



Caribbean Regional  
Sustainable Tourism  
Development  
Programme

# Caribbean Sustainable Tourism Policy Framework



CARIBBEAN™

### **The Caribbean Tourism Organization**

The Caribbean Tourism Organization (CTO) with headquarters in Barbados and marketing operations in New York, London and Toronto is the Caribbean's tourism development agency and comprises 32 member governments and a myriad of private sector organisations and companies. The CTO's mission is to provide, to and through its members, the services and information needed for the development of sustainable tourism for the economic and social benefit of the Caribbean people. The organisation provides specialised support and technical assistance to member countries in the areas of marketing, human resources development, research, information management and sustainable development.

### **The Caribbean Regional Sustainable Tourism Development Programme (CRSTDP)**

The Caribbean Sustainable Tourism Policy Framework is an output of the Caribbean Regional Sustainable Tourism Development Programme (CRSTDP); an intervention of the 8th European Development Fund (EDF) implemented in the period 2005 to 2008. The overall purpose of CRSTDP has been to foster the sustainability and competitiveness of the Caribbean tourism sector through the establishment of a sustainable development policy framework, supplementing and strengthening of regional institutional capacities, development of skills and human resources, support to small operators through business development services, and strengthening the links among CARIFORUM/ CARICOM, the Caribbean Tourism Organization (CTO), the Caribbean Hotel Association (CHA), national tourism/hotel associations and academic institutions.

The CARIFORUM Tourism Programme Unit (CTPU) has been charged with the management of the CRSTDP under the supervision of the Regional Authorising Officer (CARIFORUM). A Tourism Stakeholder Group contributed to the policy formulation and programme implementation processes. As the policy making body mandated by the governments of its 32 Caribbean member countries to internationally market and promote the region and to provide a platform for regional issues relating to tourism, CTO has been the Implementing Agency with responsibility for the development of the Caribbean Sustainable Tourism Policy Framework. Carl Bro a/s of Denmark was awarded the service contract for the provision of technical assistance to the CTO for the development of the Policy Framework and activities commenced in 2005.

### **Caribbean Tourism Organization**

One Financial Place, Lower Collymore Rock, St. Michael, Barbados

Tel.: (246) 427 5242 Fax: (246) 429 3065

Email: [ctobar@caribsurf.com](mailto:ctobar@caribsurf.com)

This document is downloadable at: [www.onecaribbean.com](http://www.onecaribbean.com)

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Reference to products and policy developments are given as examples only, and does not equate to their endorsement by the Caribbean Tourism Organization.

# Executive Summary

## Introduction

The Caribbean States share key challenges on the path to achieving a sustainable economic growth in the future. The globalised economy has steadily eroded the trade preferences obtained in the past. This has lead countries to diversify their economies by opening new areas of economic activity, whilst at the same time implementing measures to improve the competitiveness of those economic sectors already in operation.

As the World Tourism Organization (UNWTO) has pointed out, one of the defining developments of the last century has been the staggering incremental growth in travel and tourism, and the Caribbean has been well positioned to tap into that phenomenon, driving the process of economic diversification. Today tourism is one of the engines of economic growth in the region and a major employer.

The need for the sustainable development of the tourism industry has long been recognised, enabling the right balance to be struck between realising the potential of the tourism industry to contribute to national economic development goals, without damaging the very resources that attracted the visitors in the first place. Bearing in mind the importance of the tourism sector for Caribbean countries, the complex inter-relationships between tourism and other areas of the national and regional economy, the impacts of tourism on destinations and the common identity of the region, the purpose of this Policy Framework is to put forward guidelines for the sustainable development of tourism in the Caribbean.

## Application

It is the intention of the Caribbean Tourism Organization (CTO) that this document provides its members, primarily the National Tourism Organisations (NTOs) in its 32 member states, with a Policy Framework to guide the sustainable development of tourism. It brings together in one document, broad policy guidelines to address the thematic areas identified during the stakeholder consultation as being critical to the sustainable development of tourism at the national level. Not only are these issues relevant to CTO member states, but they also have regional implications. Moreover a regional approach to common challenges will give added value.

NTOs can use the Policy Framework as a tool to adapt, develop, revise and update their individual tourism policies and strategies according to their national priorities. It will also provide CTO and its partner organisations with a platform for planning, implementing and monitoring measures to assess issues of regional significance for the sustainability of tourism. Governments are thus kindly invited to benchmark their national state of affairs against this Policy Framework and to take necessary action. The policy guidelines can then be used as a point of departure for the development of national policy where a need has been identified.

Users should note that compliance with the provisions of this document is not mandatory, neither is CTO advocating regional harmonisation. Rather the tourism sector is encouraged to use this document to realise its responsibilities to the people of the region, as well as to the consumers, and to ensure a strong regional emphasis on a sustainable tourism development. To ensure its applicability in the future, it is recommended that the Policy Framework is reviewed and updated at relevant forums, such as the CTO annual Sustainable Tourism Conference.

# Development

The Policy Framework development process began with the hosting of two inter-sectoral policy planning workshops in 2005 (Barbados) and 2006 (St. Lucia). At these meetings, stakeholders met to discuss the concept and design of the Policy Framework. Six thematic areas were identified as being critical to the sustainability of Caribbean tourism: tourism management capacity, marketing, transportation, environment, linkages, and health, safety and security issues. CTO released the first draft in July 2007 for stakeholder review, and a period of consultation commenced culminating in the Sub-regional Policy Consultation for the South and East Caribbean in November 2007 (St. Vincent and the Grenadines) and for the North and West Caribbean in January 2008 (Antigua and Barbuda).

Based on the feedback and guidance provided by the stakeholders, a final draft Policy Framework was released by CTO in March 2008 for stakeholder review. The Policy Framework was ultimately finalised following further stakeholder feedback and guidance. In addition the development process has benefited from the work done within the other CRSTDP programme components as well as by the consultancies implemented within this component. Finally an in-depth review of the demand and supply aspects of Caribbean tourism was undertaken to inform the Policy Framework, the results of which are included in Annex 1 to this document.

The Policy Framework consists of an overarching vision, ten guiding principles, and six integrated policies relating to the critical areas identified in the stakeholder consultations. Each policy is comprised of an overarching development goal and policy guidelines clustered into specific policy objectives.

## The Vision

The guiding vision for the Policy Framework is that the sustainable development of Caribbean tourism engenders a sector that is viable and resilient, of high quality, promotes empowerment and ownership, and continues to embrace regional integration.

**Viable and resilient:** Stakeholders of the Caribbean tourism sector agree that it is viable and resilient. It successfully attracts the tourist segments with the most significant tourist spend, who stay longer in the region and return year after year. The tourism sector's capacity to absorb and then recover from external events underlines its resilience, as well as its importance to livelihoods and national and regional economies.

**High quality:** Tourism contributes to providing a higher quality of life for all citizens of the Caribbean through the provision of job security, dividends for the state and recreation opportunities for the enjoyment of one and all. The tourists experience a high quality product based on the region's unique natural and cultural assets, with the necessary infrastructure in place for the responsible management of those assets to preserve them for future generations of Caribbean citizens and tourists alike.

**Empowerment:** Citizens of the Caribbean are proud of their region's status as the world's premier tourist destination and are aware of the contribution that tourism makes to the nation's financial, cultural and natural well-being. Through public participatory methods, governments involve the people in the planning and development of the tourism industry.

**Ownership:** Citizens of the Caribbean acknowledge that tourism is being developed on an inclusive basis rather than on an exclusive basis. National frameworks are in place to facilitate the skills development and capital investment necessary for a nationally-owned product, giving people the opportunity to take advantage of tourism opportunities and driving national ownership.

**Regional integration:** Caribbean nations continue to cooperate regionally to meet the challenges engendered by an increasingly globalised tourism economy. By working towards integration on key issues where a regional approach gives added value, the efficiency and effectiveness of Caribbean policy is enhanced and regional synergies can be realised.

## Guiding Principles and Development Goals

Ten guiding principles are put forward, which convey CTO and UNWTO current thinking on sustainable development and tourism. The principles define sustainable tourism, its interaction with communities and the environment, and underline the importance of an inclusive process involving informed participants. In addition the principles stress that sustainable tourism guidelines are applicable to all forms of tourism in all types of destination in the Caribbean, and not just to niche markets such as ecotourism. In particular, achieving sustainable tourism is a continuous process requiring constant monitoring and there is no single model for the implementation of sustainable tourism – instead a mix of the right management practices, legislative instruments and forms of partnership is needed.

The six Development Goals are related to the policies and are therefore included in the brief overviews of each policy area which are presented below.

### Policy on Tourism Management Capacity

#### **Goal 1: Ensure adequate and appropriate national capacity to manage the sustainability of the tourism sector**

The policy guidance to build tourism management capacity is grouped into policy objectives related to: good governance, public awareness, human resource development, tourism research and development and Information Communication Technology (ICT).

Central to the Policy Framework is that governments are aware of the importance of tourism's contribution to the fulfilment of national, social, and economic needs and for the achievement of national growth targets. If tourism is considered a priority sector, this should be recognised at the highest political level with the integration of tourism into national development plans, in line with the principles of good governance. A range of policy actions should then be articulated, in particular the development of a national tourism policy and corresponding tourism master plan in a participatory manner, to ensure that a coherent approach is taken to tourism development. Governments should monitor the effectiveness of tourism development initiatives, and be accountable for their actions. As tourism is a people business, delivering supreme customer service, raising public awareness of the key strategic importance of tourism, and engendering feelings of ownership and involvement are vital.

The tourism sector in the Caribbean recognises that service is an integral part of the tourism product and as such contributes to the quality and overall level of competitiveness. The human resource requirements of the sector thus merit dedicated, focused and systematic action at the national and regional level, and Human Resource Development (HRD) is considered in thorough detail within the Tourism Management Capacity policy. The Policy Framework provides HRD policy guidance for (i) tourism planning, which addresses the national mechanisms needed to coordinate tourism HRD; (ii) public perception, which focuses on raising the profile of careers in tourism; (iii) tourism education and training, which looks at how tourism can be integrated into the national framework from primary school to adult learning; and (iv) tourism and the labour market, which provides guidance on the overall conditions for working in tourism.

The policy focuses on tourism research and development by examining ways to ensure a sound information base for policy making, and how to facilitate the knowledge transfer necessary for innovation. Related to HRD is the issue of the uptake of Information Communication Technology (ICT). Tourism is an information intensive industry and developments within ICT are revolutionising the way in which businesses are being run. Guidance is provided on the uptake of ICT by the tourism sector through a national enabling environment.

## Tourism Marketing Policy

### Goal 2: Continuously improve the sustainability of the marketing mix in light of emerging global market trends

The policy guidance on improving the sustainability of the marketing mix is grouped into policy objectives on market intelligence, ICT and marketing, tourism product development, diversity of tourism, quality issues and the effectiveness of marketing.

Successful marketing is key to the long term sustainability of tourism in the Caribbean and a range of stakeholders are involved in this activity, with government constituting a key player in the development of the marketing mix. In particular the marketing must fit into the direction for the national tourism sector as defined in national tourism policy. With respect to international market trends and given the increasing competition from comparable destinations across the world, marketing needs to build on the comparative advantages that the Caribbean has over other destinations. The policy guidance on market intelligence thus underlines the importance of the central collection and management of tourism data at the national level, and that this information is analysed and fed into the marketing process.

Fundamental changes are taking place in user behaviour in key markets for the Caribbean as countries move towards knowledge-based, digital economies. The use of ICT in marketing offers highly cost-effective opportunities for tourism marketing by facilitating booking, information distribution and communication directly with customers and within the industry. The essence of the policy guidance on ICT and marketing is the importance of developing national internet strategies that keep abreast of ICT developments, ensure the effectiveness and usability of national destination marketing, whilst focussing on those product components that can be most easily marketed and managed using ICT.

The tourism product is an essential component of the marketing mix, and national governments are able to shape its development through a range of policy measures. The policy emphasizes that product development is not just confined to expanding the accommodation sector but should broadly encompass tourism-related activities such as visitor attractions and community-based tourism developments. Guidance is given on monitoring the effectiveness and transparency of incentives to attract tourism sector investment, as well as the functionality of the process itself. The Policy Framework also addresses the need to maintain the small hotel sector, which may be adversely affected by further accommodation capacity coming on stream.

The policy considers how to stimulate a diverse national tourism product in particular with regard to the need to carefully plan for the development of priority niche markets such as yachting, dive tourism and weddings and honeymoons, which are consistent with sustainable tourism (if managed correctly) and where the Caribbean has added value. This should not only increase the attractiveness and interest levels of the product offer, but also avoid product homogeneity and the risk of having “too many eggs in one basket”. Guidance is provided on a local destination-based approach to tourism planning, in order to ensure that tourist areas specialise in the niche products that they are best suited for. The initiative taken by the Belize Tourism Board to classify the country into nine different tourism destinations is used to illustrate this. Using a decentralised, destination-based approach to product development also provides a mechanism for vital feedback from local communities, so that opinions can be captured and communicated to the national level. Jamaica’s six resort boards, which constitute public private partnerships, are identified as a suitable framework to facilitate this.

As tourism is an export industry, it is vital that the products on offer meet internationally accepted levels of quality. The policy provides guidance on how to establish a culture of quality performance assessment, including the establishment of a specific licensing agency with responsibility for the management of the standards on a daily basis, including communication and inspection activities. Other standards issues include uptake of voluntary quality standards related to service excellence and the environment, as well as legislation to enforce that tourism operators obtain an operating license and are registered with the relevant agencies for tourism promotion. It is also essential that the marketing targets the priority markets identified in the national tourism policy, and that the effectiveness of the promotional activities undertaken by the agencies responsible for destination marketing is monitored and evaluated.

## Tourism and Transportation Policy

### Goal 3: Develop efficient and cost effective transportation options to facilitate a sustainable level of destination accessibility

The policy guidance on developing efficient and cost effective transportation options is grouped into policy objectives on: air transportation, marine transport and ground transportation.

Air transport solutions are crucial to tourism and general business development, and a regional approach would be much more effective, far-reaching and sustainable. With regard to the regulatory environment, a series of proposals are made in line with the San Juan Accord, including the need to establish a regional umbrella policy for air transport within the framework of the existing Association of Caribbean States (ACS) Multilateral Air Transport Agreement (MATA). or other mechanisms taking into account the obligation of CARICOM member states under the revised Treaty of Chaguaramas.

Other issues include the intensification of efforts to develop a single regional air space within sub-groupings such as CARICOM and where feasible, extend this air space to the wider Caribbean. The policy also addresses commercial development issues, infrastructure and quality, safety and crisis capabilities. The importance of efficiency and cost effectiveness of air transport should be a major consideration when opening new routes, and it is thus important that market intelligence and visitor arrival data is analysed and used to inform existing and planned commercial aspects. The opportunities offered by new technologies such as Common Use Self-Service Systems (CUSS) help to overcome economies of scale and facilitate competition with larger carriers.

The Caribbean is the world's favourite cruise destination, cornering about half of the worldwide cruise berth allocation. The sheer volume of cruise passenger visitation raises new challenges for destinations. Policy guidelines are put forward with regard to improvement of the cruise and maritime infrastructure, cruise passenger spending and sector management issues. The infrastructure section refers to the need to update infrastructure to meet the challenges presented by the new generation of mega cruise ships. There are also environmental concerns relating to compliance with the MARPOL Convention on marine pollution. With respect to ground transportation, the policy underlines the importance of an effective ground transportation network for the overall quality of the visitor experience, with guidance being provided on issues such as signage, road safety and vehicle emission standards.

## Policy on Tourism and the Environment

### Goal 4: Ensure the sustainable use of the natural environment and the cultural heritage for the benefit of all

The policy guidance on ensuring the sustainable use of the natural environment and the cultural heritage is grouped into the following policy objectives: the planning, management and monitoring of the environment; sustainable patterns of resource use and the application of adaptation and mitigation strategies for tackling the climate changes predicted to be inevitable by the international scientific community.

The policy guidance on tourism planning is based on the principles of good governance that were enunciated in the thematic area on tourism management capacity. It is thus important to secure a coherent and consensus-based approach to the planning process by ensuring that the right regulatory framework is in place for land use planning to protect the built and natural environment. The policy advocates the development and implementation of National Physical Plans (NPPs) that classify development zones in keeping with the principles of sustainable development.

At the next level, tourism master plans should further extrapolate how to facilitate strategic tourism development within these zones in line with overall national policy. Planning regulations need to be applied in a transparent manner, so that applications for planning permission are screened to ascertain the application process necessary for that particular form of development, and where necessary to require the use of impact assessments to assess whether the type of tourism development is permissible.

The policy provides guidance on resource management in existing tourism enterprises, in terms of energy efficiency, water conservation, wastewater treatment and solid waste management. Attention is also given to the adoption of Environmental Technology in the sector to promote more sustainable patterns of resource use and realise commercial linkages. Climate change is also a major environmental issue for the long-term sustainability of tourism in two respects: climate change will have consequences for tourism, which is in turn a contributor to global warming. The policy puts forward guidance on the adaptation measures that need to be integrated into the planning process to prepare for climate change, including the regeneration of coral reefs to protect against storm surge and the development of coastal defences. Caribbean governments also have a responsibility to tackle climate change through mitigation, for example by encouraging the use of measures such as carbon offset programmes, which reduce the tourism sector's carbon footprint by investing in projects to neutralise carbon emissions and improve the quality of life.

## Policy on Linkages to Other Economic Sectors

**Goal 5: Develop and strengthen the links between tourism and other economic sectors nationally and regionally to maximise the multiplier effect on the economy and reduce leakages**

The policy guidance on developing and strengthening the links between tourism and other economic sectors is grouped into the following policy objectives: the provision of an enabling framework to realise national and regional inter-sectoral linkages and ensuring that communities are able to gain meaningful benefit from linkages with tourism.

In terms of establishing an enabling framework, the policy supports the need to anchor the institutional capacity gained from working with linkages and tourism, and ensuring that this knowledge base feeds into the overarching national tourism management framework. Other areas of focus include research to determine the viability of sectoral linkages before initiating development schemes, and expanding the institutional framework to support the growth of sustained public-private partnerships in areas of linkage where existing arrangements for collaboration may be either too weak or too informal. Other aspects of the enabling framework include integrating the issue of linkages into skills development in tourism-related trades, for example training chefs to design menus that incorporate local agricultural products and foodstuffs.

Community-based tourism (CBT) is an approach that strives for community participation in the tourism industry. The policy guidance is put forward under the four headings identified as critical factors for successful CBT in a CTO/CRSTDP report on this subject: commercial viability (in terms of product quality, price, marketing and funding mechanisms), access to the market (in terms of physical location, economic elites and social constraints on local producers), policy framework and land tenure (in terms of the planning process, governmental attitude and capacity), and implementation challenges in the local context (filling the skills gap, managing costs and expectations and maximising collaboration among stakeholders).

## Policy on Health, Safety and Security Issues and Tourism

**Goal 6: Manage the health, safety and security issues that impact the sustainability of tourism**

The policy guidance on managing the health, safety and security (HSS) issues that impact on tourism sustainability are grouped into the following policy objectives: enhancing communication and coordination mechanisms, improving the health and safety of citizens and visitors to the Caribbean, managing security issues to reinforce the reputation of the Caribbean as a secure destination and integrating multi-hazard risk management in all sectors including tourism.

The policy identifies a need to ensure enhanced, nationally coordinated inter-agency strategies between health and tourism, with the development of a parallel mechanism at the regional level. Intelligence gathering on HSS threats and the development of communication protocols for HSS issues are also highlighted. In terms of health and safety, the policy guidelines focus on health risks such as communicable diseases, in particular food-borne diseases (FBDs), vector-borne diseases and sexually transmitted diseases (STDs) among local and visitor populations.

Key areas include the implementation of standards and practices to ensure food safety and reduce FBDs, as well as action to prevent and minimise the spread of communicable diseases for example by developing HIV/AIDS prevention programmes. With respect to security, reviews of legal and institutional efforts to deter crime against tourists are recommended, with measures considering community-related crime prevention groups in tourism areas.

Tourist destinations around the world have previously been the target of terrorist activity, and in order to reinforce the reputation of the Caribbean as a secure destination, this policy area advocates an integrated approach to managing the risk of a terrorist attack in the tourism sector through the development of contingency plans and through cooperation with key stakeholders. With regard to multi-hazard risk management in the tourism sector, there is a need for governments to liaise closely with the development of specific regional standards for multi-hazard risk management in the tourism sector. Importantly tourism enterprises need to be aware of their responsibility to plan for natural hazards, with regard to the use of building codes.

## **Conclusion**

The manner in which tourism develops over the next 25 years will have significant implications for the sustainable development of the Caribbean. On the one hand tourism is critically important for all the Caribbean economies, on the other hand there is no question that the evolution of the tourism plant across the region has brought with it a range of specific environmental and socio-cultural impacts. It is therefore vital that tourism is developed in a sustainable manner, and that the principles of sustainable development are allowed to permeate the thinking behind all forms of tourism development. Of fundamental importance is the inclusion of the Caribbean people in the development of the industry – both at the policy level through consultation processes and as part of the industry through ownership and employment at all levels – from senior manager to line staff, with ample opportunity for career advancement.

After the Rio Earth Summit in 1992, sustainable development has evolved to become a cornerstone principle of all development. Global governments and their partners, including the Caribbean, have committed themselves to a process of sustainable development, which is often difficult to plan and track. The next major milestone in this process is the Rio+20 Summit to be held in 2012. By working in a systematic manner with those thematic areas of the Caribbean Sustainable Tourism Policy Framework that are relevant for the Region, ministries of tourism, as well as national tourist boards, private sector associations and their national and regional stakeholders can demonstrate their commitment to sustainable tourism for the benefit of citizens and tourists alike.

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# 1 Setting The Scene

## 1.1 Introduction

The Caribbean states, despite differences in terms of geography, demographic composition and economic performance, share key challenges to their future economic growth in a globalised world economy. For many years, developing countries in the region benefited from preferential market access, high levels of grant-based foreign aid, longer adjustment periods to international agreements and other special policy measures. However, globalisation is eroding trade preferences and foreign aid flows are declining. These factors, combined with others such as high transport costs, dependency on a single product and less access to international finance markets, mean that developing countries in the region have higher levels of vulnerability<sup>1</sup>.

The Caribbean governments are committed to achieving the Millennium Development Goals (UNMDGs) identified by the United Nations<sup>2</sup>. Poverty reduction in the Caribbean has been impeded by the heightened vulnerability of Caribbean countries to fluctuations in the global economic climate. The two driving forces behind macroeconomic policy in the Caribbean in recent years have therefore been to (a) diversify the economic sector by encouraging investment in the infrastructure necessary for new industries and (b) increase competitiveness in existing sectors.

One of the defining developments of the past fifty years has been the staggering incremental growth in tourism, and the need for travel is now thoroughly ingrained in the modern lifestyle of most regions of the world. The World Tourism Organization (UNWTO) estimates that during the period 1950 – 2005, the number of international arrivals increased from 35 million to 808 million, an average annual growth rate of 6.5 percent. Even more strikingly, the inflation-adjusted income from tourism has grown by an average of 11 percent per year since 1950<sup>3</sup>. The expected trebling of numbers of tourist arrivals within the space of one generation, combined with a strong population growth in many popular tourist regions, will place considerable strain on the world's tourist destinations. The Caribbean states have been well positioned to tap into that growth trend, and tourism is without doubt one of the greatest engines of economic growth in the region and a major employer, providing an estimated 1.3 million jobs<sup>4</sup>. Governments have developed their tourism industries in a strategic move to diversify their economies, and in many Caribbean countries, the tourism sector now contributes up to 50 percent of the GDP, with tourism receipts a major source of foreign currency.

Stakeholders of the Caribbean tourism sector have long recognised the benefits associated with an appropriate and cohesive Policy Framework providing a structure that (i) enables countries in the region to effectively foster the competitiveness and sustainability of their tourism sectors and (ii) considers policy approaches to issues that need to be tackled at the regional level. However, to date, no such policy instrument has been established and accepted<sup>5</sup>. This document therefore seeks to address that need.

## 1.2 Methodology

The primary target group for this document are the national governments of the Caribbean countries that are members of CTO<sup>6</sup>, who's ultimate objective is to develop their tourism sectors in a sustainable manner. The Policy Framework provides CTO member countries with a menu of policy options to support existing national tourism guidelines and strategies. The methodology was therefore designed to ensure the ultimate relevance of the Policy Framework for this target group, and was built on three key approaches.

Firstly two Sustainable Tourism Inter-sectoral Planning and Policy Development Workshops were held in Barbados<sup>7</sup> and St. Lucia<sup>8</sup>. The target group for the workshops consisted of: tourism officers involved in the development of tourism policy and assigned by country members to lead their involvement in the Caribbean Sustainable Tourism Policy Framework; individuals in ministries with responsibility for the planning and development of relevant sectors; and corporate stakeholders as well as NGO representatives and the research community. Group recommendations were put forward for consideration in the development of the Policy Framework. The main output of the workshops was the consolidation of the six critical thematic areas that form the backbone of this Policy Framework: (1) tourism management capacity, (2) marketing, (3) transportation, (4) environment, (5) linkages and (6) health, safety and security issues.

Secondly, it is the result of an intensive and inclusive consultation process triggered by the release of the first draft Policy Framework document on July 16 2007, involving relevant stakeholders that combined to form a cross-section of the tourism sector in CTO member countries. The main vehicle for this was the implementation of two sub-regional policy consultations in St. Vincent and the Grenadines<sup>9</sup> and in Antigua and Barbuda<sup>10</sup>. Stakeholders have also taken the opportunity to comment directly to CTO using the feedback mechanism provided in the first draft Policy Framework. Feedback and guidance was noted and taken into account in the development of the final draft of the Policy Framework. Thirdly, it has benefited from the incremental generation and application of new knowledge generated by the other programme components on Research and Development, IT and Human Resource Development, as well as the four consultancies implemented within this component of the Caribbean Regional Sustainable Tourism Development Programme on the issues of community-based tourism, sustainable heritage tourism development, climate change and natural hazard risk management. Finally an in-depth review of the demand and supply aspects of Caribbean tourism was undertaken, the results of which are accessible in Annex 1 to this document.

