ASSESSING THE ECONOMIC POTENTIAL FOR CULINARY TOURISM IN SURINAME: A VALUE CHAIN APPROACH

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ACRONYMS AND ABBREVIATIONS

GVC	Global Value Chains
NDP	National Development Plan
USA	United States of America
CUS	Competitiveness Unit of Suriname
IAP	Innovative Agro Processing Industries
MTCT	Ministry of Transport, Communication and Tourism
OCTA	Ontario Culinary Tourism Alliance
STS	Suriname Tourism Foundation
SHTTC	Suriname Hospitality and Tourism Training Centre
SHA	Suriname Hotel Association
Srd	Suriname dollars

TABLE OF CONTENTS

List of Figures

List of Tables

List of Appendices

BACKGROUND AND INTRODUCTION

Suriname is ranked by the World Bank as an upper middle income country. Its per capita GDP was US$8,900 in 2013. The annual average GDP growth rate is about 4%. Following a period of declining growth in 2000 Suriname has witnessed stable growth (see **figures 1 and 2**) and stable inflation after adopting tight monetary and fiscal policies, increased investment in human capital and infrastructure. Suriname could be characterized as a commodities-based economy that relies significantly on exports of mineral products with gold, oil and alumina as the leading export products accounting for 95% of total exports.

Figure1: Inflation, 1961- 2013

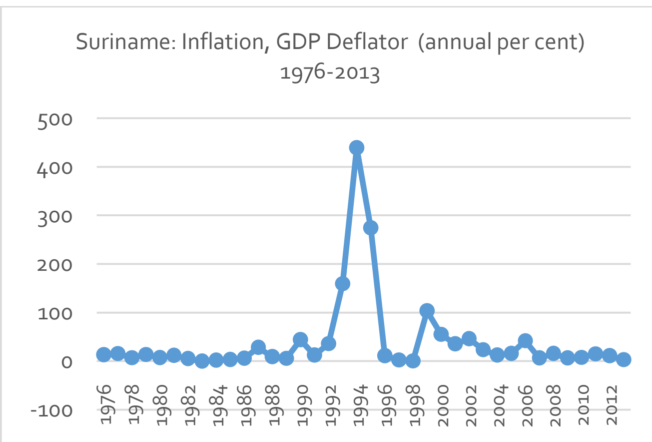
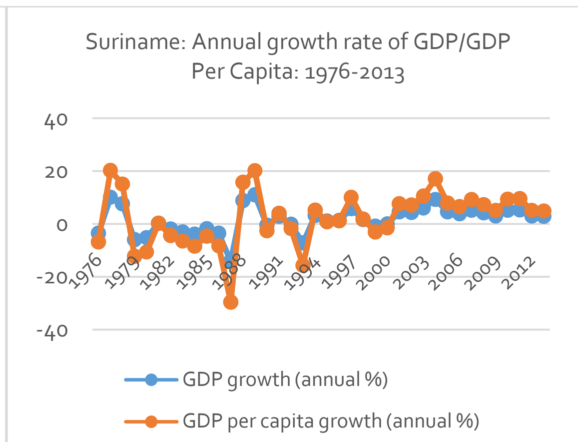


Figure 2: Growth rate of GDP, 1961- 2014



Source: World Bank, World Development Indicators (2015)

Nonetheless, services are important to the country's economy. Travel and services in particular together account for approximately 25% of services exports (see **figure 3**) and has grown marginally over the period 2005 to 2013. This growth is linked to marginal increases in tourist arrivals (see **figure 4**).

Figure 3: Trends in Tourist arrivals

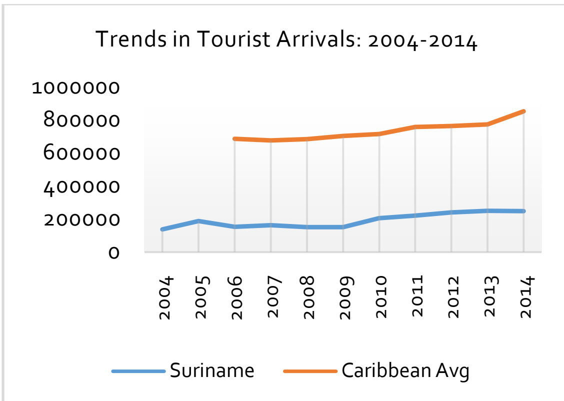
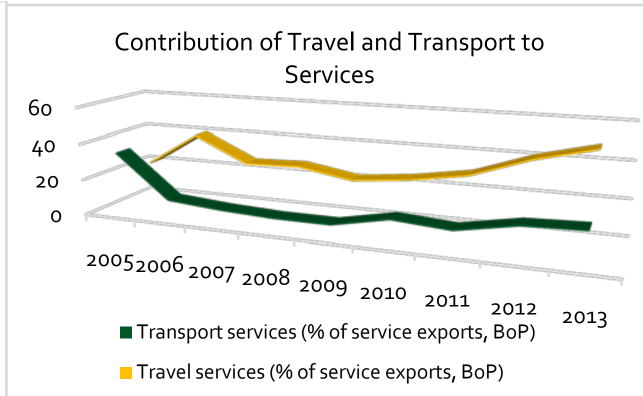


Figure 4: Contribution of Travel & Transport to Services



Source: Author based on statistics from Uncomtrade

Suriname is presently marketed as a nature and adventure destination given the significant forest resources of the country (over 90% of the country's land mass). Therefore tourists, largely the Diaspora that hail mainly from the Netherlands, neighboring South American and Caribbean countries, are attracted to the vast natural resources of the country. The major tourist districts are Brokopondo, Sipaliwini, Commewijne and Paramaribo. In the interior regions it is possible to experience the culture of the Amerindians, Saramaccans and Maroons including getting first-hand exposure to how certain foods are prepared.

The marginal growth in tourist arrivals in Suriname over the years, as well as the fact that its tourists come from a narrow range of markets has prompted this study, which seeks to assess the economic potential for Suriname to diversify its tourism sector to develop a culinary sub-sector. The main motivation for the selection of culinary tourism is linked to the significant cultural base of the country and its influence on the country's cuisine. Suriname is a multi-ethnic society consisting of Creoles, Maroons (Africans), Chinese, East Indians, Indonesians, Javanese (Southeast Asians), Whites and Amerindians. It also relates to the drive for the establishment of internationally competitive sectors to support a diversified economy.

The methodological and analytical approach of this report is the use of the global value chain framework. The specific objectives of the study in this regard are to:

a) Undertake a detailed global industry study of the culinary tourism sector
b) Review the local culinary Sector
c) Define and identify the culinary tourism sector to be studied using a value chain and cluster methodology
d) Analyze and elaborate on selected subsectors of importance to Suriname based on the global market growth trends and the services which are available in the local culinary tourism sector
e) Propose policy, strategy and institutional interventions for encouraging growth and development of culinary tourism in the country.

The report is divided into three main sections: **Section 1** presents an analysis of the global culinary tourism industry. It starts by mapping the global market for culinary tourism and then defines culinary tourism, briefly undertakes a market analysis and closes by examining the industrial organization of the global market by identifying the lead firms and their competitiveness strategies.

Section 2 outlines a local market analysis by mapping the local value chain, examining the policy and stakeholder frameworks of relevance to the industry and assessing the attractiveness of culinary tourism using a five forces analysis.

Section 3 examines through what mechanisms culinary tourism as a sector could evolve given what obtains in leading destinations elsewhere in the world. It makes relevant policy suggestions to support the industry.

METHODOLOGY

This report employs the global value chain methodological approach to assess the potential for Suriname to develop and market a culinary tourism experience globally. The GVC approach is a step-by-step analytical framework developed by the Caribbean Centre for Competitiveness drawing on the frameworks of the Duke University Centre for Globalization and Global Governance and the European Cluster foundation. It requires:

- Outlining the input/output structure for the industry at the global and local levels,
- Conducting a geographic scope for the main segments along the chain,
- Assessing how the global industry is organized and governed,
- Outlining the policy and institutional framework for management of the local industry
- Understanding where the industry currently is in the global market and outlining upgrading trajectories.

Both primary and secondary data were employed to complete the report. Primary data collection entailed the conduct of interviews with 12 public and private stakeholders over a two week period using a structured questionnaire instrument (see ***appendices 1-3***). Secondary data was obtained through scholarly articles, published statistics, annual reports of leads firms and firm and institutional websites.

SECTION 1: GLOBAL INDUSTRY ANALYSIS

1.1. DEFINING CULINARY TOURISM

OCTA (n.d.) defines culinary tourism as "any tourism experience in which one learns about, appreciates, and/or consumes food and drink that reflects the local, regional or national cuisine, heritage, culture, tradition or culinary techniques".

This definition reflects four important traits of culinary tourism. **First**, food and drink are at the center of the tourism experience. Yun et al. (2011) segmented the market for culinary tourism to provide the basis for profiling such tourists. They use as the criteria, the level of participation in culinary experience and food-related activities. They were able to delineate four segments: (1) deliberate; (2) opportunistic; (3) accidental; and (4) uninterested culinary tourists. OCTA uses a similar segmentation to define culinary tourists but eliminates the last segment. Deliberate culinary tourists are tourists for whom food is the primary motivator for visiting a destination. Opportunistic tourists are those who incorporate a food experience while travelling. Accidental tourists are those who engage in an unexpected culinary activity while on their trip.

Second, culinary tourism is significantlylinked tocultural tourism and gastronomy[1] (Yun et al 2011). In fact, culinary tourism is viewed as a subset of cultural tourism because cuisine is an expression or manifestation of a country's culture. According to Long (2004) (in Yun et al 2011), culinary tourism is a way of experiencing the cultures of the people through food. Scarpato (2002) (in Yun et al 2011) also posits that gastronomy is a "medium of cultural tourism" and is an important resource for destinations seeking to develop new quality tourism products and experiences.

Third, culinary tourism is also linked to agricultural tourism. This linkage is reflected in two levels. On one level, agriculture provides the inputs to prepare foods; on the other level, culinary tourism is more than the experience of consuming food as it can incorporate food production, farm visits, farm holidays etc.

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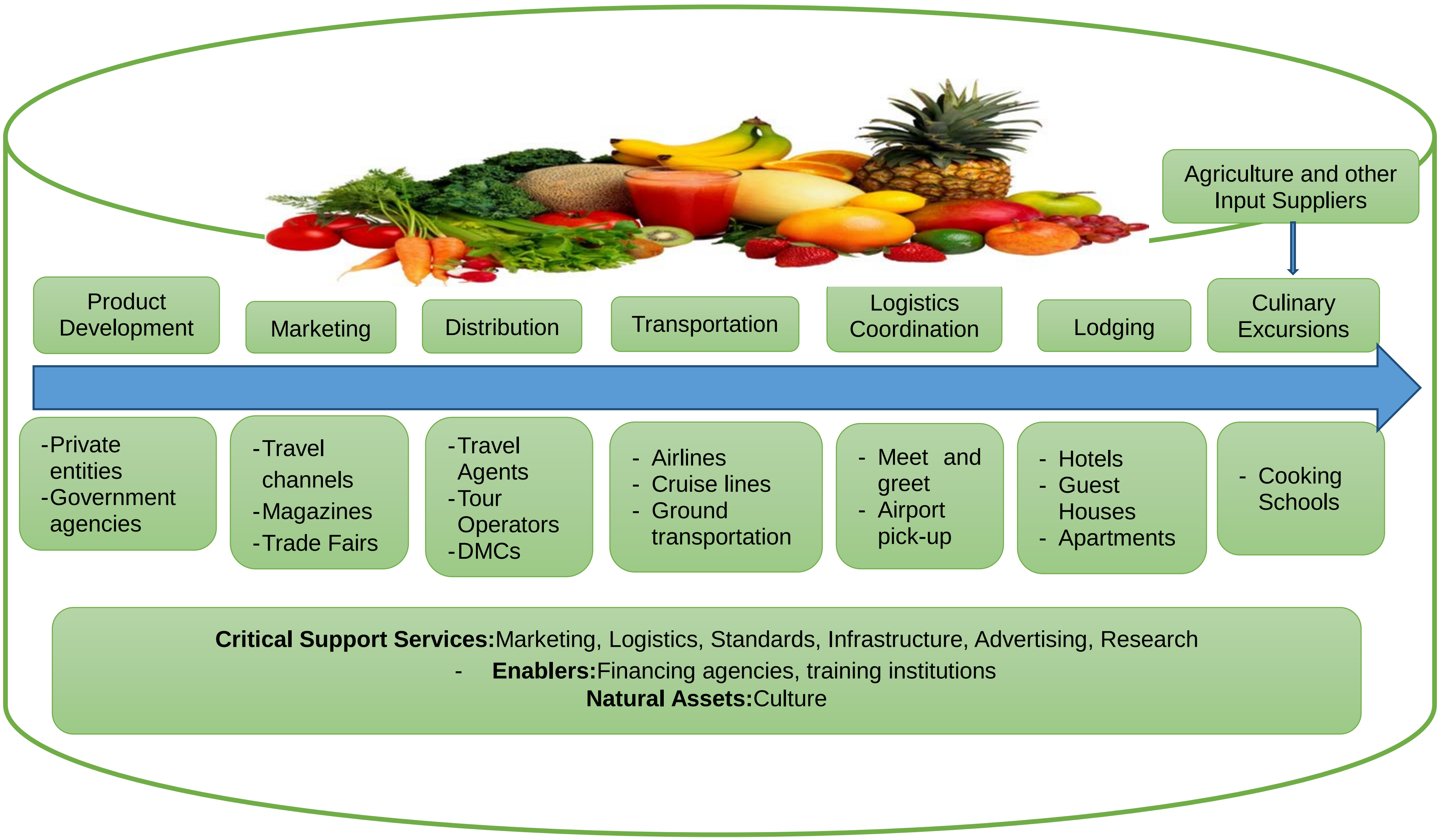
[1] Gastronomy is "the practice of choosing, cooking, and eating good food" (Oxford Dictionaries) http://www.oxforddictionaries.com/definition/english/gastronomy?q=Gastronomy

Fourth, beverages are equally important in culinary tourism. In fact, beverages alone-such as wine-, can form the basis for travel (Ignatov, 2004) (in Yun et al 2011).

