Regional Policy Framework for a More Sustainable Tourism Development in the Caribbean

July 2007
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 “Regional Sustainable Tourism Policy Framework for the Caribbean” 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 Regional Sustainable Tourism Policy Framework for the Caribbean.

To order copies of this regional policy framework please contact:
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JOIN IN THE CONSULTATION – YOUR OPINION MATTERS!

This Regional Policy Framework constitutes a unique opportunity for the countries of the Caribbean region to adopt a coherent framework of policies that can promote a more sustainable tourism. In order to assure maximum relevance and applicability, the organisations behind this policy now invite readers of this draft Regional Policy Framework document to supply their comments and suggestions for its improvement.

In order to ensure an open and transparent process, please copy the Guidance and Feedback Sheet below into a Word document and complete with your personal details and points of guidance. These will be taken into consideration during the finalisation of the Regional Policy Framework for a More Sustainable Tourism Development in the Caribbean. Please return your completed Guidance and Feedback Sheets to CTO at the coordinates given in the sheet, either by fax, or email. Owing to resource issues, comments received after the deadline may not be taken into consideration.

Deadline for receipt of feedback: 1st November 2007

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Regional Policy Framework for a More Sustainable Tourism Development in the Caribbean

PLEASE RETURN TO: Caribbean Tourism Organization
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EXECUTIVE SUMMARY

Setting the Scene

The Caribbean region has long recognised the benefits associated with an appropriate and cohesive Regional Policy Framework providing a structure to enable countries in the region to effectively foster competitiveness and sustainability in their tourism sectors. The development of a “Regional Policy Framework for a More Sustainable Tourism Development in the Caribbean” (also referred to as the Regional Policy Framework in this document) within the framework of the 8th EDF Caribbean Regional Sustainable Tourism Development Programme (CRSTDP), implemented in the period 2005 to 2008, seeks to address this.

It is intended that the establishment of the Regional Policy Framework can assist National Tourism Organisations to adapt, develop, revise and update their tourism policies and strategies. It sets forth broad policy guidelines to address the thematic areas identified during the extensive stakeholder consultation as critical to the sustainability of tourism at the national and regional level. Not only are these areas relevant for Caribbean Tourism Organization (CTO) member states but they also have regional implications for Caribbean tourism and, the diversity of the region notwithstanding, a consensus-based approach to common challenges will give added value. A broad Regional Policy Framework that integrates harmoniously with the different national policies constitutes an effective tool to shape the impacts of the Caribbean region’s tourism sector by creating a base of manageable guidelines for a more sustainable tourism development, and a common framework of reference for all stakeholders.

The primary target group for this document are the national governments of the Caribbean countries that are members of CTO. It is their ultimate objective to develop their tourism sectors in a sustainable manner. To this end, this policy serves as general guidelines to existing policies and strategies available at the national level. Regional governments are thus invited to benchmark their national situation against the Regional Policy Framework. The policy guidelines formulated can then be used as the point of departure for the development of national strategies for the areas where a need has been identified. The concrete examples of what has actually been done in countries across the region, as well as at the regional and international levels, may also provide inspiration for initiatives to promote the sustainability of this important sector.

Analysis of the Caribbean Tourism Value Chain

In the Regional Policy Framework, the Value Chain framework is used to analyse the current performance of the Caribbean tourism sector. It identifies areas of internal and external pressures that may affect its long term sustainability, as well as specific activities where there is value creation and competitive advantage. The Caribbean tourism sector value chain is thus classified into primary and ancillary activities. No single entity has ownership of the entire tourism sector value chain, though there are trends towards horizontal and vertical integration. Instead, tourism is an economic activity that requires the effective cooperation of a variety of specialised groups.
Primary Activities

Marketing and sales: The Caribbean tourism sector has enjoyed incremental, cross-sector growth over the last 25 years, with major gains being made 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 more gradual growth in the first decade of the new millennium. In 2005 there were approximately 22 million stay-over arrivals and 19 million cruise passenger arrivals, with levels in most sub-regions exceeding the pre 9-11 volume. The Hispanic Caribbean continues to dominate, with 55 percent of the regional market share.

Cruise passenger arrivals have steadily increased from 36 percent of total arrivals in 1980 to 48 percent in 2004, indicating the growing importance of the cruise sector to the Caribbean. There are though signs that the number of cruise ships has reached its peak with a slight decline in numbers in 2005. The Caribbean tourist season peaks in December, March, and July/August. This corresponds well with the seasonal holidays in the main tourism markets. Hosting internationally marketed cultural events in the off-season has been a successful strategy to reduce its impact.

The annual marketing budget of the National Tourism Organisations (NTOs) in CTO member countries varies significantly, reflecting the size of a country and its prioritisation of tourism. Budgets range from below US$1.0 million (18 percent) to in excess of US$30.0 million (11 percent). The main regional markets for the Caribbean are North America, Europe and the Caribbean itself, though the importance of each market varies from country to country. The USA is the biggest single country of origin for tourist arrivals in the Caribbean though the percentage volume of US tourist arrivals has gradually declined over the last two decades, with the gap being filled by tourists from Europe.

In 2003, visitor expenditure in the Caribbean broke through the US$20 000 million ceiling for the first time. Estimates of average expenditure by stay-over and day visitors contra cruise passengers have shown that stay-over visitors spend as much as 20 times more per head than cruise passengers.