### **1.3 Recommendations for Application**

This document provides a Policy Framework to guide the sustainable development of Caribbean tourism. It brings together, broad policy guidelines to address the thematic areas identified during the stakeholder consultation as being critical to the sustainability of tourism at the national level. Not only are these critical issues relevant for CTO member states but they also have regional implications and adopting a regional approach to common challenges, will give added value. National Tourism Organisations (NTOs) can use the Policy Framework as a tool to adapt, develop, revise and update their individual tourism policies and strategies according to their national priorities. It will also provide CTO and its partner organisations with a platform for planning, implementing and monitoring measures to address issues of regional significance for the sustainability of tourism.

Governments are thus kindly invited to benchmark their national state of affairs against this Policy Framework and to take necessary action. The policy guidelines formulated can be used as the point of departure for the development of national policy for the areas where a need has been identified. To facilitate this process, additional information on (i) national, regional and international information resources within the field of sustainable tourism and (ii) national, regional and international examples of good practices for sustainable tourism has been made available on CTO's [www.onecaribbean.org](http://www.onecaribbean.org) website. Users in need of supporting information and guidance are encouraged to visit relevant websites to access additional information. It is important to stress that compliance with the provisions of this document is not mandatory and therefore there are no timelines for its implementation at the national level, neither is CTO advocating regional harmonisation. Rather the tourism sector is encouraged to use this document to realise its responsibilities to the people of the region and the consumers, and to ensure a strong regional emphasis on sustainable tourism development. The document should not be a static tool but a dynamic one. It is therefore recommended that its applicability is reviewed at relevant forums (for example at the annual CTO Sustainable Tourism Conference) and updates made as necessary.

## 2 Caribbean Sustainable Tourism Policy Framework – The Vision, Guiding Principles And Development Goals

### 2.1 The Vision

The guiding vision for this Policy Framework is that the sustainable development of Caribbean tourism engenders a sector that is viable and resilient, of high quality, promotes empowerment and ownership, and continues to embrace regional integration.

**Viable and resilient:** Stakeholders of the Caribbean tourism sector agree that it is viable and resilient. It successfully attracts the tourist segments with the most significant tourist spend, who stay longer in the region and return year after year. The tourism sector's capacity to absorb and then recover from external events underlines its resilience, as well as its importance to livelihoods and national and regional economies.

**High quality:** Tourism contributes to providing a higher quality of life for all citizens of the Caribbean through the provision of job security, dividends for the state and recreation opportunities for the enjoyment of one and all. The tourists experience a high quality product based on the region's unique natural and cultural assets, with the necessary infrastructure in place for the responsible management of those assets to preserve them for future generations of Caribbean citizens and tourists alike.

**Empowerment:** Citizens of the Caribbean are proud of their region's status as the world's premier tourist destination and are aware of the contribution that tourism makes to the nation's financial, cultural and natural well-being. Through public participatory methods governments involve the people in the planning and development of the tourism industry.

**Ownership:** Citizens of the Caribbean acknowledge that tourism is being developed on an inclusive basis rather than on an exclusive basis. National frameworks are in place to facilitate the skills development and capital investment necessary for a nationally-owned product, giving people the opportunity to take advantage of tourism opportunities, and driving national ownership.

**Regional integration:** Caribbean nations continue to cooperate regionally to meet the challenges engendered by an increasingly globalised tourism economy. By working towards integration on key issues where a regional approach gives added value, the efficiency and effectiveness of Caribbean policy is enhanced and regional synergies can be realised.

### 2.2 Guiding Principles

The following principles are central to this Policy Framework<sup>11</sup>:

1. Sustainable tourism development means the optimal use of social, natural, cultural and financial resources for national development on an equitable and self-sustaining basis to provide a unique visitor experience and an improved quality of life through partnerships among government, the private sector and communities<sup>12</sup>.
2. Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations in the Caribbean, ranging from traditional package forms of tourism to the various niche market segments.

3. Sustainable tourism should make optimal use of environmental resources that constitute a key element in tourism development, maintain essential ecological processes and help to conserve natural resources and biodiversity.
4. Sustainable forms of tourism should respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance. Tourism shall contribute to improving the quality of life enjoyed by citizens of the Caribbean and engender meaningful local participation in the sector, bringing about lasting beneficial effects to communities.
5. Sustainable tourism should ensure viable, long-term economic operations, providing socio-economic benefits that are fairly distributed to all stakeholders. This includes stable employment and income earning opportunities in addition to social services which contribute to poverty alleviation to host communities.
6. Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building.
7. Achieving sustainable tourism is a continuous process and it requires a constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary.
8. Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices among them.
9. There is no single model for the implementation of sustainable tourism. Instead, a mix of the right management practices, legislative instruments and forms of partnership is needed, depending on the given situation. As tourism destinations have their own features, assets, problems and vulnerabilities, the strategies to address them, based on the available instruments and funding mechanisms, will also differ. It is therefore not the intention of the Policy Framework to stipulate specific policy options for adoption at the national level. Instead, a series of policy options are proposed for adaptation by decision makers on a needs basis.
10. This Policy Framework must be a dynamic rather than static tool. Its validity needs to be assessed on a regular basis within relevant regional forums, and its content subsequently updated to reflect (i) new policy approaches within the critical issues put forward herein, and (ii) emerging challenges of concern for the sustainable development of Caribbean tourism.

## 2.3 Development Goals

**Goal 1:** Ensure adequate and appropriate national capacity to manage the sustainability of the tourism sector.

**Goal 2:** Continuously improve the sustainability of the marketing mix in light of emerging global market trends.

**Goal 3:** Develop efficient and cost effective transportation options to facilitate a sustainable level of destination accessibility.

**Goal 4:** Ensure the sustainable use of the natural environment and the cultural heritage for the benefit of all.

**Goal 5:** Develop and strengthen the links between tourism and other economic sectors nationally and regionally to maximise the multiplier effect on the economy and reduce leakages.

**Goal 6:** Manage the health, safety and security issues that impact the sustainability of tourism.

## 3 Policy on Tourism Management Capacity

### 3.1 Background

The positive effect of tourism on the national economy depends on the existence of a national enabling environment that relies on a variety of factors including the legal framework, infrastructure, education and institutional capacity. Together these factors define a nation's tourism management capacity, i.e. the resources at its disposal in order to effectively conduct the business of tourism.

The majority of Caribbean states have developed a national tourism policy, tourism legislation, and a strategic tourism development plan, which governments need to apply in order to meet responsibilities for providing the best possible conditions for the growth of their national tourism industry. However, despite the presence of a national policy framework, the development of tourism may not meet its full potential to contribute to the sustainable development of the nation.

Critical sustainability challenges identified with respect to tourism management capacity are:

- Tourism needs to be given greater priority at the highest political and planning levels, in line with its key importance to the economy;
- National commitment to the sustainable development of tourism needs to be enunciated in relevant national policy;
- Central tourism planning needs to take place in a fully integrated process involving cooperation between the ministry responsible for tourism and other relevant ministries and agencies, and between the public and private sector;
- There needs to be a better understanding of tourism's potential as a tool for economic development and its function as an export industry;
- Public opinion of the importance of tourism as an engine of the economy needs to be addressed on a continuous basis, as there is a tendency for the tourism sector to be narrowly viewed as the preserve of the international carriers and accommodation providers and therefore bringing few benefits to the country itself;
- There is still some stigma attached to the tourism industry, which may impede on the industry's ability to attract the best qualified management and staff, and which needs to be comprehensively tackled;
- The status of tourism workers in many countries is too low and needs to be raised;
- The training and development of human resources needs to be continuously monitored and improved to meet globally expected standards, and at the same time it is crucial that trained staff are used in the field of work that they are qualified for;
- Governments need to be aware of, and act on, the challenges and opportunities offered by the World Trade Organization (WTO) General Agreement on Trades and Services (GATS) process and its potential impact on tourism in the region, as well as the implications of other trade and labour agreements.

### 3.2 Development Goal

**Goal 1: Ensure adequate and appropriate national capacity to manage the sustainability of the tourism sector.**

### 3.3 Policy Objectives

- Ensure that the principles of good governance are applied in the planning and development of a sustainable tourism sector.
- Raise public awareness of the importance of tourism for the country's economic development.

- Use human resource development strategies to provide the best possible staffing for the present and future tourism sectors.
- Facilitate tourism research and development and promote the dissemination and adoption of innovative practices.
- Embrace the information management, educational and communication opportunities offered by ICT by creating an enabling environment for their uptake.

### **3.4 Ensure that the principles of good governance are applied in the planning and development of sustainable tourism sector**

Good governance refers to the way in which powers are exercised at the national level. Recent EU policy uses the principles of coherence, openness, participation, accountability, and effectiveness to define good governance<sup>13</sup>. Each of these principles is important for establishing good governance and they apply to all levels of government – global, trans-national, national, regional and local.

These principles provide a set of parameters for a response to the governance-related tourism management capacity challenges identified in the preceding section. They can form a common core of values around which a society can subscribe to, and which can guide public servants (both elected and administrative) in their daily operations. In line with business approaches such as the Corporate Social Responsibility (CSR) model, the corporate sector is increasingly adopting these principles in its management practices.

#### **Coherence**

To be effective, policies and related actions for their implementation must be coherent and easily understood. Coherence requires a consistent approach on the behalf of national governments, often within a complex framework of executive bodies, assemblies and judicial bodies. National governments and their national and regional partners are invited to consider the following policy guidelines to facilitate a coherent approach to sustainable tourism development in the Caribbean:

- Assess at the highest political level, the present and future importance of tourism to contributing to meeting national social, economic, environmental and cultural needs, as well as national growth targets. The successful implementation and operation of a Tourism Satellite Account (TSA) will facilitate this by enabling key policymakers to make informed decisions based on accurate data analysis (see also Section 4.4 on market intelligence). If considered a priority sector, the sustainable development of tourism must be identified and positioned as a priority for the country.
- The tourism sector should thus be integrated into any mainstream national economic strategy/development programme. This action should ensure a focused commitment to the tourism sector and its future by national government, and release resources for its development via annual capital budgets.

#### **Example of approach taken – Belize – Tourism’s Mandate:**

The 2005 Draft Tourism Policy states that “The trajectory for Belize’s tourism industry is inextricably linked to the Government of Belize’s National Development Programme. Planning the sector’s future is pointless without recognition and assimilation of its contribution into the national development agenda. As a sector with the potential for positive impacts on national, social and cultural objectives, tourism should feature prominently in the Government of Belize’s economic development strategy and resultant annual capital budgets”.

- Where tourism is deemed to be a priority sector, strategic policy reviews should be undertaken to assess policy impact. These reviews should be carried out according to an agreed, predefined methodology.

- Develop a national tourism policy, following the principles of good governance, which makes a clear commitment to the sustainable development of the tourism industry. Using the mandate given in the overall national economic strategy/development programme, this should outline the ways in which the vision for tourism, its contribution to the overall national development goals and its sustainability objectives are to be realised.

- A national tourism master plan should be developed in accordance with the principles of good governance setting forth concrete targets, specific activities and timelines for these to be conducted for the sustainable development of the national tourism sector, within the ambit of the stated policy. Monitoring and evaluation mechanisms should be an integral part of the tourism master plan, and are essential for tracking progress made in the realisation of the enunciated targets. Responsibility for monitoring progress according to the specified indicators needs to be stipulated in the tourism master plan.

## Openness

It is essential that the institutions involved in tourism development at the national and regional levels work in a transparent manner, which invites the understanding and the confidence of the general public in the present and future direction of the sector, and gives them the chance to have their say through various levels of consultation. National governments and their national and regional partners are invited to consider the following policy guidelines and examples to facilitate an open approach to sustainable tourism development:

- Develop a specific strategy detailing how the work performed by the Ministry of Tourism and its relevant divisions will be actively communicated to stakeholders. The strategy should be based on the edict of freedom of stakeholder access to information relevant to the sector, and include the results of decision making processes. The language used in any communications should be easily understood by the general public. A variety of mechanisms may be used for consultative processes including the internet. These actions are essential to engage society in governance issues and to engender public appreciation of the seriousness and the value of the tourism sector.

- Develop a national policy in an open manner relating to the tourism sector, for example the national tourism policy and the national tourism master plan, based on a participatory consultation method that empowers industry stakeholders, civil society and the general public. These sectors of society need to be informed of the policy development process and to be given an opportunity to have their say on the direction proposed in the policy document, i.e.: vision, goals, target markets and product development issues. An open approach is essential for engendering feelings of ownership of the tourism sector among civil society, and ultimately for its sustainability.

### Example of approach taken – Barbados – Participatory Consultation:

The 2001 *Green Paper on the Sustainable Development of Tourism in Barbados* pledged that the government will: “Develop mechanisms for obtaining comments and feedback from the general public on tourism matters”. During the development of the Green Paper, a 15 page colour supplement entitled *The Sustainable Development of Tourism in Barbados* was published in a popular Sunday newspaper to inform the general public of the policy components ahead of the public meetings to be held the proceeding month. Prior to this, the document had been widely circulated to all tourism and related organisations, individuals in the public sector and civil society, as well as relevant regional and international organisations with offices in Barbados. After a tourism policy forum, the document was revised and submitted to the Cabinet for comment. Permission to publish the policy document was subsequently granted, and public consultation began. The Barbados government now holds an annual consultation with key tourism stakeholders to encourage information sharing and address areas of major concern for the sector.

## Participation

The quality, relevance and effectiveness of national tourism policy are a reflection of wide participation throughout the policy chain in the policy making process – from conception to implementation – within relevant organisations. Participation crucially depends on central governments following an inclusive and integrated approach when developing and implementing policies. Improved participation is likely to create increase public confidence in the end result and in the policy-making institutions.

National governments and their national and regional partners are invited to consider the following policy guidelines to facilitate a participatory approach to sustainable tourism development:

- Ensure that government bodies, the private sector, the general public and other relevant stakeholders are made aware of the importance of tourism to the national economy and of the ongoing work to develop tourism in the country.
- Acknowledging the linkages between tourism and other policy areas, establish inter-sectoral coordination mechanisms with other governmental bodies involved in relevant decision making processes so tourism develops in harmony with overall economic, social and environmental goals. The tourism departments of some countries regularly convene inter-institutional meetings to inform on tourism performance and the directions being taken, as well as organising information meetings for new ministerial staff on the organisation of national tourism.

### **Example of approach taken - Puerto Rico – Legislation Mandating Inter-agency Cooperation:**

Puerto Rico passed its Law on the Sustainable Development of Tourism on 30 November 2006. The Law identifies the sector as a priority for Puerto Rico and puts in place the mechanisms for its sustainable development. It mandates the Puerto Rico Tourism Company to take the lead on sustainable tourism, and establishes an office for the Sustainable Development of Tourism within that organisation. The inter-agency components of the Law on Sustainable Tourism include:

- Identification of all relevant legislation for the management of the sector (i.e. the 1991 Law of Independent Municipalities) enabling municipalities to recommend land for classification as having a high ecological value.
- Identification of the public institutions that need to cooperate including: Department of Natural and Environmental Resources, Department of Economic Development and Commerce; National Planning Agency; Department of Agriculture; Department of Education; Economic Development Bank; Department of Recreation and Sports; Licensing Office; Office of Special Communities; and National Utilities Company.
- The activities of the Office for the Sustainable Development of Tourism are detailed.
- The creation of an Inter-agency Commission comprised of the above organisations to provide integrated coordination at the state level.
- The creation of an Advisory Council comprised of ad hoc members summoned by the Inter-agency Commission to advise on initiatives and to facilitate a participatory approach<sup>14</sup>.

- Take part in policy formulation and the activities of government in areas that impact on and/or support the development of the tourism product. Tourism institutions should participate in, and provide input on, government decision making processes related to topics such as: land use plans, waste management strategies, planning of parks and protected areas, safety and security, cruise ship agreements and concessions agreements related to resources of interest to the tourism sector.

### **Example of approach taken – Grenada – Cross-cutting Cooperation:**

One means of promoting inter-sectoral coordination at the ministerial and departmental levels is to establish a multi-sectoral work group comprised of representatives from relevant public and private sector organisations. This provides a framework for cooperation and a mechanism for integral follow-up on policy decisions taken. Grenada successfully used this approach when it created a Tourism Task Force in September 2004, to coordinate the short-term tactical recovery of the tourism sector in the aftermath of Hurricane Ivan, with the immediate goal of re-establishing the cruise ship market within a month. A project unit was set up under the direct responsibility of the Minister of Tourism to coordinate the work of project groups working with issues such as communication, site beautification, infrastructure (e.g. the repair of telecommunication lines on tourist routes) and visitor safety. Detailed plans were developed by each project group and a daily status reporting was initiated. The work of the Tourism Task Force bore fruit when two cruise ships docked in Grenada within a month, bringing 2000 passengers each<sup>15</sup>.

## **Accountability**

Accountability relates to the roles of the institutions involved in governance processes, and the need for a clear definition of areas of responsibility. National governments and their national and regional partners are invited to consider the following policy guidelines to facilitate a coherent approach to sustainable tourism development:

- The ministry with responsibility for tourism and its divisions should have a public mission statement that clearly reflects the mandate given by central government.
- Existing legislation relevant to the tourism sector should be made publicly available to interested parties, as well as information on planned legislation.
- The ministry with responsibility for tourism should assess public opinion on a regular basis regarding its work, and analyse the results to learn lessons that can shape future decision making processes.

## **Effectiveness**

Policy takes place in a dynamic environment and needs to react in a timely manner to changes in the sector. Effectiveness also depends on taking decisions on the implementation of policy at the most appropriate level and ensuring that the regulatory environment is optimised to minimise unnecessary red tape. National governments and their national and regional partners are invited to consider the following policy guidelines to facilitate the effectiveness of their approach to sustainable tourism development:

- Review existing legislative frameworks, and process and institute measures to simplify the regulatory environment, in order to reduce unnecessary administrative burden.
- Develop and select the most realistic and appropriate instruments for effective regulatory policies and systems of economic and social incentives and disincentives.
- Track the application of public sector spending on tourism-related investments in order to learn from the lessons gained, in particular assessing the feasibility of similar investments in the future.
- Monitor the effectiveness of national tourism policy with respect to the edicts put forward in this Policy Framework. Any issues that arise from this process should be discussed with the partners and a solution proposed.

### 3.5 Raise public awareness of the importance of tourism for the country's economic development

Tourism is a people business and it's crucial that visitors receive a warm welcome and a level of service that exceeds their expectations from all sectors of society. The sustainable development of tourism in the Caribbean thus requires the support of the general public, and it is crucial that there is awareness of its economic importance, as well as feelings of ownership, acceptance, appreciation and understanding. Against this backdrop, a recent CTO/CRSTDP survey of residents' attitudes towards tourism in three Caribbean States, found that one third of the persons in St. Lucia and one quarter in Barbados and Trinidad and Tobago felt that tourism did not benefit their communities. At the same time, one in every five respondents in Barbados and St. Lucia felt that tourists did not pay their fair share for using public services<sup>16</sup>. Tourism is also reliant on public goods such as beaches, forest and even the built environment, hence it is vital that care is taken in the management and use of these resources for the benefit of all.

National governments and their national and regional partners are invited to consider the following policy guidelines to raise public awareness of the benefits that tourism and its sub-sectors bring to the national economy and development:

- The ministry with responsibility for tourism, in partnership with the private sector and other key stakeholders, should take the steps necessary to make tourism more visible in the national arena.

#### **Examples of approach taken – Caribbean – World Tourism Day:**

Many countries in the Caribbean region use the annual World Tourism Day on 29 September to raise awareness concerning the positive impacts that tourism has made. Jamaica, Trinidad and Tobago and St. Maarten all initiate activities in conjunction with World Tourism Day. Examples of activities to put the focus on tourism include street banners, tourism-focused radio talk shows, awards ceremonies and school activities. In St. Maarten, participants in the Junior Tourism Minister Competition learn about the tourism industry by visiting a cruise ship, and touring the new Princess Juliana International Airport<sup>17</sup>.

- The ministry with responsibility for tourism should issue key statistics on the value of tourism to the national economy and its assistance in the provision of infrastructure and other positive impacts on society.
- Review the opportunities offered by the Tourism Satellite Account (TSA) and consider beginning the processes necessary for its implementation. TSAs provide a tried and tested methodology for the development of information on the economic impact of tourism. This information can both be used in the planning of promotional activities to specific market segments, and to communicate to key policymakers the full economic impact of the tourism sector. This in turn facilitates the prioritisation of the sector based on an objective assessment (see Section 3.4 on good governance). Operating a TSA requires inter-ministry cooperation, and should be led by the national statistics office with the support of the ministry responsible for tourism. CTO is committed to expanding the regional understanding and appreciation for the TSA following the lead of its members.
- Focus on establishing a national service culture of excellence, for example via the establishment of specific programmes to promote service excellence throughout all sectors of society and the tourism value chain.

#### **Example of approach taken – Barbados – Service Excellence Programme:**

NISE Barbados (National Initiative for Service Excellence) is an organisation created by the government, trade unions and private sector, as a nationwide effort to help Barbados consistently deliver service excellence and receive international recognition for its efforts. NISE initiatives include the "Smile Barbados" campaign in conjunction with the 2007 World Cup Cricket finals, which issued sticker packs to raise awareness about service standards and to underline the importance of welcoming guests. Other activities include benchmarking and research on service excellence, and the provision of educational and training interventions<sup>18</sup>.

■ The public needs to be sensitised to the importance of the natural and cultural environments for a successful tourism sector, in addition to a need to respect these resources.

■ Other initiatives to improve public perception of tourism as an inclusive sector include:

- Bringing to the public's attention success stories as they relate to community-based tourism activities where the local communities are the main beneficiaries of the tourism earnings.
- Providing specific training to the media on the importance of tourism for the region and how they can participate in creating a stronger and newsworthy image for the sector.
- Showcasing tourism and its linkages to other productive sectors of the economy.
- Creating developmental opportunities for members of the media to enhance their knowledge of tourism, so that they can communicate the information in a more accurate and informed manner.

### **Example of approach taken – Caribbean – Spotlighting Tourism in the Media:**

The Caribbean Media Exchange for Sustainable Tourism (CMEx) event brings together media and tourism stakeholders to facilitate debate on tourism communication and strategies. It is produced by Counterpart International, a US based international development agency and is sponsored by a range of private and public sector stakeholders in the Caribbean. CMEx has played a role in increasing press coverage of sustainable tourism in the Caribbean by building bridges between journalists across Latin America, the Caribbean, the United States and beyond<sup>19</sup>.

### **3.6 Use human resource development strategies to provide the best possible staffing for the present and future tourism sectors**

The tourism sector in the Caribbean recognises that service is an integral part of the tourism product and as such contribute to its product quality and overall level of competitiveness. As a result, the human resource requirements of the sector merit dedicated, focused and systematic attention and action at a national and regional level.

In order to remain a leading tourism region, it is essential that the human resource – both present and future – is professionally trained to meet globally expected standards. There is a tendency for the tourism industry to struggle to attract promising personnel at all levels, both within private sector enterprises and public sector organisations. The CTO/CRSTDP survey of residents' attitudes towards tourism in three Caribbean States, also found that in Barbados almost one in three persons felt that jobs in the tourism industry were low paying. In St. Lucia, more people agreed than disagreed with the view that tourism was low paying (36% vs. 29%)<sup>20</sup>. Hence despite being an economic heavyweight, tourism may not be regarded as an industry of choice by high profile school leavers, and as a career it may defer to other more traditional professions.

As a priority, industry staff must be appropriately sensitised to the cultural dimension of working in the industry in order to promote levels of job satisfaction. The intention of this policy objective is to provide guidance on the mechanisms, programmes and actions at the regional and national levels, which can help address the salient issues related to the human resource needs and requirements of the tourism sector.

This Policy Framework proposes a holistic approach to tourism HRD, based on the tenet of lifelong learning. Lifelong learning advocates the provision of a full range of learning opportunities from childhood to adulthood, essential for adaptation to the global knowledge-based economy. The implications of labour and education treaties need to be considered by those countries affected, for example the CARICOM Single Market. National governments and their national and regional partners are invited to consider the following specific cross-cutting policy guidelines to facilitate Human Resource Development for sustainable tourism:

## Tourism Planning

■ Put in place national mechanisms to examine and address critical issues impacting on the HRD needs/demands of the sector. The ministry with tourism responsibility might seek to establish a coordinating mechanism at the national level, comprised of senior level representatives from key stakeholder organisations such as the national hotel and tourism authority, Ministry of Education, training centres, etc. It is proposed that this coordinating mechanism should:

- Function in an advisory capacity and (i) establish standard requirements for entry into the industry, (ii) develop tourism professional certification programmes, and (iii) review and approve existing and new curricula for certified training of personnel in the public and private sectors. This review should start with the most critical areas first, which necessitates conducting needs assessment surveys periodically to inform the human resource development strategy.
- Ensure coherence between tourism and education policies and in particular that the tourism sector is integrated into national policy on education.
- Identify key institutions and private sector stakeholders and consider the development of a national tourism HRD database providing the contact details of organisations with training competence and the type of services offered.
- Support the establishment of sustainable funding mechanisms, including specific scholarships for tourism and hospitality studies, for different target groups including research at the graduate level, which will support and help meet the demand for tourism education and training at different levels.
- Ensure that labour market information is collected and made available for proper manpower planning for the sector. This is linked to the setting-up of Satellite Accounts for Tourism, out of which the labour market information can be sourced.
- Liaise with CTO to identify needs and capitalise on regional initiatives. In particular promotion of the mobility of the current workforce across the region, through the support of national/sub-regional accreditation bodies which assess the value and equivalency of credentials, education and training programmes and tertiary level institutions across the region.
- In addition, the need for a human resources strategy for Caribbean tourism at the regional level needs to be considered, especially the steps being taken towards the free movement of all types of skills in the region in the near future.