Given the aforementioned traits, clearly, culinary tourismencompasses a wide rangeof experiences including: food tours and trails; festivals, fairs and shows; food tastings; cooking classes, dining, visits to farms, farmers' markets, museums, food factories etc.; observing cooking competitions; among other activities.

1.2. GLOBAL VALUE CHAIN ANALYSIS

Figure 5: Global Value Chain for Culinary Tourism



Overview of Global Chain

Figure 5 shows a global value chain for culinary tourism. It outlines the major service activities that together shape the culinary tourism experience. The chain starts with product development. Product development occurs in the supplying nation. This is where the public and private agencies together shape the culinary tourism experience (services and products) that will be offered to consumers. Public agencies will also develop standards. Once the product is developed it is then marketed, by-and-large by a public designated tourism agency. Marketing may occur through participation in trade fairs, advertising on travel channels, in magazines, websites and social media, in newspapers etc.

Following marketing is distribution where culinary packages are sold to tourists through destination management centers (DMCs), tour operators and travel agents. Tourists with packages will then travel to the destination where the service is to be consumed using international airlines, cruise lines and ground transportation for countries with connecting borders. Within the country providing the service, DMC and tour operators may organize logistics such as meet-and-greet and airport pick-ups. They may also make arrangements with respect to lodging. Tourists can choose to stay at hotels, apartments, guest houses or private residences.

Excursion activities is the stage that particularly separates culinary tourism from other forms of tourism. At this stage, tourists engage in activities where food is centralized such as festivals and street fairs, farm visits, produce picking and cooking classes. Noteworthy, in the value chain diagram depicted above is the role of input suppliers at the culinary excursions stage. Suppliers such as farmers, producers, growers, wineries, breweries, markets, cooking schools, culinary colleges and educators provide services and products used in culinary excursions on the one hand. On the other hand however, tourists may directly interact with such stakeholders to consume services and products as part of the culinary tourism experience.

Auxiliary services in support of excursion activities include standards and certification such as the Michelin Guide global restaurant rating system that bestows stars of excellence upon restaurants with good facilities and quality foods[2]. Countries may also have their own quality certification system. For instance, Canada has the Taste of Nova Scotia certification system.

1.3. GEOGRAPHICAL SCOPE AND MARKET ANALYSIS

1.3.1. Demand Analysis

The demand for culinary tourism experiences is a demand for a cultural experience given the link between culinary and cultural tourism. This is supported by the 2006 Travel Activities & Motivations Survey commissioned by Statistics Canada which revealed a higher interest in cultural, outdoor and historical activities by food tourists when compared to their generic tourist counterparts.

While there are no figures on the size of the global market for culinary tourism, its size can be construed from other estimates. Notably, it is purported that cultural tourism accounts for approximately 37% of global tourism. Further, in the United States 77% of leisure travelers (of a total of 170 mn) can be classified as culinary tourists. The Skift 2015 report also highlights that some 39 million tourists choose a destination based on the availability of culinary activities, while another 35 million seek out culinary activities after a destination is decided upon. 22% of Europeans are driven by the desire to have cultural experience when going on holidays (Gheorghe, 2014). In the UK, food tourism is estimated to be worth nearly $8 billion each year (CTO, n.d.). Bulgarians spend about 40% of their trip budget on gastronomic products (Ibid, 2014).

The demographics of culinary tourists correlate strongly to that of cultural tourists. According to the Ontario Culinary Tourism Alliance, culinary tourists are usually older (30-50), more affluent and more likely to be professionals when compared to regular tourists. Thus they may spend more of their overall budget (around 50%) on food related activities. Following a survey of culinary tourists, the International Culinary Tourism Association stated that on average, food travelers spend around $1,200 per trip, with over one-third (36% or $425) of their travel budget going towards food-related activities. Those considered to be “deliberate” food travelers tend to spend a significantly higher amount of their overall travel budget (around 50%) on food-related activities.

[2] See http://www.michelinguide.com/

Globally, tourists from Developed and large Developing Countries are among the leading travelers and biggest spenders on international tourism. In 2014, the top five spenders were China, the United States, Germany, the United Kingdom and Russia. China accounts for 13.2% of the global market for tourism expenditures, followed by the US with 8.9%.

1.3.2. Supply Analysis

Developed and High Income Developing Countries are among the leading destinations for culinary tourism. Noteworthy are countries in North America and Europe including; the US, Canada, France, Italy, Spain, Germany and the United Kingdom. Developing countries that are leading destinations for culinary tourism include; China, India, Thailand, Malaysia, Mexico and Peru. In 2014, the World Travel Awards declared Peru as the leading culinary destination globally. The country has a rich cuisine that draws from various cultures including Spanish, Africans, Chinese, Japanese and Italians[3].

A study by the UNWTO (2012) on culinary tourism based on a survey among UNWTO members highlights the following as activities tourists prefer to engage in: food events (79%); gastronomic routes and cooking classes and workshops (62%); food fairs featuring local produce (59%); visits to markets and producers (53%); visits to museums (12%); and presentations (6%). Not surprising therefore, leading destinations offer a diverse and rich cuisine. Most of the leading destinations also have a wide cultural base and therefore foods with influences from a variety of cultures. This forms the basis for their comparative advantage in the global market. Mono-cultural societies have a comparative advantage related to gastronomical techniques and regional (geographical) differences in food offerings.

Table 1 highlights examples of culinary excursions in some of the leading markets globally. Clearly, festivals and fairs are among the leading culinary events offered. Festivals are organized to celebrate the cuisine of a destination and may be combined with musical shows, restaurant weeks and art shows. For instance in the US there are several restaurant weeks and food festivals including: a restaurant week in Providence, New England[4]; an annual Music City Food and Wine Festival in

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[3] http://www.peru.travel/what-to-do/peru-of-today/food#sthash.egMApC3k.dpuf

[4] This was launched in 2006 and had about 100 participating venues.

Nashville; a Street Food Festival in San Francisco; Southern Living Taste of Charleston festival hosted by the GreaterCharleston Restaurant Association in NC[5]; Smorgasburg in New York City, where Vendors must sell a unique product; and 'Life is Beautiful' in Las Vegas.

Festivals and fairs are increasing globally particularly in Europe where there is a gamut of both gourmet and fresh produce fairs. In Europe organized tours, food trails and cooking classes are also popular. For instance, it is possible to take chocolate tours in France and Italy. Because of the cultures and resources specific to some regions it is also possible to take regional tours and enjoy unique experiences in the same destination.

In wine and beverage producing countries it is also possible to engage in wine tastings. For example, in Ireland tourists can go on a whiskey trail.

Eating at a restaurant generally is a central part of culinary tourism. However, an emerging trend in culinary tourism is dining with locals. In a survey of Canadians' participation in culinary tourism, some 57.9% of persons indicated that they prefer to dine at restaurants featuring local foods. To this end, some businesses are focused specifically on matching locals with foreigners such as EatWith Locals in the Czech Republic.

Street foods also feature significantly. Street foods and locals' only restaurants are seen as offering more authentic experiences of local foods as opposed to larger restaurants that may feature an international cuisine. Streets foods have been increasing significantly in cities around the world. In the US the leading cities with food trucks include Orlando, Florida; Miami, Florida; Washington DC; Minneapolis, Minnesota; and Austin, Texas. These have Food Trucks per 100,000 ppl as follows: 37.67, 33.83, 26.61, 22.14, and 18.51. Food trucks are expected to generate about $2.7 billion in revenue in the U.S. by 2017 a fourfold increase from 2012 (Intuit, n.d.).

Table 1: Leading culinary destinations and offerings

[5] This is held for three days and features a range of activities such as chef competitions, restaurant promotions, sampling stations, beer tastings and musical performances

Country	Offerings	Total Visitor Arrivals (5 year average (2009-2013)	Expenditure (5 year average current US$, 2009-2013)
Australia	"Tasting Australia" festival which highlights local food and wine producers over the course of eight days. Individual events include farmland feasts, food and wine master classes, producer picnics, and other activities as unique as a nine-course mushroom tasting in a limestone cave.	5,893,000	31,954,200,000
Canada	Culinary tours of Ottawa; fine dining; cooking schools; farmers markets such as Metcalfe Farmers' Market; food tastings; Cook-offs; food festivals; wine festivals.	16,180,800	18,469,400,000
Argentina	Culinary classes and cultural tours, ranch visits with horseback riding and Argentinean cowboy and outdoor street fairs. .	5,299,200	5,367,200,000
Costa Rica	A combination of traditional and modern cooking styles and use of unique vegetables such as chayote and ayote and; festivals such as fiesta del Maiz.	2,197,200	2,385,400,000
Croatia	Festivals and evens such as Days of beer Festival, Rural Products Fair, wine and jazz festival, Days of truffles; harvest festivities such as Olive day and; a restaurant week.	9,811,200	
France	Festivals such as the Fete de la Crepe; fairs such as the Livarot Cheese Fair; Shows such as the Grand Prune Show; Feasts; country-wide restaurant tours; farmers' markets; chocolate shows such as the Salon Du Chocolat; Gourmet rendezvous with exhibits, tastings and workshops such as Salon Des Plaisirs Gourmands; wine festivals.	80,747,800	62,180,600,000
Greece	Culinary and restaurant tours, cooking classes, food tastings, Gastronomic festivals such as the Ouzo festival; wine festivals such as Kythira wine festivals; food festivals such as SkalaKaloni Sardine Festival; Agricultural Festivals; Feasts	15,957,400	14,372,000,000
Ireland	Culinary tours; historical tours; food festivals; Rallies such as the National Steam Rally; Agricultural Shows such as the North Tipperary Agricultural Show; Beer Festivals; Harvest Festivals; Seafood Festivals; Gourmet Festivals; Cook-Offs such as the All Ireland Chowder Cook-Off; Cooking Classes; Wine Tours; Food trails such as the Irish Whiskey Trail.	7,552,600	8,954,600,000
Italy	Culinary tours such as cheese factory tours, truffle tours, wine tours; cooking classes; Lunch with celebrity chefs; food tastings, such olive oil tastings; concerts; market visits; festivals; fairs, such as agricultural and gourmet fairs; confectionary exhibitions; Pastry, Confectionary and Bakery, parades	45,409,600	43,318,000,000
Mexico	Cooking workshops, culture excursions, town tours such as puebla Tlaxcala and Puerto Vallarta; cooking and pastry classes; tequila workshop; mixology workshops; gourmet dining; feasts and festivals such as the Holbox Gastronomic Festival and the San Felipe Shrimp Festival; Exhibitions.	23,318,600	13,051,800,000
Morocco	Cultural tours, cooking classes; Festivals such as apple, date and olive festivals and Ahwach National Festival; Carnival	9,278,400	8,389,800,000
Peru	Wine festivals, such as the Festival Internacional de la Vendimia; pisco; Expos such as the Vino Expo; fairs; festivals, such as the festival of San Juan; concerts, competitions; parties	2,609,400	2,945,600,000
South Africa	Market visits; food and wine fairs such as the Hermanus Wine and food fair; festivals such as the Soweto Wine and Lifestyle Festival; food tastings such as cheeses, olive oils; wine tastings; Jazz festival; Orchard tours; Cook-offs.	8,430,000	
Spain	Tours; wine and brandy tasting; cooking classes; fairs such as the Malaga fair; festivals, such as the Fiesta de Marisco (Seafood Festival); wine exhibitions such as the Vinoble Wine Exhibition; special food days or	55,831,400	63,458,000,000

	food weeks such as the (Alora Soup Day) and the International Sherry Week (celebrating wine)		
Sweden	Culinary tours; cooking classes, food and beverages festivals such as Umea Taste Festival where a variety of street foods are offered, the Stockholm Beer and Whiskey Festival, Gothenburg Chocolate and Delicacy Festival; Food fairs such as the Nordic Organic Food Fair.	5,135,800	12,137,400,000
Thailand	Culinary tours; cooking classes; year round Pattaya Floating Market; a range of festivals from vegetarians, fresh fish, cake and vegetables festivals such as the international crab festival, Hatyai vegetarian festival and the Trang Cake Festival; fairs such as BaitongKrongMuang that emphasizes foods made from Banana.	19,643,400	31,666,200,000
Turkey	Culinary and cultural tours such as the tour of Istanbul to Cappadocia; cooking classes; festivals such as Apricot, watermelon festival, Mengen Chef's festival where local and foreign writers are embellished with samples of Turkish cuisine.	33,939,600	29,812,000,000
USA	Major US cities offer music and food festivals. Other attractions include cooking classes; culinary tours and food streets.	62,871,800	183,402,600,000
Source:http://www.howdoescialismed6b.com/, http://traveltips.usatoday.com/culinary-tourism-1910.html, World Development Indicators			

Through DMCs and tour operators, tourists can combine several culinary related excursions into a vacation package. **Table 2** shows examples of a few seven days culinary vacation packages globally. Across the countries captured there is a lot of variation in prices. For instance a cooking holiday in Greece (Corfu) costs US$1,020; in Italy (Marche) US$2,825 and in Mexico (San Miguel de Allene) US$1,650.

