputation'[1] (p.16).

Allen Flores, Costa Rican Tourism Minister discussed in 2011 the increase in marketing and promotional activities, stating they were 'the backbone of [the] institution and the essence of what we do'. He outlined the process of designing a 'country brand' through the 'No Artificial Ingredients' campaign, costing $18m. As of July 2017, ICT has partnered with Cable News Network (CNN) International and the United Nations World Tourism Organisation (UNWTO) across media platforms. 'Essential Costa Rica. My choice, Naturally' targets the USA, Canada, Mexico, France and the UK as these account for the largest numbers of visitors (Fernández Mora, 2017).

[1] Translated from Spanish to English.

1.3: Overview of Nicaragua's tourism industry

1.3.1: Facts and figures

Nicaragua scores 92 in *The Travel & Tourism Competitiveness Report* (World Economic Forum, 2017), below Honduras and El Salvador and far below Costa Rica at 42. Figure 3 displays its tourist numbers as half of Costa Rica's and the income generated only a fifth. Hunt (2011) attributes this underdevelopment to a string of 'disasters, dictators and delayed development' (p.267), none of which Costa Rica suffered.

Commented [AC13]: so does that mean CR is just lucky?

Figure 3: 2009/2010 tourism statistics Nicaragua

	Population 2009 (1000s)	Tourists 2010	Hikers 2010	Visitors 2010	Income generated (mil. USD) 2010	VFR Visitors 2009 %	Rooms
Central America	37.002,8	6,325,445	2,621,615	8,947,060	4.866.7	23.3	99,033
Costa Rica	4.620,5	2,056,793	390,453	2,447,246	1.975.4	9.0	19,738
El Salvador	5.744,5	1,148,740	450,021	1,598,761	519.8	42.5	7,967
Guatemala	13.018,8	1,220,215	655,562	1,875,777	1.378.0	26.1	43,706
Honduras	7.876,7	889,802	1,054,550	1,944,352	642.3	28.1	19,583
Nicaragua	5.742,3	1,010,670	71,030	1,081,700	383.0	28.5	8,039

Source: *CANATUR, 2011,* p.31

Tourism in Nicaragua only began on an industrial scale in the late 1990s. The 1999 *Law of Incentives for the Tourism Industry*[2] offered tax breaks and incentives that caused 250% increase in tourism between 1997 and 2009 (Hunt, 2011). Despite its late start, Nicaragua's tourism has seen enormous growth over the past 20 years in visitors, income, accommodation and employment.

Like most Central American countries, nature is Nicaragua's principal attraction. Hunt cites the UNWTO (2010) stating that a natural resource base allowed Nicaragua to benefit from growing tourism demand and Sánchez and Moreno (1997) believed the abundance of undiscovered natural resources is why 'Nicaragua is dedicating all of its promotional efforts to position itself as a "green" tourist centre'[3] (p.17).

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[2] Translated from Spanish to English.
[3] Translated from Spanish to English.

Figure 4: Tourist arrivals in Nicaragua
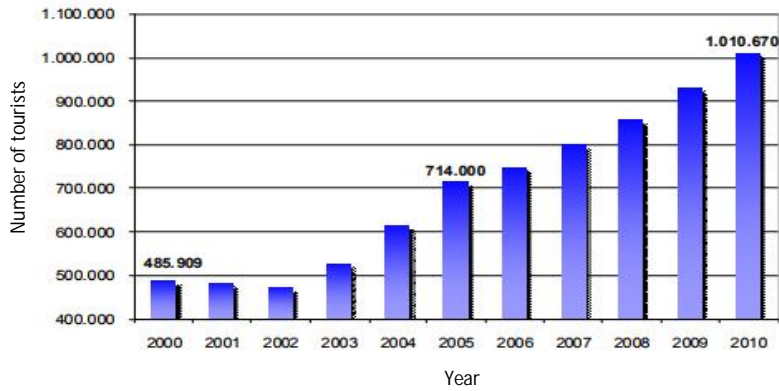
Source: *CANATUR, 2011,* p.25

Figure 5: SWOT analysis of Nicaragua's tourism attraction

Strengths	Weaknesses	Opportunities	Threats
- Ample biodiversity available - Existence of a legal framework which protects biodiversity - Authorities' interest in exploiting these resources sustainably	- Difficult public access to protected areas - Scarce infrastructure development - Lack of rigorous park administration - Budget issues in managing these areas - Lack of statistics - Lack of specialised personnel	- Develop tourism towards adventure activities - Source of employment and wellbeing for nearby communities - Increase awareness nationally of flora and fauna protection	- Biodiversity is at risk of over-exploitation and depredation

Source: *Sánchez and Moreno,* 1997, p.51[4]

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[4] Translated from Spanish to English.

According to Sánchez and Moreno, in 1997 the tourism industry still had much to develop and public investment in infrastructure had been insufficient. The World Economic Forum furthermore ranks Nicaragua second-to-last in all of Central and North America for tourist infrastructure (2017, p.15), ahead of only El Salvador.

1.3.2: Potential

'We foresee a combined effort by both private and public sectors to develop Nicaragua's tourism to capitalize on its considerable tourism potential and the growing magnitude of the tourism industry worldwide' – Croes and Vanegas (2008).

Combining the strengths listed above with year on year growth in tourism (Figure 4), it is clear why Croes and Vanegas saw potential in Nicaragua's tourism industry. One large player in Nicaragua's development is the Luxemburg Development Cooperation Agency, which participates in the Luxembourg government's initiatives to eradicate poverty and sustain development. LuxDev has chosen to focus on the 'promising tourism sector' as a means of economic and social development in Nicaragua (Projet NIC/128, 2017).

As Hunt (2011) notes, Nicaragua is geographically 'book-ended by two of the world's most recognised ecotourism destinations' (p.270), which puts it in a good position to exploit growing tourism demand. Hunt proposes that increasing zoning, restrictions and overdevelopment in Costa Rica makes its northern neighbour a better option for investors, and Liu *et al* (2008) suggest that the way in which Costa Rica is evolving along Plog's continuum makes the unexploited Nicaragua more desirable for both investors and tourists. Furthermore Nicaragua offers a cultural element lacking in Costa Rica with colonial cities like Granada and Leon (Sánchez and Moreno, 1997).