## **Example of approach taken – Caribbean – Regional Approach to Tourism and Human Resources**

The Caribbean Tourism Human Resource Council (CTHRC) was established by CTO in 1998 and is a regional body comprised of senior representatives from business, labour, government, industry associations as well as education and tourism related organisations/groups that meet together on a bi-annual basis. It provides guidance on the Caribbean's tourism education, training and career development needs. CTHRC has developed a Caribbean Tourism Learning System, in order to facilitate a strategic and coordinated approach to tourism education and training in the region, at all levels of the formal system of education.

The interventions already concluded are: the development of training modules in tourism for primary and secondary school teachers, written and audio-visual materials on Careers in Tourism, industry-endorsed Common Core Curriculum (CCC) for the Associate Degree Programme in tourism/hospitality across the region, on-line courses in tourism/hospitality and a Quality Assurance Framework for tourism and hospitality programmes in the region, with the further development of a Quality Assurance Framework and Guidelines for tertiary education institutions. Another regional initiative supported by the Council is the Pontificia Universidad Católica Madre y Maestra (PUCMM) managed Tourism Internship Exchange System (TIES), which aims to provide experiential learning for hospitality workers and senior students through internship opportunities and job attachments.

## **The Public Perception of Tourism**

■ Liaise with relevant national tourism bodies to proactively raise the profile of careers in tourism sub-sectors by:

- Encouraging educators to include tourism modules and/or tourism topics in their curricula that seek to present accurate information on the tourism sector and allow students to do research on tourism-related topics.
- Creating awareness among youth and students about the career options available within tourism and encouraging outstanding students to pursue tourism careers, for example through participation in career talks and trade fairs to showcase the job opportunities and long term career prospects in tourism.
- Creating awareness among youth and students with regard to the outstanding diversity of jobs within tourism, which draws on the skills of a wide variety of specialised groups that are not restricted to the accommodation sector, including administration, construction and consultancy.
- Working for clear career paths in the sector and seeking to provide financial assistance in the form of scholarships, for those seeking careers in tourism.
- Showcasing positive role models in tourism at the national and regional levels.
- Fostering a deeper understanding of the importance of tourism to the national economy through ongoing joint public/private sector tourism awareness initiatives that target different groups in the community.
- Sensitising the private sector to the skills training in place at national institutions and actively encouraging the employment of qualified individuals that have successfully completed that training.

## Tourism Education and Training

■ Coordinate with national education bodies and regional partners the integration of tourism education into the school curriculum, from pre-school and primary school education, to the level of upper secondary and tertiary education.

In particular, the following initiatives should be considered:

- Integration of Tourism Studies into the formal school curriculum.
- Integration of tourism examples into text books for relevant disciplines, such as physics, geography and mathematics.
- Developing environmental education materials to demonstrate the economic and aesthetic importance of a clean environment both for the civil society and for tourism.
- Establishment of a programme to bring young people into contact with tourism, for example the Antigua and Barbuda Informal Tourism Cadet Programme, or the Tourism Clubs in Jamaica, which help to provide young people with positive experiences in tourism.

■ In order to best manage the teaching and learning needs of those involved in vocational education and–training, the following initiatives should be considered:

- Develop occupational standards for industry sector jobs. It must be noted that this is already being done in some Caribbean countries where national technical/vocational bodies have been set up, (e.g. the HEART Trust/NTA in Jamaica).
- Partner with colleges to promote market driven training with certification using occupation standards.
- Liaise with the private sector to ensure that there is adequate provision of human resources at all levels, i.e. that supply meets demand, both in terms of numbers of trained personnel and the skills areas that are required (this links to the importance of collecting labour market information on a continuous basis).
- Develop internship/training attachment programmes with local and regional enterprises and educational institutions (The Tourism Internship Exchange System (TIES), managed by the Pontificia Universidad Católica Madre y Maestra (PUCMM) in the Dominican Republic, needs to be sustained for the continued coordination of internships and exchanges within and outside the region.
- Develop environmental education material to demonstrate the economic importance of a clean environment both for the civil society and for tourism.
- Where employment of overseas nationals is necessary, and in accordance with local immigration laws, mentorship and understudy programmes should be encouraged to allow Caribbean nationals/residents to eventually occupy specialist posts and management positions.
- Help foster interchange, cooperation and mobility between education and training institutions within the Caribbean.

■ In order to address the teaching and learning needs of workers in all forms of tourism employment, the following initiatives in conjunction with the private sector should be considered:

- Work to eliminate barriers to vocational training by encouraging the day release of workers for training, providing scholarships to facilitate participation and by identifying suitable locations for training centres to be established.
- Develop specific training programmes for (i) the provision of management training for SMEs and (ii) the provision of training specifically designed for middle management, for example supervisors, who often experience a knowledge gap upon promotion.
- Identify processes whereby industry professionals can be trained to become training facilitators. On-the-job training using internal and external trainers is the preferred method of delivery for skills training, whereas training through day release is best for general and management training.
- Focus on improving the skills of public sector employees and continue to support and encourage the private sector to continuously invest in skills upgrading for staff by providing special incentives such as tax credits etc.
- Promote the development of foreign language training at all levels of the school system and through established and new immersion programmes between the English, Spanish, French and Dutch territories of the Caribbean.

#### **Example of approach taken – Jamaica – Creating a Quality Tourism Team:**

TEAM JAMAICA was launched in 1997 borne out of a perceived need to improve Jamaica's image in the marketplace. Since then its purpose has been to (a) create a quality Tourism Team by building team spirit, and pride in self, country and tourism (b) provide standardised certification for all tourism personnel. Participation in TEAM JAMAICA activities has been mandatory for all tourism personnel since 2001, and in 2006 approximately 5000 people received training across 74 vocational institutions, 8 community colleges and 2 universities. There are five levels of certification: Team Member (line), Team Captain/Coach (Supervisor/Line Manager), Team Trainer (Instructor), Executive Team Coach and TEAM JAMAICA Tourism Ambassador (entertainers, sports personalities and government officials).

#### **The modules within the core content are comprised as follows:**

1. Tourism Awareness, Customer Service and Self Development
2. Tourism Product/Our People: History and Cultural Awareness
3. Tourism Product/The Environment: Geography, Flora & Fauna and Environmental Care and Protection
4. Programme Assessment

### **Tourism and the Labour Market**

■ Ensure that government, labour representatives and the tourism private sector address issues related to conditions of work in the tourism sector and the overall welfare of the tourism workforce (e.g. pay, working hours, seasonal and shift work, gender issues, worker health and safety issues, outsourcing etc.).

■ Create an industrial relations climate for the tourism sector that is based on mutual respect and cooperation between employers and employees as well as an atmosphere that is conducive to encouraging local and international investments.

- Provide opportunities for basic skills training and re-training for unemployed/underemployed persons wishing to join the tourism workforce, including training in the skills required to work in a quality service culture.
- Encourage the tourism private sector to conduct HIV/AIDS Awareness programmes within their organisations, in addition to working with government, to look at the likely impact of HIV/AIDS on the tourism workforce in the future.

### **3.7 Facilitate tourism research and development and promote the dissemination and adoption of innovative practices**

In terms of capacity building, one of the challenges facing tourism policy makers is finding ways to bridge the gap between the creation of knowledge and its practical application to specific, diverse situations<sup>21</sup>.

A Tourism Learning Area (TLA) is a multi-stakeholder, inter-sectoral, problem-solving approach aimed at improving SME performance and human potential in the tourism sector at the destination level. The TLA approach engages a broad range of regionally-based stakeholders, bringing them together to form coherent information and cooperation networks. A TLA can address contemporary tourism sector challenges by developing inter- and intra-organisational collaboration alongside a set of holistic learning opportunities. These are aimed at continuous improvements in labour competences and organisational management, in order to foster better entrepreneurial quality, innovation, competitiveness and sustainability<sup>22</sup>.

National governments and their regional partners are invited to consider the following policy guidelines to facilitate tourism research and development and promote the dissemination and adoption of innovative practices:

- Encourage national bodies with tourism competence, (i.e. example tertiary institutions, development consultants, etc.) to share their knowledge in national forums to be attended by a broad stakeholder grouping, on the management of tourism.
- National Tourism Organisations should actively develop research capabilities, or form links with local/regional/international research entities to access and undertake critical research, as well as to promote the transfer of knowledge-based skills.
- The ministry with responsibility for tourism should encourage its personnel to proactively use best practice forums on issues related to tourism development.

### **3.8 Embrace the information management, educational and communication opportunities offered by ICT by creating an enabling environment for their uptake**

Tourism is an information intensive industry, and developments within ICT, (in particular internet accessibility), are revolutionising the way the business is being managed. Advances in ICT are having major implications for the operations of organisations throughout the tourism value chain. The information storage and data analysis functions are vital for the analysis of tourism statistics, as well as for reservation systems. Moreover, the opportunities provided by the internet for the online sale and distribution of products enable traditional handicraft manufacturers to access new markets. Nevertheless, reliance on ICT raises issues with regard to data protection and safety from external exploitation.

However, as noted in the 2005 *St. Lucia Tourism Sector Strategy and Action Plan* “While there is broad understanding of the value of ICT in tourism, its use is not widespread across all areas of tourism. The use of ICT in tourism is evident at the St. Lucia Tourist Board and in the larger properties in St. Lucia, in areas such as reservation systems, food and beverage systems, accounting and inventory controls, but utilising ICT to manage accommodations in the small hotel sector and ancillary services remains limited”.

It is thus vital that e-business strategies are integrated into the daily operations of tourism enterprises in the Caribbean, as well as in the public sector organisations. This is both a resource issue, as well as a skills issue. Without sufficient allocation of resources and IT training, Caribbean countries run the risk of being on the wrong side of the digital divide. National governments and their regional partners are invited to consider the following policy guidelines to ensure that ICT contribute to the sustainability of the tourism sector:

- E-tourism strategies should be integrated into the broader framework of national ICT policies.
- Public authorities should be involved in providing the infrastructure and human capacity for, and encouraging the use of, ICT relevant to the tourism sector.
- National tourism policy should address the need for a national enabling environment for the uptake of ICT in tourism including access, infrastructure, education, capacity building and the legal framework.
- Basic ICT skills within the tourism workforce should be encouraged through the teaching of ICT in pre-schools, primary and secondary schools and adult education. By promoting access to public digital services, eLearning projects, broadband availability, and by ensuring the interoperability of ICT systems, such as digitalisation of working procedures, government can build ICT capacity in the sector.
- The uptake and use of ICT by tourism SMEs, including those in remote areas, should be facilitated by providing:
  - Easy and low cost access to ICT solutions.
  - Advanced training of key management staff.
  - Easier access to expert knowledge regarding eBusiness for enterprises.
  - Increased cooperation between enterprises and knowledge institutions.
  - Increased efforts in ICT research on eTourism innovation.
- Utilise the opportunities offered by ICT to encourage sector participation in online courses, which may provide an interesting alternative to conventional training, by giving students the flexibility to structure their study, and by reducing or completely eliminating the need to travel. CTO/CRSTDP in cooperation with UWI and Barbados Community College has developed a pilot for a diploma-based online training course for Sustainable Tourism. The course is based on a series of modules, and broadly targets those with an interest in learning more about this subject. The software used allows the course tutor to communicate with students in a common forum, as well as on a one-on-one basis. Students upload their assignments onto the internet, and receive their grades through a mailbox. Each module has its own web page with an introductory section and required reading.
- Consider regular consultative meetings with CTO member states to facilitate knowledge sharing with other destinations in order to define appropriate ICT strategies and implementation plans and timetables.
- Remove the barriers facing SMEs seeking to exploit the opportunities offered by web-based purchases, for example in the handicrafts sector.

■ Quality and timely information is vital for the public and private sector alike, and the ministry responsible for tourism should ensure that there is a Government to Business mechanism for the rapid dissemination of market intelligence, statistics, marketing plans and development activities, for example via the development and maintenance of a user-friendly website.

#### **Example of approach taken – Belize – Uptake of ICT in Tourism:**

*The Toucan Trail* enables visitors to explore Belize on a budget. At [www.toucantrail.com](http://www.toucantrail.com) potential visitors can access information on over 100 small hotels with room rates of US\$60 per night or less. The website features a destination guide and a request form that can be used to search for accommodation using pre-defined criteria. A list of properties that match search criteria is developed featuring links to the hotels. Clicking on a hotel provides a range of information including a photo gallery, list of amenities, reviews from previous guests, as well as contact details for the user to communicate with the chosen accommodation provider and finalise the booking.

The participating hotels have signed a pledge of good practice including the need to:

- ☐ Operate a licensed property that follows the rules and regulations of the Hotel Act.
- ☐ Ensure that all advertising and marketing for the property are accurate.
- ☐ Communicate promptly with potential guests and to honour reservations.
- ☐ Treat all guests with equal respect and dignity regardless of differences in race, religion, cultural origin, language, gender or economic status.
- ☐ Act in an environmentally responsible manner, and educate and encourage guests to use basic water and energy conservation practices.

## 4 Tourism Marketing Policy

### 4.1 Background

Successful marketing is a key to the long-term sustainability of tourism in the Caribbean, and a range of stakeholders are involved in this activity. Governments constitute a key player in the development of the marketing mix and must ensure that it complements the vision of the national tourism sector as defined in national tourism policy. Other players include private-sector interests with sufficient capital to drive their own marketing, as well as various forms of public-private partnerships. As markets and consumer needs change rapidly, any organisation involved in marketing must continually review the integral aspects of its marketing strategy such as product, price, place and promotion, in order to ensure that they are effective in achieving the maximum results possible in today's marketplace.

Over recent years, the marketing of Caribbean tourism has been influenced by a range of industry trends including vertical and horizontal integration in the generating markets, the opportunities offered by new Information Communication Technology (ICT), and market-generated pressures on product development to meet minimum standards in areas such as safety and hygiene. For instance, the evolution of the internet represents a paradigm shift in the information-intensive tourism industry. It offers highly cost effective opportunities for tourism marketing by facilitating booking, information distribution, and communication with customers and within the industry. It has also dramatically altered the process of booking holidays, with estimations of the online travel market predicting continued substantial growth rates, as consumer confidence grows and technologies improve. Finally ICT is a powerful tool in business management and its applicability for information management in terms of recording arrivals and forecasting business and inventory management indicate that it is used in all sectors.

In the face of increasing competition from other long haul destinations offering tourists comparable sun, sea and sand vacations at equivalent rates, there is general recognition in the region that the Caribbean tourism sector can no longer compete on price alone. Instead, marketing needs to take into account and build on the comparative advantages that the Caribbean has, in favour of other destinations. The Caribbean resource base, comprising a rich and uniquely diverse tangible and intangible heritage is well suited for this differentiation process, and furthermore this provides a good match with the demand trends in international tourism. Market research shows that there is increasing demand for vacations offering opportunities for experiences in areas such as education, the environment, entertainment and excitement. This demand can be met by matching the market mix to target market segments, for example the soft adventure market and the market for authentic heritage tourism developed in a sustainable manner. Other potential markets that are receiving increasing attention from across the region are the diaspora, intra-regional visitors and the domestic vacation sector. Though the relevant importance of these segments for an individual country and the region tends to be difficult to capture in the tourism statistics, national marketing strategy needs to reflect on ways in which these sectors are to be taken into account.

Finally, visitors are tending to be more discerning and have larger frameworks of reference to evaluate the quality of their experience. That assessment begins from the moment that they enter the destination, to the point of their departure. In order to remain competitive, and to reduce the vulnerability of the sector, it is necessary to integrate quality parameters into all aspects of Caribbean tourism, to ensure that visitors feel that they are receiving value for their money. Critical sustainability challenges identified with respect to tourism marketing are:

- Marketing needs to be informed by accurate, up-to-date information on the profiles of the visiting tourists, including their country of origin, dates, length of stay, and accommodation used;

■ Policy makers and tourism enterprises need to understand the implications of ICT developments, and ICT and e-development strategies need to be part of policy planning in order to support the necessary human and physical infrastructure and to introduce and adopt measures to ensure equitable access and widespread capability to make maximum use of ICT;

■ Government incentives need to take into account the small hotel sector, which plays an important role in the intra-Caribbean market, and should ensure that new developments do not have detrimental effects on existing accommodation stock;

■ The Caribbean tourism sector needs to maintain its diversity, and to avoid the sameness that would be detrimental to the image of the region;

■ Tourism is essentially an export sector, and governments therefore need to cooperate with the private sector to assist tourism enterprises with their infrastructure, as well as management and service aspects in order to meet internationally recognised levels of quality.

The uptake of international quality standards based on pre-defined management criteria, for example ecolabels, and the deployment of star-rating schemes which reflect room furnishings and hotel activities, are means of demonstrating achieved levels of quality to the market in the accommodation sub-sector;

■ Countries need to coordinate marketing and promotion between the different stakeholders to ensure that the same message is advertised about the country, and that the image portrayed is not diluted;

■ Given the strength of the Caribbean brand, there is a need for the opportunities of joint or multi-destination marketing to be fully exploited in order to reap potential benefits;

■ The “Caribbean” is an extremely strong and instantly recognisable brand it exerts a positive influence on tourism marketing by uniting the region, which otherwise would consist of a range of less well known destinations due to a lack of size and capacity. Caribbean countries therefore have a joint responsibility to carefully maintain the value of the brand, especially taking into account the fact that a common brand can also have a negative effect. For example, if negative developments in one country (such as crime, environmental pollution, or unfriendly service) become associated with the whole region.

## 4.2 Development Goal

**Goal 2: Continuously improve the sustainability of the marketing mix in light of emerging global market trends.**

## 4.3 Policy Objectives

■ Capture and analyse market intelligence data to facilitate an informed tourism marketing strategy.

■ Ensure that the tourism sector embraces the opportunities offered by ICT in its tourism marketing.

■ Provide an enabling environment for investment in the tourism product.

■ Stimulate a diverse tourism sector by focusing on product areas where the Caribbean has added value.

■ Ensure that international standards are achieved and maintained in all tourism sub-sectors.

■ Ensure that effective marketing targets the priority markets identified in the marketing strategy.

#### **4.4 Capture and analyse market intelligence data to facilitate an informed tourism marketing strategy**

With regard to tourism marketing, market intelligence is essential to enable efficient planning and decision making. Furthermore, by facilitating Customer Relations Management (CRM), it can become a major element of competitive advantage for Caribbean countries. Information on the origin of visitors, their date of arrival, accommodation and their length of stay, the activities they participated in and those they wish to try in the future, as well as opinions about their holiday, enables more effective marketing of destinations. It also assists in product development and improvement initiatives, enables identification of current and future market trends, and can be used for the further development of business forecasting systems. Without this type of information, management of the sustainability of the sector becomes compromised.

National governments and their national and regional partners are invited to consider the following policy guidelines to generate and manage the information necessary for tourism market intelligence:

- Utilise central information systems for the collection and management of tourism data. CTO has developed a Management Information System for Tourism (MIST) within the framework of CRSTDP. MIST offers standardised data collection and management approaches at the national level for visitor information that can be used to enhance the decision making for the tourism industry. This information is furthermore aggregated at the regional level, generating further useful investor-oriented sector development information.

- Ensure that there is a structure in place to analyse the visitor information captured at the national level, and to feed these observations into the marketing process. This activity may benefit from an inter-ministerial and intra-departmental approach to ensure that the information is used effectively and that market trends are identified at an early stage.

#### **4.5 Ensure that the tourism sector embraces the opportunities offered by ICT in its tourism marketing**

Fundamental changes are taking place in user behaviour in key markets for the Caribbean as countries move towards knowledge-based, digital economies. National governments and their national and regional partners are invited to consider the following policy guidelines to generate and manage the information necessary for tourism market intelligence:

- Monitor internet and related technology developments, especially as they relate to online marketing and sale of destinations and changing visitor needs, for example Web 2.0, Real Simple Syndication (RSS) functionality and social networking features. As a matter of priority the national tourism organisation should develop an effective e-marketing strategy and monitor its implementation.

- The ministry with responsibility for tourism and its divisions should review national tourism policy to identify niche tourism products that can be easily and cost effectively marketed and managed using ICT in order to increase the attractiveness, competitiveness and uniqueness of the destination.

- Destination websites need to apply good practices in order to ensure the effectiveness and user friendliness of the site, for example through the use of search engines. At the same time, benchmarking national destination websites on a continuous basis against competitors will facilitate design improvements.

### **Example of approach taken – St. Lucia – Maximising Value of Web Presence:**

The 2005 tourism master plan states that destination websites have the potential to generate high levels of traffic. However, to convert that traffic into business, such websites need to be a destination marketing service rather than being a destination information service.

The website should work to provide a positive brand image for St. Lucia by:

- Providing users with a searchable portal providing information on a full range of tourism products
- Creating links to existing product and accommodation sites
- Providing effective e-marketing opportunities and coverage for tourism businesses and products currently offline
- Building links with other relevant websites and service providers to ensure rich and appropriate content
- Incorporating sections for the promotion of themes, niche products and sectors to support development areas<sup>23</sup>

## **4.6 Provide an enabling environment for investment in the tourism product**

Product development is an essential part of the marketing mix, and national governments are able to shape tourism product development through a range of policy measures. It is important to recognise that investments are needed in all tourism sectors, and not just in the accommodation stock. Other sectors that can benefit include visitor attractions, transport infrastructure and even amenities such as road signage. There is also a need to increase the contribution of national and regional investors to product development, vis-à-vis Foreign Direct Investment (FDI), thus increasing ownership of the product. In order to provide an enabling environment for tourism product development, national governments and their regional partners are invited to consider the following policy guidelines that can help maintain the sustainability of the sector:

■ Ensure that the approach used to promote and approve development projects in the sector is consistent with the national development plan, the national investment policy and the principles of sustainable development.

### **Example of approach taken – Grenada – Prioritisation of Development Proposals:**

The 1997 *Grenada Tourism Master Plan* states that in the consideration and approval of projects, priority will be given to those proposals that most contribute to the following goals:

- Maximum local ownership and participation
- Strengthening linkages with other sectors of the economy
- Preservation and promotion of the nation's culture and heritage
- Preservation and enhancement of the environment
- Utilisation of local resources
- Local job creation
- Increased national revenue and net foreign exchange earnings

■ Review on a regular basis the effectiveness and transparency of the incentives regime to attract tourism sector investment. For example, Antigua and Barbuda found that their previous investment process was complicated and disjointed, and lacked specific legislation for tourism sector incentives. This led to the proposed drafting of the Antigua and Barbuda Tourism Development Act to encode the regime of fiscal and economic incentives and concessions common to all categories of investors.

■ Make it easier to invest in the Caribbean tourism sector by the establishing, of dedicated national agencies to tackle tourism sector applications. The Jamaica Trade and Investment (JTI) organisation has a specific tourism sector mandate, because tourism is a targeted sector of the National Industrial Policy. The organisation provides guidance to new investors on incentives and opportunities, and gives the investor a one stop shop for tourism investment information<sup>24</sup>.

■ Consider the feasibility of streamlining the application process without jeopardising the sustainability of the sector. One criticism that has been mooted in the past is that the investment and development application process is excessively bureaucratic in the Caribbean. Target timeframes should be set for the processing of development applications and these should be communicated to potential investors. If process time is extended then this needs to be promptly communicated to the applicant, thereby removing a degree of the frustration entailed.

■ Incentives represent lost revenue and in fact constitute a leakage. Consideration should be given to the cost of revenue lost from providing incentives relevant to the benefits to be gained from development to find the right mix. For example, Antigua and Barbuda estimate that the revenue forgone from Import Related Taxes may have exceeded 8 percent of GDP in 2003<sup>25</sup>.

■ Research ways in which direct investment can be routed to benefit commercial growth across the entire range of the tourism value chain, for example heritage tourism attractions, and marina developments, as well as investments in resorts and condominiums.

■ Whilst seeking to attract direct investment for large-scale accommodation developments, national tourism bodies must ensure that the resulting increases in accommodation capacity do not jeopardise the long-term viability of existing accommodation stock, with particular reference to the small hotel sector. Inns, hotels and guest-houses are an important component of the national tourism sector and the preferred accommodation of choice for visitors in a number of source markets. At the same time, they signify local participation in the industry and therefore contribute to the value added of tourism. The high failure rate of these small hotels has raised new concerns about their viability. In order to assist the existing accommodation stock, the following steps based on investment promotion, business support and effective marketing campaigns should be reviewed<sup>26</sup>:

- Conduct impact analyses on existing accommodation stock before allowing new large scale accommodation developments to enter the approval pipeline.
- Improve the aesthetic quality of the accommodation experience through technical assistance, for example by attaching experts to hotels and providing guidance to owners/operators.
- Provide training in areas such as customer service and sustainability (including standards and marketing) to ensure consistency in quality of service. The vehicle for this could be classroom training or via the use of internet-based learning such as that developed by the Organization of American States (OAS) Small Tourism Enterprises Program (STEP).
- Provide technical assistance in marketing including the use of ICT to improve the efficiency and reach of individual accommodation sector efforts.
- Establish a Business Advisory Service to provide the above support.

### **Example of approach taken – Caribbean – Support and Assistance for Small Hotels**

The Small Tourism Enterprises Project (STEP), was established by the OAS (Organization of American States) with a focus on creating a support and assistance service for Caribbean small hotels in participating countries. The primary emphasis has been on technology and hotel management support through volunteer programmes. At the STEP website [www.caribbeaninnkeeper.com](http://www.caribbeaninnkeeper.com) a series of training toolkits are available for download in critical areas related to hotel operations, for example hotel management (front office, housekeeping etc.), marketing (marketing position toolkit), and environment (waste toolkit, water conservation toolkit etc). The concept also included the provision of Walk-in Resource Centres in the participating countries where services and facilities were available for small hotel operators such as training and computers for use in website design.

#### 4.7 Stimulate a diverse tourism sector by focusing on product areas where the Caribbean has added value

A diverse national tourism sector strongly rooted in the natural environment and the built and living heritage, will counter any development towards uniformity in destinations across the Caribbean. It will also help tap into the “new tourists”, who are more likely to seek authentic experiences related to the natural and socio-cultural backdrop of their vacation. As stated in the Trinidad and Tobago draft national tourism policy: “niche marketing is consistent with the sustainable tourism thrust to maximise the positive and minimise the negative impacts of tourism; examples being yachting, leisure and dive, conference tourism, weddings and honeymoons, events tourism, cultural/heritage tourism, ecotourism, golf, soft adventure, and health/spa”. At the same time, it is important to establish feedback links with the local communities so that concerns at tourism visitation can be addressed at an early stage in order to prevent negative repercussions. The people themselves are an intrinsic part of the tourism product and need to be sensitised about the importance of tourism to the economy, so that visitors are made to feel welcome (see policy on tourism management capacity).