Culinary experiences are captured in various ways in the packages. For instance, cooking with locals; combinations of cooking and language classes, cooking and outdoor activities such as hiking, trekking, horseback riding, cycling; cooking and eco-adventures; cooking and beach adventures; cooking and yoga; home cooking experiences; vegan tours, luxury cooking tours and rural experiences.

Table 2: Culinary packages in various destinations

Country	Product (7 days package)	Price US$ (per person) (starting price)
Antigua and Barbuda	Beach Culinary Vacations in Antigua & Barbuda	2,999
Argentina	Spanish Language & Cooking Holidays in Argentina	610
Austria	Culinary Vacations in Vienna, Austria	2,475
Barbados	New Year Cooking Vacations in Barbados	1,999
Canada	Gourmet Trip & Horse Riding in Quebec, Canada	997
Croatia	Sailing & Wine Tour in Dalmatia, Croatia	1,782
Dominica	Dominica Eco Adventure & Culinary Tour	1,999
France	Cooking Holiday & Beginner French	1,506
France	French Language & Cooking Vacations in France	609
France	French Patisserie Holidays in Gascony	1,250
France	Luxury Culinary Vacations in the French Riviera	3,695
Greece	Greek Culinary Vacation & Honey Roads in Argolis	1,275
Greece	Vegan Culinary Holiday in Crete	3,660
Greece	Sensational Zakynthos Cooking Vacation	1,226
Greece	Culinary Vacations in Rural Greece	2,228
Greece	Vineyards & Wine Trips in Peloponnese	1,309
Italy	Tuscan Food and Wine Tour in Colle Val d'Elsa	3,500
Italy	Tuscan Women Cook Cooking Holidays in Italy	3,950
Italy	Exclusive Wine Tour in Piedmont, Italy by Bluone	2,934
Italy	Cooking Holiday Near Cortona	3,450
Italy	Italian Cooking & Food Vacations in Marche	2,825
Jamaica	Taste of Jamaica Caribbean Cooking Holidays	1,999
Lebanon	One Week Taste of Lebanon with Corinthian Travel	2,597
Malta	Week of Cookery Holidays in Gozo	924
Mexico	Cookery Holiday in San Miguel de Allende	1,650
Mexico	Mexican Home Cooking Holiday in Tlaxcala	1,258
Mexico	Cookery Holiday in San Miguel de Allende, Mexico	1,650
Mexico	Mexican Home Cooking Holiday in Tlaxcala	1,258
Morocco	One Week Yoga and Cooking in Morocco	3,700
Portugal	Conrad Algarve Culinary Holidays in Portugal	1,120
Slovakia	Slovak Wine Tasting Holiday in Slovakia	967
Slovenia	Culinary Expedition in Slovenia	2,800
South Africa	Culinary Trip in South Africa by African Appétit	2,017
Spain	Organic Farm Cookery Holidays in Mairena, Spain	598
Spain	Spanish Cooking Holiday in Cordoba	761
Spain	VBT Tours Cycling and Culinary Holidays	2,895
Spain	Cooking Vacations in Spain	2,548
St. Lucia	Saint Lucia Thanksgiving Cookery Holidays	1,999

Turkey	Aegean Cooking Vacations in Izmir	2,425
Turkey	Cooking Classes Bodrum Turkish Culinary Retreat	1,684
Umbria	Relaxing Cooking & Trekking Trip in Umbria	618
Umbria	Relaxing Cooking & Cycling Trip in Umbria	630
USA	Food & Wine Vacations in California, USA	2,892
Source: http://www.epitourean.com/		

1.3.3. Growth Trends

Culinary tourism is a growing segment globally (Ontario Culinary Tourism Alliance, UNWTO, International Culinary Tourism Association). The"American Culinary Traveler Report highlights that the percentage of U.S. leisure travelers who travel to learn about and enjoy unique dining experiences grew from 40% to 51% between 2006 and 2013.

A number of factors are driving growth in culinary tourism including:

i. Tourists spend one third of their budget on food (Gheorghe et al 2014).
ii. The nexus between a country's culture and its food. Cultural tourism is projected to grow by 15% per year according to the UNWTO (2012). Despite the fact, that with globalization it is now more possible to enjoy food from various cultures in one's homeland, this does not replace authenticity. Culinary tourists prefer engaging in destination-specific culinary experiences.
iii. The increase of food-focused media such as Food channels; for example the Food Network and social media such as Facebook, Pinterest and Instagram, (Skift Report, 2015; USA today).
iv. An increase in farm-to-table activities by group travelers (World Food Travel Association, 2010)
v. The introduction of high-profile events celebrating local cuisine (World Food Travel Association, 2010)
vi. A shift in trends where people spend less time coking but see food as part of leisure (AJTM, 2013).

1.4. INDUSTRIAL ORGANIZATION AND GLOBAL GOVERNANCE

1.4.1. Lead Firms

Lead firms in the tourism global value chain include international airline carriers, cruise lines, global tour operators, multinational hotel brands and culinary service providers. Some of the lead firms in each category are identified in turn below:

The world's largest airlines are reflected in **table 3** below. Here airlines are ranked based on number of passengers carried, number of countries served, fleet size, number of employees, revenue and profits. At the top of the list is US based American Airlines Group which has a fleet of 1,494 airplanes and made a profit of US$2.88 bn in 2014. The airline is a merger of AMR Corporation (American Airlines) and US Airways Group in 2013. Other leading airlines include; Delta Air Lines; Lufthansa Group of Germany; United Airlines and Air France KLM, a merger of Air France and KLM in 2004.

Table 3: World's largest airlines

Rank	Airline	Country	Revenue ($B)	Profit ($B)	Employees	By passengers carried (thousands) 2014	By fleet size	By number of countries served
1	American Airlines Group Inc.	USA	42.65	2.88	113,300	87,830	1,494	56
2	Delta Air Lines	USA	40.3	.659	79,655	129,433	1,357	71
3	Lufthansa Group	Germany	39.8	.073	118,781	59,850	401	83
4	United Airlines	USA	38.9	1.1	84,000	90,439	1,264	60
5	Air France-KLM	France	33.1	.263	94,666	50,636 (2012)	381	78

Source:https://www.aa.com/homePage.do, https://www.delta.com/, http://www.lufthansagroup.com/en/company.html, https://www.united.com/web/en-US/default.aspx?root=1, http://www.airfranceklm.com/en/, https://en.wikipedia.org/wiki/World%27s_largest_airlines

Table 4 shows the leading hotel chains globally. These all operate in the branded segment of the market which accounts for 53% of the global market (IHG, 2014). These have a global presence and operatein the mid to luxury price range. The leading hotel chains are InterContinental Hotels Group (IHG) which has over 4,800 hotels globally; Hilton, with over 4,000 hotels; and Wyndham with over 7,000 hotels. Hilton and the Marriott are present in Suriname.

Table 4: World's leading hotel chains

Brand	Headquarters	Locations	Founded	Hotels	Rooms	Price Segment
1. InterContinental Hotels Group (IHG)	Denham, Buckinghamshire, United Kingdom	Worldwide	2003	4,800	710,000	Mid to Luxury
2. Wyndham Worldwide	Parsippany-Troy Hills, New Jersey, United States	Worldwide	2006	7,342	627,437	Mid to Upper scale
3. Hilton Worldwide	McLean, Virginia, United States	Worldwide	1919	4,115	678,630	Upper midscale to luxury
4. Choice Hotels	Rockville, Maryland, United States	Worldwide	2006	6,372	497,023	Mid to upscale
5. Marriott International	Bethesda, Maryland, United States	Worldwide	1927	4,087	697,000	Mid to Luxury
6. Starwood Hotels and Resorts Worldwide	Stamford, Connecticut, United States	Worldwide	1969 as a REIT, 1980 as a corporation	1,200	335,415	Upper midscale to Luxury
7. Accor	Paris, France	Worldwide	1967	3,700	450,487	Mid to Luxury
8. Best Western Hotels	Phoenix, United States	Worldwide	1946	4,000		Mid to Upper scale

Source: http://www.ihgplc.com/index.asp?pageid=406, http://wyndhamworldwide.com/, http://www.hiltonworldwide.com/, https://www.choicehotels.com/, http://www.starwoodhotels.com/, http://www.accorhotels-group.com/en.html, http://www.bestwestern.com/, http://carlsonrezidor.com/, http://www.homeinns.com/, http://www.marriott.com/default.mi

Table 5 shows examples of tour operators globally providing culinary packages. They are all based in developed countries mainly in the United States and Europe. Most provide services worldwide. For instance 'On the Menu' facilitates cooking tours in 14 countries covering Asia, Africa, Europe and South American. Some tour operators facilitate tours in only one or a few countries. For instance, Cooking Vacations facilitates cooking tours and participation in cooking classes in only Italy. Culinary tour operators provide both general and customizable packages.

Other non-culinary tour operators may also provide packages or activities related to culinary tourism in their packages. For instance, Abercrombie and Kent is not a specialist provider of culinary tours but facilitates luxury tours nonetheless.

Table 5: Key Tour Operators

Key Tour Operators	Offices	Year Created	Number of Countries Served	Details
On the Menu	United Kingdom and Australia	1998	14 countries; China, South Africa, Argentina, Burma, Bomeo, Turkey, Russia, Brazil, France, India, Italy, Jordan, Thailand and Vietnam	Cooking tours
Cooking Vacations	USA	-	Italy	Facilitates cooking tours and participation in cooking classes
Abercrombie & Kent	USA	1962	Worldwide	Gourmet tours to Alaska, but cater specifically for the luxury market and are not associated with culinary tourism specifically
Whole Journeys	USA	-	Italy, the USA, Latin America and Asia/Pacific	Small group culinary tours
Cellar Tours	Spain	2003	Spain, Portugal, Northern Italy, Ireland, France, Chile, California	Customized all-inclusive luxury food and wine tours
Epiculinary	USA	2000	Worldwide but mainly Italy, Spain, France, Mexico, and USA	Offers unique cooking holidays
Wok Wiz	USA	1984	USA and Asia.	Culinary and historical walking tours
Everyday Gourmet Traveler		-	Italy, France, and the USA	Cooking school travel programme offering small group culinary tours
Walkabout Gourmet	Australia, France	1986	Europe, Australia, theMiddle Eastand Africa.	Gourmet walking tours
Cuisine International			Europe, Brazil, and USA	Offer culinary adventures
Classic Journeys	USA, UK, Australia	1995	mainly North America and Europe	Offers small group adventure travel, walking tours, cooking tours, and family holidays
Adventures in Thai Cooking and Travel		-	Thailand, and more.	Thai cooking classes, small group adventure tours

Source: http://www.holidayonthemenu.com, http://www.cooking-vacations.com, http://www.abercrombiekent.com http://travel.nytimes.com, http://travel.timesonline.co.uk/tol/life_and_style/travel, http://www.bild.t-online.de/BILD/lifestyle/reise/home/reise.html, http://globalgourmettours.co.uk, http://www.classicjourneys.com/contact/, http://wokwiz.com/tours/index.html, http://epiculinary.com/home, http://www.wholejourneys.com/content/about_us http://www.onecaribbean.org/content/files/CulinaryCaribbeanNicheMarkets.pdf

Table 6 provides examples of leading marketing and distribution agencies related specifically to culinary tourism. It captures websites such as Epicurious and the foodblog.com; magazines such as the Food and Wine Magazine and; Newspapers such as the New York Times. Destinations also use social media and television as outlets to market their services.

