

The word "CARIBBEAN" is written in a colorful, stylized font. Each letter is a different color: C (pink), A (orange), R (green), I (light blue), B (dark blue), B (purple), E (light blue), A (light blue), N (purple). A blue brushstroke underline is positioned below the letters. A small trademark symbol (TM) is located at the top right of the letter 'N'.

CARIBBEAN™

“Leading Change in Tourism
Within a Dynamic, Global Environment”

Guadeloupe, June 27th 2007



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HOTEL
ASSOCIATION

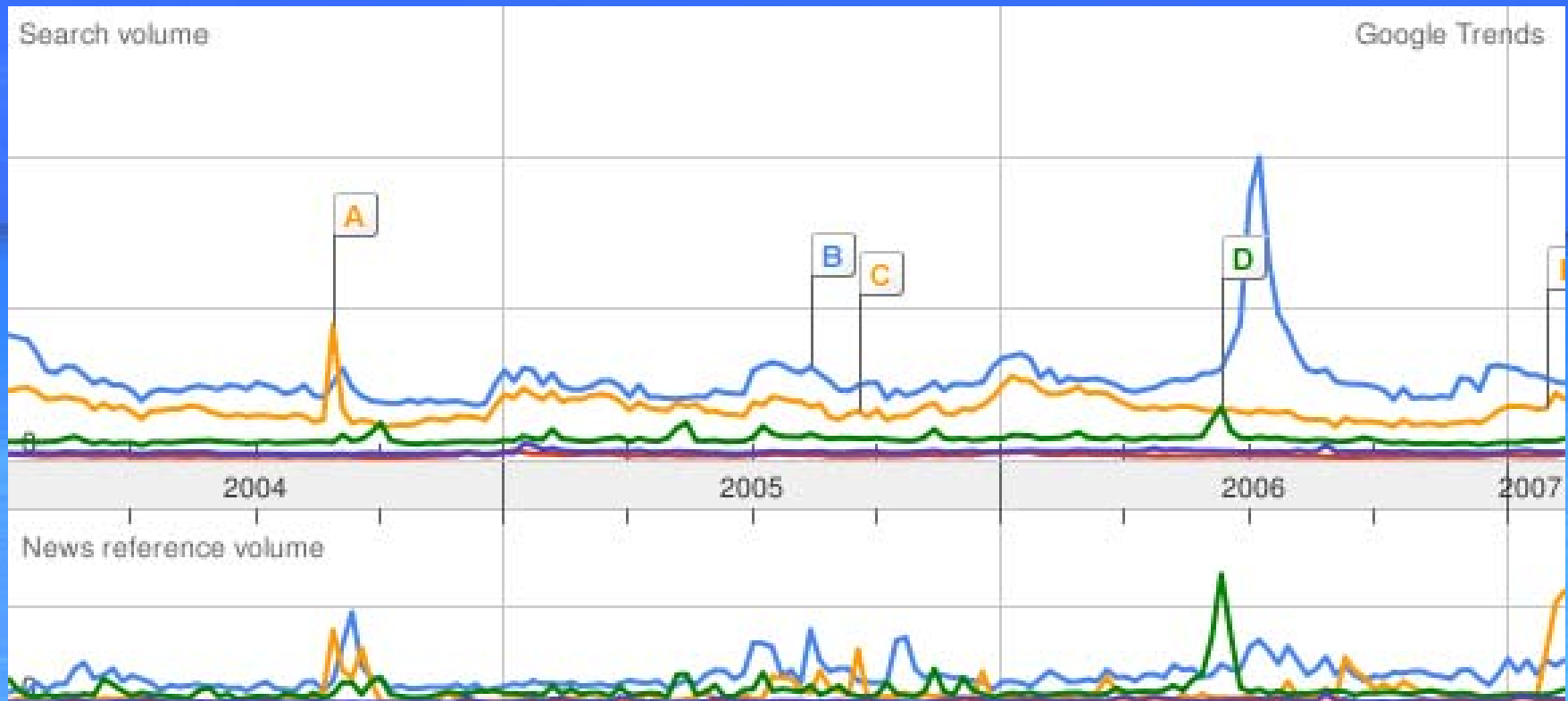
Leading Change In Tourism. . .