In order to maintain the diversity of the tourism sector, national governments and their national and regional partners are invited to consider the following policy guidelines that can facilitate progress towards a more sustainable tourism development:

- The ministry with tourism responsibility and other national agencies should where feasible integrate a local destination-based approach into tourism planning. This will ensure that there is a diverse product offer, with areas specialising in the tourism niches for which they are best suited. Another benefit of this approach is that it facilitates linkages to local communities and their involvement in decision-making processes.

##### Example of approach taken – Belize – Local Destination-based Approach:

Belize has been classified into nine tourism destinations by the Belize Tourism Board. Though with some overlap the tourism product development priorities (e.g. nature tourism, marine tourism, adventure tourism) vary for each destination, ensuring diversification of the product. The guidelines for tourism development priorities by area are shown in the table below:

Area	Cruise Segment	Stay-over segment					
		Nature tourism	Marine tourism	Adventure tourism	Heritage/cultural tourism	Sun, sea & sand	Meetings & Conventions
Belize District	✓				✓		✓
Ambergris Caye			✓	✓		✓	✓
Caye Caulker			✓	✓		✓	
Cayo		✓		✓			
Corozal		✓	✓	✓			
Orange Walk		✓		✓			
Stann Creek	✓	✓	✓	✓	✓		
Placencia			✓	✓		✓	
Toledo	✓	✓	✓	✓	✓		
Outer Islands			✓	✓		✓	

Source: Belize, Draft Tourism Policy, 2005

- Continually review national product offer to maximise diversity in target areas where the Caribbean has competitive advantage, and to encourage creativity and innovation in tourism product development. As an example, Dominica is now re-positioning its tourism sector to expand its market position from a nature destination to one that encompasses adventure and cultural tourism.

■ Take an innovative approach to tourism product development. Develop a comprehensive strategy and action plan for priority niche market sectors prior to the initiation of product development activities. The strategy and action plan should include relevant market trends for the sector, performance of competitors, identification of competitive advantage and the setting down of objectives to realise that advantage. The product development approach should also include the measuring and monitoring of carrying capacity of tourist attractions, and encourage diverse product development.

■ Ensure that there is feedback from the local communities in areas where tourism takes place. For example the six resort boards in Jamaica provide a framework for any concerns at the local level to be captured and communicated to the national level.

#### **Example of approach taken – Jamaica – Decentralised Approach:**

The Tourism Product Development Company's (TPDCo) mission is to develop and improve the product in order to position Jamaica as a preferred destination. It reports to the Ministry of Tourism and is also advised by the six resort boards. The resort boards are public-private partnerships established in each of the six resort areas (Negril, Montego Bay, Ocho Rios, Portland, Kingston and the South Coast) to work with product development within their areas<sup>27</sup>.

■ Involve local communities in the management of the tourism product. Extensive consultation of communities in areas where developments are planned should facilitate this. Due consideration needs to be given to finding ways to bring the culture alive in an authentic manner and which creatively tells a story of the experience. It should also have a meaning for the local people as well as for the tourists.

### **4.8 Ensure that international standards are achieved and maintained in all tourism sub-sectors**

Tourism is essentially an export industry, and it is therefore vital that the products on offer reach the quality levels expected by key markets. The marketing of products with a poor quality will have a detrimental effect on the credibility of the national tourism sector.

National governments and their national and regional partners are therefore invited to consider the following policy guidelines that focus on product quality and facilitate progress towards a more sustainable tourism development:

■ Facilitate a cross-sectoral approach to the quality of tourism on offer by ensuring that national tourism policy promotes the principles of continuous quality improvement. Encourage a culture of quality performance assessment to help move the sector forward by:

- Establishing a licensing agency to deal specifically with the enforcement of standards via the periodic inspection of operators and mandating that operators are licensed.
- Ensuring that feedback is gained from visitors on the quality of their experience, including perceptions of warmth of welcome, service levels, and environmental quality, as well as suggestions for improvements.
- Developing a central registry of complaints and reviewing this information at agreed intervals in order to identify and act on areas for improvement.
- Collaborating with stakeholders to develop a national forum where quality issues in the tourism value chain can be identified.
- Encouraging suggestions for improvement from visitors.

- Develop and incentivise voluntary environmental standards to ensure that visitors are able to make an “environmental choice” in the selection of their service providers.

- Liaise with regional partners in the provision of quality standards. For instance, the internationally recognised Hospitality Assured® programme has been implemented by CTO within the framework of CRSTDP and supported by the CARICOM Regional Organization for Standards and Quality (CROSQ). Another relevant initiative is the Quality Tourism for the Caribbean (QTC) programme that establishes and promotes quality standards and systems designed to ensure healthy, safe and environmentally conscious products and services.

- Consider annual awards for those stakeholders that show best practice in raising the quality and sustainability of their product. Participation should also be sought at the annual CTO coordinated Sustainable Tourism Awards. This will help disseminate best practice and raise public awareness of the approach being taken for responsible tourism.

- Generate legislation to enforce that tourism operators are registered with the relevant tourism agencies and obtain an operating license. Implement health and safety standards in all tourism operations and link this to the license of operation. Establish a tourism certification at the national standards bureau to facilitate the assessment of quality standards. These should be promoted, and if possible recognised by tour operators who should undertake health and safety audits of new products.

#### **Example of approach taken – Dominica – Quality Standards for Tourism Sub-sectors:**

The Quality Assurance Unit at Dominica’s former National Development Corporation (now Discover Dominica Authority) developed tourism standards for the full range of tourism sector services: accommodation, food and beverage, hair braiders, taxi drivers, tour guides, tour operators, travel agencies, vehicle rental, vending and water sports. These are integrated into the licensing process as part of the 2005 Tourism Regulations and Standards Act. By way of example, an accommodation provider has to submit the following documents with the application, together with a processing fee, in order to be licensed as accommodation: proof of registration, public liability insurance, food premises certificate (if applicable), fire certificate, planning permission (if applicable), food handlers permit (if applicable), and disaster management plan.

### **4.9 Ensure that effective marketing targets the priority markets identified in the marketing strategy**

This policy objective relates to the design and development of effective marketing for existing well-proven markets, as well as to the opening-up of new geographic markets, both of which are vital ongoing activities for the long-term sustainability of the sector. When considering the improvement of marketing to existing markets, national governments and their national and regional partners are invited to reflect on the following policy guidelines:

- Ensure that the marketing environment created is consistent with the vision for the sector embedded in the overall national tourism policy, and with the commitment to sustainable tourism. Consider the feasibility of creating a joint public and private sector marketing agency operating within a strict commercial reference where such an organisation is not in place. This should ensure greater coordination between the marketing agencies, tourism industry associations and private sector organisations responsible for selling the destination.

- In a branding exercise, the relevant agency/ies should use a participatory process to identify the core characteristics that set the country apart and define its unique attributes. The branding design and values should be distributed to travel industry partners and these must permeate all marketing activities to avoid the value of the brand being diluted by contradictory statements.

- Focus on programmes for the continuing conversion of visitor traffic from cruise to land based stay-over visitors. Cruise ships constitute the high quality low cost means of sampling the Caribbean and its products.

■ Monitor and evaluate the effectiveness of promotional activities undertaken by the agency/ies responsible for destination marketing. Using arrival statistics, visitor surveys and observations in the field, it will be possible to evaluate whether the desired type of tourism (in terms of market, visitor spend and behaviour) is taking place. If not, the marketing strategy needs to be revisited and enhanced in a process of continual improvement. Assessments should also be made of the visibility of the marketing and the product recognition, in key source markets.

#### **Example of approach taken – St. Lucia – Focussing on a Niche:**

St. Lucia has had a tremendous impact on the weddings and honeymoon niche market. Its success has been based on setting clear objectives, planning and implementing specific marketing campaigns, and building an appropriate brand image, based to a large extent on the natural and romantic beauty of the island<sup>28</sup>.

Some CTO members have a higher dependence on certain markets by reason of location or history. It is proposed to push diversification of source markets for the Caribbean as a whole and for each member country. When considering the opening-up of new geographic markets, national governments and their national and regional partners are invited to reflect on the following policy guidelines:

- When opening new geographic markets, national governments should commit sufficient funding for this enterprise.
- The relevant agency should use accurate market intelligence to give information on new and emerging markets in order to provide a solid foundation for decision-making purposes. This information should be incorporated into any national marketing strategy, and funding allocated according to the assessed potential of the emerging markets.

## 5 Tourism And Transportation Policy

### 5.1 Background

The geographic and economic structure of the Caribbean is dependent on the right combination of air, sea and ground transportation solutions providing the right levels of accessibility vital for the continued economic development of the region. Countries generally feel a strong sense of vulnerability in this regard, and that vulnerability is perhaps greatest in the tourism sector, which is dependent on the provision of reliable, efficient and affordable air transport, both within and into the region<sup>29</sup>.

Caribbean governments have traditionally utilised two approaches to mitigating risk in the air transportation sector. Firstly, by seeking to diversify airlift sources, for example, by the provision of blanket subsidies to privately owned regional airlines, or by payment to international carriers for seat guarantees. Secondly, by ownership of airlift capability such as domiciled airlines, preferably through private sector funding (in the Caribbean funding is usually through the public sector). Evidence suggests that a less restrictive regime is associated with expanded airlift, lower airfares, increased investment by private regional and international carriers and enhanced reliability and efficiency of air services, CTO member states in the Caribbean Community (CARICOM) have initiated an ongoing process to liberalise air transport services and harmonise aviation safety and security measures pursuant to obligations emanating from the Revised Treaty of Chaguaramas.

The provision of adequate infrastructure for the accessibility of cruise ships has been an important issue for the diversification of the tourism economy in some destinations. One major concern is the sheer volume of cruise passengers that can visit a destination at any one point in time. The quality of the visitor experience is improved by the existence of an efficient and effective land transport network, which is also of benefit to the local population.

Critical sustainability challenges identified with respect to transportation are:

- The escalating cost of regional air travel, and the reduction in intra-regional air travel<sup>30</sup>;
- The need to strengthen the region's domiciled airlines which are comprised of a number of small commuter and jet airlines that are all very weak financially and continue to lose millions of dollars<sup>31</sup>;
- A perceived seasonality in the Caribbean tourism sector, which means that there are peaks and troughs in the levels of demand on regional air travel;
- The combination of many islands/countries, many airports, disparate systems and administrations, and relatively few people leads to a lack of regional economies of scale;
- There is a tendency towards relatively liberal approaches to Air Service Agreements (ASAs) with third countries (e.g. Canada and UK) but for fairly restrictive approaches within the region, for example MASA does not currently allow for cabotage rights (the freedom to pick-up and drop-off passengers between different points in another member country);
- The economic implications of rising fuel prices for all transportation sectors, in particular for the air transport;
- The capacity demands placed on destinations by the next generation of mega cruise ships entering into service in the Caribbean, in particular with regard to cruise infrastructure and the communities at the attractions utilised by the cruise operators;
- The need to focus on accessing the purchasing power of the cruise passengers to the greatest extent achievable by providing the best possible visitor services, and by promotional activities to encourage the conversion of current cruise passengers into future stay-over visitors;
- Regional governments need to review the signage, and ensure that they are coherent, especially those leading to tourist sites and visitor attractions that are off the beaten track;
- Regional governments need to work on aspects such as road safety, public transport and road conditions.

## 5.2 Development Goal

**Goal 3: Develop efficient and cost effective transportation options to facilitate a sustainable level of destination accessibility.**

## 5.3 Policy Objectives

- Encourage the air transportation needed to facilitate a sustainable level of destination accessibility.
- Encourage the marine transport needed to facilitate a sustainable level of destination accessibility.
- Design, develop and maintain an optimal ground transport infrastructure.

## 5.4 Encourage the air transportation needed to facilitate a sustainable level of destination accessibility

Air transport solutions are crucial to tourism and general business development, and a regional approach would be much more effective, far-reaching and sustainable. Policy actions are focussed within the following headings: regulatory environment, commercial development, infrastructure and quality, safety and crisis capabilities.

### Regulatory Environment

It is recommended that Caribbean governments and their regional and international partners, in line with the proposals of the San Juan Accord consider the following:

- Integrate a commitment to optimal airlift that is affordable, reliable and safe into the national economic development plan and any national tourism policy.
- Accelerate the revision of the CARICOM Multilateral Air Services Agreement (MASA) and related liberalisation of the regional air transport sector.
- Convene a forum of CTO Tourism Ministers and Ministers responsible for air transport, national security, and other related matters, to examine ways and means of harmonising air transport policy in the context of the sustainability of Caribbean tourism. A technical group should be attached to this forum, in order to prepare working papers for consideration by the Ministers at the forums.
- Establish a CTO-wide umbrella policy for air transport within the framework of the existing Association of Caribbean States (ACS) Multilateral Air Transport Agreement (MATA), or other mechanisms to take account of the obligation of CARICOM member states under the Revised Treaty of Chaguaramas.
- Intensify efforts towards the creation of a single regional air space within sub-regional groupings such as CARICOM, and where feasible, extend this air space to the wider Caribbean.
- Urge the Regional Aviation Safety Oversight System (RASOS) or a successor agency to consider the feasibility and procedural requirements of creating a single regional air space (see above proposal), in accordance with International Civil Aviation Organization (ICAO) policy, cognisant of the disparate structures for the delivery of air navigation services in the region<sup>32</sup>.

- Where required, pursue further liberalisation of Air Service Agreements (ASAs) with key international partners such as the EU and the USA.

- Reinforce measures to facilitate the ‘hassle-free’ movement of international and intra-regional passengers in the Caribbean. These may include a common ED Card, regional travel card, harmonised visa policies and streamlined customs and immigration procedures.

- Promote in association with existing regional airlines, enhanced functional cooperation geared towards improving the efficiency of those airlines and, ipso facto their profitability, reduce dependence on governments financial and other support.

## **Commercial Development**

It is recommended that national governments and their regional partners:

- Review the marketing support mechanism used for airline subsidies and financial support of new route networks. Where markets match the overall tourism vision and national policy, financial support should be applied to stimulate their growth and development where competition in the market cannot be sustained. As an example, the funding and subsidisation strategy proposed in the St. Lucia tourism master plan is a combination of government budget contributions, a percentage of the airport departure tax, and a new tax to be levied on visitors, via an increase in the accommodation tax.

- Make efficiency and cost effectiveness of air transport the major considerations when considering the opening of new air routes. It is thus important that market intelligence and visitor arrival data is analysed and used to inform existing and planned commercial aspects.

- The ministry with tourism responsibility should encourage air service agreements that provide adequate airlift to traditional and emerging markets, with emphasis on direct non-stop scheduled service. For main generating markets (e.g. mainland Europe) where scheduled services are not available, the deployment of charter services will be sought as a vibrant and necessary alternative.

### **Example of approach taken – Tobago – Leverage for Improved Airlift:**

The Government of Trinidad and Tobago (GOTT) established the GOTT Air Committee in May 2005, which includes representatives from the Tobago Chamber of Commerce, the Trinidad Hotel and Tourism Association, The Tobago House of Assembly, the Tourism Development Company, the Ministry of Tourism and the Office of the Prime Minister (Tobago Affairs). This subcommittee serves to negotiate mutually acceptable terms with air carriers on a case-by-case basis on behalf of GOTT, in order to increase arrivals in Tobago<sup>33</sup>.

- Liaise with regional public and private sector partners to monitor policy developments linked to the climate change and air travel debate, taking place in the main markets of Europe and North America and thus of potential commercial significance. Relevant policy developments include: the UK Aviation Tax, the European Parliament’s initiative to integrate the civil aviation sector into the European Emissions Trading Scheme and conscience campaigns by domestic tourism sectors to encourage citizens to reduce their carbon footprint and vacation in their home country.

### **Example of approach taken – Caribbean – Communicating Regional Position on Global Climate Change:**

The CHA-CTO Position Paper, released in March 2007 in conjunction with the ITB, represents a public-private sector initiative to present to the European travel trade those organisations' position on the issues of climate change. It states "The CHA and the CTO recognize the importance of air transport services for the growth and development of not only the tourism industry in the Caribbean, but for the growth of other sectors in the global trading arena. We support initiatives in all transport segments, not only aviation, that are incorporated into a global policy framework that achieves reductions in carbon dioxide emissions that would reduce negative impacts on the climate system".

- Liaise with air carriers and regional partners to encourage the use of best practices, which will reduce the carbon footprint of air transport to, and within the region. Substantial reductions in energy consumption and resultant emissions can be achieved by technology modifications to planes (see example) and by better planning of flight routes, so that planes are able to fly more direct to their destinations.

### **Example of approach taken – Caribbean Airlines – Uptake of Resource Conservation Measures**

Caribbean Airlines is currently implementing steps to improve its fuel efficiency, thus reducing its contribution to global warming whilst at the same time benefiting its bottom-line. The company is investing US\$840k in engineering costs to fit winglets to its fleets of aircraft. These reduce fuel burn, particularly at cruise altitude, and also reduce the thrust requirement at take-off, which in turn reduces noise pollution. The installation of winglets should result in 4-5000 tonnes of CO<sub>2</sub> reduction in 2007, with the North American routes accounting for 3825 tonnes of CO<sub>2</sub> reduction (New York: 1781 tonnes, Toronto: 1308 tonnes and Miami 736 tonnes)<sup>34</sup>.

## **Infrastructure**

It is recommended that national governments and their regional partners should:

- Commit additional resources to upgrade aviation safety and airport security in order to meet international standards. Civil aviation authorities should achieve and maintain the International Aviation Safety Assessments (IASA) Program Category One status, (the highest safety category possible), which is one of the prerequisites for ongoing route development.

### **Example of approach taken – OECS – Stakeholder Cooperation for Aviation Safety:**

In 2006, the OECS was awarded Category One status by the US Federal Aviation Authority (USFAA). The OECS has had a Category Two rating since 1996 when a number of deficiencies were identified including outdated legislation, inadequate facilities and lack of technical staff. Measures to address these issues included the revision of existing civil aviation legislation, recruitment of technical staff and upgrading of administrative facilities. The Eastern Caribbean Civil Aviation Authority (ECCAA) was established as a fully autonomous entity, providing safety oversight and regulating civil aviation in Member States<sup>35</sup>.

- Ensure that the function of the airport infrastructure and its associated human resources are optimised. Upgrade on a running basis the arrival and departure facilities to provide a positive visitor experience.

- Implement training to improve the technical and customer service skills of the workforce responsible for immigration, customs and general services, including the porters and the taxi dispatch services.

## Quality, Safety and Crisis Capabilities

It is recommended that national governments and their regional partners consider the following:

■ Airlines in small and resource poor developing countries need to readily embrace new technologies that help overcome economies of scale, as these would create a more level scenario for competition with larger carriers. Governments should therefore provide the necessary environment (removal of administrative, legal and fiscal disincentives) to facilitate the acquisition of those technologies, which include:

- Moving to electronic ticketing which IATA estimates lowers operating costs by 10%.
- Implementing the Common Use Self-Service System (CUSS), which IATA estimates would cost US\$0.55 per person as compared to the current US\$4.50 per person, with the traditional check-in system.
- Adopting Bar Code Boarding Passes (BCBP), which would enable home check-in and would thereby increase efficiency, reduce airport check-in congestion and lower airline processing costs.
- Using Radio Frequency Identification Detector (RFID) baggage systems, in order to significantly enhance baggage handling processes and ultimately reduce costs.
- Implementation by all regional airlines of a frequent flyer card.

### 5.5 Encourage the marine transport needed to facilitate a sustainable level of destination accessibility

National governments and their national and regional partners are invited to consider the following policy guidelines related to (i) improvement of the cruise and maritime infrastructure, (ii) visitor spending, and (iii) sector management issues:

■ Encourage better regional coordination with respect to negotiations with cruise operators.

■ Upgrade cruise ship infrastructure to meet international standards, especially in view of the new build of mega cruise ships with a capacity of over 4000 lower berths. Potential actions include the development of terminals and pier expansion, as well as the creation of duty free shopping zones. Attention should also be paid to the road infrastructure away from ports to facilitate visitor excursions into the interior. Home-porting may prove attractive for certain destinations, and requires a critical mass of ground transport and hotel room availability to be in place, before a sales and marketing drive can be developed. The upgrade of cruise ship infrastructure should also include waste and wastewater disposal facilities that can accommodate the “international” and “special” waste categories. Ports can charge for these services and hence off-set the capital costs.

■ The provisioning of cruise ships offers a major opportunity that agricultural suppliers and local food and drinks manufacturers should seek to capitalise on<sup>36</sup>. Unless steps are taken to broker local produce (see Section 7.4 on providing a linkage enabling framework), most supplies will be imported and the value added marginal and derived exclusively from mark-ups on supplies and labour costs.

■ The ministry with responsibility for tourism and its divisions should encourage the provision of high quality, diverse product offerings and entertaining touring experiences that will optimise the disembarkation rate and encourage higher cruise passenger expenditure. Initiatives should be developed to promote cruise passenger conversion to stay-over tourists. Focus should also be on the crews, who constitute an important financial resource. They also need to feel welcome, for example through providing entertainment and other recreational opportunities.

■ Collaborate with relevant ministries and, the port authority, to ensure that systems are in place and enforced to prevent cruise ships operating in local coastal waters from discharging any illegal waste, thus ensuring that they comply, with the MARPOL Convention. Cruise ship pollution of territorial coastal waters should be subject to a minimum fine. Records of pollution should be gathered to build up a body of evidence over time against polluters. A ban on cruise ship operators that frequently flout the rule of law, should also be considered as a policy option.

■ Owing to the scale of the sector and its future growth potential, the ministry with responsibility for tourism should consider whether it is necessary to enunciate a specific cruise ship policy in line with the principles of good governance (see Section 3.4 on good governance).

#### **Example of approach taken – Belize – Setting Down Framework for Cruise Sector:**

The Cruise Ship Policy (CSP) aims to maximise the benefits from the cruise industry, whilst sustaining the natural resources of Belize. A daily visitation limit of 8,000 cruise passengers is recommended for Belize City. An Environmental Compliance and Monitoring Plan is an integral part of the CSP and must be signed by cruise lines as part of the licensing process. Licensing also requires cruise ships to offer passengers excursions owned and operated by Belizean tour operators and conducted by licensed guides. A guideline maximum level of visitation at each attraction/site is set down and ensures that the resources are protected (Belize is marketed as an eco-cultural destination). There are entrance fees at attractions and sites, and the cruise ship company must develop an orientation programme to inform their visitors of the natural resources and the environment. Other specifications include anchorage at pre-designated sites and harbours, and only phosphate free detergents may be used for cleaning the decks.

■ Investigate the feasibility of scheduled high speed, multi-functional inter-island ferry services that would promote intra-regional tourism and also facilitate linkages and economic integration between the islands.

#### **Example of approach taken – Eastern Caribbean - Inter-island Ferry**

Guadeloupe-based L'Express des Iles, also known as the Island Express, has operated a high-speed ferry service between Guadeloupe, Dominica, Martinique and St. Lucia since 1989. L'Express des Iles' services include daily return trips between Guadeloupe and Martinique, and Martinique and St. Lucia. There is also a special service between other Caribbean islands and covering St. Vincent, Barbados, Grenada, Antigua, Montserrat, St. Kitts, St. Martin and St. Bart<sup>37</sup>.

### **5.6 Design, develop and maintain an optimal ground transport infrastructure**

National governments and their national partners are invited to consider the following policy guidelines and examples related to land-based transport:

■ Ensure that the ground transport infrastructure is maintained and upgraded, including quality of road and signage.

■ The ministry with responsibility for tourism should liaise with the organisation responsible for public transport to investigate options for the improvement of visitor usage of the public transport network, for example, by providing regular bus routes to attractions. Where possible, alternative less polluting forms of transport could be considered to reduce the dependence on motorised transport. For example instance, the use of cycle rickshaws, which are extremely popular across the world, as well as bicycle hire.

■ The ministry with responsibility for tourism and its national partners should take steps to implement quality standards in the tour guiding, taxi and vehicle rental sectors (see Section 4.8 on quality standards).

- Consider means of reducing the emissions from vehicles, via for example, the implementation of emission control limits and the integration of this requirement into road worthiness tests.
- Encourage the integration of alternative modes of transport into the tourism product to relieve congestion and reduce pollution, and which can themselves become attractions in their own right. For example, the use of waterways connecting visitor attractions and excursions with central points, and horse and carriage rides for sightseeing tours.

## 6 Policy On Tourism And The Environment

### 6.1 Background

Each year the Caribbean receives some 20 million international tourist arrivals and a similar amount of cruise passenger arrivals. These volumes are forecasted to grow, bringing considerable pressures and several threats to the integrity of the natural resources, as well as the cultural and built environment within the Caribbean destinations. If serious harm to the very resources on which tourism depends is to be avoided, this growth must be well managed. This will require careful planning of the location and the types of new development, improved environmental management practices and influencing consumption patterns.

The Caribbean marine environment is typically rich in biodiversity and has an abundance of threatened species, which are of international significance. The coastlines of many Caribbean countries are protected by coral reefs, which are important nursery grounds for fish and other aquatic organisms. Environmental indicators show clear signs of the degradation of the marine environment: with man-made pressures resulting in coral reef bleaching and habitat change, further compounding ecosystem vulnerability to the climatic implications of global warming, such as increased storm frequency. It is now estimated that nearly two thirds of coral reefs in the Caribbean are threatened by human activities, including tourism<sup>38</sup>. This is partly explained by the fact that much of the tourism is concentrated in the coastal areas, where the sheer numbers of tourists place considerable pressures on aquatic ecosystems. Tourism in the coastal zone not only causes issues of environmental management – conflicts of interest may occur between the tourism sector and local communities, over issues such as access to beaches for recreational purposes and the continued ability to pursue traditional livelihoods such as fishing.