Very important to marketing a destination is the Michelin Guide published annually. The Guide awards stars of excellence to selected restaurants and hotel establishments around the world based on anonymous visits. The acquisition or loss of a star sends a signal about the quality of the service offered by the establishment.

Table 6: Leading marketing and distribution agencies

Leading Marketing and Distribution Agencies	Location	Type
Epicurious (part of CondeNet)	USA	Website
USA Today (travel section)	USA	Magazine
Food and Wine – Magazine		Magazine
Michelin Guide	France	Book
New York Times (travel section)	USA	Newspaper
The Times (travel section)	UK	Newspaper
Bild	Germany	Newspaper
Germany: Faz Frankfurter AllgemeineZeitung	Germany	Newspaper
Social Networks		
(The) foodblogblog.com – A directory of food blogs	-	Website
seriouseats.com – A food blog community	-	Website
Caribbean Food Emporium (CFE), Caribbean food and drink magazine	-	Magazine
Travel and Leisure	-	Website

Source: http://www.epicurious.com/articlesguides/diningtravel, http://www.foodandwine.com http://www.usatoday.com/travel, http://travel.nytimes.com, http://travel.timesonline.co.uk/tol/life_and_style/travel, http://www.bild.t-online.de/BILD/lifestyle/reise/home/reise.html, http://www.faz.net http://www.seriouseats.com, http://www.foodblogblog.com, http://www.caribbeanfoodemporium.co.uk, http://www.travelandleisure.com/blogs/whole-foods-launches-culinary-themed-tours https://en.wikipedia.org/wiki/Michelin_Guide

1.4.2. Strategies of lead firms

The tourism global value chain is a consumer driven chain as consumers choose destinations based on food preferences and the quality of service provided. However, lead firms in the chain including international airline carriers, cruise lines, global tour operators and multinational hotel brands can influence the accessibility of a destination using several strategies to enhance their presence globally (Christian, 2011).

Airlines generally use transnational linkages and ownership arrangements such as joint ventures and franchising to consolidate their market share (Ibid, 2011). For instance, American Airlines is part of the oneworld alliance which is a grouping of the world's leading airlines including AirBerlin of Germany, British Airways, Cathay Pacific of Hong Kong; Finnair of Finland, Iberia of Spain, Japan Airlines, LAN airlines of Latin America, Malaysia Airlines; Qantas of Australia, Qatar Airways, Royal Jordanian; S7 Airlines of Russia; SriLankan Airlines and TAM of Brazil. The group provides referrals to member airlines and special privileges and rewards such as redeeming miles and access to airport lounges.[6]

Delta Airlines has a transatlantic joint venture with Air France- KLM and Alitalia. As part of the arrangement, they coordinate ticket pricing, schedules, capacity and revenue. Franchising is a popular practice among hotel chains. Leading hotel Hilton, franchises out its properties to independent operators and companies.[7]

Coordination is also a strategy that lead firms such as airlines may use where they sell packages of tour operators or accommodation offerings or a cruise line may sell destination shore excursions. Airlines may also engage in direct international marketing where discounts are offered on travels to particular destinations.

For Suriname such arrangements means increased competition from more established destinations served by these airlines.

Specifically as it relates to culinary tourism, destinations offer:

1. ***A diversity of activities*** through which tourists can experience their cuisine incorporating both <u>attractions</u> such as; visits to restaurants, farmers' markets and museums as well as <u>events</u> such as; festivals, culinary tours, cook-offs, agricultural fairs and food tastings. This is particularly noteworthy in leading destinations such as France, Italy, Spain and Canada. France for instance offers the Fete de la Crepe festivals, Livarot Cheese Fair, Grand Prune Show, Country-wide restaurants, Salon Du Chocolat chocolate show and the Salon Des Plaisirs Gourmands workshop among other activities.
2. ***Major events incorporating other aspects of culture*** such as music and art shows. Food festivals may be combined with musical shows, restaurant weeks and art shows to provide a more attractive package to tourists. Organizing major events is seen as a means for attracting visitors and also as a means of gaining publicity and enhancing the image of the destination.

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[6] https://www.oneworld.com/

[7] http://www.hiltonworldwide.com/portfolio/hilton/

3. ***Promotion of cuisine among locals.*** For instance, Canada hosts a 'Food Day Canada' which was started in 2003 where restaurants, markets, farmers and foodies are called to celebrate local food.[8]
4. The ***gamut of cultural influences*** on their cuisine as a selling point in marketing their destination as offering unique foods.
5. ***Bundling*** of activities by tour operators into a culinary tourism package to offer tourists a diversified package at a lower cost. For instance, in France, cooking classes are combined with language classes for a seven culinary package. In Italy a food and wine tour in Colle Val d'Elsa is combined into a seven day culinary vacation package.
6. ***Collaboration among relevant stakeholders*** for organizing events. Collaboration is evident among private industry stakeholders and NGOs as well as public agencies for hosting culinary events. For instance, the street food festivals held annually in San Francisco, USA which feature food trucks and pop-up restaurants is a partnership between a private entity, Whole Foods Market and an NGO, La Cocina. Such collaboration allows small and medium-sized enterprises to be able to thrive in the tourism industry. In Canada the culinary tourism industry consists mostly of small and medium-sized enterprises including restaurants, wineries etc. and collaboration as such industry players collaborate in various respects.
7. ***Collaboration for marketing under a common banner.***For instance, in Canada a county of inns, wineries, cooking schools and local producers have collaborated to market themselves under the banner 'Savour Ontario' (OCTA, n.d.).
8. ***Institutional support for building capacity*** to offer quality services. Leading destinations demonstrate a close relationship between public institutions and private service providers in selling their destinations. Noteworthy is Canada. In Canada a committee of industry volunteers were formed known as the Ontario Culinary Tourism Advisory Council (OCTA) to advice the Ministry on Culinary Tourism. The Council recommended the creation of a strategy and action plan that would be implemented by the industry but supported by the government. In 2001 the Wine and Culinary Tourist Strategy Report was developed. Several projects subsequently emerged out of the strategy to support culinary tourism including; wine and culinary adventure guides for tourists, quality assurance programs for wineries

[8]https://ontarioculinary.com/celebrate-canadian-food/

across Ontario; creation of culinary associations in Niagara and Muskoka; creation of a Taste Trail in Prince Edward County among others (OCTA, n.d.).

Another form of institutional support relates to financing. In Canada grants are provided for tourism in support of various undertakings including; festivals and events; community development and other cultural activities; skills development within cultural organizations; innovation and competitiveness of agri-food production and for projects that seek to increase awareness and access to local foods. In addition, general financing is available for small businesses through the Canada Small Business Financing Program which provides loans and capital leases of up to $250,000 for fixed assets; and the Business Development Bank of Canada.[9]

9. ***Incentive system through awards to encourage excellence in the private sector***. For instance, in Ireland Tourism Industry Awards through the Irish Tourist Industry Confederation were introduced as a means of raising standards, recognizing and awarding excellence, and providing a benchmark for best practices. Examples of awards include: best festival/event experience and best international marketing initiative.
10. ***Fiscal incentives***. For instance in Ireland, the VAT rate was reduced from 13.5% to 9% on restaurant and catering services among other services to boost tourism.[10]
11. ***Legislative support through drafting of policies, strategies and action plans***. This is notable in the case of Ireland, Canada and the Philippines. In Canada, strategies and action plans for culinary tourism were drafted for selected major regions; Ontario, Muskoka, Niagara and Price Edward Country.

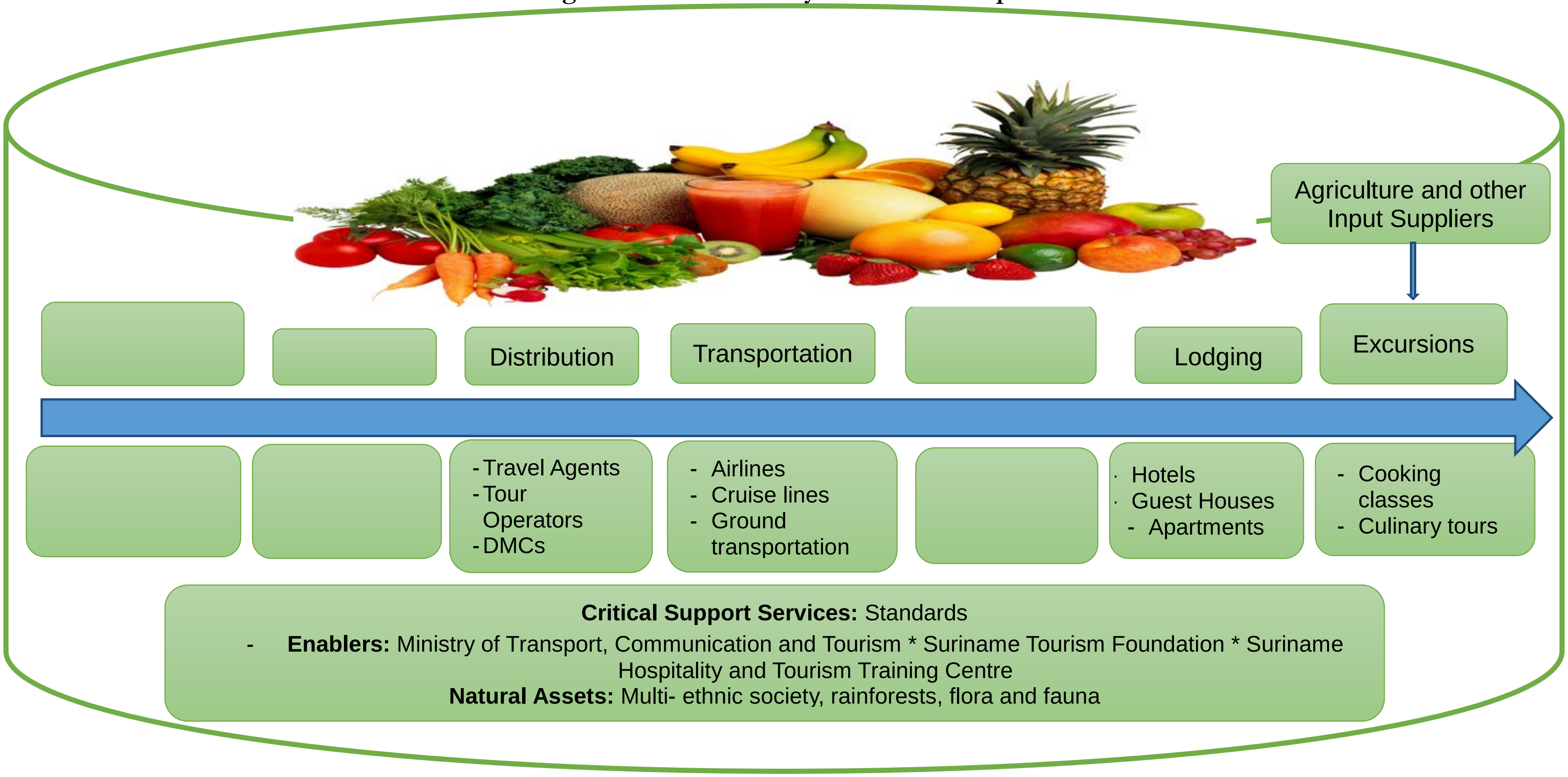
[9] https://ontarioculinary.com/resources/reports-toolkits/

[10] http://raymondkeaney.blogspot.com/

SECTION 2: LOCAL INDUSTRY ANALYSIS

2.1. LOCAL VALUE CHAIN ANALYSIS

Figure 6- Local industry value chain map



Value Chain Description

Figure 2 above maps the local value chain for Culinary Tourism industry in Suriname. The chain is meant to demonstrate what currently obtains with respect to culinary tourism in Suriname given the ideal global value chain. Missing from the start of the chain are product development and marketing because Suriname is not presently marketed as a culinary tourism destination. Suriname's tourism product is a nature and adventure experience.

At the distribution stage, Suriname essentially begins to have a presence for culinary tourism because destination management organizations and tour operators sell tour packages that feature culinary experiences on a limited scale and uncoordinated basis. Most of the tourists who presently consume such experiences come from neighboring countries with which Suriname shares borders including; French Guiana and Brazil that use ground transportation to get to Suriname and Guyana that uses a ferry service connecting the two countries; and Suriname's traditional tourist base in the Netherlands.