- “Caribbean is the world’s best known unowned brand”
- Approval to establish CTO business development unit for development of our Caribbean brand
- Brand cannot be owned by CTO alone must be CTO+CHA
- Signed Memorandum of Cooperation and Coordination: CTO+CHA
- Approval of logo + audio logo by CTO: 32 destinations
- Approval of Caribbean logo + audio logo by CHA: 33 hotel associations
- Approval to form business development company with CHA
- Overcoming the challenges + dispensing with the myths
- Start combining efforts of CTO marketing +CHA marketing to officially form Caribbean Tourism Development Company (CTDC)
- Caribbean Tourism Development Company legally formed + operating



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Google – Global Searches, “Caribbean” Most Searched Word



■ **caribbean** ■ **anguilla** ■ **bahamas** ■ **trinidad** ■ **guyana**



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Cooperation at All Levels

Research



+

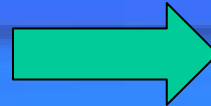


Smith Travel
Research &
Immigration
Card Project

Human Resources



+

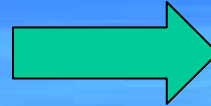


Hospitality
Assured &
Caribbean
Experiences

Marketing



+



One consumer
site, one
membership site

Sustainable
Development



+

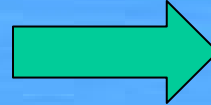


Stern Report &
Taxes on
Travel

Lobbying &
Funding



+



EPA Paper +
International
Funding Agencies



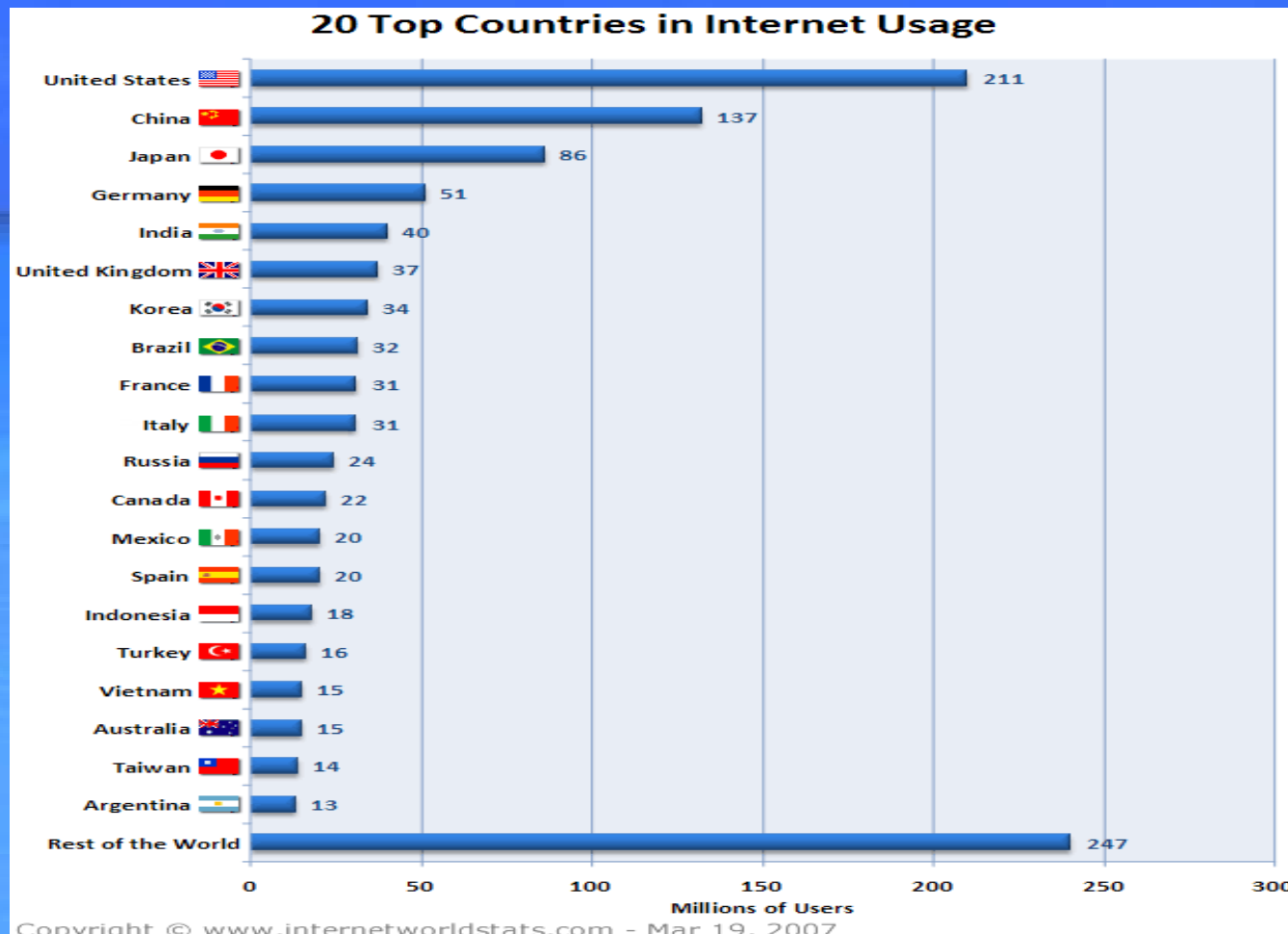
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Cooperation In Developing A Global Brand