The terrestrial environment is also fundamental to the tourism product, and Caribbean states display a variety of terrestrial ecosystems ranging from rainforest covered mountain slopes to grassy plains, and from areas of volcanic/geothermal activity to large river catchments. Though the Caribbean islands do not feature as much biodiversity as the oceans that surround them, some endemic species found on particular islands are endangered. Certain types of location and resources, including those listed below, are particularly vulnerable to pressure, and their usage needs to be taken into consideration by Caribbean governments during tourism management and planning:

- Marine and coastal environments: Badly sited development, poor management of waste from resorts and cruise ships, in addition to general over-use by tourists, lead, to serious loss of amenity and natural habitats;
- Historic towns and cultural heritage sites: Pressures and congestion from visitors and their traffic affect overall amenity and residents' quality of life;
- Fragile natural environments: Even quite low levels of development and visitation can threaten biodiversity;
- Freshwater supply: This is necessary in areas with low rainfall, or where infrastructure is lacking;
- Provision of effective waste management.

In particular there is urgent need for:

- Restoration of degraded ecosystems where feasible;
- Official recognition and conservation of remaining areas of natural integrity, both terrestrial and marine;
- Integration of water conservation and energy efficiency practices into all aspects of the tourism value chain;
- Integration of waste treatment measures (solid waste and waste water) according to established good practices into the management practices of tourism enterprises;
- Use of innovative means to achieve sponsorship of conservation areas;

- Monitoring of threatened species and other activities necessary to determine whether the carrying capacity of specific sites or destinations has been exceeded;
- Revaluation of public access to the beach and shoreline. A recent CTO/CRSTDP survey showed that residents in St. Lucia are concerned that tourism growth will bring with it reduced access to beaches<sup>39</sup>; and
- Effective protection of marine environments: The levels of protection afforded by Marine Protected Areas (MPAs) varies considerably, with a 2004 study finding that only 6 percent of MPAs in the Caribbean are effectively managed, while 13 percent engage in partially effective management<sup>40</sup>.

Climate change is also a major environmental issue for the long-term sustainability of tourism in two senses: climate change will have consequences for tourism and tourism activities contribute to climate change<sup>41</sup>. There is now widespread scientific consensus that global warming is a reality and that this phenomenon is accelerated by man-made activities. The principal greenhouse gas is carbon dioxide (CO<sub>2</sub>), generated by the combustion of fossil fuels. CO<sub>2</sub> emissions derived from tourism related activities are primarily generated by air travel and ground activities, such as road transport and electricity generation. Although aviation is often identified as being responsible for 2% of global CO<sub>2</sub> emissions, or 3.5% of total radiative forcing, these estimates are based on the Inter-governmental Panel on Climate Change (IPCC) Special Report on Aviation and the Global Atmosphere, which was published in 1999 and based on 1992 data. Consequently, these estimates are 16 years old and do not account for the rapid growth in the aviation sector since then, nor that emissions in some other sectors have stabilized or declined<sup>42</sup>. The rapid growth rates forecast for international travel indicate that aviation has been one focus of the climate change debate for governments, environmental organisations and the media<sup>43</sup>.

In the Caribbean, climate change may have a wide range of consequences detrimental to the tourism industry, including:

- Greater hurricane intensity and possibly frequency, which would result in damage or loss of infrastructure, increased insurance costs or even lost insurability, business disruption and evacuation costs, as well as a negative image of the region as a safe destination;
- Sea level rise, which would increase the vulnerability of tourism facilities in coastal areas (beaches, yachting marinas and cruise ship piers, a large percentage of accommodations, heritage attractions);
- Salt water intrusion into fresh water aquifers, with the Bahamas being identified as the world's most vulnerable nation to sea level rise by percentage of land area lost;
- Temperature changes, resulting in warmer winters in northern markets and warmer summers in the region, affecting seasonal demand;
- Changing precipitation patterns, leading to reduced water supply and the potential for drought;
- Increased sea surface temperatures causing coral reef bleaching and mortality.

In the light of these potential developments arising from a changing climate, it is clear that the Caribbean needs to (i) continue the implementation of measures to adapt to climate change, (ii) support general climate policy aiming at a reduction of greenhouse gasses in industrialized countries and (iii) take steps towards mitigation of factors that contribute to global warming. However, in addition to the direct impacts of climate change on the region, the global implementation of climate change policies will also impact on tourism, and in particular aviation, both of which have recently been identified as important sources of greenhouse gas emissions<sup>44</sup>. For this reason, there is a need for national tourism organisations to work with the three areas identified in the Stern Report as being necessary to reduce emissions of greenhouse gases<sup>45</sup>:

- Exploring the opportunities presented by Carbon Pricing, which puts a market value on carbon emissions thereby enabling trading in so-called carbon credits. These credits enable organisations and individuals to purchase carbon savings, to achieve regulatory requirements, or, to offset the carbon emissions from a long haul flight;
- Liaising with the tourism and travel industry to encourage developments in technology to reduce the climate impact of tourism transport;
- Encouraging behavioural change by all stakeholders of the Caribbean tourism sector.

## 6.2 Development Goal

**Goal 4: Ensure the sustainable use of the natural environment and the cultural heritage for the benefit of all.**

## 6.3 Policy Objectives

- Implement using a participatory approach effective planning, management and monitoring of the environment in which tourism exists.
- Engender sustainable patterns of resource use in the Caribbean tourism value chain.
- Implement appropriate adaptation and mitigation strategies to reduce the vulnerability of Caribbean tourism to the physical and strategic implications of climate change.

## 6.4 Implement using a participatory approach, effective planning, management and monitoring of the environment in which tourism exists

CTO recognises that as a tourism product, the Caribbean has a natural global comparative advantage. High levels of environmental quality are at the core of the Caribbean tourism product, in terms of the region's cultural and physical resources. Regional and international stakeholders have expressed concern that the steps being taken to improve the quality of the environment are not making sufficient scale improvements, and that environmental considerations are not sufficiently integrated into tourism planning at the national level.

National governments and their national and regional partners are urged to consider the following policy guidelines in order to ensure effective planning, management and monitoring of the environment:

- Develop and implement National Physical Plans (NPPs) on a systematic basis that establish the regulatory framework for land-use planning protect the built and natural environment, match infrastructure investments with sustainable development, and maintain and enhance property values. The NPPs should classify development zones in keeping with the principles of sustainable development. The national tourism master plan (see policy on tourism management capacity) should describe in detail the type and scale of tourism within these zones, in line with overall national tourism policy. Inter-agency coordination should be in place to ensure a consensus-based approach to support the planning process.

### **Example of approach taken – Jamaica – Integrated Planning System**

Two main statutes control development in Jamaica, the Town and Country Planning Act of 1954 and the Local Improvements Act of 1944. Development Orders are some of the most common forms of land use regulation and control. These are prepared by the Town and Country Planning Authority and specify the type of land use permitted within each zone, and also regulate and control the type of building and other structures that can be constructed in the zone. Applications for development may be handled by the local planning authority at the parish council, though for towns or parishes of a particular sensitivity, these are referred to the Town and Country Planning Authority. The local planning authorities must submit sub-division plans that further detail development for residential and other purposes<sup>46</sup>.

- Integrate the principles of sustainable tourism into specific environment-related national policy, including national environmental action plans, energy policy and cultural policy. Ensure that the positive and negative impacts that tourism may have on the environment are brought into environmental planning at the highest levels.

- Ensure that tourism is represented in cross ministerial/departmental collaboration on environmental issues, including regional and national environmental management strategies and/or action plans, to ensure that a more coherent, integrated and comprehensive approach is taken.

- Ensure that the principles of good governance are used in the application of planning regulations:

- All development applications should be screened to ascertain that the application process is applicable to the specific development project.

- Legislation should be in place mandating the use of impact assessments according to a standardised methodology for any developments where there is concern of potential negative impacts. Environmental Impact Assessments (EIAs) should be conducted for those tourism-related developments within the coastal zone or other ecologically sensitive areas where the likelihood of significant environmental damage is deemed to exist in the preliminary screening. Social Impact Assessments (SIAs) should be carried out for tourism-related developments that require the compulsory purchase of property and the relocation of communities. Moreover, Hazard Vulnerability Assessments should be conducted on those developments where there is deemed to be a particular risk from natural and man-made hazards.

- Planning regulations can:

- Require that any new economic activity within the boundaries or environs of national parks and reserves must be compatible with the management objectives of that area for its sustainability.

- Provide for wildlife corridors connecting nature areas and allowing the interaction of flora and fauna populations.

- Establish a coastal set-back requirement for all new developments with due consideration for sea level rise projections.

- Require special permission for constructions over a certain height.

- Specify noise threshold values in key tourism zones. Licenses for nightclubs should specify noise levels, as well as stipulate that nightclubs should be air-conditioned and enclosed to contain noise.

- Stipulate that new constructions and renovations of existing constructions must meet environmental regulations to promote resource use efficiency and management of waste streams. In particular there needs to be compliance with MARPOL and the land-based sources of marine pollution protocol of the Cartagena Convention, with regard to the management of waste and its safe disposal to the environment.

- Encourage the use of local building materials in keeping with internationally accepted conservation practices.

- Secure public access to the beach and the shoreline at regular intervals for the local population at specifically determined intervals for recreation purposes but also with respect for the traditional rights of fishermen.

- Require that tourism development projects follow national building codes, where these are in place, in order to ensure high building standards.

- In recognition of the fragile balance that exists between ecosystems in the coastal zone and which are of vital importance for tourism, (as well as other economic activities such as fishing), encourage the relevant agencies to set-up and carry out an Integrated Coastal Zone Management (ICZM) plan, in order to address management issues in the coastal environment, including the effects of intensive tourism development. The ICZM plan should establish a formal framework for the planning, management and monitoring of activities in the coastal zone management area.

#### **Example of approach taken – Barbados – Coastal Zone Management Unit (CZMU)**

The CZMU was established in 1996 and developed out of the Coastal Conservation Project Unit. The Coastal Zone Management Act governs its primary functions, however, other related legislations are the Town and Country Planning Act, Marine Pollution Control Act and the National Conservation Commission Act. The Unit's main activities are: preparation and revision of coastal management plans; control of development in the coastal zone management area; beach erosion and accretion control; research; reef protection and monitoring; marine water quality assurance; development of water quality standards; control of sand mining; development and management of marine parks; coordination and enforcement; and provision of legislation and regulations<sup>47</sup>.

- Protect the cultural heritage by:

- Conducting an inventory of cultural heritage sites such as monuments and cultural landscapes, in addition to preserving the cultural patrimony including oral history, folk traditions, literary and performing arts and the collective memory.

- Collaborating with relevant organisations to ensure that the demolition of listed buildings of architectural and/or historic importance is penalised.

- Encouraging the development of an appropriate regime of direct and indirect incentives to facilitate the preservation of architectural heritage.

- Promote the meaningful involvement of local communities in tourism planning using the community-based tourism approach (see Section 7.5 on community-based approaches). Guyana's National Development Strategy points out that while ecotourism is meant to be small scale, it has the potential to make local communities too dependent on it, which is unfortunate bearing in mind seasonality and the global economic climate. A diverse approach with alternative incomes, as well as careful management, should therefore be advocated.

■ Initiate and participate in broad media programmes and events promoting history, as well as cultural and environmental awareness. Awareness of these national assets should also be integrated into training programmes. This should help maintain, and if needs be, increase the people's appreciation of their natural and cultural heritage, which can in turn help engender respect for these resources from visitors to the region.

■ Create new national parks and protected areas, whilst improving the management of those already in existence. Specific participatory site management plans should be developed for natural resources taking into account carrying capacity, and in particular those promoted to visitors. These should provide guidelines on: codes of conduct, infrastructure improvement, trail development and maintenance, and the design of interpretative facilities.

### **Example of approach taken – Belize – Facilitating Nature Conservation**

The Protected Area Conservation Trust (PACT) was established to provide funding for the management of protected areas. In excess of US\$1.75 million have been disbursed through over 70 grants to more than 30 organisations. Funds are raised by a compulsory US\$3.75 conservation fee, charged to visitors on their departure from Belize. PACT also receives 20 percent of the cruise passenger head tax and of the recreational licence and concession fee in protected areas. Corporations and individuals also donate voluntarily to PACT<sup>48</sup>.

■ Support regional initiatives and agreements defining environmental standards for the Caribbean by providing the necessary human and financial resources to facilitate their implementation. Examples are the St George's Declaration (SGD) of Principles for Environmental Sustainability in the OECS (2001) and the Cartagena Convention and its protocols on land-based sources of pollution, specially protected areas, wildlife and oil spill response.

### **Example of approach taken – Puerto Rico – Implementing the Blue Flag**

The Puerto Rico Tourism Company initiated work with Blue Flag in 2002 and four beaches have been awarded Blue Flag status. OPAS, an environmental NGO, now manages the programme on a daily basis in line with Blue Flag requirements. The driving force has been the realisation that the main target group and beneficiaries of the programme are not tourists, but the people of the country, who benefit from a wide range of environmental education outreach programmes, regular bathing water quality monitoring, and the knowledge that health and security issues are a priority<sup>49</sup>. It must be noted however that tourists benefit for the same reasons. The implementation of Blue Flag in Puerto Rico has been aided by the governance structure, which meant that local municipalities and central authorities were able to share the costs of beach management and water quality testing measures.

■ Given the ongoing regional and international initiatives to facilitate the use of indicators for measuring, monitoring and evaluating the impact of tourism on destination sustainability, there is a need to adopt a set of indicators that can be measured over time to benchmark progress internally and externally. The indicators may be (i) focused at the local resort level and generated by a Destination Management Company or municipality, and/or (ii) focused at the national level and generated by government.

### **Example of approach taken – Association of Caribbean States – Sustainable Tourism Indicators**

The Convention for the establishment of the Sustainable Tourism Zone of the Caribbean was signed in December 2001, and the Association of Caribbean States (ACS) is leading the work to implement it. The Convention states that the Zone is a geographically determined cultural, socio-economic and biologically rich and diverse unit, in which tourism development will depend on sustainability and the principles of integration, cooperation and consensus, aimed at facilitating the integrated development of the Greater Caribbean. A measuring system has been piloted for the homogenous but individualised normative indicators to measure the sustainability of tourism in the respective zones, as well as the speed of progress that will be defined for each destination, through a local objectives contract drawn up by the local stakeholders<sup>50</sup>.

## 6.5 Engender sustainable patterns of resource use in the Caribbean tourism value chain

A sustainable future depends on the careful management of resources to ensure their availability for present and future generations. Resources that are non-renewable, in limited supply, or essential for life support are of particular concern. These include land, freshwater, forests, minerals and fossil fuels. Tourism is a significant resource consumer in many areas, and ensuring that this sector uses the above mentioned resources efficiently is important, for the wellbeing of the local environment and host community and the maintainance of global resources<sup>51</sup>. Furthermore, the flow of energy through the Caribbean tourism value chain is likely to become an issue of key strategic importance in the future due to rising fuel prices and the threat of climate change. The implementation of good practices for energy efficiency will reduce the threat of rising energy prices and demonstrate that the Caribbean tourism sector is taking steps to reduce its contribution to greenhouse gas emissions.

National governments and their national and regional partners are urged to consider the following policy guidelines in order to ensure more sustainable patterns of resource use in the existing as well as planned tourism operations:

- National building codes should preferably take into account the environmental impacts of developments in the construction, usage and demolition phases. During the planning phase, architects can integrate environmental considerations into the design of a building, for example by maximising conditions for natural lighting and circulation of air for cooling purposes.

### Example of approach taken – USA – Tool for Eco-friendly Building Design

The US Green Building Council's Leadership in Energy and Environmental Design (LEED) Green Building Rating System programme is a tool for buildings of all types and sizes that evaluates environmental performance from a whole building perspective over a building's life cycle. The LEED system assesses all aspects of the design, construction and operation phases. This ranges from the selection of the site to its design response, to the site, and from the choice of paint and other building materials to the design and operation of electrical and plumbing equipment. Buildings can be certified according to one of four rating categories: Certified, Silver, Gold or Platinum. The LEED system is becoming increasingly prevalent in the US and around the world, with many corporate and governmental organisations requiring that new projects attain at least Silver or Gold status<sup>52</sup>.

- Ensure that resource efficiency requirements are integrated into building regulations for new tourism developments over a certain capacity, i.e. water saving devices, energy initiatives, etc.

### Example of approach taken – International – Benchmarking Environmental Health and Safety Performance

The World Bank has developed specific Environmental Health and Safety (EHS) guidelines for the tourism sector as part of its series of sector-based technical reference documents on environmental management and occupational health and safety. The EHS guidelines present good international practices for the management of waste, energy, water throughout the lifecycle of the processes in question, as well as recommendations for worker safety. The EHS guidelines have a broad target group, and are used by organisations such as the International Finance Corporation (IFC) during its project appraisal activities, for example when reviewing the operation of investments. The EHS guidelines stipulate the environmental performance requirements normally applicable to IFC projects, which are generally considered to be achievable in new facilities at reasonable costs by existing technology. The EHS guidelines therefore constitute a useful source of information for benchmark figures on resource and energy consumption as well as waste<sup>53</sup>.

- Facilitate funding of Environmental Technology (ET) for example via revolving funds that provide soft loans to businesses for the purchase of ET and reduce the risk involved for technology providers.

■ Provide technical assistance to tourism enterprises to facilitate training in energy management techniques including targets for improvement, and the implementation of concrete energy efficiency measures to achieve those targets. Energy prices have been identified as a major constraint for the Caribbean tourism sector, for instance Dominica's 2010 Tourism Policy states that the country's high energy costs are a contributing factor to the profitability issues that are facing the sector, and deterring investors from financing new facilities. By reducing energy costs through energy efficiency measures such as solar water heaters, tourism enterprises will realise comparative advantage over those competitors that have not taken such steps, and who would therefore experience the effects of rising fuel costs.

■ Provide technical assistance to tourism enterprises to facilitate training in water conservation techniques including targets for improvement, and the implementation of specific measures to achieve those targets. Water can be scarce in the Caribbean; St. Lucia's hotel sector, mainly based in the north of the island has been regularly affected by water shortages with water being trucked to properties and stored onsite at high costs. Water conservation should not though deter from the overall quality of the visitor's experience.

#### **Good Water Management Practices for Tourism Enterprises**

- ✓ Use bowls/buckets for washing/cleaning – don't leave the tap running
- ✓ Reduce flow/hours of garden watering
- ✓ Ensure full laundry/dishwasher loads
- ✓ Give guests the option regarding the timeframe for of changing linen and towels (e.g. every 3 days)
- ✓ Check water systems for leaks
- ✓ Install spray taps/flow restrictors
- ✓ Put water-filled bottles in cisterns to reduce flush volume
- ✓ Install water meters on key uses
- ✓ Collect rainwater from roofs for garden watering<sup>54</sup>.

■ Larger tourism enterprises should be encouraged to reuse wastewater, for example by recovering wastewater from rinse cycles/dry cleaning cooling cycle, and using it for garden watering or flushing toilets. Wastewater must be properly treated in order to prevent pollution leaching into ground water and/or marine areas, with implications for drinking water and also for the fragile reef ecosystems that are negatively impacted by the creation of nutrient rich environments.

■ Reduce visual pollution from illegal dumping and littering by conducting public campaigns targeted at all levels of civil society. These include, providing environmental education, establishing regular beach cleaning, enforcing fines for illegal dumping, and providing waste bins at strategic locations in public spaces.

■ Encourage waste reduction, reuse and recycling in tourism enterprises, in order to minimise the volume being landfilled. Ensure proper sanitary landfilling in order to reduce groundwater and marine pollution by leachate.

■ Lobby for appropriate waste solutions, for example the use of incineration facilities featuring waste-to-power technology. This is also in line with the MARPOL Convention which requires incineration of ship waste to remove any risk from contaminous waste.

■ Public sector agencies related to tourism should lead by example and invest in resource efficiency measures themselves and communicate their success over time to stakeholders. At the same time, regional research into sustainable patterns of resource use, such as for example the uptake of alternative forms of energy, needs to be encouraged and the results disseminated. In particular, research directed at the tourism sector would be of importance, given the economic importance of the sector for national economies.

■ Encourage voluntary compliance with environmental management systems and standards currently available at the regional level. For example, CAREC and CAST's Quality Tourism for the Caribbean's (QTC) environmental standards have been developed for application at the facility level. Facilities should be encouraged to measure and monitor their resource consumption over time and benchmark against international water and energy consumption targets for hotels, since these approaches benefit the company's bottom-line as well as the environment<sup>55</sup>.

### **Example of approach taken – Caribbean – Dissemination of Best Practices**

CAST is CHA's environmental arm and undertakes collaborative environmental activities within the hotel and tourism sector, promotes effective management of natural resources and provides access to expertise in operational efficiencies and sustainable tourism. At present it has 225 members throughout the wider Caribbean. CAST is the coordinating agency for the Green Globe environmental certification scheme in the Caribbean, and regularly conducts training and dissemination of best practices in this context. Based on its experiences from the Green Globe programme, CAST has produced a series of environmental management toolkits for use by the Caribbean tourism sector, on areas such as energy, waste management and water conservation. These are available for download at: [www.cha-cast.com](http://www.cha-cast.com)

■ Facilitate regional research regarding alternative forms of energy and initiate public information and trade-targeted campaigns, on the opportunities offered by the use of Environmental Technology. The campaigns should convey that it generates significant cost savings over the long term based on tried and tested technologies and is able to reduce environmental impacts.

■ Liaise with regional stakeholders to gather information on the measures taken by Caribbean countries to make their tourism sector more sustainable, and present these good practices in a user friendly format in order to promote their widespread use.

## **6.6 Implement appropriate adaptation and mitigation strategies to reduce the vulnerability of Caribbean tourism to the physical and strategic implications of climate change**

### **Adaptation strategies**

The climatic implications of global warming are already becoming manifest in the region, for example the Belize Barrier Reef, (the world's second largest barrier reef), has already undergone coral bleaching episodes as a result of sea temperature increase. These impacts will most likely continue, even if emissions of greenhouse gases are stabilised, hence the Caribbean states need to adapt their economies and vital infrastructure to cope with the changing environment.

National governments and their national and regional partners are urged to consider the following policy guidelines in order to ensure that the Caribbean tourism sector is able to benefit from the opportunities presented by the climate change debate<sup>56</sup>:

- Take the measures necessary to adapt to sea level rise including the following:
  - Build seawalls and breakwaters.
  - Preserve existing natural sea defences, for example mangroves and coral reefs, and where possible re-establish these resources.
  - Relieve man-made stresses on coral reef systems.
  - Consider beach nourishment.

- Implement measures to prevent sand mining on beaches, in particular preventive education and fines for offenders and the monitoring of particularly vulnerable beaches.
- Adjust coastal setbacks and enforce them.
- Institute a local system of Marine Protected Areas.

### **Example of approach taken – Barbados – Adaptation and Added Value for Tourism**

The principal objective of the Coastal Infrastructure Programme (CIP) is to ensure a healthy environment and continued economic development of Barbados through improved management and conservation of the coastal zone. CIP comprises a range of coastal management works and activities related to four specific objectives: (i) shoreline stabilization and erosion control; (ii) restoration of coastal habitats; (iii) improvement of public coastal access and (iv) institutional strengthening for coastal management. An example is, the Rockley to Coconut Court Waterfront Improvements project, which is the largest engineering project within the Programme. Rocks and boulders are deposited to stabilise the shoreline and provide enhanced beaches where feasible and appropriate. Additional measures include the integration of a hard surface walkway (boardwalk) over the stabilisation structure, which will provide full access for wheelchairs and strollers, thereby offering an alternative to the current unsafe pedestrian access on Highway 7. It will also provide approximately a kilometre of boardwalk with unprecedented continuous and unimpeded access along the Barbados shore<sup>57</sup>.

■ In response to uncertainties with regard to future precipitation patterns, take the measures necessary to adapt to climate change in the water utility sector including:

- Water conservation.
- Recycling grey water in the industry.
- Water harvesting.
- Low flush toilets.

■ Take necessary measures to adapt to climate change in the built environment:

- Buildings designed for efficient cooling.
- Adequate setbacks from eroding coasts.
- Facilities designed to accommodate future climate changes.
- Incentives to industry for compliance.
- Factor in increased insurance costs into resort profit forecasts.

### **Example of Approach Taken – Caribbean – Strengthening National Capacity for Adaptation**

The Mainstreaming Adaptation to Climate Change (MACC) project, which started in 2003, is being executed by the Caribbean Community Climate Change Centre (CCCCC), with funding from the Global Environmental Facility (GEF) through the World Bank. The primary objective of the MACC project is to mainstream adaptation to climate change into national development planning through technical support and capacity building. Under its Component 1, the MACC project, aims to build capacity to assess vulnerability and risks associated with climate change and climate variability. Part of this capacity building will strengthen the climate change and coral reef monitoring network in the region. To this end the project intends to expand the coral reef monitoring network as proposed by the Caribbean Planning for Adaptation to Climate Change (CPACC) project. The Centre for Marine Sciences, under a MOU with the CCCCC for the MACC project, will lead and coordinate the expansion of the coral reef monitoring programme to the OECS and Tobago and provide technical support<sup>58</sup>.

- Instigate enabling government policy to facilitate the implementation of adaptation measures including:
  - Land use planning needs to include climate change considerations, for example by allowing for coastal setback because sea levels may rise.
  - Fiscal regime to encourage sustainable construction in less vulnerable coastal zones.
  - Fiscal incentives for changes to built infrastructure (e.g. retrofitting to comply with adjusted building codes).
  - Encourage sharing of best practices and innovative approaches.