The preferred accommodation options for tourists are private apartments and private homes. According to estimates of the STS published through the CTO 89% of tourists to Suriname stay with friends or at private unregistered accommodation facilities. Only 11% of visitors stay at hotels. This preference arises from the fact that most of Suriname's tourists come from the Netherlands and have Diasporic linkages to the country.

Given the global value chain, ideally, critical support services include infrastructure, standards, logistics, marketing and advertising, standards and research. Because culinary tourism is under-developed in Suriname not all of these services are present. Noteworthy are research and standards. While the Bureau of Health undertakes inspections of restaurant facilities there are no other forms of quality or certification systems for culinary service providers which are evident in other countries focusing on culinary tourism. While the STS supports private enterprises with technical work in preparation for advertising and marketing, this is outside the mandate of the entity. By and large Facebook is a premier choice of advertising by local businesses. Major hotels also advertise through destination management centers as well as participate in business fairs in target markets.

Culinary related excursions do not currently feature significantly in the tourism industry in Suriname. However, there are elements of it arising in various manner based on the definition of tourism promulgated earlier. Notably are restaurant dining, culinary tours and cooking classes.

2.2. POLICY AND STAKEHOLDER ANALYSIS OF LOCAL INDUSTRY

2.2.1. Policy Mapping

The policy map below seeks to give an indication of what policies exist of broad and specific relevance to building a culinary tourism industry (see **figure 3**). It identifies national strategies, economic and trade policies, investment policies and industry development policies.

A significant deficit exists in the policy framework of the country as it relates to tourism broadly. No policy exists for tourism more so culinary tourism A Tourism Act has been on the books for over 10 years. This Act will provide the legal basis for the creation of a tourism board and a Director of the STS. In addition, there are no specific investment policies for tourism. As such, the industry does not benefit from any duty or tax concessions.

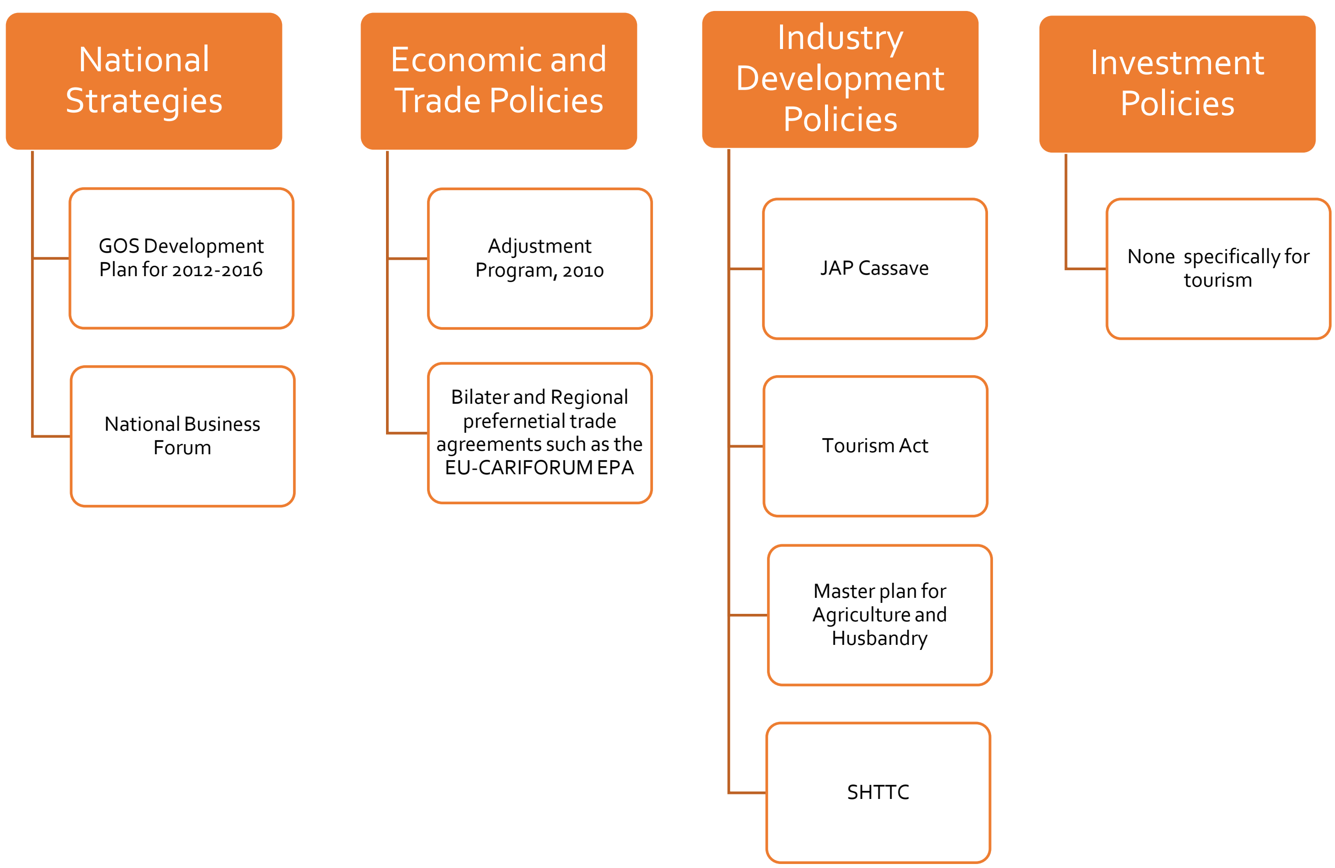
Nevertheless, the industry has seen recent innovations with the creation of the Suriname Hospitality and Tourism Training Centre in 2012.

At the national level the government of Suriname has drafted the National Development Plan to guide national development over the period 2012-2016. The Plan identifies tourism as one of the sectors of focus. It also identifies a number of areas for consideration of tangential impact to tourism including: good governance; social development; economic diversification; competitiveness and innovation; education for competitive skills and building a knowledge society; protecting natural resources and managing the impact of climate change.

Culinary tourism can also benefit from broad macro policies of the country. As a member of the WTO and the Caribbean Community, Suriname has an open trading regime and market led economy that would be very attractive to investors. Suriname is also party to other bilateral and preferential trade agreements such as the recently negotiated EC-CARIFORUM Partnership Agreement.

Within the agriculture sector, the JAP Cassave initiative (Innovative Agro Processing Industries) was started in 2012 to support increased processing domestically of Cassava, a local staple. Under the program cassava is bought from farmers at subsidized rate US$60 per kilo. The long term goal is to displace imports of wheat flour. This is a useful initiative for the culinary tourism industry in allowing for consistent supply of a key staple.

Figure 2: Map of policies



Source: Author

2.2.2. Institutional Mapping

The institutional map (**figure 4**) below gives an overall summary of the institutional framework that governs the tourism industry broadly, and under which culinary tourism will fall.

The Cabinet of the President is the highest public sector body. Under that office the Suriname Investment and Development Corporation is a government initiative administered by the Cabinet of the President. It supports and encourages business development through foreign and local investment in a number of different sectors.

The ministerial bodies formulating policies and providing services of relevance to culinary tourism services include; the Bureau of Health, Ministry of Health; Ministry of Natural Resources which will have an impact on indigenous land-use; Ministry of Regional Development; Ministry of Transport, Communication and Tourism (MTCT); and Ministry of Agriculture and Husbandry. The MTCT however is the key agency responsible for tourism policy. The Suriname Hospitality and Tourism Training Centre (SHTTC) and STS fall directly under this Ministry. Training and education responsibilities lie with SHTTC which offers vocational-level training for Chefs and cooking assistants. STS is responsible for product development, marketing and research. STS should evolve into a Tourism Board once the government's umbrella tourism act is passed into law. In the absence of the government act, the agency faces a number of challenges including lack of a dedicated Director and insufficient budgetary resources. The agency therefore rates its success at 50% given its limited resources.

The Chamber of Commerce (Kamer van KoophandelenFabrieken, KKF) is a key private association of relevance to the tourism industry. It is the contact agency for registration when establishing new business enterprises in Suriname.

The Suriname Hotel Association (SHA) is also an important stakeholder in the industry. SHA facilitates participation in trade fairs, information dissemination to members and provides a platform for businesses to discuss various issues.

Other relevant industry associations include; the Association of tour operators in Suriname and the Chef's Association.

In **table 8** stakeholders were asked to rate the level of importance and influence of various agencies on the development of a culinary tourism industry in Suriname given the mandate of the institutions broadly in tourism and what is required to develop the industry. The private associations and training institutions were identified as having important roles. Such agencies are tasked with skills development, marketing and policy advocacy. However their importance is not matched by their influence indicating that they are not effectively satisfying their mandates. STS and MTCT were also identified as having significant importance to developing a culinary tourism industry but the absence of relevant legislations gives the MTCT a low rating with respect to their level of influence.