Inbound and outbound logistics: A range of domestic, intra-regional and international airlines operate in the Caribbean. Four countries within CARIFORUM operate a domiciled public sector-owned airline, providing international service but with a heavy emphasis on connections with the US. Out of the 17 non CARIFORUM CTO member countries, three have domiciled airlines providing international service. The Caribbean dominates the world cruise ship sector with almost 50 percent of the total worldwide cruise berth allocation.

Tourist accommodation: Accommodation capacity has expanded considerably over the past 25 years. Total room stock increased by 25 percent in the period 1994 – 2000. The main category of growth has been the apartment sector. Approximately 50 percent of all rooms are concentrated in the emerging destinations of the Hispanic Caribbean. The increase in tourist establishments has not caused a negative effect on room occupancy rates, which have remained stable at around 64 percent; the average daily room rate in 2003 was US$ 136.
**Services:** The tourism sector relies on the services of a wide range of sectors in the destinations, including (i) construction sector, (ii) eating and drinking, (iii) retail sector, (iv) transportation in the destination, (v) leisure activities, (vi) healthcare, and (vii) Information Communication Technologies (ICTs). These services constitute the linkages between the tourism sector and other areas of national economic activity and may be important providers of additional income.

**Ancillary Activities**

**Public goods and utilities:** Tourism makes use of the marine and the terrestrial environments, which are key national assets and a main source of comparative advantage in tourism. In the Caribbean, these public goods are managed by governments and/or municipalities and their care is the responsibility of society as a whole: tourists, local communities and economic interests. Environmental indicators show clear signs of the degradation of the marine environment: e.g., coral reef bleaching, and habitat change. The terrestrial environment is also fundamental to the product, and can be equally significant in terms of endemic species that may only be found on a specific island and are therefore endangered at the global level.

**Water, energy and waste streams:** The world’s climate is changing, with global warming affecting weather patterns such as rainfall across the world. It’s therefore prudent to integrate water conservation measures into the tourism value chain. Water use in the accommodation sector varies considerably according to the type of establishment. Energy is derived primarily from non-renewable sources in the Caribbean, and the sector needs to practice energy efficiency measures throughout the tourism value chain.

Effective treatment of waste water is a major investment for any country. In addition, marine pollution may be caused by the indiscriminate emission of waste water from cruise ships and smaller leisure craft. Solid waste is typically collected by an authority-managed organisation and disposed of at a landfill. Solid waste management is a major issue in most Caribbean countries, with solid waste in the form of litter, fly tipping and uncollected garbage being a major source of visual pollution. Recycling options are limited, especially in the smaller island states, where the relatively small volumes of waste do not create the kinds of economies of scale necessary for market-driven recycling activities.

**Human Resource Management:** 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 intense use of low skilled labour making it ideal in the development context. Accommodation establishments are a major source of employment in the Caribbean, in 2004 CTO estimated that the sector, directly or indirectly, provided some 1.3 million jobs.

**Product development:** Continuous product development using innovative approaches and taking into account the region’s competitive advantage is essential to sustain the Caribbean’s share of an increasingly competitive market.

**Procurement:** Patterns of procurement have changed significantly within the Caribbean tourism product over the past two decades, driven mainly by developments in ICT, and placing challenges on the destinations and tour operators. There is a risk of a digital divide taking place, as a gulf emerges between those destinations that can and can’t master the new technologies.
Critical Thematic Areas for the Sustainability of Caribbean Tourism

Six thematic areas were identified as critical to the sustainability of Caribbean tourism at (i) the two CTO/CRSTDP Regional Inter-sectoral Policy Planning Workshops, (ii) the basic questionnaire survey of national bodies with tourism competence in Caribbean, and (iii) from the analytical study of the Caribbean tourism value chain presented in the previous section:

1. Tourism Management Capacity;
2. Marketing;
3. Transportation;
4. Environment;
5. Linkages; and

(i) Tourism Management Capacity
Tourism’s positive effect on the national economy depends on the instigation of a national enabling environment that relies on the interplay of a variety of factors including the legal framework, infrastructure, education, and institutional capacity. These factors define the country’s tourism management capacity, i.e. the resources at its disposal for how it goes about the business of tourism. Despite the presence of a national tourism policy framework, the development of tourism may not meet its full potential to contribute to the sustainable development of the nation.

Key challenges include the prioritisation of tourism as a key economic sector at the highest political level and the enunciation of a national commitment to the sustainable development of tourism in national policy. Significantly, central tourism planning needs to take place in a fully integrated process involving cooperation between the Ministry responsible for tourism and other related Ministries and agencies. Stakeholders have pointed out that there is some stigma attached to the tourism industry, which may impede on the industry’s ability to attract a talent pool of qualified management and staff, and which needs to be comprehensively tackled. Governments need to be aware of the challenges and opportunities offered by the WTO/GATS process and its potential impact on tourism in the region.

(ii) Marketing
Successful marketing is a key to the long term sustainability of tourism in the Caribbean. The marketing of the Caribbean tourism product has been influenced by a range of factors including the growing trend towards vertical and horizontal integration in the generating markets, the opportunities offered by new information technologies (ICTs), and market-generated pressures on product development to meet minimum standards in areas such as safety and hygiene.