1.3.3: Importance of tourism in Nicaragua

'Tourism creates direct and indirect jobs in hotels, restaurants, consultation, transportation and training; it increases tax revenues and it helps the exporting of local products' – (Kotler and Gertner, 2002, p.255).

Croes and Vanegas (2008) equally believe in the benefits of tourism on developing countries: historically, such countries have been able to actively participate in the world economy by the means of the tourism sector.

Commented [AC14]: OK: so this is the point in the dissertation where the marker is starting to get the lie of the land, and has read enough different things to start asking questions mentally. At this stage it is to be hoped that the student has identified the same (or better) questions as the marker and will start to answer them in the next sections. If not, this is where the marker starts to worry that the student will not grasp opportunities for analysis - we can see questions that naturally arise from what's been said so far, and thus it is disappointing if the student does not. In this case, I'm thinking - issues with dictators have been flagged, and the dates match, and there was a flag on marketing for CR though nothing has been said about Nicaragua.... For someone born in 1973 (me) there is an issue that the name 'Nicaragua' conjours up images of war, guerillas, civil unrest, because I grew up in the eighties when this was rife. The name will always be associated unless there is a strong rebranding. Whilst I may not be all of the target market, middle and older aged travellers are a strong part of it, having the time and money not available in younger adult groups. Obviously I would not expect a student to know about the image of Nicaragua straight off, but in researching it she should come across it and it needs a mention. Moreover, it makes me think that a great piece of data gathering would be to get opinions of people on different ages as to their gut reactions to the names Nicaragua, CR, other countries put in there for a control. It would be a quick and easy way to get some real life data in here.

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As the poorest country in Central America and second poorest in the Western Hemisphere, Nicaragua is trusting tourism to address key development needs, including: poverty alleviation, wealth distribution and reduced environmental deterioration (Hunt, 2011). Tourism represented 5.3% of total GDP in 2016, and was forecast to rise by 4.2% in 2017 (WTTC, 2017). It is also important to recognise the positive impact of tourism on other sectors such as transport and education (by impacting levels of English spoken.)

Figure 6: Total Contribution of Travel and Tourism to Nicaragua's GDP
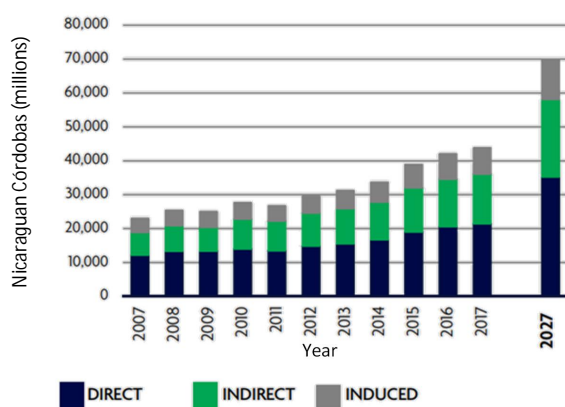
Source: *World Travel & Tourism* Council, 2017, p.1

The data on tourism's annual contribution to GDP (Figure 6) indicates its economic potential. Social potential is evident in the current *Sustainable Tourism Development Strategy* [5] (CANATUR, 2011) which is written entirely to support the Government's *National Plan of Human Development*[6] *(*PNDH, 2012), tackling poverty, inequality, unemployment and hunger. As the worldwide demand for tourism and undiscovered destinations increases, it seems natural that Nicaragua should exploit this trend sustainably to profit both economically and socially.

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[5] Translated from Spanish to English.
[6] Translated from Spanish to English.

1.4: Context of a Resource Based View

To make this paper feasible I focus through the lens of one strategic framework: the Resource Based View (RBV), first conceptualised in 1991 by Jay Barney. The view understands sustained competitive advantage to come from Resources and Capabilities that are *valuable*, *rare*, *imperfectly imitable* and *non-substitutable*. The RBV responds to previously externally focussed frameworks such as Porter's Fives Forces model (2008), which would use contrasting political and natural disaster histories to partly explain the difference in tourism success.

Figure 7: A Resource-Based Approach to Strategy Analysis
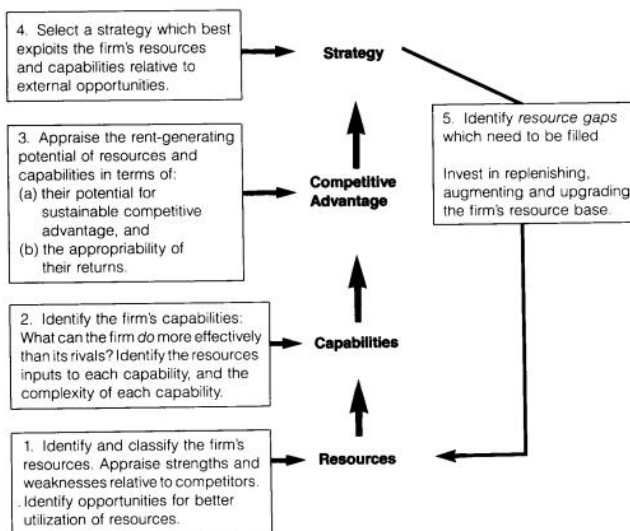
Source: *Grant*, 1991, p.115

1.5: A gap in understanding

Such is clear: Costa Rica has a successful tourism industry, Nicaragua's is relatively underdeveloped and Nicaragua could greatly benefit from its tourism potential.

Costa Rica and Nicaragua are at two ends of the Central American spectrum in terms of tourist visitor numbers (and subsequent benefits), despite sharing geographical location and similar

resources; the irony being that Nicaragua has more land resource, and boasts additional attractions in colonial cities!

No one piece of work has specifically explored the ways Nicaragua could learn from the successful strategic process of its southern neighbour.

CHAPTER 2: METHODOLOGY

2.1: Objective

I chose to conduct ten individual interviews as well as investigate existing literature to explore the ways in which Nicaragua could use Costa Rica as a model for its own tourism development, and in which areas Nicaragua should develop uniquely. This resulted in the creation of the AIM Strategic Framework.

2.2: Approach

2.2.1: Method design and reasoning

One core reason for carrying out qualitative measures is to 'address gaps in understanding' (Creswell and Poth, 1997, p.46). It is not currently clear *how* Nicaragua might follow its southern neighbour to improve its economy and society. I have identified my study to require qualitative, rather than quantitative research to fill such a gap in understanding.