### **Mitigation Strategies**

Governments, international organisations and the corporate sector are researching ways to respond to climate change, which constitutes both a threat to, and an opportunity for, the Caribbean tourism sector. It is vital for the sustainability of the sector in the Caribbean that all tourism stakeholders implement mitigation measures to reduce the sector's contribution to climate change. National governments and their national and regional partners are thus urged to consider the following policy guidelines in order to ensure that the Caribbean tourism sector is able to mitigate its impacts:

- Encourage public and private sector tourism stakeholders, as well as civil society to apply a mix of technology and behavioural change to address the issue of climate change. Governments should for example review their own travel consumption and assess whether new technologies for meetings, such as online video conferencing, can be used to replace a part of that travel.
- Cooperate with carbon offset programmes to offer travellers to/within the region the opportunity to offset the carbon emissions from their flight to the region, for example by providing a carbon offset option on web-based regional and national marketing sites. Where possible, leverage should be exerted on the carbon offset programmes to ensure that carbon offset funding from visitors to the region is earmarked for community and energy efficiency development projects in the region.

### Example of approach taken – UK – Carbon Offsetting

ClimateCare is a UK based carbon offset fund. It provides a service whereby organisations and individuals are able to purchase carbon neutrality by making a donation equivalent to removing the size of their carbon emission. This is invested in carbon offset projects around the world. A list of ClimateCare's projects are presented below<sup>59</sup>.

Type	Projects initiated and locality
Human energy	Treadle irrigation pumps, India
Bio energy	Biogas digesters, India; Cooking oil project, The Bahamas; Biofuel from crop residue, India
Wind energy	Karnataka wind turbines, India
Efficient lights	Lighting-up education, Kazakhstan; Township community lighting, South Africa; Lighting project, Marshall Islands
Efficient stoves	Construction of closed stoves to replace open fireplaces, India and Honduras
Rainforest reforestation	Reforestation of rainforest, Uganda

■ For specific events, such as mass cultural and sporting events or large-scale conferences, cooperate with carbon offset programmes to offer travellers to/within the region the opportunity to offset the carbon emissions from their flight to the region. The funding generated can be used to invest in projects in the country visited, which can counteract the carbon emissions generated by the travel, for example distribution of energy efficient light bulbs, or aforestation projects.

### Example of approach taken – CTO & Sustainable Travel International – Carbon Offsetting Events

Sustainable Travel International has offset the carbon emissions from expected air, ground transportation and energy use associated with CTO's annual Sustainable Tourism Conferences (STCs). At STC9 held in Grand Cayman in 2007, the Cayman Islands Government contributed towards a renewable energy programme with the opportunity to offset delegate carbon emissions based on a carbon footprint assessment of the event conducted by Sustainable Travel International<sup>60</sup>.

■ Communicate at relevant forums the steps that have been taken to reduce the so-called "carbon footprint" of the national tourism sector, as well as the importance of tourism, and *inter alia* air transport, to the economic sustainability of the Caribbean region.

## 7 Policy On Linkages To Other Economic Sectors

### 7.1 Background

Tourism has contributed significantly to the diversification of Caribbean economies, however, the tourism sector can make an even more significant contribution to this process if the linkages between tourism and other sectors of the national and regional economy are fully realised. Much attention has already been given to locally-grown and processed agricultural produce by national tourism sectors, however, it is important to underscore that linkages permeate through a vast variety of economic activities including construction, manufacturing, as well as service sector activities such as the provision of health and wellness services, consulting and the creative arts.

Stakeholders have also stressed that regional linkages need to be considered by policy makers at the national level, both in terms of imports as well as exploiting the opportunities of this market. The removal of preferential trade agreements means that the agriculture sector in many Caribbean countries has to increasingly operate on the open market, and would gain added impetus from increased trade with the tourism sector. Fruits and vegetables imported from outside the region are prominent in the markets, supermarkets and hotel buffets and kitchens, constituting a leakage from the sector.

Critical sustainability challenges identified with respect to linkages are:

- Stakeholders feel that a change of attitude is needed nationally and regionally to fully realise the economic potential offered by linkages, and that tourism has to be better integrated into the national and regional economy;
- Institutional capacity needs to be established at the national level to ensure that there is a permanent knowledge base on building linkages;
- The globalised economy means that manufacturers of nationally produced goods find it difficult to compete with imported goods, which are often able to retail at lower prices due to economies of scale in production. The national incentives regime may also encourage the import of duty free goods and materials from abroad, (e.g. construction materials), even though these may be manufactured and available locally;
- Forward and backward linkages need to be established between communities and the tourism sector in order to support the development and distribution of goods and services, local arts, crafts and cultural/heritage products to both locals and visitors. These linkages would also minimise foreign exchange leakages and add to Caribbean countries' domestic tourism thrust;
- Community-based tourism needs to be introduced to help realise linkages by bringing local handicrafts and other producers in contact with tourists;
- Preference needs to be given to those nationally and regionally derived materials, products and services which are derived on a sustainable basis (fishing, construction materials, agricultural produce etc.);
- Niche tourism markets which feature a high utilisation of goods and services from other economic sectors, such as ecotourism and health and wellness, should be strengthened;

## 7.2 Development Goal:

**Goal 5: Develop and strengthen the links between tourism and other economic sectors nationally and regionally to maximise the multiplier effect on the economy and reduce leakages.**

## 7.3 Policy Objectives

- Provide an enabling framework to realise national and regional inter-sectoral linkages.
- Ensure that communities are able to benefit meaningfully from linkages with tourism.

## 7.4 Provide an enabling framework to realise national and regional inter-sectoral linkages

The term national tourism economy is used to describe those economic activities that are directly related to the tourism experience, for example transportation, tour operations and accommodation, in addition to those that are indirectly related to tourism, for example the printing industry, construction sector and commercial laundries. There are many opportunities for production and service sector enterprises to tap into the tourism economy, and governmental support to remove potential barriers would help facilitate their entry into the market. In this context, national governments and their national partners are invited to consider the following policy guidelines in order to provide a linkage-enabling framework and to contribute to the sustainable development of tourism in the Caribbean:

- Ensure that there is a framework in place at the governmental level to anchor the institutional capacity gained from working with linkages and tourism. For instance by defining clear roles and responsibilities, and ensuring that this knowledge base feeds into the overarching national tourism management framework.
- Conduct comprehensive research to determine the opportunities that exist to strengthen national and regional inter-sectoral linkages in tourism, and to enable prioritisation of these according to their feasibility. Research measures include analysis of the supply and demand patterns of visitors, and the opportunities presented by alternative public-private partnership models.
- Expand the institutional framework to support the growth of sustained public-private partnerships in various areas of linkage where existing arrangements for collaboration may be either too weak or too informal, for example cultural industries and the informal vending sector.

### Example of approach taken – Jamaica – Linking Traditional Cuisine and Tourism

Walker's Wood Jerk Seasoning is just one of a range of products on offer from this Jamaican company in supermarkets across the Caribbean. The site where the sauces are made also functions as a visitor attraction, and visitors are led to the factory shop after a tour of the site where food is sampled and the natural ingredients presented. Walker's Wood is one of ten good practices featured in the CTO/CRSTDTP publication *Competing with the Best – Good Practices in community-based tourism in the Caribbean*.

- Facilitate the development of niche tourism markets that already have linkages with existing sectors including health tourism, heritage tourism, sports tourism and agro-tourism.

### **Example of approach taken – Haïti – Linking Tourism and the Community**

Destination Valibèl is one of the activities of the *Association des Paysans de Vallée* (APV), an NGO that was founded in 1987 to promote socio-economic development of the Vallée district. Over a period of two decades, APV has been able to develop tangible benefits for the local communities involved including a new road, a community school, a cyber café and radio station as well as two craft workshops. APV has also sowed 500,000 saplings and created rainwater collection systems, addressing two of the most pressing environmental issues in the area. The aim of Destination Valibèl is to create a popular mountain destination and build on the infrastructure already created. Developments to this end include an agro-ecological programme, and a visitor site that attracts some 20,000 visitors per year. It is managed by a staff of seven and is funded by the Government of Haïti, the European Union, Fondation Connaissance et Liberté, Coopération Canadienne and Helvetas Haïti. In 2007 Destination Valibèl received regional recognition as runner-up in the CTO-Islands Magazine Sustainable Tourism Award<sup>61</sup>.

■ Collaborate with national, regional and international agencies to build capacity among local food and service suppliers by:

- Delivering technical support in business development through business advisory cooperations to facilitate start-up and operation, and to ensure that the products meet accepted quality standards.
- Providing targeted information using the right delivery approach on micro-finance initiatives and entrepreneurs to access that funding.
- Training intermediaries to work with clients to ensure the regular supply of the produce required based on contractual relationships.

■ Adopt an innovative approach to the identification of linkages. One potential growth area could be the production of Environmental Technology (such as solar water heating systems), as the sub-sectors in the region's largest industry are likely to increasingly implement energy efficiency technologies in the face of escalating energy costs.

### **Example of approach taken – Barbados – Tapping Solar Energy for Hot Water**

SUNPOWER was established in Barbados in 1978 and manufactures and installs simple solar hot water systems. It sells a variety of models that are designed and manufactured in Barbados and have been deployed in hotels and resorts as well as in domestic properties across the Caribbean. The widespread use of the hot water system in Barbados, has been assisted by the government tax deduction on the purchase of a solar water heater.

■ Other areas of linkages in which the Caribbean is internationally renowned, and where the tourism sector can thus play an important role in building exports, include the music industry where innovation and product exposure is driven by the annual carnivals in the region. Other sectors include film, literature, design and fashion.

■ Review what tools are needed to ensure that linkages between tourism and other economic sectors are realised, for example:

- Promote the use of local products into all aspects of skills development relevant to tourism. For instance, construction students should receive training utilising local and traditional building materials, and trainee chefs should be trained in designing a menu that incorporates local agricultural products and foodstuffs according to their seasonality.
- Develop a national and/or regional system for the accredited labelling of national and/or regional produce available in supermarkets, (i.e a "Made in the Caribbean" brand).

### Example of approaches taken – Jamaica and Tobago – Bringing the Farmers Onboard

The Sandals Chain in Jamaica has worked with small farmers to produce exotic vegetables such as Duke Tomato, snow peas, zucchini and red cabbage for its consumption and export. Sandals has also worked with the Rural Agricultural Development Authority (RADA) to provide training in horticultural methods and to ensure success, crops that have a year round demand are chosen. The project began with only 10 farmers supplying 2 hotels, but has grown to incorporate 80 farmers on 5 localities island-wide, supplying the 8 Sandals hotels in Negril, Montego Bay and Ocho Rios.

In Tobago The Travel Foundation works in association with The Hilton Tobago and the Mt. St. George Farmers Association, to conduct a pilot of the *Adopt a Farmer's Group Project*. This aims to forge greater links between the Agricultural and Tourism sectors and to decrease the dependency on imported produce. To date, 7 farmers have been involved in supplying the Hilton with local produce and the consistent demand has led to a sharp increase in production from the farmer's association. With this success, the current plan is to involve more farmers and hotels in making this an island wide initiative. The Travel Foundation also operates *The Organic School Garden Programme*, which involves three primary schools that supply the Tobago Hilton with fresh herbs on a regular basis. Proceeds from the sale go directly back into the school, and the children learn valuable practical skills in agriculture, as well as develop an entrepreneurial spirit and a sense of connection with the land<sup>62</sup>.

■ Review and revise where necessary governmental fiscal policy and the incentives regime for new and existing tourism operations. These would enable local suppliers to participate on a level playing field, since suppliers of building materials may find it difficult to compete with favourably taxed imports from foreign suppliers.

## 7.5 Ensure that communities are able to benefit meaningfully from linkages with tourism

There are opportunities for communities to benefit from tourism, however, they often feel that their resources are being utilised for tourism development by the state and private sector, in return for only marginal benefits. CTO advocates a carefully managed community-based tourism (CBT) approach to facilitate the potential linkages between communities and tourism. CBT emphasizes the active participation and empowerment of local people in the tourism opportunity. Examples of good practices in CBT are increasingly emerging from the Caribbean and a series of case studies are documented in the CTO/CRSTDP manual *Competing with the Best: Good Practices in community-based tourism in the Caribbean*<sup>63</sup>, which also identifies four critical constraints for CBT:

1. **Commercial viability:** Product quality and price, marketing, strength of the broader destination and funding mechanisms;
2. **Access to the market:** Physical location, economic elites and social constraints on local producers;
3. **Policy framework land tenure:** Land tenure, regulatory context, planning process, government attitudes and capacity;
4. **Implementation challenges in the local context:** Filling the skills gap, managing costs and expectations and maximising collaboration among stakeholders.

National governments and their national and regional partners are invited to consider the following policy guidelines and examples, in order to address the above critical factors and provide an enabling framework that facilitates the participation of interested and engaged communities in the tourism value chain:

## Commercial Viability

### ■ Facilitate access to finance by:

- Providing technical assistance in the preparation of business plans for CBT.
- Providing and facilitating start-up funds for CBT through micro-finance that is relatively easy to access.
- Using innovative approaches to lowering the cost of finance for supporting CBT.
- Implementing effective community enterprise development programmes with skills development and job creation.
- Developing objective criteria following the principles of good governance, for the selection of CBT projects for further development in order to ensure feasibility and non-partisan planning.

### **Example of approach taken – St. Lucia:**

The St. Lucia Heritage Tourism Programme (SLHTP) commenced in 1998 as a co-funded EU and Government of St. Lucia initiative. Its objectives are to facilitate a broader distribution of the benefits of tourism, develop complementary community-based Heritage Tourism activities and strengthen the linkages between the tourism industry and other local economic sectors. To date, the programme has developed initiatives in the field of policy reform, capacity building, product development, marketing and product awareness. SLHTP has provided technical assistance to CBT products in St. Lucia, such as the *Plas Kassav* enterprise that celebrates cassava and creole cuisine. It has also facilitated the development of the *Anse Le Raye Seafood Friday* based on the Oistins Fish Fry event in Barbados. In its marketing and promotion work, SLHTP has applied collective branding and marketing of CBT products through its *Heritage Tours* product.

### ■ Promote community-based approaches to ensure the quality and attractiveness of individual products by:

- Using innovative approaches to ensure that linkages are spread when they are needed and in formats dictated by demand.
- Applying creative branding and unconventional marketing to reach niche markets.
- Supporting existing community organisations in order to ensure the sustainability of linkage programmes.
- Sensitise the national community and visitors to CBT and linkage projects in order to ensure visitor buy-in and appreciation.
- Growing local and regional markets to maintain visitation levels in the low season.
- Enabling CBT to be registered according to health and safety standards.

## Access to the Market

### ■ Promote access to the market by:

- Encouraging innovative approaches to authentic crafts, agricultural products and cultural events.
- Conducting market research with the private sector in product development to ensure viability.

- Using a community-centric approach to infrastructure improvements and development.
- Facilitating and supporting the full spectrum of marketing activities.

### **Example of approach taken – La Ruta del Café, Dominican Republic:**

*La Ruta del Café* is located in Salcedo, a rural community in the North East of the Dominican Republic with a coffee, cocoa and tropical fruit based economy. It is based on the concept of a wine route in Tuscany, Italy and visitors are able to enjoy three different routes, eat traditional foods at local restaurants as well as view demonstrations of coffee roasting. The initiative is financed by the Tuscany Region and the Province of Arezzo in Italy and the main beneficiaries are the families that accommodate visitors, the young guides, food vendors and mule owners.

## **Policy Framework**

- Incorporate the principles of CBT into national tourism policy.
- Develop fiscal incentives to encourage CBT product development and streamline administrative requirements for micro and small tourism businesses.
- Encourage participatory planning in tourism as part of a development vision that promotes consultative, inclusive decision making processes and empowerment.

### **Example of approach taken – Dominica:**

The Eco-Tourism Development Programme in Dominica has contains a central CBT component. The programme developed a Community Tourism Policy that forms part of the national Tourism 2010 Policy and established a Community Tourism Development Fund that disbursed grants to 20 community based organisations for infrastructure development. Examples are the construction of a retaining wall to stabilise the embankment and upgrade the embarkation jetty for the Indian River Tour, and the provision of skills development and technical assistance.

## **Address implementation challenges in the local context**

- Provide training interventions that are needs based and training materials that are interesting and accessible to local people.
- Ensure that sustainable mechanisms are put in place for the equitable distribution of benefits. An example is the community development fee charged on *La Ruta del Café* in the Dominican Republic.
- Implement voluntary self-regulatory instruments to ensure appropriate behaviour in environmentally sensitive areas.
- Monitoring and evaluation can be facilitated by:
  - Conducting baseline studies at the start of a CBT initiative from which to measure progress and address potentially negative effects of community tourism projects on the community and the environment at an early stage.
  - Developing participatory monitoring and evaluation involving the beneficiaries, and an example is the evaluation of the impacts of the *Anse La Raye Seafood Friday* on vendor livelihoods.

**Example of approach taken – The Bahamas:**

The Bahamas “People-to-People Program” is a community involvement venture that brings visitors and Bahamian residents together on a one-to-one basis. Established in 1976, over 200 “People to People Volunteers” now act as personal hosts to visitors. They come from a cross section of the community, are motivated by a desire to make visitors feel welcome and have been screened by People-to-People executives. Personnel of the Tourism Board are responsible for matching visitors and volunteers according to their ages, hobbies, interests and occupations. The programme is well respected regionally and internationally with thousands of visitors referring to their participation in the program as being the highlight of their visit to The Bahamas. When they leave, they are able to take with them not only memories of a wonderful vacation, but a mutually enriching “People-to-People” experience<sup>64</sup>.

## 8 Policy On Health, Safety And Security Issues And Tourism

### 8.1 Background

The health, safety and security of visitors have emerged as hallmarks of a viable, sustainable and reputable product in today's tourism industry. Globally the tourism sector is being encouraged to acknowledge its responsibility and demonstrate performance in these areas. In recent years, uncertainty about the health, safety and security of travel to certain destinations has caused significant fluctuations in tourist flows. Hence health, safety and security issues should be regarded as critical regional issues for the sustainability of tourism in the Caribbean.

In the period 2000-2005, over 55 outbreaks of food and water borne illnesses were reported to the Caribbean Epidemiology Centre (CAREC), involving over 2,600 guests and staff at hotels from 14 Caribbean islands. The root causes of these illnesses were traced to inconsistent attention to compliance with food and environmental safety standards, an inadequately trained work force, and/or the lack of an effective monitoring and reporting system. It is estimated that the combined losses and lawsuits as a result of these outbreaks are estimated to have cost the industry over US\$250 million<sup>65</sup>. Increases in poverty, marginalised groups from society, un/underemployment among youths, increased crime rates and growing incidents of HIV/AIDS further contribute uncertainties regarding visitor health and safety. A recent report from the World Bank found that the high levels of crime and violence threaten the growth and prosperity of the region and is having a direct effect on the region's attractiveness to investors<sup>66</sup>.

There are policy implications regarding image, information management, and the need for specific measures to improve levels of safety and security<sup>67</sup>. If health, safety and security issues are not managed in a proactive manner and are only dealt with as and when they occur, the result can be negative media and a travel advisories for travellers to specific countries in the region. Critical sustainability challenges identified with respect to health, safety and security include:

- The rising crime rate and the changing nature of crime in some Caribbean countries are impacting political stability and domestic tranquillity and in turn jeopardising the region's appeal as a safe destination<sup>68</sup>;
- Visitor harassment, sometimes involving drug peddling, is still prevalent with some destinations being particularly affected. Some of the criminal activity targeting tourists is in fact committed by non-nationals and this which has implications for crime detection, customs procedures and methods of punishment;
- Tourist destinations have been the target of terrorist attacks in the past and the sector needs to consider how to counter the threat of terrorism at the national and regional levels;
- The Caribbean has a tragic and significantly high incidence of HIV/AIDS, which some policymakers have indicated is a threat to the future labour pool of the tourism sector;
- The spread of vector-borne diseases such as dengue, malaria and yellow fevers, is also a potential threat to Region;
- The diverse origins of visitors to the Caribbean, as well as its trading patterns, mean that the region is at risk from transboundary health issues such as SARS and avian influenza, which have both received much attention at the global level. Contingency plans need to be in place to tackle outbreaks in the region taking into account the communication and cooperation aspects between the key stakeholders;

- Occupational health and safety issues need to be reviewed on a regular basis to reduce the risk of serious injury at the workplace;
- Tourists coming to the Caribbean must be assured of food safety. Travel related diarrhoeal illnesses among travellers resulting from consuming contaminated food or water constitute the most common health problems faced by visitors to the Caribbean;
- The transportation of hazardous substances throughout the region increases the risk of damage to the marine environment for instance from catastrophic oil spills related to tanker accidents, which in turn may have ramifications for the attractiveness of the region;
- Natural disasters constitute a major threat to the Caribbean tourism sector. There is a need to work with multi-hazard risk management covering preparedness, communication and response and recovery training in all forms of disaster;
- There has been a tendency to focus on preparedness for events that have a relatively high frequency in the Caribbean, such as hurricanes, tropical storms and flooding, though the area is also at significant risk from tsunami events related to geological activity.

## 8.2 Development Goal

**Goal 6: Manage the health, safety and security issues that impact the sustainability of tourism.**

## 8.3 Policy Objectives

- Enhance communication and coordination mechanisms related to health, safety, security and multi-hazard risk management.
- Improve the health and safety of citizens and visitors to the Caribbean.
- Manage security issues to reinforce the reputation of the Caribbean as a secure destination.
- Integrate multi-hazard risk management into the tourism sector to reduce the vulnerability of the sector to natural and man-made hazards.

## 8.4 Enhance communication and coordination mechanisms related to health, safety, security and multi-hazard risk management

A significant body of knowledge has been built-up in the Caribbean region regarding ways to respond to a range of different hazards, based on the lessons learned from past experiences. The health, safety and security challenges as well as the multi-hazards facing the region's tourism industry demand a swift response to limiting damage and ensuring that the situation is dealt with in the most effective manner. Communication among stakeholders, and efficient coordination of activities are key to achieving this objective.

National governments and their regional partners are invited to consider the following policy guidelines in order to enhance the communication and coordination mechanisms related to health, safety, security and multi-hazard risk management in the tourism sector:

- Ensure an enhanced nationally coordinated inter-agency strategy on health and tourism involving ministries of health, tourism and security with a clear identification of roles and responsibilities.

- Develop communication protocols for health, safety and security issues.
- Build intelligence networks for monitoring and communicating issues related to health, safety and security (HSS) issues for the tourist sector.
- Ensure an enhanced, regionally coordinated, inter-agency strategy on health and tourism involving ministries of health, tourism and national security.

## **8.5 Improve the health and safety of citizens and of visitors to the Caribbean**

Health and safety issues can play a major role in influencing a tourist's choice of destination. Travel advisories can have negative effects on the sustainability of the national and regional tourism sector. At the same time, increased travel perpetuates the health risk associated with communicable diseases, in particular food-borne and vector-borne diseases and sexually transmitted diseases (STDs) among local and visitor populations. In the context of this Policy Framework, the term safety is used to cover the set of precautions put in place to prevent tourists and industry workers from being exposed to situations where that they believe in personal danger, due to crime, accidents, emergencies etc.

National governments and their regional partners are thereby invited to consider the following policy guidelines that can improve the management of health and safety aspects of tourism in the Caribbean:

- Collaborate with regional and international partners to benefit from the monitoring systems that have already been developed to track health and safety related matters as they affect the tourism industry. UNWTO is for example developing an interactive global webtool for the purpose of emergency response<sup>69</sup>. Relevant regional initiatives include CAREC's ongoing work to develop an ill health monitoring system specifically for the Caribbean tourism sector.
- Liaise with planning and infrastructure bodies to implement public health and sanitation programmes for communities that already (or can possibly) cater for visitors. Ensure that visitors are able to access health care facilities, including emergency services. Implement standards and practices to ensure food safety and reduce Food Borne Diseases (FBDs).
- Adopt/promote the use of CAREC and CAST's QTC "Health Safety and Environment Standards" by hotels in the region. These are the first Caribbean wide standards and include regional and internationally recommended health safety and environmental standards and guidelines in one document.
- All tourism workers who come into contact with food should undergo specialised training in food preparation and storage hygiene. Where relevant provide training in Hazard Analysis and Critical Control Point (HACCP), the internationally recognised systematic preventive approach to food safety.
- Take action to prevent and minimise the spread of communicable diseases and diseases of international importance in the tourism sector, For example, by developing HIV/AIDS prevention programmes, minimising health risks to workers in high-risk jobs and addressing the impact of HIV/AIDS on the tourism workforce.

### Example of approach taken – Jamaica – HIV/AIDS at the Workplace Policy

Jamaica's Ministry of Tourism, Entertainment and Culture released in 2007 its Tourism Sector HIV/AIDS Workplace Policy Guidelines, outlining strategies for the sector to combat HIV/AIDS and its concomitant repercussions on the workforce of the tourism sector. Although the ministry has (since 2002) developed annual work plans which include education and training strategies to improve prevention knowledge, the guidelines go further by providing a framework from which stakeholders can launch their own workplace policy guidelines. With a national adult HIV prevalence rate of about 1.5% in Jamaica, the objectives of the policy are to (1) reduce the transmission of HIV, (2) manage and mitigate the impact of HIV/AIDS in the workplace, (3) improve care and support of workers living with and affected by HIV and AIDS and (4) reduce stigma and discrimination toward any worker known or perceived to have HIV/AIDS. The policy identifies rights and responsibilities of key stakeholders and a series of measures to be implemented including a Plan of Action, Personnel Policies, HIV Screening and Counselling and Safe Practices for Guests. The policy was developed by the Ministry of Tourism in conjunction with a broad base of stakeholders including the Ministry of Health through the National HIV/STI Control Programme and the Jamaica Hotel and Tourism Association (JHTA)<sup>70</sup>.

■ Cooperate with regional crime and security organisations to monitor tourism-related criminal activities. CTO will work with the Association of Caribbean States (ACS) and its Visitor Safety and Security Network to promote knowledge sharing among member countries on the issue of preventing crime against tourists, including economic development strategies (linkages) to reduce the pool of people who resort to harassment and crime.

■ If necessary, and in cooperation with relevant national organisations, initiate a review of and amend where appropriate the penal code to address visitor safety. A review of the penal code to improve visitor security might include:

- Swifter trials and more severe penalties (custodial sentences) for repeat offenders.
- The possibility for trial in *absentia* and for night courts.
- In some countries in the region, harassment is not classified as a crime, but is instead defined by tourism legislation, which requires that all vendors have a National Tourist Board license for operation or face a fine. Licensing programmes need to be carefully communicated.
- Institute the necessary legislative framework for outlawing all solicitation on beaches, provide adequate retail accommodation, promotional assistance, etc to ensure that all legitimate vendors are not disadvantaged. An adequate enforcement and licensing framework should also be established.