To be effective, marketing must be informed by accurate and up-to-date information on the profiles of the visiting tourists. Countries need to have in place a central system that can collect and analyse this information for use in the future marketing and indeed in the general planning of the tourism sector. At the same time, ICTs are transforming the global economy and are creating new business linkages and opportunities that cross business sectors, cultures and distances. Policy makers and tourism enterprises need to understand the implications of ICT developments. It is vital that the product development aspect of marketing takes into account and builds on the comparative advantages that the Caribbean has, in favour of other destinations. Likewise, it’s important for the Caribbean tourism sector to maintain its diversity, and to avoid the sameness that would be detrimental to the image of the region.
Visitors are tending to become more discerning and have larger frameworks of reference, due to increased travel activity, that can be used to assess 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 stages of the Caribbean tourism value chain, to ensure that visitors feel that they are experiencing good value. Marketing and promotion activities need to target the key markets identified in the marketing policy for the country. Countries need to coordinate marketing and promotion between the different stakeholders to ensure that the same message is disseminated to the market and the value of the branding exercise is not diluted.

(iii) Transportation
The geographic and economic structure of the Caribbean demands effective accessibility, which is vital for the overall economic development of the region, including tourism, social and cultural advancement and regional prospects for the future. The region’s development prospects, and that of each country therein, depend very much on the provision of reliable, efficient and affordable air transport both within and into the region.

Risk mitigation mechanisms traditionally used by Caribbean governments to counter inherent vulnerability in the air transportation sector are diversification of airlift sources and ownership of airlift capability i.e. domiciled airlines. It may now be opportune for regional governments to embrace policy reforms designed to facilitate increased airlift, more efficient and reliable intra-Caribbean air services and greater but fairer competition that provides more affordable and reliable services into and within the region.

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. Regional governments need to focus on accessing the purchasing power of the cruise passengers to the greatest extent possible by providing the best possible services, and conversion of cruise passengers into stay-over visitors. In terms of land transport infrastructure, regional governments need to review the signage, especially leading to tourist sites and visitor attractions that are off the beaten track, and ensure that it is coherent.

(iv) Environment
Each year the Caribbean receives some 20 million international tourist arrivals and a similar amount of cruise passenger arrivals. These volumes are forecast to grow bringing considerable pressures to the cultural and physical 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. Certain types of location, such as marine and coastal environments, historic towns and cultural heritage sites and fragile natural environments are particularly vulnerable to tourism development. At the same time, tourism offers a source of revenue to conservation projects and is one of the few sectors where developing countries’ cultural and natural resources give them a comparative advantage.

Climate change is a major issue for the long term sustainability of tourism in two senses: climate change will have consequences for tourism and tourism is itself a contributor to climate change. There is now widespread scientific consensus that global warming is a reality and it’s a man-made phenomenon. All participants in the tourism value chain have a role to play in tackling climate change, for example by energy conservation.
(v) Linkages
Tourism has done much to diversify Caribbean states 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 economy are fully realised. Regional governments need to prioritise the integration of tourism into the rest of the economy. The Community-Based Tourism (CBT) approach needs to be introduced to help realise linkages by bringing local handicrafts and other producers in contact with tourists. The feasibility of niche markets that have a utilisation of goods and services from other economic sectors, examples being eco-tourism, health tourism and sports tourism should also be explored.

(vi) Health, Safety and Security
In recent years, uncertainty about the health, safety and security of travel and certain destinations has caused significant fluctuations in tourism flows, and should be regarded as a regional issue for the sustainability of tourism. There are policy implications for image, for management of information, and for specific measures to improve the safety and security of tourists. If health, safety and security issues are not managed in a proactive manner but only dealt with as and when they occur, the result can be negative media and a travel advisory for specific countries.

4. Regional Policy Framework for a More Sustainable Tourism Development in the Caribbean – Vision and Objectives

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

Viable: In the future, stakeholders of the Caribbean tourism sector agree that it is viable. It has increased the number of stay-over and cruise tourists that make the most significant contributions in terms of spending, they stay longer in the region and return year after year, after recommending to friends and family.

Quality: In the future, tourists to the Caribbean experience the product quality that they expect. The infrastructure is in place to look after the environment that they have come to enjoy and they appreciate the natural, built and living heritage that they encounter. The Caribbean is well known for its innovative and functional solutions to all aspects of the tourism value chain.

Empowerment: In the future, citizens of the Caribbean are proud of their region’s status as the world’s premium tourism destination – a status which is based on its unique assets. They are in a position to take advantage of the opportunities that tourism brings and to have their say integrated into the development that takes place around them.

Ownership: In the future, citizens of the Caribbean are well aware of the contribution of the diverse aspects of tourism to their nation’s economic, cultural and natural wealth. They see the benefits that tourist spend has brought and feel ownership of the direction of tourism.

Cooperation: In the future, the Caribbean nations continue to cooperate on a functional basis, regionally meeting the challenges engendered by an increasingly globalised tourism economy, and tackling at the regional level those policy issues where a regional approach gives added value.
Guiding Principles
The following principles, adapted from CTO, UNWTO and UNEP, are central to the Regional Policy Framework:

1. A 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.

2. Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche market segments.

3. 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.