I conducted semi structured interviews over Skype to increase the sample variety. As outlined by Iacono *et al* (2016), Skype enables a researcher to interview participants across the world efficiently and cheaply; particularly applicable to my sample with five interviewees based abroad. Even for UK interviewees, Skype meant taking minimal time out of a working day, encouraging initial agreement to participate.

My first interview with Central American travel specialist (CK) was exploratory. In a broad discussion on the topic I gained a general understanding and subsequently I focussed on comparing the countries' existing and potential strategies. The exploratory interview allowed

Commented [AC16]: it feels like there's something missing here. Qualitative understanding, fine - then say what it is you are actually doing - before going on to explain what the interviews were like.

me to identify the themes to discuss in following interviews and tailor questions accordingly (see Appendix B). The main benefit of conducting semi-structured interviews was that using the same questions for each group of participants allowed me to compare answers (Bailey, 1987; Barriball and While, 1994). I set a conversational tone so interviewees would feel comfortable expressing honest information. Not being limited to fixed questions enabled the participant to direct the conversation and provide rich and diverse accounts and opinions.

I conducted ten interviews with participants variously based in Nicaragua, Costa Rica and the UK, including: different types of tourists, local tourism professionals and outbound tourism agents sending clients to Central America from the UK. Taking advantage of existing contacts, I used a snowballing technique to reach the extensive range of individuals by asking each interviewee to provide two relevant contacts. From these two contacts I interviewed those who would have an interesting perspective, and who were willing to participate (see Appendix A).

Interviewing a range of participants on both the business and consumer sides of tourism provided insight into what industry professionals think drives tourists to the different countries versus the actual reason. It was interesting to observe how aligned these two perspectives were, and to compare the motivations for visiting Costa Rica over Nicaragua, and vice versa.

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2.2.2: Varying techniques between groups

My key interviewee, TW, is a Marketing Director at a medium sized UK-based outbound travel agency. Interviewing him last, I drew on previous themes and benefitted from his strategic viewpoint as director at an agency offering holidays in both Costa Rica and Nicaragua.

Through initial contacts and those gathered using a snowballing technique, I interviewed two tourism professionals in Costa Rica and one in Nicaragua. It was important to develop a perception of the tourism industries from the viewpoint of professionals in each country, as without this context my understanding would be purely theoretical. For this group my approach was one of narrative research. Creswell and Poth (1997), define narrative research as 'experiences as expressed in lived and told stories of individuals' (p.67). As I was seeking participants' experience within tourism in their respective countries, it was logical to follow

this style of research; focussing questions on their individual stories and following a chronological order.

Finally, I interviewed five tourists: one backpacker in Nicaragua, one backpacker who had travelled in both countries and three tourists in Costa Rica: one on a couples' holiday, one on a family holiday and one backpacking. These were the easiest contacts to make and most willing to participate. A phenomenological research style was most appropriate resulting in descriptions of 'what' participants experienced and 'how' they experienced it (Moustakas, 1994), which is precisely what I wanted to derive from this group.

> **Commented [AC18]:** this is where I would start to ask questions about whether age (having lived through the conflict being on the news every day, or not) is important in the image of Nicaragua over CR. I would also probably have asked some other people who had not holidayed in central america whether they would ever consider it. Selecting people in CR means there is already a bias towards that region of holidaying.

2.3: Collection and analysis

Before ending each interview, I checked that all questions were answered and addressed any other relevant topics which arose. Each interview was recorded on an iPhone and immediately emailed to myself to minimise risk of loss. Following Edwards and Lampert's (1993) advice to minimise coding limitations I transcribed only the comments that fell under my tabulated field titles: 'Attractions', 'Infrastructure' and 'Marketing'. The system was well structured and transcribed content was ready for immediate analysis.

> **Commented [AC19]:** again, this feels a bit upside down - we heard first about the last interviewee and now we are on the ends of interviews. we still have not heard about what these people are actually being asked -I would expect to see a reference to the list of questions in the appendix here.

I approached the analysis using a Constant Comparative Analysis technique. Rather than 'taking one piece of data and comparing it with all others' (Thorne, 2000, p.69), I made numerous comparisons between variables, including: why tourists chose to go to one destination versus the other, destination drivers from the point of view of tourists versus industry professionals, and varying opinions on the factors for successful tourism.

2.4: Reliability and validity

With only ten diverse interviews it was hard to judge if results would have been consistent if repeated over a period of time, which is how Joppe (2000), defines reliability, as cited in Golafshani (2003). I did replicate each interview using the same method of Skype, and where possible used the same questions within each group, maintaining a level of internal consistency.

Joppe defines validity as 'how truthful the results are' (Golafshani, 2003, p.598). Given the factors of social desirability bias (Barriball, 1994) and a potential lack of trust between myself and the participant, my research may not be entirely robust, but within the limited timeframe, I attempted to replicate as natural an environment as possible. Using Skype, each participant was in their own, comfortable environment and using their own device to communicate with me face to face. With interviewees as relaxed as possible, I hoped to extract truthful, genuine information.

> Commented [AC20]: I'm not sure how relevant this is. If the interviewees were on skype and speaking alone then it seems a low risk of social desirability, plus, if you are going to mention a factor like this then you should really explain a bit more about it and why you think it was important here.

2.5 Ethical issues

As I did not physically meet any of the interviewees my personal risk was limited. The principal ethical issue lay in confidentiality. Over email and at the start of each interview I asked permission to audio record the conversation, clarifying that anonymity was guaranteed. Hence, this paper refers to each participant by initials only.

> Commented [AC21]: This is a seperate matter from the ethics of the whole thing

CHAPTER 3: RESULTS

3.1: AIM Strategic Framework

The interviews allowed a privileged insight into the perspectives of both tourists and industry professionals, and meant assumptions could be made surrounding three key themes which arose: Attraction, Infrastructure and Marketing (see Thematic Results Summary). It was possible to compare the decision making process of a potential visitor with the strategic process of attracting individuals to a destination. This resulted in a combined framework which assembles these themes considering both side's perspective. The AIM framework serves to assess the imitability of Costa Rica's tourism strategy and is subsequently explained:

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> Commented [AC23]: Assume this is the aforementioned Attraction, Infrastructure and Marketing thing but you need to put (AIM) after that to show you intend to use the acronym in later instances. Also, is this something you invented or should there be a reference there?