■ In cooperation with relevant national and community organisations, review on a continuous basis the effectiveness of legal and institutional efforts to deter crime against tourists. Focus should be on cooperation with the local community to avoid potential backlash against security arrangements. Steps that can be taken to address visitor crime include:

- Establish a Tourism Protection Unit within the national police force, with specific responsibility for visitor security. Training of the local police force on interactions with tourists and the local community should be facilitated.
- Ensure a clear communications policy (including the establishment of an appropriate reporting system of all incidents) among police, the national tourist board, the hotel and tourist association and private establishments.
- Ensure effective policing in areas where harassment is a particular problem.

- Review the use of security guards and private security agencies in resorts – encourage effective partnership between private security organisations and police officials for the efficient management and control of crime and other undesirable behaviour. The police force should consider mandatory training of hotel security guards.
- Encourage crime prevention groups in communities in tourism-related areas.
- Train vendors in customer relations to minimise perceptions of harassment.
- Provide visitors with information on safety and security issues of the destination upon arrival.

#### **Example of approach taken – Resort Patrol Service, Jamaica:**

Jamaica's Resort Patrol Service is an example of an initiative to combat harassment, ensure greater visitor security and also control littering and water sports activities. The initiative started in 1993 and was endorsed by the then Prime Minister (Most Hon. P.J. Patterson). In 2003, personnel graduating from the police training school underwent a week of specialised TEAM JAMAICA training provided by the Tourism Product Development Company (TPDCo).

■ Review all tourism related activities to ensure that safety requirements are adequate. Adequately trained lifeguards should be provided on popular beaches, and tourism personnel need to be trained in First Aid to provide effective assistance. Requirements relating to all aspects of safety as well as comprehensive insurance cover, should be placed on operators and integrated into the licensing of operations. As part of their operating license, accommodation establishments should therefore develop and display fire and hurricane evacuation procedures and these should be checked regularly by the fire and emergency services. Food providers should demonstrate that they comply with standard food safety and cleanliness requirements in the storage and preparation of food and beverage, and should have undergone food handler's training. Tour operators and guides should be receive adequate safety equipment, training in First Aid and CPR; (see Section 4.8 on quality standards).

■ Support the enforcement of building codes to ensure the safety of all users of tourism facilities (see Section 6.4 on environmental management, planning and monitoring).

■ Tourism can be a high stress business, due to long hours and work shifts that are contrary to standard working hours, and these factors contribute to the high turnover of employees in the sector. In collaboration with the relevant line ministry, the ministry with responsibility for tourism should ensure that occupational health and safety issues are integrated into the management of tourism operations. It is in the best interest of companies to develop management plans regarding occupational health and safety for the welfare of their employees, thus helping to create a healthy and balanced workforce. Focus should especially be on potentially significant areas of business activities where employee safety may be jeopardised. Examples include working on construction sites, when transporting heavy objects, in cold rooms such as walk-in freezers and carrying hot substances such as fryer fat, used in hotels and restaurant kitchens.

## **8.6 Manage security issues to reinforce the reputation of the Caribbean as a secure destination**

In the context of this Policy Framework, the term security is used to cover the set of precautions put in place against hostile acts that seek to inflict a large scale of damage that cause maximum economic disruption. Popular tourist destinations around the world have become targets of terrorist attacks, mostly in the form of suicide bombings. National governments and their national and regional partners are invited to consider the following policy guidelines that can reinforce the reputation of the Caribbean as a secure destination:

■ Devise, in accordance with the principles of good governance, an integrated plan for managing the risk of a terrorist attack on the tourism sector at the national and regional levels. This will include procedures for reducing the risk in sub-sectors and a response strategy to reduce the effect of a potential crisis on the long-term sustainability of national and Caribbean tourism.

■ Liaise with regional partners on security issues, (e.g. the Regional Security System's (RSS) cooperation within the Eastern Caribbean<sup>71</sup>), and share information on issues such as immigration procedures and lessons learnt from the CARICOM Single Space created in 2007, when the Caribbean hosted the Cricket World Cup. CDERA in conjunction with OAS, has developed guidelines for terrorism preparedness with hotels and resorts as the primary beneficiaries. This includes low threat and high threat preparedness protocols, communication guidelines and a business recovery plan.

## **8.7 Integrate multi-hazard risk management into the tourism sector to reduce the vulnerability of the sector to natural and man-made hazards**

In the context of this Policy Framework, the term multi-hazard risk management is used to cover the set of precautionary measures put in place at the national and regional levels to prepare for disasters, whether natural (hurricanes, storm surges, etc.) or man-made (oil spills, chemical pollution etc.). Natural disasters, in the form of hurricanes and flooding, have in the past wreaked havoc on the region's tourism sector by, causing significant damage to property, and raising concerns in the market with regard to the risk of disasters. Furthermore, scientists now predict that the occurrence of freak weather events will increase in the future as a result of global warming.

The social and economic impacts associated with natural and man-made hazards can be considerable. It is estimated that the coastal and lake flooding which affected several provinces in the Dominican Republic in 2003 caused a total of US\$ 42.6 million in damage and claimed 9 lives; and Hurricane Ivan which struck Grenada and the Cayman Islands in 2004 caused US\$ 889 million and US\$ 3,430 million in damage with a total loss of forty lives<sup>72</sup>. Some national policies already address the issue of disaster risk reduction, though these are few in number at this point in time. The Antigua & Barbuda Tourism Strategic Policy and Plan (2005-2009) states that the Government should ensure that all tourism properties have disaster plans. The 2001 Green Paper on the Sustainable Development of Tourism in Barbados identifies the need for Government to support the conduct of risk assessments against disasters such as fire, flood and hurricanes, the development of mitigation strategies, and the formulation of disaster management plans.

Against this background, national governments and their regional partners are invited to consider the following policy guidelines to reduce the vulnerability of the tourism sector to natural and man-made hazards:

■ Monitor and implement where appropriate policies and strategies for multi-hazard risk management at the regional level. Relevant initiatives include:

□ CDERA( in collaboration with the CTO, CROSQ and UWI) is implementing the IDB funded project *Regional Disaster Risk Management for Sustainable Tourism in the Caribbean*, under which a regional disaster risk management framework will be developed and adopted. This framework will consist of a strategy and action plan for the tourism sector, including standards for vulnerability assessments and risk mapping. Under the project, capacity will be built in beneficiary states for the national adaptation of the regional strategy and plan of action, for disaster risk management in the tourism sector.

□ OAS and CDERA have collaborated to develop a *Multi-Hazard Contingency Planning Manual for the Caribbean Tourism Sector*.

□ CAST and UNEP have collaborated to prepare the document on *Managing Disaster Risk: Adaptation of Coastal Tourism Destinations to Climate Change*.

□ CTO/CDERA and CRSTDP are collaborating to develop a manual of good practices for natural hazard risk management in the Caribbean tourism sector.

■ Prepare a national strategy for disaster risk management in the tourism sector, which will be informed by the regional disaster risk management strategy and plan of action currently under development (see above). It would provide the overarching framework for addressing disaster risk management in the tourism sector.

■ Make tourism enterprises aware of their responsibility to plan for multi-hazards and make this mandatory for the tourism sector. This can be incorporated into the planning regulations, for instance the siting of the development and the use of building codes to control construction build quality. It can also be incorporated in the license to operate by stipulating that emergency contingency plans, business contingency plans and associated coordinators must be in place.

■ Tourism enterprises should be encouraged to make use of available risk transfer mechanisms in order to strengthen their resilience to disaster events, for example through market insurance or budget self-insurance.

■ Institutional support for disaster risk reduction, through the establishment of national committees for Multi-hazard Risk Management in the tourism sector.

### **Example of approach taken – Barbados:**

The Ministry of Tourism has developed a comprehensive disaster management strategy for the tourism sector in collaboration with the Department of Emergency Management (formerly the Central Emergency Relief Organisation), and the Caribbean Disaster Emergency Response Agency (CDERA). The ministry has established a Tourism Emergency Management Committee (TEMC) and a Tourism Emergency Operations Centre (TEOC). The TEMC plans and co-ordinates the tourism sector's response during emergencies, while the latter mirrors the operations of the National Emergency Operations and will be a command centre from which persons will jointly co-ordinate the management of disasters in the tourism context<sup>73</sup>.

■ Ensure that national tourism policy addresses aspects of Multi-hazard Risk Management, and that national Ministries of Tourism are lead advocates for the integration of tourism into national disaster programmes and plans.

## 9 Concluding Remarks

The manner tourism develops over the next 25 years will have major repercussions for the sustainable development of the Caribbean. On the one hand tourism is critically important for the Caribbean economy, on the other hand there is no question that the development of the tourism plant across the region has brought with it a range of specific negative environmental impacts. Clearing of the mangrove forest, and exacerbated run-off from the land, which contribute (in varying degrees) to the accumulated man-made impacts on regional ecosystems, may in turn tip the balance to irrevocable damage. Tourism is also associated with socio-cultural impacts, such as sex tourism and the dilution of culture, the effects of which may be seen over coming generations.

It is therefore vital that tourism is developed in a responsible manner, and that the principles of sustainable development embodied in this Policy Framework are allowed to permeate the thinking of all forms of tourism development. Of priority is the inclusion of Caribbean citizens in the development of tourism, in accordance with the principles of good governance advocated in this Policy Framework. This needs to be achieved throughout the tourism development process – both at the policy level through consultation processes, as well as at the industry level through ownership and employment – from senior management to line staff, with ample opportunities for career development.

This Policy Framework provides recommendations in six thematic areas that are vital for the development of a more sustainable tourism sector. The intention is to assist governments in the development of new policy and in the revision of existing policy. This Policy Framework has been informed by four technical assistance projects, each of three months duration, which were implemented during the lifecycle of the overall Sustainable Tourism Policy Development project<sup>74</sup>. These projects were implemented by both regional and international consultants and involved a wide range of stakeholders in the region, including universities, specialist organisations, and private sector and community representative organisations. At the same time the Policy Framework itself has been broadly disseminated across the region to CTO members and to other public and private sector interests, who came together at two sub-regional workshops in 2007 and 2008 to provide feedback and guidance on the draft Policy Framework. Both of these processes have been immensely beneficial to the final result.

There is little doubt that this form of broad stakeholder interaction, involving discussions of research, networking and benchmarking and widespread dissemination are vital for the tourism development process, but it also reinforces the regional interaction aspects that are essential for this regional product.

The term “sustainable development” has been widely circulated for the past 20 years, since the release of the Brundtland Report in 1987, and has emerged into a cornerstone principle of all development. This Policy Framework thus provides a framework to cover all aspects of tourism – from transport to accommodation, and from governance to multi-hazard risk management – and considers what can be done to make them more sustainable.

Following on from the Rio Earth Summit in 1992 and its ten-year anniversary in 2002, global governments and their partners, including the Caribbean, have committed themselves to a process of sustainable development which is often difficult to track. The next major milestone in this process will be the twentieth anniversary of the first Rio Earth Summit in 2012. By working in a systematic manner with those thematic areas of the Policy Framework for a More Sustainable Tourism Development that are significant for them, Ministries of Tourism, National Tourist Boards, private sector associations and their national and regional stakeholders can demonstrate their commitment to sustainable tourism development.

## Annex 1. Review of the Demand and Supply Aspects of Caribbean Tourism

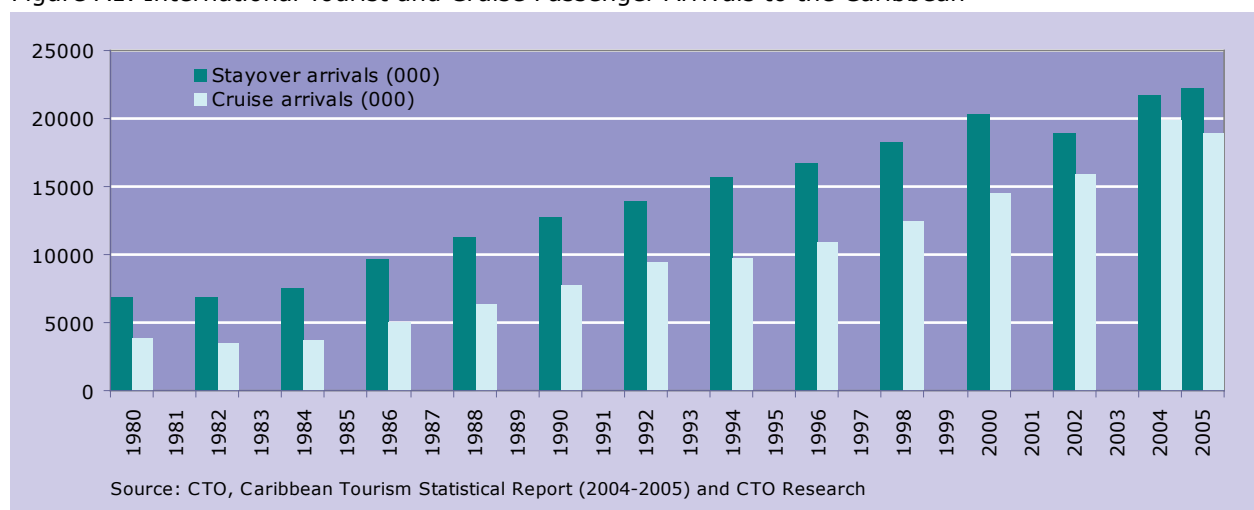
### Introduction

Prior to the development of the first draft of the Policy Framework, an analysis of the Caribbean tourism sector was instigated in order to gauge its performance over time and identify specific trends<sup>75</sup>. The analysis is intended to supplement the recommendations of the Inter-sectoral Policy Planning Workshops, with regard to verifying the critical areas for the sustainability of Caribbean tourism. To that end the analysis looks at the trends in demand (arrivals, seasonality and market) and supply (accommodation stock, employment levels etc.).

### Demand Trends

The Caribbean tourism sector has enjoyed an incremental, cross-sector growth in demand over the last 25 years, with major gains being made especially during the 1980s and 1990s. The growth rate in international arrivals to the Caribbean closely resembles the global rate. During the period from 1970-2004, the Caribbean recorded an average annual growth rate of 4.9 percent, whilst the global rate was 4.5 percent. The region is now displaying signs of a more gradual growth in the first decade of the new millennium.

Figure A1. International Tourist and Cruise Passenger Arrivals to the Caribbean<sup>76</sup>



There were approximately 22 million stay-over arrivals and 19 million cruise passenger arrivals in 2005. Cruise passenger arrivals have steadily increased since 1980, increasing from 36 percent of total arrivals to 48 percent of total arrivals in 2004, indicating the growing importance of the cruise sector to the Caribbean. However, there are signs that regional cruise passenger arrivals have peaked with a slight decline in numbers in 2005. It should be borne in mind that the cruise passenger statistic is rather inflated, because a cruise passenger is registered at each destination visited in the Caribbean, so the absolute number of cruise passengers in 2005 is less than the arrivals stated.

With regard to tourist arrivals, the table below replicates and updates a similar table presented in the 2002 *Caribbean Tourism Strategic Plan* for 1995 – 2000.

Table A1. Sub-regional Performance: 2000-2005 <sup>77</sup>

Destination <sup>78</sup>	Tourist arrivals (000s)				% Share			
	2000	2002	2005	Annual Growth (%) 2002-05	2000	2002	2005	Change 2002-05
Commonwealth Caribbean	6,134.6	5,868.5	6,379.4	2.2	30.2	30.9	28.7	-1.5
Dutch West Indies	1,414.1	1,314.0	1,506.8	3.7	7.0	6.9	6.8	-0.1
French West Indies	1,333.3	1,212.4	1,327.4	2.4	6.6	6.4	6.0	-0.4
US Territories	4,012.0	3,754.1	4,305.9	3.7	19.7	19.8	19.4	-0.4
Other Countries	7,429.2	6,848.7	8,692.8	6.7	36.6	36.1	39.1	+3.1
Total Caribbean	20,323.2	18,997.8	22,212.3	4.2	100.0	100.0	100.0	-
OECS	1,186.2	1,162.5	1,324.0	3.5	5.8	6.1	6.0	-0.2
CARICOM	5,221.9	5,000.6	5,647.6	3.2	25.7	26.3	25.4	-0.9
Hispanic Caribbean	10,573.3	9,884.3	12,152.1	5.7	52.0	52.0	54.7	+2.7

The impact of the 2001 terrorist attacks the USA on willingness to travel is clearly reflected in the difference between 2000 and 2002 tourist arrivals, with all sub-regions affected. During the period 2002-2005, the Caribbean region made major strides in regaining market share, with tourist arrivals exceeding pre-9/11 levels. The Hispanic Caribbean countries, comprising the destinations of Cuba, the Dominican Republic, the Mexican Caribbean (Cancun and Cozumel) and Puerto Rico, continue to maintain dominance in the region, with regional market share increasing from 52 percent in 2000 to 55 percent in 2005.

While the Hispanic Caribbean increased its share of total stay-over tourist arrivals in the Caribbean, all other sub-regions suffered a decrease in their share of the regional market. Over the period 2002 – 2005, the Commonwealth Caribbean's share declined from 30.9 percent to 28.7 percent; CARICOM's share from 26.3 percent to 25.4 percent; the French Caribbean's share from 6.4 percent to 6.0 percent; the Dutch Caribbean's share from 6.9 percent to 6.8 percent; and the US Territories' share from 19.8 percent to 19.4 percent. Total tourist visitation to the Hispanic Caribbean grew at an average rate of 5.7 percent per annum between 2002 and 2005, compared with 4.2 percent for the region as a whole. Thus, without the benefit of the rapid rates of growth in tourist arrivals in the Hispanic Caribbean, the region's overall performance over the period 2002 – 2005 would have been well below that of the world average.

Table A2. Main Caribbean Destinations per Market, 2004 <sup>79</sup>

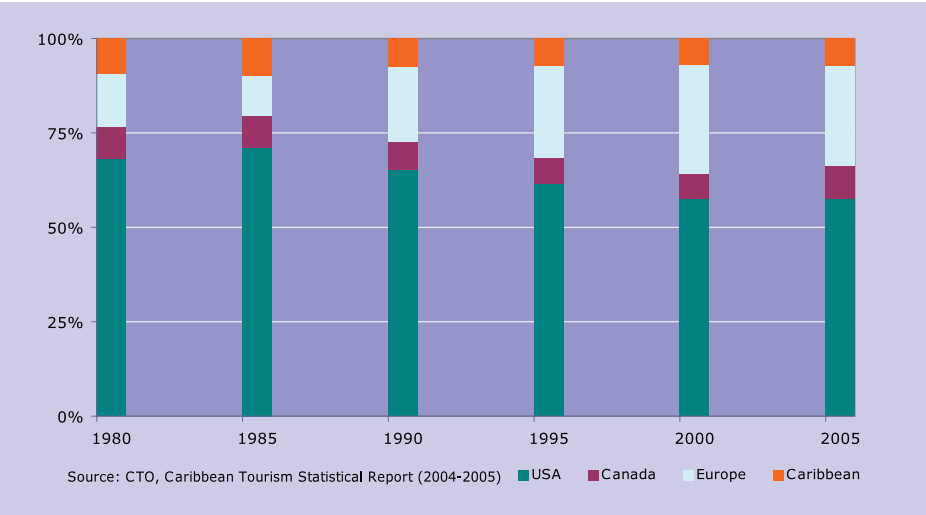
Market	#1	#2	#3	#4	#5
USA	Puerto Rico (27%)	Cancun, Mexico (15%)	The Bahamas (12%)	Jamaica (9%)	Dominican Republic (8%)
Canada	Cuba (32%)	Dominican Republic (26%)	Cancun, Mexico (10%)	Jamaica (9%)	The Bahamas (4%)
Europe	Dominican Republic (26%)	Cuba (19%)	Martinique (8%)	Cancun, Mexico (6%)	Barbados (5%) Jamaica (5%)
Caribbean	Cuba (10%) Puerto Rico (10%)		Trinidad and Tobago (9%)	Barbados (7%)	St. Lucia (5%) Martinique (5%)

Table A2 presents a breakdown of the main Caribbean destinations per market.

As illustrated in Figure A2, the USA is the biggest single country of origin for tourist arrivals in the Caribbean, with 64 percent of US arrivals to the region originating from the East Coast of the US. The percentage volume of tourist arrivals from the US has declined gradually over the last two decades, being replaced largely by tourist arrivals from Europe. The Canadian and Caribbean market shares have remained relatively stable since 1980.

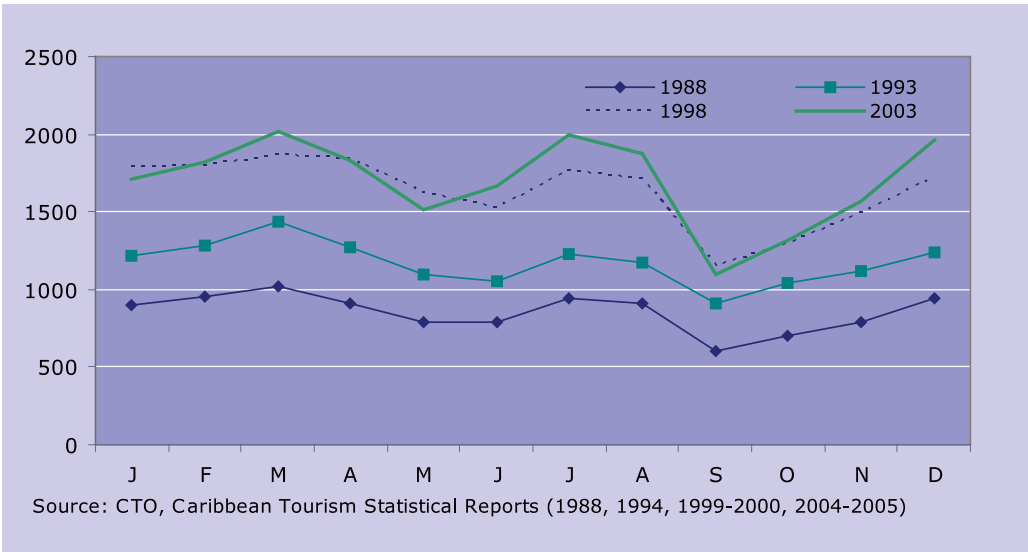
The second largest source market for the Caribbean is Canada, with the majority of tourists originating from the Great Lakes region. France and the UK are the largest countries of origin for tourist arrivals from Europe, and comprise just over 50 percent of the European market, followed by Germany (9 percent), Italy (8 percent), Spain (8 percent) and The Netherlands (7 percent).

Figure A2. Breakdown of Tourist Arrivals in the Caribbean by Main Market<sup>80</sup>



The Caribbean tourist season peaks in December, March, and July/August. This corresponds well with the seasonal holidays in the main tourism markets. Hosting international cultural events in the off-season has been a successful strategy to reduce the impact of the off-season.

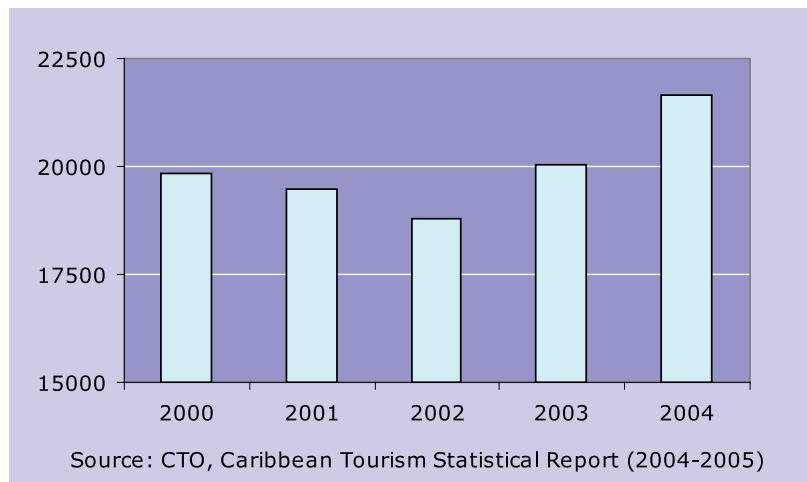
Figure A3. Seasonality of Tourist Arrivals to the Caribbean<sup>81</sup>



The average length of stay of visitors varies significantly from country to country, reflecting the different demand and supply factors in the Caribbean. At the one end of the scale, the average length of stay for visitors to Puerto Rico in 2004 was 2.5 days, whereas the average length of stay for visitors to Montserrat in 2004 was 15.9 days<sup>82</sup>. The average length of stay for visitors to the region in 2004 was 9 days.

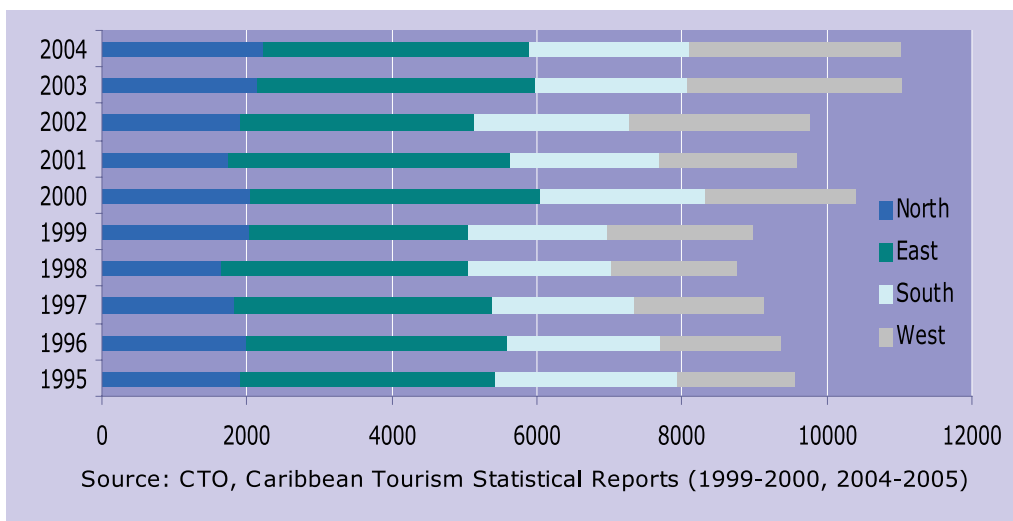
In 2003, stay-over visitor expenditure in the Caribbean broke through the US\$20,000 million ceiling for the first time. Estimates of the average expenditure by stay-over and day visitors in comparison to cruise passengers have shown that stay-over visitors spend as much as 20 times more per head than cruise passengers<sup>83</sup>. Therefore, even though cruise passengers may be dominant in some Caribbean islands, their total contribution to the national economy will be much smaller than that from stay-over tourists.