Figure 3: Map of institutions impacting the Culinary Tourism Industry

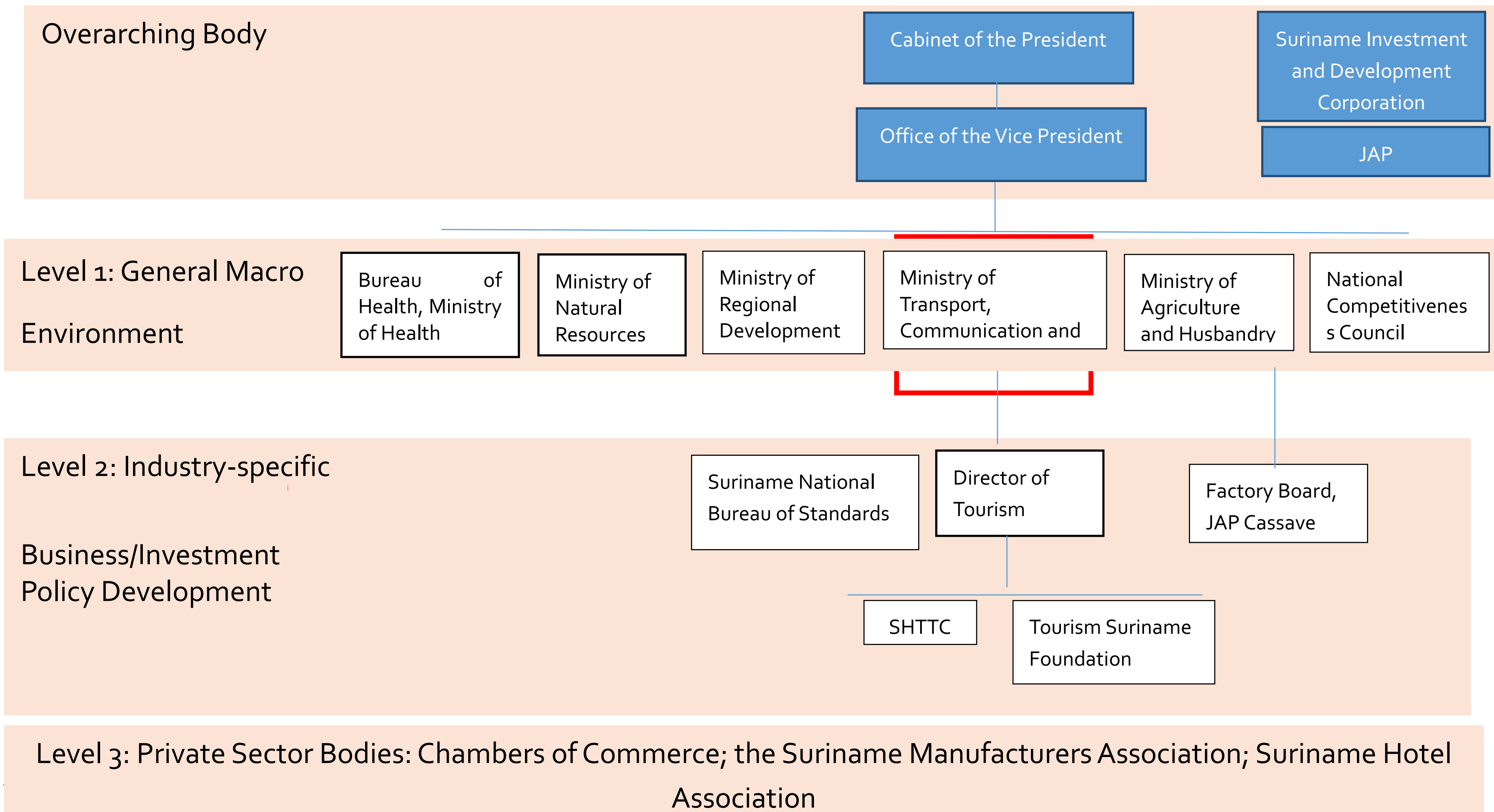


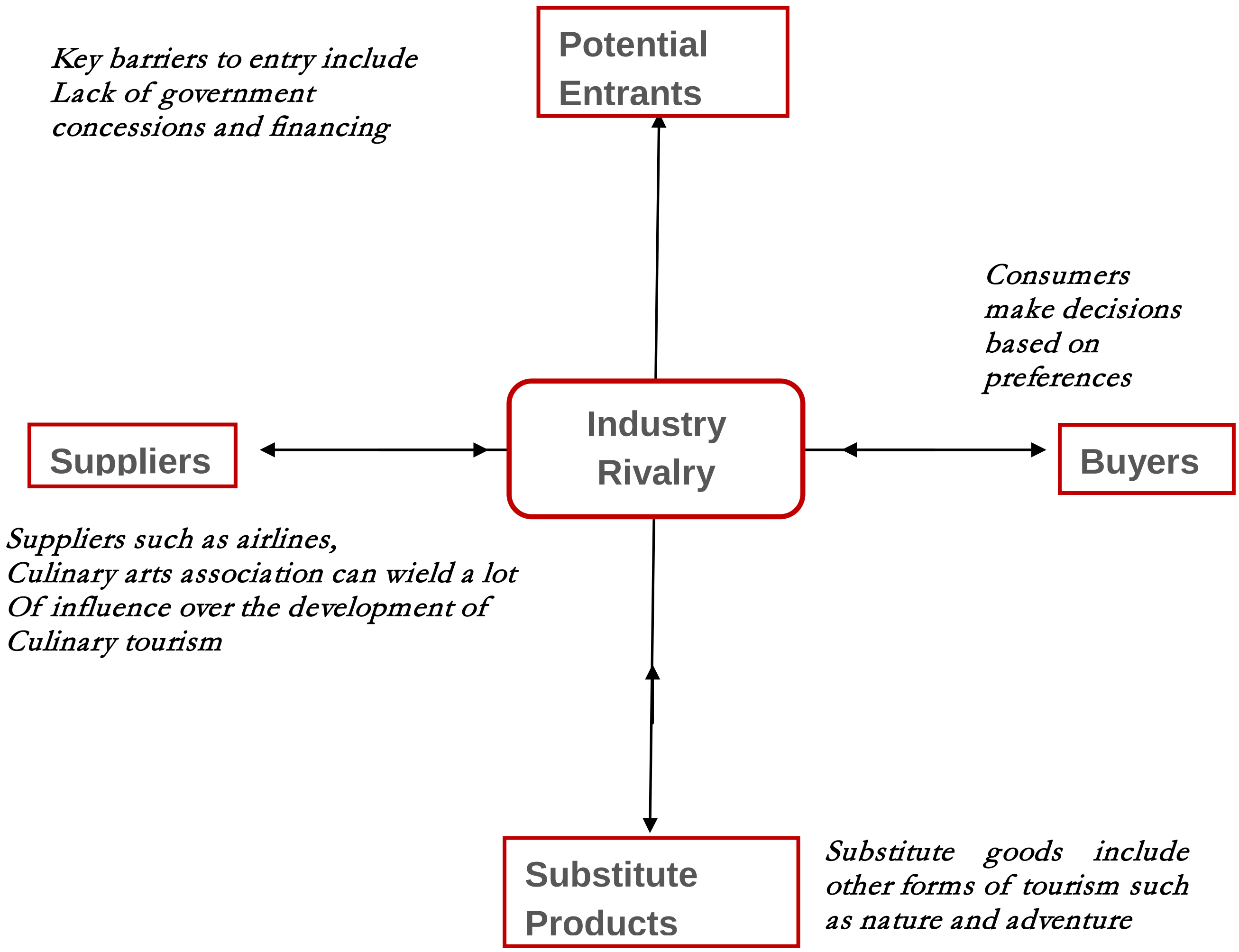
Table 7- Main Institutions with an impact on the Culinary Tourism Industry

	Level	Year Created	Description/Mandate	Importance to the Industry	Level of Influence
Technical/Academic Training Institutions					
Suriname Hospitality and Tourism Training Centre (SHTTC)	Level 2	-	Culinary and other tourism service skills development.	Medium*	Low
University of Suriname	Level 2	-	Tertiary education	Medium	Medium
Business/Investment Policy					
Suriname Tourism Foundation (STS)	Level 2	-	Product development and marketing	Medium	High
Suriname Investment and Development Corporation		-	Investment promotion and facilitation	Low	Low
JAP		-	Developing processing capacity for Cassava	Low	Low
Industry-Associations					
Suriname Hotel Association (SHA)	Level 3	-	Facilitates marketing through attendance at trade fairs.	High	Medium
Chamber of Commerce (KKF)	Level 2	-	Business registration and policy advocacy	High	Medium
Chef's Association	Level 3	-		High	High
Infrastructure/Logistics					
Ministry of Transport, Communication and Tourism	Level 1	-	Policy development	Medium	Low
Regulatory/Monitoring Agencies					
Ministry of Agriculture and Animal Husbandry	Level 2	-	Policy development	Medium	Medium
Bureau of Health (Department, Ministry of Health)		1948	Health inspections	Medium	Medium
Suriname Bureau of Standards		2006	Standards management,	Medium	Medium
NGOs					
IMKB	Level 2	-		Low	Low
Financing:					
Agriculture Development Bank		-	Financing for the agriculture sector	Low	Low

***ratings in red were done by industry stakeholders**
Source: Author's compilation

2.3. FIVE FORCES ANALYSIS OF COMPETITIVENESS AND ATTRACTIVENESS OF INDUSTRY

Figure 4: Five forces framework for the local Culinary Tourism industry



Source: Author based on interview and other data'

2.3.1. Power of Suppliers

Suppliers within the context of the tourism industry refer to the firms along the local supply chain that supply key input products and services of relevance to culinary tourism. Examples include; culinary schools, airlines, food suppliers, suppliers of kitchenware, sea/land transportation service providers, hotels etc. These can affect the quality of the final product and service provided to consumers and therefore wield great power over the development of a culinary tourism industry.

Air service is provided to Suriname through the Suriname Airways and Caribbean Airlines. The former provides direct flights to and from Amsterdam where most of Suriname's traditional customers hail from. Flights are also provided to Orlando and Miami, USA, Aruba, Brazil (Belem); Curacao; Cayenne; and Port of Spain. At Minimum, flights are available three days per week. Caribbean Airlines provides flights to and from the Caribbean and to the USA (New York and Miami) through Trinidad.

SHTTC is the only training institution specializing in culinary arts. However it is a fairly new institution that is still seeking to establish itself in the market. Prior to SHTTC companies used overseas training institutions and on-the-job training. Most of them still do.

With respect to the supply of food products, fresh produce are sourced locally and are relatively cheap and available in sufficient quantities through local produce markets, pointing to the fact that market is fairly competitive. This means that cost of switching from one supplier to another is low.However, with respect to the supply of meats, imported food products and kitchenware and other supplies, there is concentration in the industry with one group Kreuslager, monopolizing the supply of key inputs through several subsidiary firms. This restriction in competition means that there will be a high switching cost and gives the supplier dominance in the market.

2.3.2. Power of Customers

Customers are culinary tourists. These have a high degree of power as they make their decision of destinations to visit, accommodation and foods to consume based on preferences (Skift Report, 2015). Further, tourism is a service oriented activity, as such consumer expectations and opinion regarding quality of service provision are very important in forming their purchasing decisions. Globally, culinary tourism is also concentrated in developed countries where food infrastructure is better along with the quality of service provided making these destinations more competitive. These destinations are also more accessible to culinary tourists due to more consistent airline and other transportation services. Further, Suriname is a relatively unknown destination even for its traditional tourism product, nature and adventure. Therefore competing with well-established culinary destinations require significant marketing.

2.3.3. Threat of Substitutes

Substitute products can be considered in two contexts. **Firstly**, other forms of travel experiences such as nature and adventure tourism and other aspects of culture that involve a low switching cost. **Secondly**, international cuisine which is primarily available at the large hotels and restaurants. However, given that culinary tourists seek out authentic local food experiences, they are not a significant threat once an effective strategy is laid out to create excursions that can showcase local foods.

2.3.4. Threat of New Entrants

Barriers to entry in the culinary tourism include lack of industry-specific incentives such as tax concessions and limited financing. However, these are relatively low entrance barriers considering that present players in the industry have entered and sustained themselves in the absence of both government financing and concessions. Nevertheless, the industry would appear more attractive if public financial support and fiscal incentives were available.

2.3.5. Intensity of Rivalry

The actions of suppliers, customers, the availability of substitutes and barriers to entry are all factors that together can affect the overall attractiveness of a culinary tourism industry to end suppliers of culinary tourism related experiences. The international airline market for Suriname is duopolistic and monopolistic for flights from some markets (Amsterdam), making switching costs high. This can affect the number of tourists that the country could potentially attract from key markets given the number of flights and markets served by the two major airlines providing services to the country.

There are also high switching costs for customers considering that many more established destinations exist in the developed world and high income developing countries with variety, better infrastructure and more frequent and reliable transport. Further, culinary tourism competes with other forms of tourism. Within Suriname itself it will have to compete with nature and adventure tourism.

The power of transport suppliers, customers and the availability of substitute experiences can decrease the attractiveness of culinary tourism to services suppliers. This apart the, barriers to entry and exit are not significant. Further, competition for culinary tourism is likely less about price and more likely about quality and differentiation. These factors could make the industry attractive to new entrants. In addition to the fact that there aren't many competitors of culinary excursions and those that are present do not provide the same services or operate at the same level. Therefore the overall level of rivalry within the industry is medium which means that there is scope for new entrants.

SECTION 3: LOCAL INDUSTRY IN A GLOBAL CONTEXT

3.1. SWOT ANALYSIS OF CULINARY TOURISM INDUSTRY

According to the Ontario Culinary Tourism Alliance (OCTA), culinary tourism is a recipe for economic development for several reasons. **Firstly**, culinary tourism enhances all tourism assets including adventure, eco-tourism, culture, heritage and even sports because culinary tourists tend to be more active and more willing to participate in other activities. **Secondly**, culinary tourism has a greater multiplier effect on the rest of the economy. According to OCTA, eating local food has a 3 to 1 impact on the local economy whereas consuming wine has a 12 to 1 impact on the local economy. **Thirdly**, culinary tourists tend to be more affluent and spend double that of generic tourists. **Fourthly**, culinary tourism is high yielding by creating backward linkages into the agriculture sector. Culinary tourists also tend to be more loyal. **Fifthly**, food can help to preserve the local environment and cultural heritage of a county because culinary tourists are interested in experiencing the local culture. **Sixthly**, culinary tourism can be seen as a creative industry that can stimulate innovation.

Given these purported benefits, Suriname has a case for strongly considering investing in this sector. However, a SWOT analysis is useful in pointing out where gaps exist and what strengths currently exist to support the development of a vibrant culinary tourism industry.

3.1.1. Strengths and Opportunities for Upgrading

The following are the selling points for promoting culinary tourism in Suriname:

1. Most of the leading destinations have a **wide cultural base** and therefore foods with influences from a variety of cultures. This forms the basis for their comparative advantage in the global market. Suriname similarly has a wide cultural base that consists of Africans, Moroons, East Indians and Javanese and can therefore offer a diverse cuisine. Suriname already possesses an

award winning cuisine. It has secured awards at the taste of the Caribbean competition held in Miami.

2. The country has an **agricultural sector**with the capacity to support the culinary tourism industry. There are also initiatives to support the enhancement of local agro-processing sectors. Worthy of mention is the JAP Cassave program to support processing of cassava into cassava flour.
3. The **enthusiasm of the private sector** towards culinary tourism is both a strength and an opportunity. Some restaurants and individuals have begun to incorporate elements of culinary tourism through various activities. For instance, restaurant X-Avenue, which offers only local cuisine, works with CaySuri tours to facilitate tourists for meals. Further, many restaurants have under-used capacity that can be exploited to serve more tourists. As a group, restaurants are working to create a restaurant pass where persons can get discounts to eat at any of the restaurants within the grouping. This is an initiative that can be recognized and incorporated under a broader strategy to promote culinary tourism in Suriname.

   In addition there are already events being organized that present opportunities for the local cuisine to be showcased to tourists. Examples include the Suriname Festival organized by the Suriname Heritage Foundation,Pasar Malam an Indonesian fair with cultural shows and exhibitions in mid-August, Suriname Jazz Festival Surifesta in December and PagaraEstafette in December. These along with other activities can be incorporated under a culinary tourism banner.
4. The fact that **training in culinary arts** is undertaken through the SHTTC indicates that opportunities exist for qualified chefs entering the industry to enter with improved skills for gastronomy and presentation of foods.