3.1.1: A - Attraction

Tourist participants suggested some common drivers for visiting Costa Rica or Nicaragua. While the former usually focused on 'safety' (MK; GW) and the latter on 'cheap' prices (CK; HH), all visitors acknowledged 'ecotourism' or 'biodiversity' in each country as their main

> Commented [AC24]: Grammatical error; should read, comments about the former

motive for visiting. From the industry's point of view, TW outlined the first stage in tourism development as establishing 'what it is that is driving people?', using the examples of Machu Pichu in Peru and the Galapagos in Ecuador. This stage encompasses the corresponding target markets for the attractions, and therefore the country itself: younger, backpacker participants were keener to benefit from the low prices offered in Nicaragua while it was participants on a couples or family holiday in Costa Rica who emphasised safety.

3.1.2: I - Infrastructure

The stages of Infrastructure and Marketing are interdependent. Before progressing with marketing and promotion, the relevant infrastructure for the desired target market must be in place, including 'airports, roads, buses, taxis and hotels' (TW). This interviewee pointed out 'you can't appeal to a five star market if you haven't got the luxury lodges or beach resorts.' The one tourist participant who had visited both countries confirmed what others had believed: 'In terms of getting around I found Costa Rica to be far easier' (ES). Also considered at this stage is the degree of social connectivity. Both Costa Rican hostel owners and all visitors to Costa Rica agreed that the locals were welcoming, and have a high level of English, compared to three participants who thought Nicaraguan culture was not inclusive of tourism, nor was much English spoken.

> Commented [AC25]: This is a nice level of results – it is descriptive without discussion which is right for the results, you just report what you got (discussion important later) and this is the correct way to quote and cite anonymous interviewees.

3.1.3: M - Marketing

All professional participants suggested that Costa Rica has succeeded in international marketing. Between 'PR, press trips... sponsorship' (TW), 'Lonely Planet' (LA), and even '[appearing in] Jurassic Park' (DT), Costa Rica is succeeding where Nicaragua is not. That 'Nicaragua had never come on [CK's] radar' was a shared opinion amongst those who hadn't been. This stage involves combining the previous two in promoting a specific image to a relevant market and having the necessary infrastructure in place to support it.

3.2: Thematic results summary

Theme	Quotation	Verdict
Attraction		
Principal tourist attraction	'Everyone thinks of [Costa Rica] as being an eco-destination; it offers rainforest, Pacific coast, Caribbean coast, volcanoes, all in a really easy two week package.' – CK 'I knew [Costa Rica] was famous for ecotourism and I knew there were volcanoes and rainforests and cloud forests and stuff you don't get elsewhere.' – GW 'The nature in Nicaragua is incredible. You've got beautiful beaches, volcanoes, lakes, forests, all you could want really!' –HH	Outstanding nature is the main driver for visitors to both Costa Rica and Nicaragua.
Safety level	'The security it's better [in Costa Rica] than Nicaragua... It's a chill country, it's at peace, no army, everything is cool! That's what Pura Vida is for.' – DT 'People always have this image that [Costa Rica] is more safe. I would say that it's more friendly than Nicaragua and yeah that it is actually more safe, historically.' – LA '[Nicaragua] is really poor apparently, lots of corruption, discrimination. I've been told it's quite dangerous, don't go there apparently!' – MK	Perceived safety levels are at opposite ends of the spectrum: Costa Rica is seen as very safe while Nicaragua is not. It is difficult to judge from interviews if this perception reflects reality or is just a product of Nicaragua's history.

Commented [AC26]: Whilst it's quite good to have this as a table, it goes over several pages and gets a bit lost. I would have had only one quote in the central column (it's the quotes that are causing the length) and put: this quote is typical, see appendix 1 for a full list of comments reported. That way you get all the quotes in but you don't have to break up your story as much, and the word count is less as words in appendices are not included.

	'I got an old tourism book, and it was maybe 10 or 15 years out of date and it said do not go to Nicaragua, it's not safe. I think it's more about the perception of whether a place is safe or not and maybe that's why people don't go'. – ES 'I know there's an idea that Nicaragua is an unsafe country but I think it's hyped up to a degree that it's not true really.' – CK	
Level of exploitation	'We have a bit of a problem. When you try and find a good place to eat like really traditional food of Costa Rica, it's all casado you know rice and beans and that's what you can eat all over South America. We have thousands of strange things, like really good, that foreigners try to find but when they go to the beach it's all burgers, pizza but they don't find real Costa Rican food. Even for me to find a local local place you need to drive like 30 minutes out of the city. People ask me in supermarkets "can you show me some local products?" and everything comes from the US.' – DT 'It did feel like we were following a very obviously beaten track, everyone had done the same thing [in Arenal, Costa Rica].' – CG 'We did stay in these hotels and we were like wow, I think it's going to develop even further if I'm honest. Just the fact that they exploit the tourists and the activities, any time you wanted to go rafting etc. it was just so expensive.' – MK	Costa Rica, if not overexploited, is saturated with tourists. This is seen negatively and even impacts locals. Contrastingly, Nicaragua is still seen as underdeveloped and a destination to explore, putting it in a positive light.