4. Sustainable tourism should make optimal use of environmental resources that constitute a key element in tourism development, maintains essential ecological processes and helps to conserve natural resources and biodiversity.

5. Sustainable tourism should ensure viable, long term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income earning opportunities and social services to host communities and contributing to poverty alleviation.

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 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 implementing 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 Regional Policy Framework to stipulate specific policy options for uptake at the national level. Instead, a series of policy options are put forward for adaptation by decision makers on a needs basis.
10. This Regional Policy Framework should be a dynamic rather than static tool. Its validity should 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.

The remainder of this Executive Summary introduces the six policies put forward within the Regional Policy Framework to address the critical thematic areas previously identified. Each policy has an associated Development Goal, a series of Policy Strands and finally policy guidance, which national governments and their national and regional partners are urged to consider for the sustainable development of tourism. Descriptions of concrete initiatives within the region as well as internationally are put forward to exemplify policy guidance. In a region as rich and diverse as the Caribbean, the intention has not been to list all activities in the region but rather to provide a cross section sample of what has been done, to provide inspiration for stakeholders. Owing to the nature of an Executive Summary, it is not possible to go into detail with regard to the multifarious policy guidance put forward within the Regional Policy Framework. Instead, the main essence of the policy guidance is outlined for the reader’s orientation.

Policy on Tourism Management Capacity

| Goal 1: Ensure sufficient national capacity to manage the sustainability aspects of the tourism sector. |

Policy Strands:

- Ensure that the principles of good governance are applied in the planning and development of a sustainable tourism sector.
- Raise awareness of tourism’s importance for the economic development of the country among citizens.
- 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 uptake of innovative practices.
- Embrace the information management and communication opportunities offered by ICTs by creating an enabling environment for their uptake.

A range of policy guidance is then provided linked to the above policy strands and which is summarised below. Examples of approaches taken are highlighted from Belize, Barbados and Puerto Rico; and from three regional initiatives: CMEx, World Tourism Day and the Caribbean Tourism Human Resource Council.

Good Governance

Good Governance refers to the way in which powers are exercised at the national level. The principles of coherence, openness, participation, accountability, and effectiveness are recognised as being central to the definition of good governance.
Each principle is important for establishing good governance and they apply to all levels of government – global, transnational, national, regional and local.

Central to the Regional Policy Framework is that governments should carefully consider 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 indeed considered a priority sector, this should be recognised at the highest political level, and tourism should be integrated into the National Economic Policy/Development Plan. From this action a range of spin-off effects should ensue that are essential for the sustainable development of tourism, for example the development of a National Tourism Policy and corresponding Master Plan, and the recognition of the inter-agency approach that is needed to support the coherent development of the sector.

**Public Awareness**
The sustainable development of tourism in the Caribbean requires the support of the general public. 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 essence of this policy area is that governments should seek to inform the broad base of public opinion with information on the key strategic importance of tourism for the national economy on a regular basis.

**Human Resource Development for Sustainable Tourism**
The tourism sector in the Caribbean recognises that its service personnel are 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 action at a national and regional level.

This Regional Policy Framework proposes a holistic approach to human resource development (HRD), based on the tenet of lifelong learning. Lifelong learning advocates the provision of a full range of learning opportunities from childhood to old age, essential for adaptation to the advent of the global knowledge-based economy. The essence of the guidance provided within this policy area is the consideration of a coherent approach to the national coordination of tourism HRD, and the initiatives that should be considered at each stage of the lifelong learning cycle.

**Tourism Research and Development**
In terms of capacity building, one of the challenges facing tourism policy makers is how to bridge the gap between the creation of knowledge and its practical application in specific and diverse situations. This policy area introduces the concept of a Tourism Learning Area (TLA), which 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 essence of the policy guidance provided within this policy area is how to ensure that knowledge is generated and then shared by tourism stakeholders for its uptake in practice. Focus is put on knowledge transfer, putting research into practice and the use of best practice forums.

**Information Communication Technologies (ICTs)**
Tourism is an information intensive industry and developments within ICTs, in particular internet accessibility, are revolutionising the way that the business is being run. However, its use is not widespread across all areas of tourism with take-up of ICT in the small hotel sector and ancillary services remaining limited. The essence of the guidance put forward in this policy area is to generate a national focus on E-tourism, including the national enabling environment that should be put in place to facilitate this via training, education and internet access.
### Tourism Marketing Policy

**Goal 2:** Continuously improve the sustainability of the marketing and product mix.

**Policy Strands:**
- Capture and analyse information for market intelligence purposes to facilitate an informed tourism marketing policy.
- Ensure that the tourism sector embraces the opportunities offered by ICT in its tourism marketing.
- Provide an enabling environment for product development and improvement.
- Stimulate a diverse tourism sector by focusing on product areas where the Caribbean has added value.
- Ensure that international standards of quality are reached in the tourism product making it export ready.
- Ensure that effective marketing and promotion targets the priority markets identified in the marketing policy.

A range of policy guidance is then provided within the areas that are summarised below. Examples of approaches taken are highlighted from St. Lucia, Grenada, Cayman Islands, Belize, Jamaica and Dominica.