3.1.2. Weaknesses and Threats

Suriname faces a number of challenges that can curtail the possibility of developing a culinary tourism industry.

1. **Limited government support** for Sector. Stakeholders expressed the view that tourism appears not be an expressed priority of the government. This is reflected by the significant

delay in the enactment of the tourism act and the hindrance this has posed to the creation of a tourism board. In fact, the absence of a clearly articulated government strategy and accompanying budgetary resources for the sector was noted by some as the biggest challenge to the industry's development. Further, while other sectors benefit from government concessions to spur investment the tourism industry does not receive any concessions.

2. **Poor coordination** between government and the private sector.Private stakeholders have noted that there is limited communication between the government and the private sector with respect to broad plans for the development of the industry. Stakeholders also expressed the view that the level of enthusiasm towards developing the tourism industry is greater within the private sector than at the public level.
3. **Scarcity of adequately skilled labour**. Restaurants have highlighted a shortage of skilled chefs as a challenge in the industry. While SHTTC provides training in the culinary arts it is a fairly new institution whose services are not familiar to all stakeholders. Therefore most restaurants continue to rely on on-the-job training. Other reasons for this relate to the cost of obtaining qualified chefs and the inconsistency in the skills possessed by entrants to the industry.
4. **Lack of creativity in presentation of food**: While Suriname has a wide array of foods associated with its diverse ethnic groups a major factor that could curtail the development of a culinary tourism industry is poor quality of presentation and packaging of foods.
5. **Unorganized industry**: The tourism industry is not fully organized due to limited membership of stakeholders in industry associations. At the government level through the STS and the KKF operators are registered. However many of the smaller operators avoid registration. SHA presently has only 17 members including 15 hotels. This is not very representative in terms of the number of facilities though it is large in lieu of the market share of members.
6. **Outdated and lack of relevant Legislations**. The industry lacks an overarching legislation to guide effective institutionalization in the public sector. Some regulations on the books, even though they are not enforced, are outdated and need to be revamped. The regulation to not sell alcoholic beverages to women does not reflect the current state of social relations in a modern society

The lack of relevant legislations has affected standardization. For instance a tour guiding license is not required to operate in the industry. Noteworthy, however is that there has been a move by the government to standardize elements of the industry such as food and beverages and tour guides.

7. **Poor institutionalization**. In the absence of a tourism act there is no legally supported tourism board. The SHA similarly does not operate as a fully institutionalized body.
8. **Limited capacity of relevant agencies**. The agencies in the position to provide support services presently are ineffective and are therefore not in a position to support culinary tourism. This is linked to capacity constraints vis-à-vis human and financial resources. For instance, in 2014, the STS' budgetary allocations were srd 250,000 per quarter but media buying alone is approximately srd652,376.03 (180,000 euro). Due to insufficient financial resources to pay membership dues Suriname was expelled from the Caribbean Tourism Organization since 2000. Further evidence of financial constraints is reflected in the fact that the last exit survey was conducted in 2004 due to the unavailability of funding. Other agencies have similarity expressed that financial resources are insufficient to fully carry out their mandates.
9. **Awareness and appreciation of local culture and cuisine**. Several agencies such as Sokpa work with interior communities to promote the development and marketing of locally made produce from products such as Podosirie (Cassava). However, some stakeholders lament the insufficient awareness and appreciation of local cuisine and the nullifying impact this can have on attracting culinary tourists.
10. **Access to finance**. Access to finance was noted as a challenge, particularly for rural communities that lack the collateral to push local projects.

There are also threats that can implode the industry's prospects. ***Firstly***, is the intrusion of international cuisine. Though stakeholders did not consider this to be a significant threat to local cuisine, there has been growth in the number of Chinese restaurants providing food at a lower cost. ***Secondly***, local chefs in the interest of offering diverse products are increasing the number of international foods offered on their menus. Large scale international hotels for instance, provide an international menu. **Thirdly,** is the cost of airfare. Airfares are perceived to be more expensive compared to travelling to other Dutch countries such as Curacao. This leads to competition in destination selection.

3.2. RECOMMENDED UPGRADING TRAJECTORIES

There are four trajectories through which upgrading can take place: product upgrading, process upgrading, and functional upgrading and end market upgrading (Gereffi, 2005). In Suriname's case all forms of upgrading are necessary and can be pursued somewhat simultaneously (see **table 9**).

Table 8- Upgrading trajectories for Suriname's Culinary Tourism industry

STRATEGY	What it entails
Product Upgrading	Culinary tourism product development
Process Upgrading	Gastronomy and presentation of foods Brand (theme) development and promotion
Functional Upgrading	Niche sub-sectors developed through clusters
End Market Upgrading	Improve presence in traditional markets; targeting of markets where there is an abundance of foodies
Source: Author	

3.2.1. Product Upgrading

Developing a culinary tourism product requires centering food in the experience marketed to tourists by firstly developing a theme and associated slogan under which the culinary experience will be marketed. This should seek to capture the wide cultural base of the country and should be done collaboratively between the public, private and civil sectors and can be a corollary of a culinary tourism strategic development plan.

Product development further requires developing associated culinary themed events and activities that can be developed to showcase the country's unique cuisine, local foods and cooking techniques. Such activities should incorporate cultural attractions and experiences and seek to highlight the country's natural resources. Careful consideration should be given to packaging as part of product development. According to the Ontario Culinary Tourism Alliance 70% of culinary travelers enjoy bringing back food of some sort from places that they visited to share with family and friends. Packaging is itself a mode of advertising.

Activities and events must also reflect the type of tourists that Suriname wants to attract. For instance, food trucks appeal to a younger demographic whereas farm-to-table meals attract a mixed audience, and gala events pull in business leaders and young professionals.

In the developed world food tours, cooking classes, festivals and fairs are popular and may therefore have a greater international appeal. Dining at restaurants, particularly local restaurants, remains a central part of a culinary experience but an emerging trend in the developed world is street foods and food trucks. This is a trend quite familiar to all Caribbean economies and should therefore be more willingly embraced providing that requisite systems are put in place for certification of food vendors.

3.2.2. ProcessUpgrading

Process upgrading is considered in two lights here. **Firstly**, improving the use of traditional cooking techniques, the application of international techniques to locally produced foods and the overall presentation of foods so that quality is improved and foods reflect market demand. **Secondly**, centralizing food in the promotion and marketing of Suriname as a tourism destination. This would require effective coordination of the local supply chain to ensure better coordination and communication between stakeholders (e.g. artisans, farmers).

3.2.3. FunctionalUpgrading

Functional upgrading is where firms expand into higher value services and capabilities. In the case of culinary tourism in Suriname this can proceed on the basis of niche sub-sectors to, on the one hand, give tourists a wide range of services through which they can experience the cuisine of the country; and on the other hand, to ensure the sustainability of any efforts towards developing a culinary tourism industry. This is because the Ontario Culinary Tourism Alliance notes that multiple culinary tourism experiences are important to ensuring the success of culinary tourism.
The following are possible niches to consider.

1. Dining at local and hotel restaurants and other consumption activities such as picnics

2. Agricultural and food festivals, fairs and shows
3. Farm-to- table community experiences
4. Visits to food-related facilities such as Breweries and markets
5. Education including; cooking classes and observing cooking competitions

These can evolve into packages thatincorporate elements of Suriname's traditional tourism product (nature and adventure) as well as cultural experiences. For instance, cultural excursions such as visits to historical sites can be complemented with restaurant dining. Eco-adventures such as hiking can be complemented with consumption activities such as picnics.

These niches reflect what private operatives have already begun to do in an unstructured environment and what Suriname has the potential to expand on, pointing to the fact that there are some near market ready services. For instance, J. Wolff Catering has been conducting cooking classes with tourists since 2010. As part of the cooking classes, tourists are taken to the local produce market in Paramaribo. There are also other sole proprietorships providing classes on making local foods such as 'Pom'.Culinary tours are offered on a very small scale such as by Orange Tours.

Tourists dine at popular hotel restaurants such as Krasnapolsky, Royal Torarica and Torarica that focus on providing a largely international cuisine but may also apply international cooking techniques (gastronomy to local foods and flavours). Krasnapolsky plans to have an event where they will bring Master Chefs from Holland and give them Surinamese ingredients with which to make foods. Dining also takes place at pure restaurants that offer a cuisine that may entail a blend of international and local foods such as Spice Questrestaurant which uses local snook and tambica as part of its menu.Spice Quest restaurant also uses traditional cooking techniques in preparing traditional meals.

There are also restaurants offering predominantlylocal cuisine such as restaurant X-Avenue which is the largest Surinamese restaurant in Paramaribo offering creole food with an open kitchen. Restaurant X-Avenue targets consumers in the middle and upper class and attracts many tourists. It frequently hosts tourists from neighboring French Guyana through tour operator CaySuriTours.

3.2.4. End market Upgrading

There are two main categories of tourists to Suriname. **Firstly**, back-pack tourists interested in experiencing the country's natural resources. These come mainly from the Netherlands. **Secondly**, tourist with Diasporic linkages to the country who are more likely to be based in Paramaribo. This is the largest group of tourists to the country. Suriname can market its culinary tourism experience in these traditional markets but at the same time must seek to explore new customers in key origin markets for culinary tourists in other parts of Europe and North America in order to increase the volume of tourists travelling to the country.

For target markets, appropriate and affordable tools must be selected to market culinary tourism services. The UNWTO identified the following as the most popular marketing and promotional tools used by members: organizing events (91%); producing brochures and advertising (82%) and dedicated websites on food tourism (78%); tourism guides (61%), blogs (43%), and familiarization trips for journalists and tour operators (13%); social networks (4%). Marketing is particularly important in non-traditional markets where there is limited awareness of Suriname as a country, let alone its cuisine.

3.3. STRATEGY AND POLICY MECHANISMS TO SUPPORT UPGRADING

A broad-based cluster strategy is recommended for promoting growth of a culinary tourism sub-sector in Suriname. The cluster strategy offers a number of useful advantages including; collaborative removal of constraints affecting the industry at a lower cost to each firm in the industry; scope for innovation by pooling resources to undertake market research; more effective coordination of the relevant linkages of the local supply chain so that bottlenecks are avoided;

greater communication between the public and private sector on setting goals and achieving targets. The cluster strategy is particularly useful in the context of Suriname where there are many small and medium sized enterprises in the tourism industry. Canada, whose culinary tourism industry also consists of mostly small and medium-sized enterprises follows a similar approach where events and activities, strategies and plans may be developed through associations and alliances.

The cluster-based strategy must be supported by more specific strategies that can be implemented at the cluster level (see **table 10**). These draw on success criteria identified by both the Ontario Culinary Tourism Alliance and the UNWTO in its recent Food Tourism report (2012).

Strategy #1: Leadership and Communication

Formulating a framework for communication between the public and private sector on industry goals through perhaps a steering committee that incorporates associations that presently exists such as the Chef's association and the Suriname Hotel Association. In addition, creating a framework for coordination. This framework must also seek to enhance coordination of the industry so that the private sector retains the leadership on the development of the sector and that there is communication among all the stakeholders representing the various linkages in the industry.

Strategy #2: Product Development and Marketing

Creation of an integrated culinary tourism strategic development and marketing plan which outlines specific goals and targets for product development and marketing including building a theme to sell Suriname and appropriate marketing tools; identifying stakeholders under the various niches and elaborating on offerings; adopting and enforcing quality standards where these do not exist.

Strategy #3: Education and Training

Educating and building awareness of local cuisine among the local populace as a precursor to selling Suriname's cuisine further afield. This can be supported by a focus on inbound culinary tourism.

It is also necessary to ensure that chefs and cooking assistants trained though the SHTTC have the skills required by the industry such as creativity in the presentation of foods.

Strategy #4: Mechanisms for Funding and Support

Establish mechanisms for funding and support especially for small businesses and community projects. This must include tax and duty concessions for importation for critical inputs as would be provided in commodity-based industries.

3.3.1. Key Policy Recommendations

The above strategy must be supported by the following policy mechanisms to fill gaps that exist in the industry:

1. Enactment of umbrella tourism legislation to facilitate creation of a tourism board. This will signal to the private sector that the government is serious about the industry's development.
2. Increased government subventions to STS so that it can better fulfill its mandate.
3. Appointment of a functioning head of the Suriname Tourism Foundation.
4. General financial support and concessions for tourism.
5. Development of a culinary tourism strategic development plan.
6. Initiatives to support and build awareness of local cuisine.
7. Adoption and enforcement of mandatory standards and quality certification systems for relevant stakeholders including local tour guides and restaurants.