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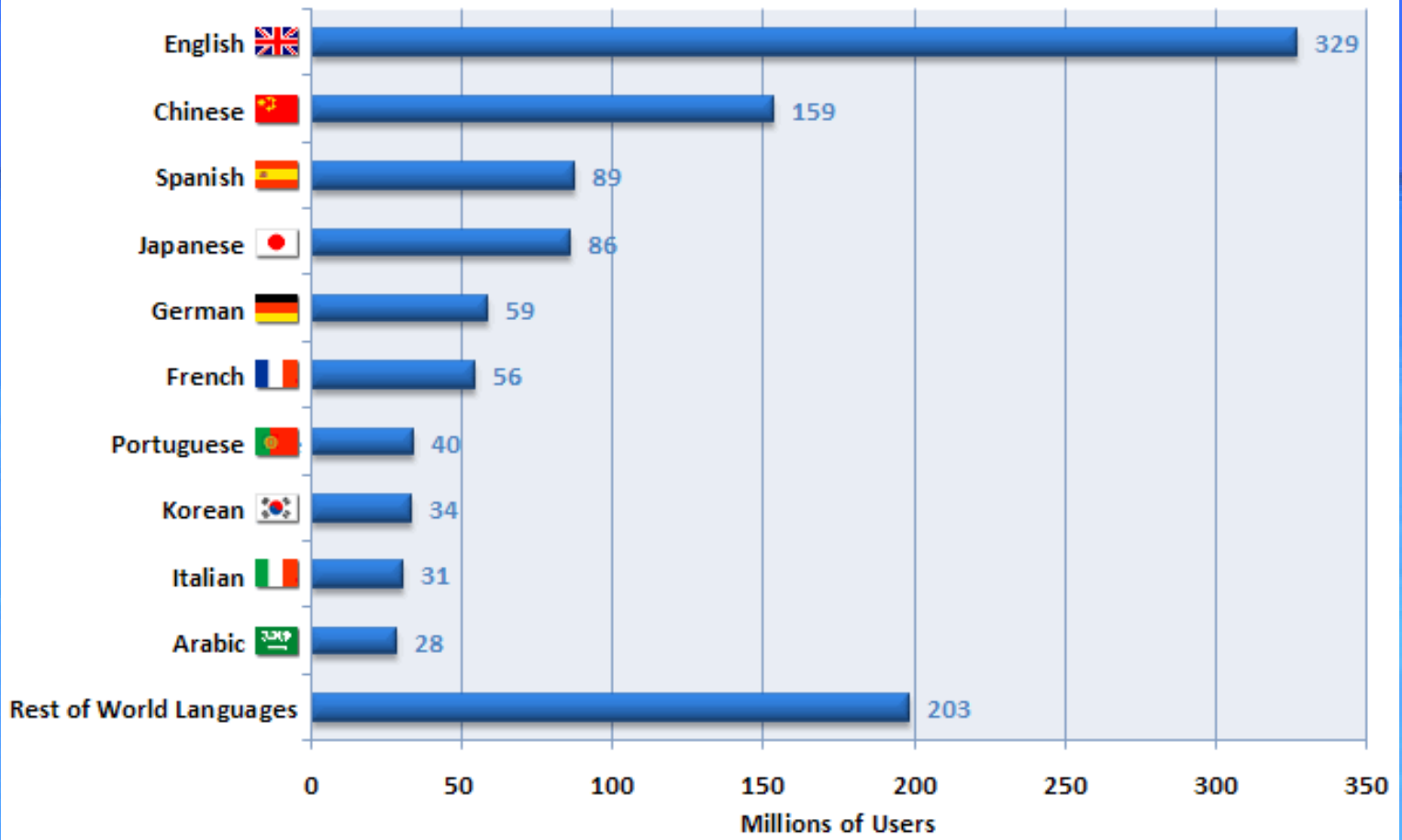
The Global Internet Revolution