#### Tourism Market Intelligence
Market intelligence is essential to enable efficient planning and decision making with regard to marketing and investment. Furthermore, by facilitating Customer Relations Management (CRM), it can become a major element of competitive advantage. Information on where visitors come from and when they come, where they stay and how long they stay as well as what they thought about their stay enables more targeted promotion of destinations to be carried out at the national and regional levels. It also assists in product development and improvement initiatives 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.

This policy area recommends action in two key areas: uptake of a systematic approach to gather information on visitors in the form of a Management Information System, and to review the opportunities offered by Tourism Satellite Account (TSA) implementation. TSAs are a tool for the delivery of accurate information on tourism’s economic impact for decision-making purposes, and CTO is committed to expanding the regional understanding and appreciation for the TSA following the lead of its members.

#### ICTs in Tourism Marketing
Fundamental changes are taking place in user behaviour in key markets for the Caribbean, as countries move towards a knowledge-based, digital economy. The evolution of the internet represents a paradigm shift in the information-intensive tourism industry, offering 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 grow and technologies improve. The essence of this policy area is that national governments and their national and regional partners should monitor the effectiveness of their internet strategy, and consider its update, for example by reviewing the National Tourism Policy to identify tourism products that can easily be integrated into on-line marketing.

**Tourism Product Development**
National governments are able to shape tourism product development through a range of policy measures, for example via an effective incentives regime. This policy area provides recommendations related to the enabling environment for tourism product development, for example reviewing the effectiveness of the system put in place to attract FDI, and alternative strategies necessary to maintain the small hotel sector, which has a high failure rate despite being an important component of a country’s tourism product portfolio.

**A Diverse Tourism Sector**
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, and help tap into the “new tourists”, who are more likely to seek activities related to the natural and socio-cultural backdrop of their vacation. The policy guidelines put forward advocate an innovative approach to tourism development, for example by involving local resort destinations in the product development process.

**Quality Standards**
Tourism is essentially an export industry, and it’s therefore vital that the products on offer meet internationally accepted and appreciated levels of quality. The marketing of products with a poor quality will have a detrimental effect on the credibility of the national tourism sector. This policy area recommends that national governments use a range of approaches to raise product quality, for example by cooperating with regional organisations specialising in this field, and by integrating quality parameters into the product licensing process.

**Effective Promotion**
This policy strand relates to the design and development of effective marketing and promotion 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. Guidance is provided on the organisation of promotion, advocating a joint public and private sector marketing agency operating within a strict commercial reference; and on the monitoring the effectiveness and selection of new promotion areas.

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**Tourism and Transportation Policy**

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

**Policy Strands:**
- Encourage the air transportation needed to facilitate a sustainable level of destination accessibility.
• Encourage the cruise and maritime transport needed to facilitate a sustainable level of destination accessibility.

• Achieve and maintain an optimal land-based transport infrastructure.

A range of policy guidance is then provided within the areas that are summarised below. Examples of approaches taken are highlighted from Guadeloupe, Tobago, Belize and OECS.

Air Transportation
Adequate airlift is vital for the sustainability of the Caribbean tourism sector. The recent Caribbean Air Transportation study, commissioned by CTO under the EU-funded CRSTDP made a series of policy recommendations to regional governments, which input the Regional Policy Framework. These recommendations are related to the adoption of a “regional open skies” regime, national open skies arrangements and the adoption of clear and suitably devised policies for supporting regional airlines. In addition, further policy guidance is given, which has been informed by national tourism policy across the region, on the improvement of airport infrastructure and human resources.

Cruise and Maritime Transport
The Caribbean is the world’s largest cruise market, and it provides the region with an important source of revenue whilst diversifying the product. This policy area provides guidance on (i) the improvement of the cruise and maritime infrastructure, (ii) carrying capacity of visitor attractions and hot-spots for cruise passengers, (iii) visitor spending, and (iv) sector management issues. In addition, it is proposed that governments consider extending high-speed ferry services where feasible, as a sought-after tourist product and as an effective means of promoting regional integration.

Land-based Transport
In order to facilitate visitation of communities and the realisation of linkages, a range of recommendations are made on land-based transport, primarily related to the quality and effectiveness of the road system including signage and coordination with relevant authorities.

Policy on Tourism and the Environment

<table>
<thead>
<tr>
<th>Goal 4: Maintain the integrity of the cultural and physical environment in which tourism takes place in the Caribbean.</th>
</tr>
</thead>
</table>

Policy Strands:

• Ensure effective planning, management and monitoring of the environment in which tourism takes place.

• Engender sustainable patterns of resource consumption practices in the Caribbean Tourism Value Chain.

• Benefit from the opportunities offered to the region by the international response to Climate Change.
A range of policy guidance is then provided within the areas that are summarised below. Examples of approaches taken are highlighted from Belize, Barbados, Jamaica and Puerto Rico, as well as the work being done by Association of Caribbean States (ACS), Caribbean Alliance for Sustainable Tourism (CAST), American Airlines and the ClimateCare carbon offset fund.

**Planning of Tourism**
CTO recognises that when it comes to tourism, 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 both the region’s cultural and physical resources. Policy guidelines and examples are put forward to facilitate the effective planning, management and monitoring of the environment in which tourism takes place. The principles of good governance cut across this important field.

A coherent and integrated approach is advocated involving inter-sectoral coordination between the governmental bodies with planning and development competence. Planning regulations are also focused on in terms of the necessary interaction between National Physical Development Plans, their transcription to the local level, and the regulation of development in and around areas of environmental and cultural sensitivity.