	'No I didn't go [to Costa Rica], everything I heard it just sounded so touristy and full of Americans. I think the point of travelling is to explore, not have it all served up on a plate, and I felt I could really do that in Nicaragua. It felt real.' – HH	
Expense	'I expected Costa Rica to be cheaper than it was. I just remember when we were there people saying [Nicaragua] was like a cheaper version of Costa Rica.' – CG 'I've noticed in the hostel that in the last four years everyone is going to Nicaragua, it's the budget choice because you know Costa Rica is getting more expensive. And that's the backpacker group you know they go for the budget.' – LA 'There is a big backpacker market [in Nicaragua] which Costa Rica still has but it's almost too expensive.' – GC	Price levels were reported as disparate. Costa Rica is unexpectedly expensive and is consequently dissuading backpackers, who choose neighbouring Nicaragua as an alternative.
Infrastructure		
Connectivity and physical infrastructure	'I think the connectivity in Costa Rica is significantly better than any other country in the region.' – TW '[Costa Rica] was probably more developed than I was expecting, infrastructure was extremely good.' – GW 'In terms of getting around I found Costa Rica far easier than Nicaragua.' – ES	Costa Rica is better connected than most other countries in the region, while Nicaragua's infrastructure is patchy. While it is improving, this means that large

	'San Juan del Sur is an example of a place where Nicaragua has got the infrastructure. I think you're probably right [that it's no coincidence that it's so close to the Costa Rican border]. Further north it's little pockets of surfing towns and not much more.' – CK 'There's no road infrastructure to get to the Caribbean side [in Nicaragua]. That whole area is totally underdeveloped.' – CK 'Actually to be honest [Nicaraguan] roads in the past ten years are amazing, even better than in Costa Rica I would say.' – GC	areas of the country are inaccessible.
Culture towards tourists	'It really struck us wherever we went how proud the people were of their country [Costa Rica], how welcoming they were. Everyone's English was excellent. It felt very very geared up for tourism in a good way.' – GW 'Locals [in Costa Rica] were really nice, so open, you know 'Pura Vida'! Generally had a high level of English.' – CG 'I think locals can kind of clash with tourists on a cultural level [in Nicaragua].' – CK 'People who didn't speak Spanish in Nicaragua found it hard to integrate.' – ES	Tourism seems to be integrated into Costa Rican culture but is not in Nicaragua. This is reflected in friendliness towards tourists and English as a common dialect. This may be a result of tourism being lucrative in Costa Rica and not yet so in Nicaragua.

Commented [AC27]: Although largely fine, in some places here I am feeling that the student had already found out that (for example) the infrastructure in N is poorer than CR and this is not so much a discovery from the interviews but the interviews backing up what was already thought.

	'Parts of Costa Rica are really different, if you go up north it's far more developed, they have a little bit already the downside of it, lack of water, too many tourists so they're not that excited about it... Here I feel they all get excited when it's high season because everyone starts making money again.' – LA	
Marketing		
How potential visitors encountered a destination	'[Costa Rica] came across on TV as this incredibly unique place.' – GW 'In the beginning it would be the travel books and then it switched over to just booking sites.' – LA 'Because I'd worked and travelled before, countries kind of come onto your radar, there's kind of a buzz or a talk whereas Nicaragua had never come on my radar.' – CK 'Some friends went last year and just fell in love [with Nicaragua] so I didn't want to miss out.' – HH	Nicaragua depends upon word of mouth promotion whereas Costa Rica has a further reach through various media platforms.
Level of international promotion	'I'm sure Nicaragua will have some amazing wildlife and natural beauty, but it's done a poor job of marketing, and Costa Rica has done a great job.' – TW 'I think like [Nicaragua] can have like really good things but they don't promote, they don't do videos they don't do nothing so nobody knows. Costa Rica even in the movies, even in Jurassic Park, Costa Rica is in it.' – DT	Nicaragua, while working to improve its marketing internationally, contrasts to Costa Rica which has succeeded in various marketing via various channels.

	'I think [Nicaragua] has made a push in the past couple of years. They are working with a PR company in the US, it is working, we're in international magazines but I think the marketing needs to be improved, especially in Europe.' – GC	

CHAPTER 4: DISCUSSION

This chapter discusses the findings from my research - the AIM framework and thematic conclusions, combining the views of interviewees with concepts brought forth in the literature. Following the AIM structure, the ways in which Nicaragua could imitate Costa Rica's successful tourism strategy are examined, given the similarities and differences of the countries.

> Commented [AC29]: This is a good intro linking what's gone before and what should happen next.

4.1: Attraction

4.1.1: Costa Rica's target markets relative to its attractions

The impressive natural resources, unique man-made eco attraction and high safety levels have led the country to specifically target, as interviewee GW believed, a higher end of the market and an older and wealthier demographic, which is consistent with Liu *et al*'s assessment of Costa Rica's placement on Plog's spectrum. The participant, a Costa Rica tourist and travel professional, thought it was this target market to which the safety factor appealed. This demographic is typical of American visitors. CK, who spent six months in Nicaragua and is now at a responsible travel agency noticed that US citizens were particularly security focussed, this being a common conversation topic. Between January and November 2017, Americans accounted for 40.46% of total visitors, and Europeans only 15.57% (ICT, 2017). As markets are driven by connectivity, this observation is supported by seven major US airlines offering direct flights to Costa Rica (versus only British Airways and TUI flying from the UK for example).

> Commented [AC30]: Citation needed

> Commented [AC31]: Sure, but there are also logistical reasons – it's a really long flight from Europe and a lot of families with kids, or older travellers with varicose veins, don't want a ten hour flight for their holiday

4.1.2: Nicaragua's recommended target market relative to its attractions

Both countries' main attraction is ecotourism and this will obviously attract nature-orientated visitors to each. Whether consciously or not, Nicaragua has additionally imitated Costa Rica in extending its ecotourism appeal from pure natural resources to include a unique, adventure activity. Where Costa Rica claims canopy zip-lining, Nicaragua declares its volcano Cerro Negro to be the only place in the world to 'Volcano Board'. TW saw Costa Rica's concept as 'a really smart move, it's something really tangible that tourists can get excited about' and this no doubt also extends to Nicaragua's. It is, however, worth addressing that the two attract distinct audiences. Interviewee GC was part of the team that founded the volcano boarding concept. She cited it as number two on CNN's list of 'Thrilling things to do on vacation', and believed it attracted an audience of *backpackers*; a different point on the spectrum to Costa Rica.

Beyond nature, its attractions are fundamentally different to those of Costa Rica. Principally, Nicaragua has a colonial culture which Costa Rica lacks. The Spanish colonial cities of Granada and León were a reason one interviewee wanted to visit Nicaragua. Along with stunning architecture and colourful city streets, Nicaragua offers culture that a locally based interviewee thought was not too Americanised, unlike Costa Rica. GC observed 'the [Nicaraguan] Revolution was only 30 years ago; it's still a fresh part of the culture, in people's lives and stories.' It is refreshing to see a tourism appeal, evident in the form of the Revolution Museum in León, emerge from dark times that have dissuaded tourism in the past (Hunt, 2011). This is a dimension in which Nicaragua cannot imitate Costa Rica, but could look to another country to learn from. Mexico, whose 'Central Tourist Macro-region'[7] hosts the country's most important colonial cities (Propín-Frejomil and Sánchez-Crispín, 2002, p.386) could be a template for the management of museums, tours and maintenance of a colonial image.