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The Global Internet Revolution

Internet Top 10 Languages

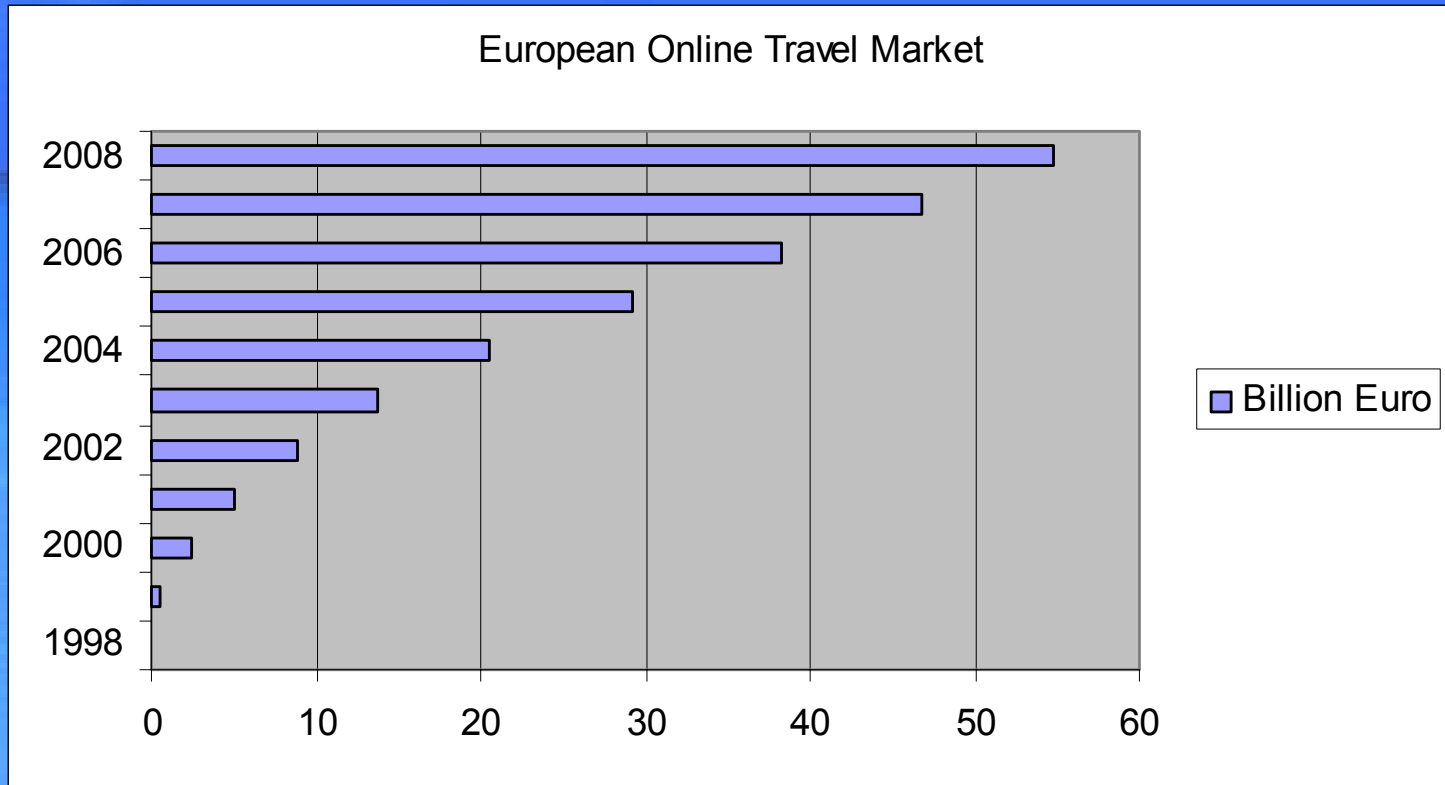


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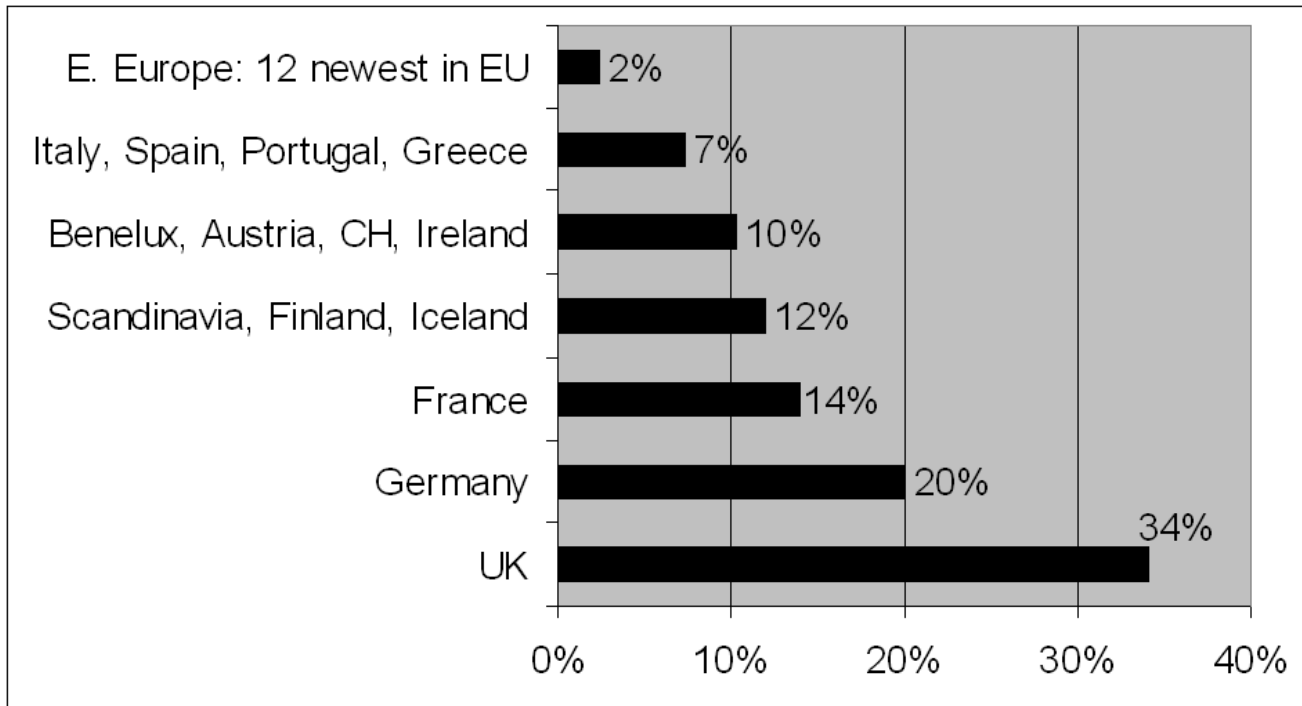
The New Dynamic . . . Buying Online



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The New Dynamic . . .Buy Online

Geographic status for the European online travel market 2006 (EUR 38.3 bn.)



Source: Carl H. Marcussen, Centre for Regional and Tourism Research, www.crt.dk/trends, 22 May 2007.



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The New Dynamic . . . Consumer Generated Media

Which of the following influenced your purchase decision? (Among travelers surveyed)

	Percent
Online Travel Agencies	37.3
Friends and Family	36
Company website	34
Consumer Review/Ratings site	21.2
Advice from consumers online	11.3
Magazines/offline pubs	9.4
Television/advertisements	6.9
Travel Agency	4.9
Company Blog	1.1



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The Global Environment

- Competition fiercer . . .everyone in tourism
- Tourism the most globalized industry on earth
- But Caribbean more dependent on tourism than any other region
- So we must perform better than anyone else



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Globalization: Two Lessons

1. Compete in area of natural comparative advantage
2. Make our strengths stronger
 - Caribbean has a natural global competitive advantage in tourism
 - Tourism chose us we did not choose tourism



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Our Global Strengths

- MasterCard study 2006: Caribbean type vacation the most desirable in the world
- Our diversity central part of our brand. . . .compare China
- Barbados, St Lucia, Dominican Republic . . .Guadeloupe
- Put life back into Caribbean promotion + reinforce diversity
 - Music . . .diversity
 - Rums, Foods . . .diversity
 - Focus on reinvigoration, health and wellness
- In a world increasingly concerned about the environment, the Caribbean is seen as a refuge: fresh air, naturally clean, naturally green, naturally serene:
- Promote & protect our diversity
- “Life Needs the Caribbean”



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Make Strengths Stronger . . .Get Our Best and Brightest Involved