Figure A4. Estimated Stay-over Visitor Expenditure 2000 – 2004 (US\$ millions)<sup>84</sup>



The number of cruise ship calls to the Caribbean has gradually increased over the last ten years. There has been a development in the distribution of the cruise calls, with the grouping of Belize, Cayman Islands, Cozumel, and Jamaica (West Caribbean) having doubled its 1995 quota of cruise ships calls by 2004, and the North Caribbean (The Bahamas and Bermuda) has also seen solid growth.

Figure A5. Distribution of Cruise Ship Calls in the Caribbean<sup>85</sup>



The growth spurt after 2001, which started gradually in 2002 and then saw dramatic performance levels in 2003 and 2004 reaching 11,000 cruise ship calls in 2004, can be attributed to a number of factors. In the face of a drop in national stay-over visitor arrivals, some governments have actively encouraged cruise ship calls, by relaxing restrictions such as cruise passenger taxes and by providing improved cruise ship related infrastructure. Another reason may be the strategy taken by some cruise lines to concentrate their itineraries in safer waters in the aftermath of the 9/11 terrorist attacks in 2001.

The Caribbean Sea, with its many islands has been a haven for another form of marine based tourism for many years. Not all countries record and report yacht arrivals and/or yacht visitors and there is also a lack of data on yacht visitor expenditure. However, there is little doubt that the yachting sector makes an important contribution to the economies of several countries in the region. Specifically, the main charter boat destinations are the Virgin Islands (comprising the British Virgin Islands, the United States Virgin Islands and the Puerto Rican outer islands) and the Grenadines (Grenada, and St. Vincent and the Grenadines) reflecting the popularity of these areas for cruising. The lack of data complicates identification of clear trends, though it would seem that the sector was in a period of stagnation at the entry into the decade.

Table A3. Comparative Yacht Arrivals, 1999 – 2002<sup>86</sup>

Year	Yacht arrivals				Yacht visitors 000s	
	Antigua	Grenada	St. Lucia	Trinidad	Martinique	St.Vincent
1999	3,352	na	na	2,970	43	89.6
2000	3,202	na	na	3,249	44.8	75.8
2001	3,063	5,607	6,643	2,735	45.8	91.9
2002 year to	2,113 (Sept.)	2,397 (Sept.)	7,883 (Oct.)	1,865 (Sept.)	na	na

Other forms of transport such as trans-national road networks and railway systems may play a role in facilitating international tourist arrivals in the mainland country members of CTO. Belize is for example connected to Mexico and the USA by a spur of the Inter-American Highway.

## Supply Trends

A range of domestic, intra-regional and international airlines operate in the Caribbean. Four countries within CARIFORUM have a domiciled public sector owned airline, providing international service but with a heavy emphasis on connections with the US. Each of the four airlines provides limited intra-regional service. Antigua and Barbuda is also the domicile of regional airline(s) that primarily serve the Eastern Caribbean. An analysis of the 17 non-CARIFORUM members of CTO indicated that three have domiciled airlines providing international service and limited intra-regional service, two of which are public sector owned<sup>87</sup>.

As indicated in Table A4, the Caribbean dominates the world cruise ship sector, with almost 50 percent of the total worldwide cruise berth allocation. This translated into a total of 11,000 cruise ship calls to the Caribbean in 2004.

Table A4. Cruise Berth Allocation 2004<sup>88</sup>

Cruising region	Bed days	Percent share
Caribbean*	36,192,000	46.8
Trans Canal	2,930,528	3.8
Mexico West	4,827,262	6.2
South America	1,088,569	1.4
Alaska	5,913,967	7.7
Mediterranean	9,704,398	12.6
Europe	7,560,171	9.8
Far East	403,538	0.5
Other Regions	8,678,033	11.2

There are two main forms of yacht tourism in the Caribbean: charter boats and bare boats. A charter boat is a yacht typically with a crew of two that is rented for a fixed period of time whereby the crew is responsible for all aspects of the sailing experience. A bareboat yacht is a yacht rented without a paid crew for a fixed period of time.

Table A5. Estimated Charter Fleet in the Caribbean<sup>89</sup>

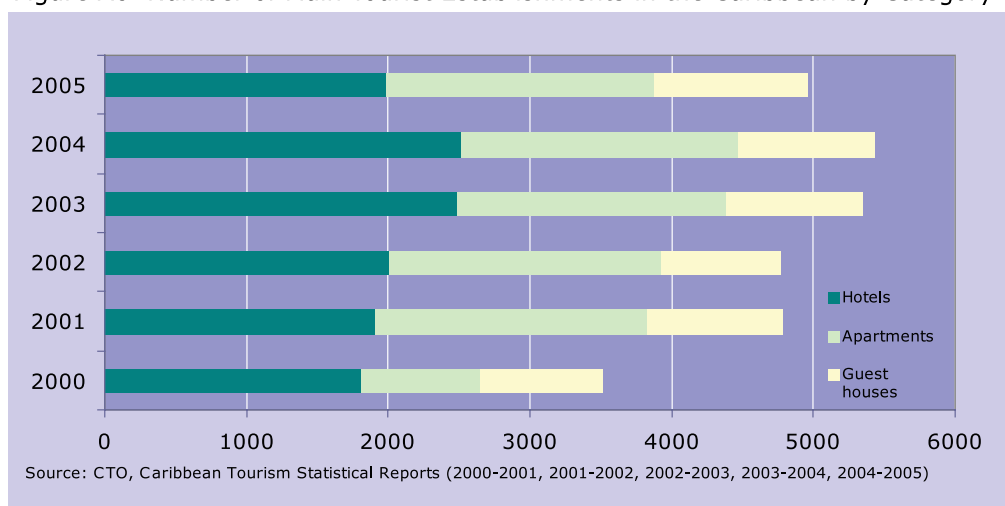
Country	Estimated Number of Charter Boats
Antigua and Barbuda	7
British Virgin Islands	1000+
Dominica	0
Grenada	44
Guadeloupe	Na
Martinique	750+
St. Lucia	42
St. Maarten	148
St. Vincent and the Grenadines	85
Trinidad and Tobago	0

The charter fleet is concentrated in the most popular cruising areas. Other islands like Trinidad are also able to benefit from yachting although they are not popular cruise destinations, because they function as service centres or hurricane shelters.

The accommodation capacity in Caribbean CTO member countries has expanded considerably over the past 25 years. Total room stock increased by 25 percent in the years between 1994 and 2000<sup>90</sup>. The number of main tourist establishments showed significant growth during the period 2000 – 2005, increasing from 3500 establishments to 5000, as illustrated in Figure A6. The main category of growth has been in the apartment sector. There has though been a reduction in the number of hotel establishments in the Caribbean after reaching a peak in 2004; this could be explained by conversions to condominiums etc. or bankruptcy.

Approximately half of all rooms are now concentrated in the emerging destinations of Cuba, the Dominican Republic and the Mexican Caribbean, where there has been spectacular growth over the past decade. Significant growth in tourist accommodation has also taken place in Aruba, The Bahamas, the French West Indies, Jamaica and Puerto Rico, and in the villa sector of Barbados. However, elsewhere in the region, particularly in the East Caribbean, there has been little or no new investment in the accommodation sector<sup>91</sup>.

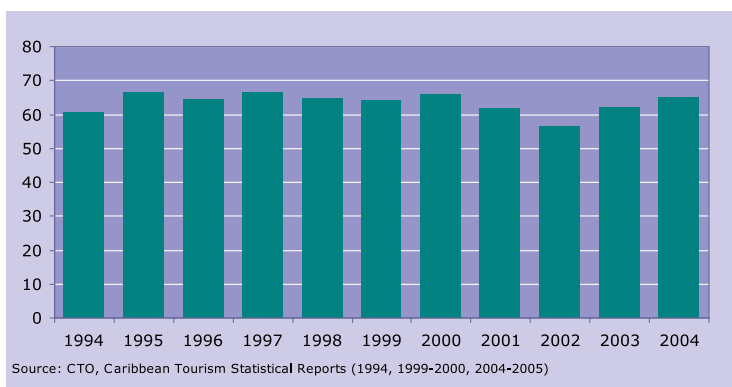
Figure A6. Number of Main Tourist Establishments in the Caribbean by Category<sup>92</sup>



The predominance of rooms in the Hispanic Caribbean reflects the fact that this sub-region has been attracting the highest tourism-related investments. With a capital investment of US\$1.3 billion, Puerto Rico was the highest ranked country in the Caribbean, followed by Cuba at US\$878 million, Dominican Republic at US\$794 million and The Bahamas at US\$753 million. In relative terms, looking at travel and tourism as a percentage of total capital investment, Aruba lead the table with 76.2 percent, followed by Antigua and Barbuda (73.6 percent), The Bahamas (66.5 percent) and Barbados (65.1 percent)<sup>93</sup>.

Generally, the increase in tourist establishments has not caused a negative effect on room occupancy rates, which have remained relatively stable (averaging 63.5 percent), during the period 1994 – 2004. The average daily room rate in 2003 was US\$136.20, 3 percent off the 2000 peak<sup>94</sup>.

Figure A7. Trends in Room Occupancy Rates in the Caribbean<sup>95</sup>



Governments in CTO member countries have introduced a hotel room tax that constitutes an additional source of income and the amount levied in the tax varies from country to country. In 2000, the tax charged varied from 5 percent (St. Martin) to 15 percent (Jamaica)<sup>96</sup> generating a revenue of some US\$80 million in 2000, compared to US\$70 million in 1995<sup>97</sup>.

The Caribbean tourism sector is characterised by a relatively small number of large companies and a majority of either micro-sized or small and medium sized enterprises. One of the main benefits of tourism is that it has a relatively intensive use of low skilled labour, making it ideal in the development context. Accommodation establishments are a major source of employment in the Caribbean, though the sector is currently showing signs of an efficiency improvement process, with the ratio of employees per room falling from 1.22 in 1999 to 1.01 in 2003. In 2004, CTO estimated that the sector, directly or indirectly, employed some 1.3 million persons<sup>98</sup>.

Figure A8. Employment in Accommodation Establishments in the Caribbean<sup>99</sup>



## Conclusion

Stakeholders of the regional tourism industry have indicated that the Caribbean tourism sector, due to a range of external and internal factors, is now at a crossroads. In a globalised economy, the performance of the sector will be heavily influenced by the economic prospects facing its key source markets, as well as the rising prices of vital resources in the tourism value chain, in particular for oil and food commodities. These pressures are further exacerbated by increasing competition from emerging destinations offering similar products and the fact that quality issues associated with its resource base are not being adequately addressed throughout the sector.

The critical thematic areas identified during the extensive stakeholder consultations intrinsic to the Policy Framework process are: Tourism Management Capacity, Marketing, Transportation, Environment, Linkages and Health, Safety and Security. These form the basis of the Policy Framework, which industry stakeholders are urged to act on for the sustainability of tourism in the region.

Finally, it is worth noting that no single entity has ownership of the tourism sector value chain at the national level, although there are trends toward horizontal integration of the tourism value chain with large multinational companies. These companies move into sectors that are upstream and downstream of their operations to increase revenue and gain better control. The tourism experience is therefore the virtual result of a series of economic activities and requires the effective cooperation of a variety of specialised groups and areas of responsibility, in order to make the improvements necessary for competitive advantage.

## Annex 2. Glossary

ACCC	Adaptation to Climate Change in the Caribbean
ACP	Africa, Caribbean and Pacific States
ACS	Association of Caribbean States
ACSAC	Association of Commonwealth Societies of Architects in the Caribbean
APV	L'Association des Paysans de Vallée
ASA	Air Service Agreement
BCBP	Bar Code Boarding Pass
CAA	Commonwealth Association of Architects
CAREC	Caribbean Epidemiology Centre
CANARI	Caribbean Natural Resources Institute
CARICOM	Caribbean Community and Common Market
CARIFORUM	Caribbean Forum of ACP States
CAST	Caribbean Alliance for Sustainable Tourism
CBT	Community - based tourism
CCA	Caribbean Conservation Association
CCCCC	Caribbean Community Climate Change Centre
CCLEC	Caribbean Customs Law Enforcement Council
CDB	Caribbean Development Bank
CDERA	Caribbean Disaster Emergency Response Agency
CEHI	Caribbean Environmental Health Institute
CER	Certified Emission Reductions
CFTC	Commonwealth Fund for Technical Co-operation
CGM	Consumer Generated Media
CHA	Caribbean Hotel Association
CPACC	Caribbean Planning for Adaptation to Climate Change
CREDP	Caribbean Renewable Energy Development Programme
CREF	Caribbean Renewable Energy Fund
CRETAF	Caribbean Renewable Energy Technical Assistance Facility
CRM	Customer Relations Management
CROSQ	CARICOM Regional Organization for Standards and Quality
CRSTDP	Caribbean Regional Sustainable Tourism Development Programme
CSHAE	Caribbean Society of Hotel Association Executives
CSME	Caribbean Single Market and Economy
CSR	Corporate Social Responsibility
CTDC	Caribbean Tourism Development Company
CTO	Caribbean Tourism Organization
CTPU	CARIFORUM Tourism Programme Unit
CUSS	Common Use Self-Service Solutions
CWWA	Caribbean Water and Wastewater Association
DCA	Development Credit Authority
EC	European Commission
ECCAA	Eastern Caribbean Civil Aviation Authority
ECDPM	European Centre for Development Policy and Management
EDF	European Development Fund
EHS	Environmental Health and Safety
EPA	Economic Partnership Agreement
EU	European Union
FAA	Federal Aviation Authority
FBD	Food-Borne Disease
FDI	Foreign Direct Investment
FEED	Foundation for Environmental Education in Europe
FP7	Seventh Research Framework Programme
GATS	General Agreement on Trades and Services
GDP	Gross Domestic Product
GEF	Global Environment Facility
GHG	Greenhouse gas

## Annex 2. Glossary

GoTT	Government of Trinidad and Tobago
HRD	Human Resource Development
HSS	Health, Safety and Security
IASA	International Aviation Safety Assessments Program
IATA	International Air Transport Association
ICAO	International Civil Aviation Organisation
ICT	Information and Communication Technology
ICZM	Integrated Coastal Zone Management
IDB	Inter- American Development Bank
IFC	International Finance Corporation
IMPACS	Implementation Agency for Crime and Security
IPCC	Inter-governmental Panel on Climate Change
ISO	International Organization for Standardization
IWCAM	Integrating Watershed and Coastal Area Management in Small Island Developing States of the Caribbean (IWCAM)
JTI	Jamaica Trade and Investment
LEED	Leadership in Energy and Environmental Design
MACC	Mainstreaming Adaptation to Climate Change
MASA	Multilateral Air Services Agreement
MATA	Multi-lateral Air Transport Agreement
MICE	Meetings, Incentives, Conferences and Exhibitions
MIST	Management Information System for Tourism
MPA	Marine Protected Area
NPP	National Physical Plans
NTO	National Tourism Organisation
OAS	Organization of American States
OECD	Organisation for Economic Co-operation and Development
OECS	Organisation of Eastern Caribbean States
PANCAP	Pan-Caribbean Partnership Against HIV/AIDS
PUCMM	Pontificia Universidad Católica Madre y Maestra
QTC	Quality Tourism for the Caribbean
RADA	Rural Agricultural Development Authority, Jamaica
RASOS	Regional Aviation Safety Oversight System
RFID	Radio Frequency Identification Detector (RFID)
RSS	The Regional Security System
SARS	Severe Acute Respiratory Syndrome
SGD	St George's Declaration (OECS, 2001)
SIDS	Small Island Developing States
SMEs	Small and Medium-sized Enterprises
ST-EP	Sustainable Tourism – Eliminating Poverty
STD	Sexually Transmitted Disease
ST-EP	Small Tourism Enterprise Program
STZC	Sustainable Tourism Zone of the Caribbean
TIES	Tourism Internship Exchange System
TLA	Tourism Learning Area
TOI	Tour Operators' Initiative
TPDCo	Tourism Product Development Company, Jamaica
TSA	Tourism Satellite Account
UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme
UNESCO	United Nations, Educational, Scientific and Cultural Organization
UNMDG	United Nations Millennium Development Goals
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
USDA	United States Department of Agriculture
US\$	United States Dollar
VER	Voluntary Emission Reductions
WTO	World Trade Organization
WTTC	World Travel and Tourism Council

## Annex 3. Definitions

CTO member countries	Anguilla, Antigua and Barbuda, Aruba, The Bahamas, Barbados, Belize, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Cuba, Curaçao, Dominica, Dominican Republic, Grenada, Guadeloupe, Guyana, Haiti, Jamaica, Martinique, Montserrat, Puerto Rico, St. Eustatius, St. Kitts and Nevis, St. Lucia, St. Maarten/St. Martin, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, Turks and Caicos Islands, US Virgin Islands, and Venezuela.
Caribbean statistical region	The UNWTO classification of the Caribbean region, used for statistical purposes, is: Anguilla, Antigua and Barbuda, Aruba, The Bahamas, Barbados, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Cuba, Curaçao, Dominica, Dominican Republic, Grenada, Guadeloupe, Haiti, Jamaica, Martinique, Montserrat, Puerto Rico, Saba, St. Eustatius, St. Kitts and Nevis, St. Lucia, St. Maarten/St. Martin, St. Vincent and the Grenadines, Trinidad and Tobago, Turks and Caicos Islands, and US Virgin Islands
CAREC member states	Anguilla, Antigua & Barbuda, Aruba, Bahamas, Barbados, Belize, Bermuda, British Virgin Islands, Cayman Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, Netherlands, Antilles, St. Kitts & Nevis, St. Lucia, St. Vincent & the Grenadines, Suriname, Turks & Caicos Islands
CARICOM member states	Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago
CARICOM associate member states	Anguilla, Bermuda, British Virgin Islands, Cayman Islands, Turks and Caicos Islands
CARIFORUM member states	Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago
CCLEC member listing	Anguilla, Antigua and Barbuda, Aruba, The Bahamas, Barbados, Belize, Bermuda, British Virgin Islands, Canada, Cayman Islands, Colombia, Costa Rica, Cuba, Dominica, Dominican Republic, France, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Montserrat, Netherlands, Netherlands Antilles, Nicaragua, Panama, Spain, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, Turks and Caicos Islands, UK, USA, and Venezuela
CDERA definition of disaster	An unforeseen and often sudden event that causes great damage, destruction and human suffering which exceeds the ability of the affected society to cope using its own resources. Though often caused by nature, disasters can have human origins. Wars and civil disturbances that destroy homelands and displace people are included among the causes of disasters. Other causes can be: building collapse, blizzard, drought, epidemic, earthquake, explosion, fire, flood, hazardous material or transportation incident (such as chemical spill), hurricane, nuclear incident, tornado or volcano.
CEHI member states	Anguilla, Antigua and Barbuda, The Bahamas, Barbados, Belize, British Virgin Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Trinidad and Tobago, and Turks and Caicos Islands.
Commonwealth Caribbean	Anguilla, Antigua and Barbuda, The Bahamas, Barbados, Belize, British Virgin Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Trinidad and Tobago, and Turks and Caicos Islands.
Dutch West Indies	Aruba, Bonaire, Curacao, Saba, St. Eustatius, St. Maarten
French West Indies	Guadeloupe, Martinique
Hispanic Caribbean	Cancun, Cozumel, Cuba, Dominican Republic, Puerto Rico
OECS member states	Antigua and Barbuda, Dominica, Grenada, Montserrat, St. Kitts and Nevis, St. Lucia and St. Vincent and the Grenadines. Associated countries: Anguilla and British Virgin Islands
Other Countries	Cancun, Cozumel, Cuba, Dominican Republic, Haïti and Suriname
PANCAP Member Countries	Anguilla, Antigua and Barbuda, The Bahamas, Barbados, Belize, Bermuda, British Virgin Islands, Cayman Islands, Cuba, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, Montserrat, Netherlands Antilles, Puerto Rico, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, Turks and Caicos Islands, US Virgin Islands.
Regional Security System (RSS) Member States	Antigua, Barbados, Dominica, Grenada, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines.
US Territories	Puerto Rico, US Virgin Islands

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<a href="http://www.unep.org">www.unep.org</a>	United Nations Environment Programme (UNEP)	12-02-2007
<a href="http://www.unfccc.int">www.unfccc.int</a>	United Nations Framework Convention on Climate Change (UNFCCC)	11-02-2007
<a href="http://www.usgbc.org">www.usgbc.org</a>	United States Green Building Council (USGBC)	04-02-2008
<a href="http://www.vallue.org">www.vallue.org</a>	L'Association des Paysans de Vallue (APV)	17-05-2007
<a href="http://en.wikipedia.org">http://en.wikipedia.org</a>	Wikipedia	15-05-2007
<a href="http://www.worldbank.org">www.worldbank.org</a>	World Bank Group	22-11-2006
<a href="http://www.worldbank.org/lac">www.worldbank.org/lac</a>	World Bank Group Latin America and Caribbean site	09-05-2007
<a href="http://www.world-airport-codes.com">www.world-airport-codes</a>	World Airport Codes	04-02-2007
<a href="http://www.world-tourism.org">www.world-tourism.org</a>	UN World Tourism Organization (UNWTO)	26-01-2007
<a href="http://www.wttc.org">www.wttc.org</a>	World Travel and Tourism Council (WTTTC)	05-02-2007

## Annex 6. Relevant Regional and International Stakeholders for Policy Interventions

Policy	International	Regional
Tourism Management Capacity	United Nations World Tourism Organization (UNWTO) World Travel and Tourism Council (WTTC) Organisation for Economic Cooperation and Development (OECD)	Caribbean Tourism Organization (CTO) Caribbean Hotel Association (CHA) Caribbean Alliance for Sustainable Tourism (CAST) Caribbean Tourism Human Resource Council (CTHRC) Association of Caribbean States (ACS) Organisation of Eastern Caribbean States (OECS) University of the West Indies (UWI)
Marketing	International Tourism Trade Fair Association (ITTFA) Destination Marketing Association International (DMAI)	Caribbean Tourism Organization (CTO) Caribbean Hotel Association (CHA) Caribbean Tourism Development Company (CTDC)
Transportation	International Civil Aviation Organisation (ICAO) International Air Transport Association (IATA)	Caribbean Tourism Organization (CTO) Caribbean Community (CARICOM)
Environment	United Nations Environment Programme (UNEP) United Nations Framework Convention of Climate Change (UNFCCC) World Wide Fund for Nature (WWF) World Conservation Union (IUCN) Global Environment Facility (GEF) Rainforest Alliance The International Ecotourism Society (TIES) International Council on Monuments and Sites (ICOMOS)	Organization of the Wider Caribbean on Monuments and Sites (CARIMOS) Caribbean Environmental Health Institute (CEHI) Caribbean Water and Wastewater Association (CWWA) Caribbean Community Climate Change Centre (CCCCC) Caribbean Conservation Association (CCA) Caribbean Natural Resources Institute (CANARI)
Health, safety and security	World Health Organisation (WHO) Pan American Health Organisation (PAHO)	Caribbean Epidemiology Centre (CAREC) CARICOM Council on Human and Social Development (COHSOD) Caribbean Customs Law Enforcement Council (CCLEC) Caribbean Community Implementation Agency for Crime and Security (IMPACS) Regional Security System (RSS) Association of Caribbean Commissioners of Police (ACCP) Caribbean Disaster Emergency Response Agency (CDERA) CARICOM Organization for Standardisation and Quality (CROSQ) Caribbean Commission on Health and Development Caribbean Cooperation in Health Initiative
Linkages	Food and Agricultural Organization of the United Nations (FAO) Pro Poor Tourism Foundation (PPTF)	The Travel Foundation, Tobago Inter-American Institute for Cooperation on Agriculture (IICA)

## Annex 7: Endnotes

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<sup>3</sup> World Tourism Organization (UNWTO), UNWTO News, Issue 3/2006, p.4, Madrid, Spain

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<sup>5</sup> Reference is made to two seminal documents that have guided the development of this Policy Framework: The 1999 CTO document Sustainable Tourism in the Caribbean, Regional Sustainable Tourism Policy Framework, and the 2002 Commonwealth Fund for Technical Cooperation's Caribbean Tourism Strategic Plan Final Report.

<sup>6</sup> CTO member countries are: Anguilla, Antigua and Barbuda, Aruba, The Bahamas, Barbados, Belize, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Cuba, Curaçao, Dominica, Dominican Republic, Grenada, Guadeloupe, Guyana, Haiti, Jamaica, Martinique, Montserrat, Puerto Rico, St. Eustatius, St. Kitts and Nevis, St. Lucia, St. Maarten/St. Martin, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, Turks and Caicos Islands, US Virgin Islands, and Venezuela.

<sup>7</sup> 1<sup>st</sup> Regional Sustainable Tourism Policy Development And Intersectoral Planning Workshop, Barbados, 1-3 December, 2005

<sup>8</sup> 2<sup>nd</sup> Regional Sustainable Tourism Policy Development And Intersectoral Planning Workshop, St. Lucia, 21-23 March, 2006

<sup>9</sup> Sub-Regional Policy Consultation for South and East Caribbean, St. Vincent and the Grenadines, 28-29 November, 2007

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<sup>11</sup> The Caribbean Tourism Organization's definition of sustainable tourism and the World Tourism Organization and UNEP's assessment of sustainable tourism were used in the development of the Guiding Principles and form an intrinsic part of the Policy Framework

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