Costa Rica is more saturated with tourists than Nicaragua making the latter more attractive to many. By targeting the *Venturer* market from Plog's continuum (Plog, 2001), Nicaragua could use its yet underdeveloped tourism positively. In their 2008 Study, Liu *et al* judge that 'adventurous travellers are shifting away from Costa Rica' (p.271) a theory echoed in

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[7] Translated from Spanish.

Commented [AC32]: Fair enough but you just said that Americans are a much larger market so if a country makes its appeal 'not being americanised' it by definition restricts its market to the Europeans who apparently are less likely to come anyway

Commented [AC33]: Ok – this relates a little to my earlier comment about the image conjured up by the word Nicaragua for anyone over 40. I feel this is a place where the student made a mild comment which could have been seriously expanded – this is a missed opportunity for much more complex criticality. What are the ethical issues with exploiting a colonial past to attract tourists, particularly sometimes tourists originating from past colonising powers? How would reactions of American and European tourists differ on this? By invoking the past, is Nicaragua still courting danger in reminding people about the bad times – i.e., is it 'too soon'?

Commented [AC34]: This is a weird comment; how is the one with fewer tourists the one that's more attractive to tourists? – I kind of know what you meant but it reads weird.

interview with a Costa Rica backpacker who felt that the rainforest tour in Arenal was too well beaten a track. Costa Rica is evolving along Plog's spectrum, with higher tourist numbers and over development already evident in areas like Tamarindo and Jacó (Honey *et al*, 2010). As it develops, Nicaragua could take the opportunity as a yet-unexploited alternative, accommodating the wave of adventure travellers moving away from the potentially overly-touristic Costa Rica.

Nicaragua's significantly cheaper prices reinforce its appeal to a backpacker market. Numbeo, the largest internet database on World Prices, shows Nicaragua's rent as 38.6% cheaper than Costa Rica's, and a price gap also exists between restaurant and grocery prices. Costa Rican hostel owner LA noticed increasing numbers of her guests over the past four years were visiting Nicaragua as the budget choice, and CG recalled Nicaragua being likened to a cheaper version of Costa Rica. Given Scheyvens (2002) states that backpackers appreciate low costs more than the high end tourist, GC's assessment that Costa Rica is 'almost too expensive' for the backpacker market is well founded and highlights this distinct difference between Costa Rica and Nicaragua which make a common target market impossible.

Consequently, Nicaragua's appeals are too different to Costa Rica's to be able to wholly imitate them or target a similar audience. The audience targeted should be relevant to Nicaragua's own attractions rather than attempt to attract a high end tourist to low end prices. Given that O'Reilly (2006) generalises that a large proportion of backpacker tourists originate from Northern European countries, and relatively fewer from North America, Nicaragua could target a European backpacker market, driven by the same connectivity that Costa Rica has achieved with the US. Thus, the two countries would not be directly competing for the same visitors.

4.2: Infrastructure

The second stage in the AIM Strategic Framework is developing the necessary infrastructure for the target market: in Nicaragua's case the backpacker, or Plog's *Venturer*. Any process Costa Rica has undertaken to develop hotels, airports, roads and transport systems which now constitute an enviable infrastructure resource will have to be adapted to maintain relevance to Nicaragua's target market at the opposite end of the scale. Hampton (1998)

Commented [AC35]: Here is an opportunity to extend discussion – there is clearly a tension between using your unbeaten tracks to attract people, and ending up becoming a beaten track as a result

Commented [AC36]: Another opportunity – to note that rents and prices are not fixed, naturally occurring situations but responses to demand. If tourism goes up the rents and prices will go up and this links to the argument about the beaten track again – you want to attract tourists, enough to sustain, but not so many that it becomes touristy. Trading on being rare and untouristy is clearly a very risky strategy because, by definition, if it works and loads of tourists come, you have killed off your selling point.

Commented [AC37]: Could mention here the countries that would be its competitors – Europeans have to fly far in either direction so proximity is not the thing – I would suggest for example that Thailand/bali are competitors in this regard

labels the type of infrastructure demanded by the backpacker 'minimalist' (p.642), which is less capital-intensive than the accommodation, transport and dining facilities demanded by mass tourism.

The Incentives for the Tourism Industry Law[8] (1999), means $298m is being invested into the industry; specifically into 'hotels, transport and artistic events' (CANATUR, 2011, p.23). This dimension of the framework is more relevant than ever to ensure careful, strategic investment to develop tourism infrastructure as effectively as possible.

4.2.1: Physical infrastructure

Costa Rican individuals developed a capability of efficiently and effectively growing a key resource by entering into majority share joint-venture partnerships with foreign hotel operators such as Marriott and Best Western (Lie *et al*, 2008). Given the model's successful replication in Guatemala, El Salvador and Panama, Nicaragua could similarly follow the strategy but adapt by seeking joint-ventures with backpacker appropriate accommodation, such as hostel chains. A number of South American chain hostels exist, but the most established, Che-Lagarto, is yet to enter Central America. Local Nicaraguan investors could propose to Che-Lagarto a joint-venture, or alternatively take the group's established franchise strategy.

> Commented [AC38]: Good idea

Since two interviewees commented on the difficulty in reaching the Caribbean side of Nicaragua and its general underdevelopment, Costa Rica's spread of road network is a great model to imitate (see Figure 8). Currently, there exists a dense cluster of 'tourist roads' on the Pacific side of Nicaragua where tourist hubs León, Granada, Ometepe, San Juan del Sur and the capital, Managua, are located (see Figure 9). Secondary destinations, such as the North which offers natural and cultural touristic products (López Olivares, 2005), cannot be accessed to their full potential as in Costa Rica. However, as a significantly larger country than Costa Rica, this development cannot be expected to happen either thoroughly or quickly.

> Commented [AC39]: Same thing here as before – presumably massive increases in road building would risk killing the selling point of natural beauty

A comparison of interview accounts indicate Nicaragua has much to learn from Costa Rica's main mode of public transport: its bus system.