- Identify, select, then train in addition to training current industry members
- Still not the industry of first choice so broaden our source of recruits
- Infuse existing school curricula with tourism examples
- Most tourism dependent region must depend on the best of our citizens



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Global Standards & Local Content

- Our tourism development depends on maintenance of high diversity
- So high internationally recognized service standards AND high local content
- Compare many cities in Europe, compare Dubai, United States
- Compare Bellagio in Las Vegas
- Biggest threat to the “Caribbean” . . .becoming a mélange: Barbados=St Lucia=Dominican Republic=Guadeloupe



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The New Battle

- Region by Region
- No longer destination by destination alone
- Especially from Europe, India, Far East



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Our Brand Is Our Reputation

- Caribbean Tourism Development Company exists to own, promote, protect, advance and enhance the Caribbean brand.
- As the reputation of the region grows, all entities connected thereto benefits: “Rising tide raises all boats”
- Brand = Reputation . . .reputation derived from experience
- So focus on building the Caribbean brand one phenomenal experience at a time



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Measure HR Programs By Visitor Assessments

- Need timely information from Immigration cards + other regular & reliable sources
- Share visitor evaluations with all
- Develop HR and other programs to repair specific product and service deficiencies
- Establishing internationally recognized standards . . .critical to the establishment of our Caribbean brand
- Monitor visitor generated media



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OUR GOALS: THE NEW BASICS

A Successful & Sustainable Tourism Industry

Goal I

Experiences that Compel Visitors to Extol Virtues of the Caribbean That Are Sustainable & Profitable

Goal II

Low Cost, High Frequency, High Quality Transportation

Goal III

Efficient Delivery of Effective Information

Goal IV

Forestall, Reduce and Eliminate Impediments to Sustainable Growth

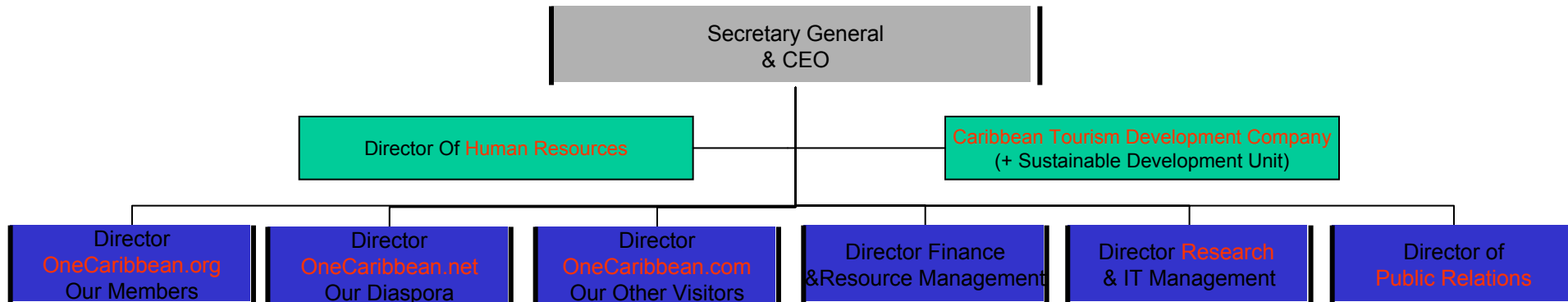
OUR PRIMARY RESPONSIBILITIES

1. Identification, Selection, Engagement and Training of our people to deliver experiences worth bragging about: **Human Resources**
2. Information Measuring Performance in Areas that matter: **Research**
3. Efficient Delivery of Effective Information to our prospective Customers: **Our Visitors.com**
4. Efficient Delivery of Effective Information to our Members: **OurMembers.com**
5. Efficient Delivery of Effective Information to our Diaspora: **OurDiaspora.com**
6. Credible people/brands/organizations bragging on our behalf either by association or through delivery of information to our publics. **Public Relations**
7. Letting people know where to go to get all of this information: **Advertise** our URL's always & everywhere
8. Private/Public Sector speaking with one voice and ensuring sustainability in all that we do. **CTDC**



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New CTO Structure



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From Human Resources To Development Of Human Capital

- Look not only at quantity but also at quality and culture
- Unlike tourism other global industries, financial services, mining, manufacturing . . . Output not affected by the cultural background of the worker
- The right people in the right places performing the right jobs delightfully



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How Will We Know Success?

- Stop charging Departure Taxes across the Caribbean
- Will start charging admission



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“Life Needs the Caribbean”



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