Table 9- Plan of Action and Stakeholder Responsibility

STRATEGY	CURRENT WEAKNESSES	GOAL	GOALS/OBJECTIVES	POLICY MECHANISMS	TIMEFRAME*
STRATEGY 1- LEADERSHIP AND COMMUNICATION	1. Poor institutionalization 2. Outdated and lack of relevant Legislations 3. Unorganized industry 4. Poor coordination between government and the private sector 5. Limited government Support for Sector	Allowing for greater communication between government and the private sector and strong private sector leadership	i. Creating an institutional framework for coordination of the industry ii. Framework for communication and collaboration between public and private sector	i. Appointment of a functioning head of the Suriname Tourism Foundation ii. Creation of tourism board iii. Create culinary tourism steering committee	Short to medium term Medium to long term Short to medium term
STRATEGY 2- PRODUCT DEVELOPMENT AND MARKETING	1. Limited capacity of relevant agencies 2. Awareness of Suriname as a tourism destination in non-traditional markets	Developing and marketing culinary tourism products	i. Building a theme ii. Creating clusters based on geography or market niches iii. Select appropriate and affordable tools to market culinary tourism iv. Create awards and recognition system v. Adopt and enforce standards and quality certification vi. Enhance capacity for market research	i. Increased budgetary allocations to Suriname Tourism Foundation to support product development and marketing	Short to medium term
STRATEGY 3- EDUCATION AND TRAINING	1. Awareness and appreciation of local culture and cuisine 2. Lack of creativity in presentation of food 3. Scarcity of adequately skilled labour	Improve appreciation of cuisine among locals and culinary skills of chefs entering the industry	i. Education to build awareness and appreciation for local cuisine ii. Needs-based culinary arts training	i. Augment capacity for needs-based training in institutions providing training in Culinary Tourism	Short to medium term
STRATEGY 4- MECHANISMS FOR FUNDING AND SUPPORT	i. Access to finance: ii. Lack of government concession for tourism industry	Provide financial and fiscal support to the industry	i. Funding mechanisms ii. Government concessions	i. Improve access to finance ii. Provide fiscal incentives for sector	Medium to long term

*assumes a total timeframe of 3 years needed to bring about changes in the industry
source: author

CONCLUSION

This report assessed whether scope exists for Suriname to competitively develop a culinary tourism industry. The report followed the global value chain analytical approach which assesses an industry by segmenting the various activities and inputs required to take a product from production to the final consumer. The analysis of the global and local value chains show that Suriname does not have capacity at some of the critical stages of the chain including product development and marketing and faces weaknesses at other parts. Systemic weaknesses exist broadly within the tourism industry that could hinder the development of a culinary tourism sub-sector if left unattended, especially given that more competitive and established culinary destinations operate at a higher level. Noteworthy are the poor level of organization of the tourism industry, institutionalization, capacity weaknesses within leading agencies in the public sector and limited public/private dialogue and coordination on issues affecting the industry. The assessment of the competiveness strategies of leading destinations (mainly developed countries and high income developing countries) shows that the opposite obtains where industries are organized, legislations are in place and there exists public and private sector, and in some cases civil society, collaboration on activities and initiatives for culinary tourism.

Nevertheless, Suriname does have the potential to develop a culinary tourism industry. Suriname's potential relates to its cultural diversity and an enthusiastic private sector that is already making efforts to offer culinary tourism experiences. A look at leading culinary tourism destinations reveal that diversity in cuisine as a result of cultural influences is a key factor used to market the cuisine of those destinations. In addition, culinary tourism is an attractive industry that is demonstrating growth globally. Culinary tourism is also a subset of cultural tourism and can operate in tandem with other forms of tourism as long as food is centralized in the experience that is marketed. Culinary tourists are usually older, more affluent, more likely to be professionals, and spend more of their overall budget on food related activities compared to generic tourists. Therefore the scope for employment creation and revenue creation is higher with culinary tourism.

However, while Suriname has cultural diversity and can compete on that basis, in lieu of its weaknesses the country needs to focus on all forms of upgrading identified in the theoretical literature including product, process, functional and end-market upgrading. Significant time and resources will be required to organize the industry, develop a theme and related activities and events to market the theme and to improve knowledge (locally but especially internationally), appreciation of, quality and presentation of Suriname's foods.

The report recommends that five niches be considered for a culinary tourism industry in Suriname and that their development be pursued under a cluster strategy to facilitate more effect organization of the industry, communication among stakeholders,removal of constraints and pooling of resources to build capacity.

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APPENDICES

Appendix 1- Institutional Questionnaire

Caribbean Centre for Competitiveness
Sir Arthur Lewis Institute for Social and Economic Studies
University of the West Indies, St. Augustine Campus
Global Value Chain and Cluster Study of the Culinary Tourism Industry in Suriname
Interview Guidelines for Institutions

1. Name of Institution
2. Head of Institution
3. Contact details
4. Target Clientele/Membership
5. Specific mandate and strategic objectives
6. Are you governed by any legislations? If so can you say which one?
7. Products/services offered of relevance to the industry
8. How would you describe the use and access to services by players in the industry
9. How is your agency financed?
10. Can you describe the challenges to service provision
11. How would you describe your success rate?

Inter-agency Linkages for Capacity Development

12. Do you have a functional working relationship with any agencies domestically, regionally or internationally? If yes please state which agencies and the nature of the relationship
13. Do you belong to any associations? If so what services do they provide to your company?
14. Have you benefitted from any capacity building training offered by any agency especially international agencies? Please explain

Challenges and Opportunities for Growth

15. Do you see a lot of growth potential in the culinary tourism industry?

16. What challenges does the industry currently face that can curtail its growth potential?
17. Do you have any plans for industry development?
18. What recommendations would you make for placating those challenges and pushing the industry's development?

Thank you for participating.

Appendix 2- Interview Guidelines for Firms

Caribbean Centre for Competitiveness
Sir Arthur Lewis Institute for Social and Economic Studies
University of the West Indies, St. Augustine Campus
Global Value Chain and Cluster Study of the Culinary Tourism Industry in Suriname

Interview Guidelines for Firms

About the company

1. What specific products/ services does the company offer? Please describe thoroughly
2. How long have you been in operation?
3. How many employees do you currently have? What skills do they possess?
4. Are you faced with a skills or labour shortage?
5. What was the value of your asset base as at the most recent year?
6. Peak periods

Production Activities

7. When you started where did you obtain financing?
8. Has the company grown/ expanded since it has been established (in terms of productive capacity and varieties of products produced)?
9. What was your last production volume?
10. Where do you source inputs from? – Domestically or through imports? At what cost?
11. What is your productive capacity?
12. How much of your capacity are you utilizing in %age terms?
13. Are your operations mechanized? If not where does the deficit lie? If yes, what specific tasks/activities?
14. Standards required to comply with

Product Marketing and Distribution

15. Where are your main markets?
16. Do you export? If so, which are the major markets by shares?
17. How are your products packaged?
18. Where do you obtain packaging materials/services?
19. What distribution channels locally do you use to get your products to consumers?
20. What products/Services suppliers would you say are your main source of competition?
21. Does most of your competition come from imported or locally produced products?
22. Do you use any particular marketing strategy to market your products?
23. In what price range do your products sell?
24. How different are your prices from competing prices?
25. What would you estimate is your share of the local market?

Policies of relevance to the tourism industry

1. Are you aware of any policies/ strategies for tourism development in Suriname?
2. Economic and trade policies of relevance to the tourism industry
3. Investment policies for tourism

4. Policies to build productive capacity

Inter-agency Linkages for Capacity Development

26. Do you have a functional working relationship with any agencies domestically, regionally or internationally? If yes please state which agencies and the nature of the relationship
27. Do you belong to any associations? If so what services do they provide to your company?
28. Have you benefitted from any capacity building training offered by any agency especially international agencies? Please explain

Challenges and Opportunities for Growth

29. What plans do you have for expansion over the next 1 to 5 years or longer?
30. Do you see a lot of growth potential in this industry?
31. What are the major challenges you face in this industry?
32. What recommendations would you make for placating those challenges and pushing the industry's development?

Thank you for participating.

Appendix 3: Stakeholders Interviewed/Consulted

Company Name	**Interviewee Name and Position**
1. Restaurant X- Avenue	Derek Rogers, Owner Mahadew, Xaviera, Owner
2. STS- Suriname Tourism Foundation	Dhr. Gerrold J. Vismale, Manager of Data and Research Mrs. Talisha van Leeuwaarde, Marketing Manager
3. Jap Cassave	Dr. Robert Power, Presidential Adviser to the President for Agriculture
4. SHTTC	RabinBoeddha, Policy Advisor on Tourism/ Chair/Acting Director
5. Suriname Hotel Association	Zinhagel, Annie
6. Restaurant Spice Quest	Verwey, Shaun, Manager
7. Chamber of Commerce	Oswaldo R.Braumuller, Executive Board Member
8. J. Wolff Catering	John Wolff, Caterer
9. Hotel Krasnapolsky	Hans Huiskes, Director Manager Daryl Jaeger, Operations Manager
10. StokPA, Steering Committee for Development of the Cassava, Advice for Business Innovation and Creation	SheridaMormon, Chair
11. Orange Tours	Ernie DeVries Manager
12. Torarica Hotel	Maije, Chef Sherwin Executive Chef

Appendix 4-Players in the Culinary Tourism Industry in Suriname

Position in the value chain	Major Companies	Services	Established	Number of Employees	Productive Capacity	Capacity Usage	Other details
Distribution/ International Tour Operator	Discover Suriname Tours	Destination Management Centre/Tour Operator	-	-	-	-	-
	METS Travel and Tours	Tour Operator	1962	-	-	-	Began operating internationally in 2012
	Orange Travel Suriname	Tour Operator	-	-	-	-	-
	Oetsi Tours	Tour Operator	-	-	-	-	-
	Water Tours	Tour Operator	-	-	-	-	-
Excursion	Garden of Eden	Restaurant	-	-	-	-	-
	Baka Foto	Restaurant	-	-	-	-	-
	De Wuagg	Restaurant	-	-	-	-	-
	Royal Torarica	Hotel Restaurant	-	-	-	-	-
	X-Avenue	Restaurant		-	124 persons	-	-
	Spice Quest	Restaurant	2004	10	100 persons	40%	-
	Dumplin	Hotel	1999	-			-
	Torarica	Hotel Restaurant	-	-	-	-	-
Tour Operators	Caysuritours		-	-	-	-	-
			-	-	-	-	-
Input Suppliers	Inter-farm Trading (Keurslager)		-	-	-	-	-
	Abdul Khan		-	-	-	-	-
	Suriname American Industry Ltd.		-	-	-	-	-
Lodging	Torarica (RoynalTorarica)	Hotel	-	-	-	-	-
	Marriott	Hotel	-	-	-	-	-
	Krasnapolsky	Hotel	-	-	-	-	-
	Residence Inn	Hotel	-	-	-	-	Subsidiary in Nickerie
	Ramada	Hotel	-	-	-	-	-
	Windham	-	-	-	-	-	-

Source: Author based interviews etc.

Appendix 5- SWOT Framework for Suriname's Culinary Tourism Industry

Strengths	Weaknesses	Opportunities	Threats
• Media coverage buying • Culture (wide, strong oriental) • Awards at international cooking competition • Enthusiasm of private sector • Strong colonial links with the Netherlands • Assistance to indigenous communities with product development through • Activities organized to promote local foods (Suriname festival organized by the Suriname Heritage Foundation)- e.g. stokpa • Tourist card issued by the government	• Lack of know how in creative presentation of food (finishing and consistency in favor) • Unorganized industry. For instance, many small apartments are emerging which are not regulated SHA • Outdated and lack of relevant legislations and permits • Poor coordination between government and the private sector • Poor institutionalization • No legally supported tourism board • Insufficient budgetary allocations for semi-autonomous agencies. Budgetary allocations • Awareness and appreciation of local culture and cuisine • Access to finance • Chefs with the right skills (SHTCC is young) • Lack of skills in the culinary world- gap with other Caribbean countries such as Curacao • Low degree of registration of restaurants with STS • Shortage of labor e.g. online marketing • Investment and incentives are poor only incentives for land are available • Bureaucratic processes for imports	11. Diverse culture of the country 12. JAP Cassava program to increase use of cassava flour locally 13. Gastronomy- application of international techniques to local foods. 14. Organize culinary events around peak periods 15. Cultural tourism given indigenous peoples 16. X- Avenue offers local cuisine 17. Under-used capacity of restaurants.	18. Intrusion of international cuisine e.g. Chinese foods. 19. Expensive airfare which leads to competition in destination selection. 20. Local chefs are more international offering international cuisine 21. Limited awareness of Suriname as a country outside of traditional markets.

Company Information

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