**Sustainable Patterns of Consumption**
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. This policy area concentrates on resource management in tourism enterprises, in terms of energy efficiency, water conservation and solid waste management. Focus is also put on the uptake of Environmental Technology in the sector to promote more sustainable patterns of consumption and to realise commercial linkages.

**Climate Change**
Governments, international organisations and climate specialists are considering how the public and private sectors shall respond to climate change. Climate change is both a threat and an opportunity to the Caribbean. It is vital for the sustainability of the sector in the Caribbean that governments and their regional partners take a proactive stand on the issue of climate change. Guidance is put forward on steps that can be taken to open-up opportunities in this area.

**Policy on Linkages to Other Economic Sectors**

**Goal 5:** Realise the intrinsic linkages between tourism and national economic sectors, in order to maximise the multiplier effect of tourism on the economy and reduce leakages.

**Policy Strands:**

- Provide an enabling framework to realise inter-sectoral linkages.

- Ensure that communities are able to benefit from linkages with tourism.

A range of policy guidance is provided within the areas that are summarised below. Examples of approaches taken are highlighted from The Bahamas, Barbados, Dominica, Dominican Republic, Haiti, Jamaica, St. Kitts and Nevis, St. Lucia, and Tobago.
**Provide a Linkage Enabling Framework**

CTO recognises that the task of extracting maximum economic benefits from tourism begins after the visitor arrives – the job is not over when the arrival of the visitor has been registered. However, the local producers who play a considerable role in maximising the economic benefits of tourism to the national economy, will not be competing on a level playing field. They face a globalised economy in which imported goods, thanks to economies of scale, retail at lower prices.

The essence of the guidance provided in this policy area is the capacity building steps that government can implement to strengthen linkages, for example by reviewing policy in areas linked to tourism, by conducting awareness campaigns and by developing training and tools that can especially be applied in the agricultural sector.

**Facilitate Linkages between Communities and 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 Community-Based Tourism (CBT) approach to facilitate linkages between communities and tourism. CBT emphasizes the active participation and empowerment of local people in the tourism opportunity.

Policy guidance is provided within the following core areas to help promote CBT: (i) access to the market: in terms of physical location, economic elites and social constraints on local producers; (ii) commercial viability: in terms of product quality and price, marketing, strength of the broader destination and funding mechanisms; (iii) policy framework land tenure: in terms of land tenure, regulatory context, planning process, government attitudes and capacity; and (iv) 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 have a potential impact on the tourism industry.

**Policy Strands:**

- Manage health and safety issues to reduce potential negative impacts on the sustainability of tourism.
- Manage security issues to reinforce the reputation of the Caribbean as a secure destination.
- Integrate disaster risk management into the tourism sector to reduce the vulnerability of the sector to natural disasters.

A range of policy guidance is then provided within the areas that are summarised below. Examples of approaches taken are highlighted from Jamaica and Barbados.
Health and Safety Issues and Tourism
Health and safety issues can play a major role in influencing a tourist’s choice of destination. At the same time, increased travel perpetuates the health risk associated with the spread of communicable diseases, vector-borne diseases and sexually transmitted diseases (STDs) among local and visitor populations. In the context of this Regional Policy Framework, the term safety is used to cover the set of precautions put in place to prevent tourists from being exposed to situations where they feel in personal danger, including crime, accidents, emergencies etc.

The essence of the guidance provided in this policy area is that governments need to evoke a range of approaches to tackle crime against visitors. This needs to be seen in the context of the community linkages policy area, which will over time help increase prosperity in communities and reduce the need for crime. Other aspects reviewed include food safety, prevention of the spread of sexually transmitted disease and HIV/AIDS and accident prevention.

Security Issues and Tourism
In the context of this Regional 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 for maximum economic disruption. Popular tourist destinations around the world have become targets for terrorist attacks; 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, and the uptake of regional standards currently being developed for terrorism preparedness.

Disaster Risk Management in the Tourism Sector
In the context of this Regional Policy Framework, the term disaster risk management is used to cover the set of precautionary measures put in place at the national and regional levels to prepare for the event of a disaster, whether it be natural (hurricanes, storm surges etc.) or anthropogenic (oil spill, chemical pollution etc.).

Natural disasters, in the form of hurricanes and flooding in particular, have in the past wreaked havoc on the region’s tourism sector by causing (i) significant damage to property and (ii) affecting the market’s sense of safety with regard to vacationing or planning an event. Furthermore, scientists now predict that the occurrence of freak weather events will increase in the future as a result of global warming.

The essence of this policy area is that that the national tourism sector should consider an integrated approach to disaster risk management involving emergency preparedness authorities and including risk management, disaster preparedness and response. Governments should also liaise closely with the developments of specific regional standards for disaster risk management in the tourism sector. Importantly, tourism enterprises need to be aware of their responsibility to plan for disasters, for example with regard to the siting of the development and the use of building codes to control construction build quality.
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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, small states in the region in particular 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 preference available to small states and foreign aid flows are declining. These factors, combined with others such as high transport costs, dependency on single product and less access to international finance markets, mean that small states have high vulnerability.