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[8] Translated from Spanish.

Figure 8: Road network in Costa Rica

Source: *Ministerio de Obras Públicas y Transportes* (undated)

Figure 9: Road network in Nicaragua

Source: *MapaCarreteras*.Org (undated)

'[Nicaragua's] bus system was awful! I found it really hard to orientate myself, find timetables, find the right bus, know how much to pay and when I did eventually get on what they call a chicken bus, it was so stressful... packed full with people, bags, livestock. No organisation, tickets or even seats! Madness. Really not enjoyable.' – HH (backpacker tourist in Nicaragua)

Contrastingly, after a restructure of a previously low quality public transport system (Alpizar, 2003) Costa Rica's buses are of an impressively high standard. Clean, clear bus terminals with regular departures of modern coaches using a formal ticketing system is why interviewee ES found it easier getting around Costa Rica than Nicaragua. Transport networks aid the development of the tourism sector, but Richards and Wilson (2004) note that tourism could reciprocally aid transport development. The Nicaraguan government must follow its neighbour in addressing this deficiency to generate and benefit from backpacker tourism.

> Commented [AC40]: I think some backpackers might find a clean westernised transport hub to be rather disappointing, and imagine that travelling in chaos with a chicken on their lap is more romantic!

Evidently, physical infrastructure is where Costa Rica's process should be almost directly imitated, excepting where only 'minimalist' infrastructure is required. Until steps have been taken to improve the transport sector, Nicaragua cannot justify charging the high prices of Costa Rica as the services are incomparable and this would undermine Nicaragua's "cost effective" appeal.

4.2.2: The cultural connectivity question

Interviewees thought Costa Rica was socially ready for tourism. While a high English level is something the Nicaraguan government could imitate over time by encouraging lessons in schools, culture is harder to instil. Interviewees thought Costa Rican locals welcomed tourism, often quoting the national greeting 'Pura Vida'. As a result of the friendly, relaxed and peaceful culture from which the phrase originates (Rankin, 2012, p.1), such touristic 'readiness' would be almost impossible for Nicaragua to imitate. LA, however, assumed locals look forward to welcoming tourists in high season because 'everybody starts making money again' but in overly-saturated areas like Coco beach she suspected locals are bothered by tourists' negative impact, using the example of tourism contributing to water shortages which Ramírez (2007) also cites. The concept that openness to tourists results from money generated was also reflected in a scenario which CK described as a 'microcosm' for touristic readiness. On one side of a bar stood tourist-suspicious locals; on the other, foreign visitors

including himself. He explained how his local Spanish teacher, income-dependent on tourists like himself, bridged the gap between the groups. Extrapolating this example, it seems that those whose income does not depend on the industry are suspicious but those who make money from tourism are welcoming of foreigners, and will inevitably bridge the two. It is unclear if there exists a way in which the Nicaraguan government or tourism industry could actively imitate Costa Rica and invoke a tourist-welcoming culture or if this is something that will develop naturally as tourism, and its income, grows.

4.3: Marketing

The third stage in the AIM Strategic Framework is inspired by Kotler *et al* (2002), who point out; 'attracting tourists to the place without fixing the problem will lead visitors to bad-mouth the country and worsen its image' (p.251). For Nicaragua this is especially relevant as 48.9% of 2016's tourists chose to visit thanks to a personal recommendation (INTUR, 2016, p.35): Nicaraguan tourism depends on word of mouth. This section focuses on the fourth of the 4Ps of the Marketing Mix (McCarthy, 1960) Product, Price and Place and *Promotion,* as much of the marketing discussed by interviewees centred on promotion.

4.3.1: Public Relations

Clark Communications CEO identifies one of Costa Rica's key strengths as ensuring no side issues hinder its ecotourism brand dominance, observing 'no one's going to be interested in seeing monkeys in the rainforest if they're afraid of getting kidnapped' (Clark, 2015). Every interviewee to some extent viewed Nicaragua's safety image adversely, and a conclusion is that Nicaragua has more than a 'side issue' to overcome. While both countries' tourist boards work with Public Relations firms (ICT with *Four Communications* and INTUR with *Myriad Marketing*) their situations require distinct PR capabilities. Nicaragua's tourist board INTUR would benefit more from learning from Turkey's board, which according to Kotler *et al* (2002), hired a PR company specifically to overcome its corrupt, violent image diffused in the 1978 film *The Midnight Express.* Due to this coverage, Turkey's tourism suffered compared to Greece's despite having arguably stronger vacationer resources. The comparison is alike to the Costa Rica/Nicaragua dynamic, as Nicaragua was similarly represented violently in the American and British made films: *Under Fire* (1983), *Carla's Song* (1996) and *Last Plane out*

(1983). Hence, in terms of building a specific PR capability, Turkey may be a more apt model to follow.

4.3.2: Advertising

Ideally, Nicaragua would copy Costa Rica's advertising strategy given its year on year success. In 2010 ICT launched its most successful advertising initiative to date (Miller, 2012). The 'No Artificial Ingredients' campaign involved billboards in international airports and a 15 second promotional video that aired 1,152 times on a 'mammoth' screen in Times Square, New York (p.66). The recent $1.8m campaign 'Essential Costa Rica: My choice, Naturally', includes social media, digital and television platforms, and is in more markets than ever before (Fernández Mora, 2017). However, INTUR has not made its budget public and one could assume that it is significantly lower than that of ICT given its smaller scale and lack of partnerships with the like of UNWTO and CNN international. Due to its comparatively limited financial resources, INTUR could to an extent imitate this international promotion strategy, but target only specific markets relevant to them, for example backpacker tourists in Europe to which Nicaragua's attractions appeal.

Nicaragua has copied Costa Rica's successful use of a much-repeated one line slogan. INTUR launched the campaign *'Orgullo de mi país'*, (*'Pride of my country'*) in 2015 (TeleSur). It conveys the cultural, emotive, traditional image of Nicaraguan life to the international market (CANATUR, 2015). However, as of September 2017 it had not yet provided the increased tourist numbers as desired. This may be partly due to the principle slogan being in Spanish: its international reach is limited. Perhaps a combination of imitation, (namely the use of an English language slogan) and divergence (from Costa Rica's big-budget worldwide approach) to a more specific geographic and demographic target market would be the best use of financial resources.

> Commented [AC41]: I think it's a dreadful slogan for more reasons than it being in Spanish! It really does say anything about its natural attractions or cheapness. I think we could have explored more about what makes a good slogan in tourism.

CONCLUSION

Following the AIM Strategic Framework reveals that Nicaragua cannot generally imitate Costa Rica's tourism strategy. The countries are too different in too many respects for an identical strategy to be successful; especially given that targeting the same audience with attempted

replicas of Costa Rica's touristic attractions would make the market leader a direct competitor. Moreover, many of Nicaragua's own touristic attractions would go unexploited and matching a smaller, far more developed country on infrastructure would be financially impossible - as would copying its large scale promotional campaigns.
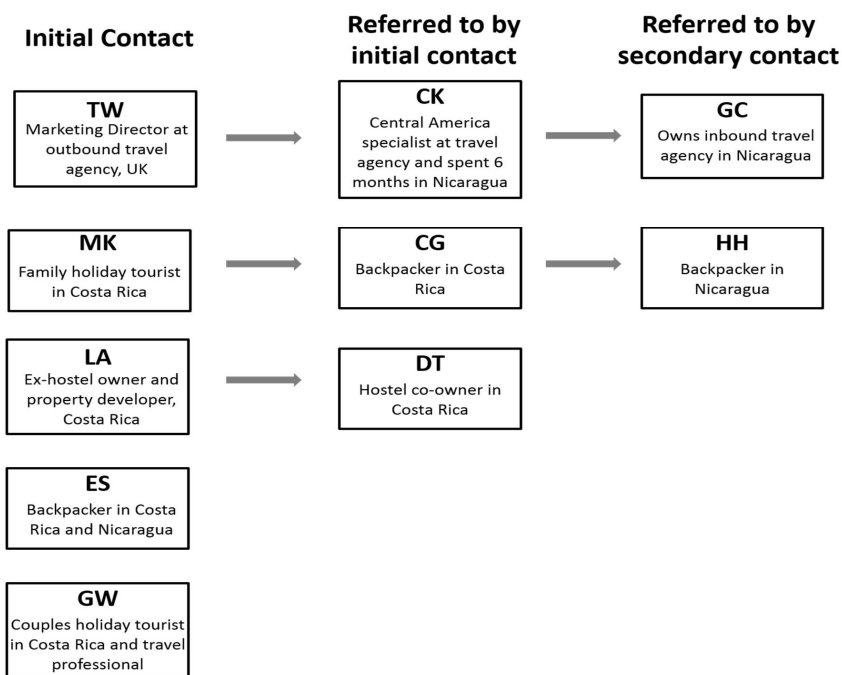
Instead, each element of the framework should be adapted from the Costa Rica model for Nicaragua's own needs as a tourism destination. In some ways the strategy can be almost replicated with small alterations (e.g. using a joint-venture to establish an accommodation resource but approaching 'minimalist' hostels rather than large hotel chains), and in others the opposite of the model strategy should occur (e.g. targeting a European *Venturer* market in place of Costa Rica's worldwide *Mid-centric/Dependable*). In other cases there may not exist a model in Costa Rica that best exploits Nicaragua's resources and capabilities, but rather in another country (e.g. colonialism in Mexico). The suitability of each foreign model should equally be adapted as necessary.

Ultimately, while Costa Rica's tourism success has not provided a textbook model for Nicaragua, it has inspired a comprehensive framework which is substantially more useful. The AIM Strategic Framework allows Costa Rica's model to be adapted to the needs of the destination in question. While neighbouring countries such as El Salvador and Guatemala could benefit from comparing their own tourism strategies with those of the regional leader, the AIM framework can be potentially applied to underdeveloped countries worldwide looking to benefit socially and economically from the growing global demand for tourism.

Commented [AC42]: This is fine, a tidy summing up. Again there aren't really any very exciting conclusions to strike, and this may have been different if the discussion had delved deep in a couple of well chosen places; however, I must say the premise (should one country copy another? – turns out not) was not one that was ever going to yield very high impact conclusions. That isn't necessarily a bad thing – as I keep saying, this is a good, tidy, competent paper, and a fairly safe topic is just fine if you want to be assured of being able to do a decent job with no nasty surprises. However this also makes it harder to push it into the top grade zone, as you need insightful criticality at quite a strong level to do that. More risky topics can yield a higher impact but also have a much greater likelihood of going horribly wrong. The safer choice can be the wiser one.

APPENDICES

Appendix A: Interviewees and snowballing technique process

Initial Contact	Referred to by initial contact	Referred to by secondary contact
TW Marketing Director at outbound travel agency, UK	**CK** Central America specialist at travel agency and spent 6 months in Nicaragua	**GC** Owns inbound travel agency in Nicaragua
MK Family holiday tourist in Costa Rica	**CG** Backpacker in Costa Rica	**HH** Backpacker in Nicaragua
LA Ex-hostel owner and property developer, Costa Rica	**DT** Hostel co-owner in Costa Rica	
ES Backpacker in Costa Rica and Nicaragua		
GW Couples holiday tourist in Costa Rica and travel professional		

Appendix B: Excerpts of interview questions

Tourist questions (MK, CG, HH, ES, and GW)

1. What type of trip would you say yours was? (Backpacking, family holiday, couples' trip)

2. What was your mental image of *the country you visited* before you went? Did you have any expectations?

2. What did you do when you were there? (Places, activities)

3. Why did you choose to visit *the country you visited*?

4. Do you have any perceptions of *Costa Rica/Nicaragua; whichever did not visit*

5. How was your experience with the locals? (Welcoming, mixed in/ unwelcome, stuck out/ uninterested)

6. At any time did you think tourism had 'gone too far'/ seem too touristy?

7. If you could, which Central American destination would you go to next?

Nicaraguan inbound travel agency owner questions (GC)

1. What do you currently do? What have you done in the past in tourism?

2. Why did you choose to set up in Nicaragua as opposed to other surrounding countries?

3. Has tourism grown in your time in Nicaragua? How?

4. Why do you think people come to Nicaragua? (Vs. Costa Rica)

5. Can the government do any more to support tourism growth?

6. Where do you see the future of tourism in Nicaragua?

7. Do you think Nicaragua is doing a good job of marketing itself as a tourist destination?

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