The Caribbean governments are committed to achieving the Millennium Development Goals (UNMDGs) identified by the United Nations. 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. 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.

One common denominator in the Caribbean is that tourism counts. It is without doubt one of the greatest, engines of economic growth in the region and a major employer, providing employment for an estimated 1.3 million jobs. 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.

This document puts forward a Regional Policy Framework to guide the long term sustainability of tourism in the Caribbean. It provides integrated policy guidelines on thematic areas identified during extensive stakeholder consultation as critical to the sustainability of tourism in the Caribbean and relevant to both emerging and more mature destinations. National governments and their regional partners are urged to be informed by these on an ongoing basis in order to ensure the integrated planning of their tourism sector according to their priorities.
1.2 Background

The Caribbean region has long recognised the benefits associated with an appropriate and cohesive Regional Policy Framework providing a structure to enable countries in the region to effectively foster competitiveness and sustainability in their tourism sectors. However, to date, no such policy instrument has been established and accepted\(^5\). The development of a “Regional Policy Framework a More Sustainable Tourism Development in the Caribbean” within the Caribbean Regional Sustainable Tourism Development Programme (CRSTDP), an intervention of the 8\(^{th}\) European Development Fund (EDF) implemented from 2005 - 2008, seeks to address this.

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 capacity, 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) and national tourism/hotel associations and academic institutions.

As the policy making body mandated by the governments of its 32 Caribbean member countries to amongst others provide a platform for regional issues relating to tourism, CTO has been the Implementing Agency with responsibility for the development of the Regional Sustainable Tourism Policy Framework for the Caribbean. 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 Regional Policy Framework and activities commenced in 2005.

1.3 Objectives of the Regional Sustainable Tourism Policy Framework

The Terms of Reference for this component state that the policy is to serve as general guidelines to existing policies and strategies available at the national and regional levels. With respect to the Regional Policy Framework, the scope of work given in the terms of reference for the Sustainable Tourism Policy Development Consultant included:

1. Working with national administrations and coordinating with the CTO Sustainable Tourism Development Officer, refine and finalise the regional policy framework for sustainable tourism;
2. Organising and facilitating the implementation of sub-regional workshops to disseminate information and promote the adoption of the sustainable tourism policy framework;
3. Delivering technical assistance to CTO member countries and assisting countries in developing, refining and synchronising their individual tourism policies with the regional tourism policy framework. Ensure coordination with other ongoing tourism projects at the national level and wider participation in planning and decision making in the implementation of activities of the programme for example ensuring that the views of NGOs and the wider society are taken on board;
4. Developing a response to cultural heritage and community tourism agendas as part of the regional policy framework for sustainable tourism;
5. Ensuring that each beneficiary of the programme develops a sustainable tourism framework for sustainable tourism; and
6. Facilitating and participating where necessary in the hosting of national sustainable tourism development forums.
The Terms of Reference also provided for 12 person months of input for short term technical assistance. The short term advisors conducted research to support the policy development process, examples being Community-Based Tourism and Heritage Tourism Development.

1.4 Methodology

The primary target group for this document are the national governments of the Caribbean countries that are members of CTO. It is their ultimate objective to develop their tourism sectors in a sustainable manner. To this end, this policy serves as general guidelines to existing policies and strategies available at the national level. The methodology has therefore been designed to ensure the ultimate relevance of the Regional Policy Framework for this target group.

The methodology has been built on three key approaches. Firstly, it has benefited from the two, three-day Sustainable Tourism Inter-sectoral Planning and Policy Development Workshops that were held in Barbados and St. Lucia. 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 Regional 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. The workshops allowed participants to:

- Identify critical issues to be attended to that require national/regional policy responses;
- Promote an inter-sectoral approach to sustainable tourism issues;
- Share best practices in the formulation and implementation of national tourism policy; and
- Contribute to the discussion of issues and the formulation of the regional policy agenda.

The workshops stimulated a significant amount of discussion and there was a high level of participation from all who attended. Group recommendations were put forward for consideration in the development of the Regional Policy Framework.

Secondly, it is the result of an intensive and inclusive consultation process among relevant stakeholders forming a cross-section of the tourism sector in the CTO member countries. This process started with a survey directed at ministries with tourism competence to gain knowledge on relevant initiatives such as national tourism policies and master plans. A working group was set-up on onecaribbean.org and sustainable tourism articles posted there for common access. The draft version of the formulated tourism policy has been widely distributed for peer review and guidance, and the comments received integrated into the final Regional Policy Framework.

Thirdly, it has benefited from the incremental generation and application of the new knowledge generated by the other programme components, and by the short term consultancies. Inputs were thus generated on Caribbean air transport systems, Community-based Tourism, heritage tourism, information management systems, marketing and promotion and good practices for training, awareness raising and Human Resource Development in tourism. Regional research has also been applied during the development of the Regional Policy Framework.
1.5 Report Structure

The Regional Policy Framework consists of the following sections:

- **Section 2** analyses the various sectoral components of the Caribbean tourism industry, using a value chain approach.

- **Section 3** summarises the critical issues which Caribbean tourism is facing, based on the feedback given from the participatory process and the Tourism Value Chain analysis.

- **Section 4** sets out a vision for the sustainable development of tourism in the Caribbean, guiding principles for the Regional Policy Framework, and a set of development objectives.

- **Section 5** puts forward policy guidance to address the critical thematic area of tourism management capacity.

- **Section 6** presents policy guidance to address the critical thematic area of tourism marketing.

- **Section 7** identifies policy guidance to address the critical thematic area of tourism and transportation.

- **Section 8** identifies policy guidance to address the critical thematic area of tourism and the environment.

- **Section 9** outlines policy guidance to address the critical thematic area of linkages with other economic sectors.

- **Section 10** puts forward policy guidelines to address the critical thematic area of health, safety and security and tourism.

In addition, the Annex to the Regional Policy Framework consists of the following annexes:

- **Annex 1** provides a glossary of the acronyms used in the Regional Policy Framework.

- **Annex 2** contains definitions of the regional groupings and terms used in the Regional Policy Framework.

- **Annex 3** lists the publications and national tourism policy documents consulted during the development of the Regional Policy Framework.

- **Annex 4** provides an overview of the websites consulted during the development of the Regional Policy Framework.

- **Annex 5** matches the thematic areas of the Regional Policy Framework to relevant regional and international stakeholders.

- **Annex 6** assembles in one place the footnotes used throughout the document.
2  ANALYSIS OF THE CARIBBEAN TOURISM VALUE CHAIN

2.1  Introduction

This section analyses the Caribbean tourism sector using the Value Chain approach. The Value Chain model has been adapted to fit the tourism sector in the Caribbean, with the aim of identifying the specific activities where there is value creation and competitive advantage. Where feasible, data is presented to illustrate the structure and performance trends of the sector in Caribbean.

Figure 1. The Caribbean Tourism Sector Value Chain (adapted from Michael Porter)

The primary activities are those line functions that comprise the essential product that the visitor to the Caribbean experiences. The ancillary activities are those assets and activities necessary to maintain the desired level of product quality. In Porter’s theory, competitive advantage can be gained by strengthening any one of these areas.

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 moving 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.

2.2  Primary Activities

2.2.1  Marketing and Sales

The Caribbean tourism sector has enjoyed incremental, cross-sector growth over the last 25 years, with major gains being made 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.
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. There are though signs that regional cruise passenger arrivals has peaked with a slight decline in numbers in 2005.

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 1. Sub-regional Performance: 2000-2005**

<table>
<thead>
<tr>
<th>Destination13</th>
<th>2000</th>
<th>2002</th>
<th>2005</th>
<th>annual growth (%)</th>
<th>% share</th>
<th>change 2002-05</th>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2002-05</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commonwealth Caribbean</td>
<td>6,134.6</td>
<td>5,868.5</td>
<td>6,379.4</td>
<td>2.2</td>
<td>30.2</td>
<td>30.9</td>
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<tr>
<td>Dutch West Indies</td>
<td>1,414.1</td>
<td>1,314.0</td>
<td>1,506.8</td>
<td>3.7</td>
<td>7.0</td>
<td>6.9</td>
</tr>
<tr>
<td>French West Indies</td>
<td>1,333.3</td>
<td>1,212.4</td>
<td>1,327.4</td>
<td>2.4</td>
<td>6.6</td>
<td>6.4</td>
</tr>
<tr>
<td>US Territories</td>
<td>4,012.0</td>
<td>3,754.1</td>
<td>4,305.9</td>
<td>3.7</td>
<td>19.7</td>
<td>19.8</td>
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<td>Other Countries</td>
<td>7,429.2</td>
<td>6,848.7</td>
<td>8,692.8</td>
<td>6.7</td>
<td>36.6</td>
<td>36.1</td>
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<td>Total Caribbean</td>
<td>20,323.2</td>
<td>18,997.8</td>
<td>22,212.3</td>
<td>4.2</td>
<td>100.0</td>
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<td>OECS</td>
<td>1,186.2</td>
<td>1,162.5</td>
<td>1,324.0</td>
<td>3.5</td>
<td>5.8</td>
<td>6.1</td>
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<td>CARICOM</td>
<td>5,221.9</td>
<td>5,000.6</td>
<td>5,647.6</td>
<td>3.2</td>
<td>25.7</td>
<td>26.3</td>
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<td>Hispanic Caribbean</td>
<td>10,573.3</td>
<td>9,884.3</td>
<td>12,152.1</td>
<td>5.7</td>
<td>52.0</td>
<td>52.0</td>
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</table>

The impact of the 2001 terrorist attacks in 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 emerging destinations of Cuba, the Dominican Republic, the Mexican Caribbean (Cancun and Cozumel) and Puerto Rico, continue to maintain a 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 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.

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 3. Seasonality of Tourist Arrivals to the Caribbean**

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. The average length of stay for visitors to the region in 2004 was 9 days.
As part of the service provided to their members, the Caribbean Tourism Organization and the Caribbean Hotel Association, market and promote the region using a variety of media including internet, travel media publications, trade fairs and publicity events. In 2006, the two organisations agreed to cooperate within the framework of the newly established Caribbean Tourism Development Company (CTDC) based in New York. One of its core competence areas is web-based marketing of the region. In addition, a range of stakeholders are involved in marketing individual Caribbean destinations: National Tourism Organisations (NTOs), Tourism Associations, hotels and other accommodation sub-sectors, airlines, cruise lines, tour operators and travel intermediaries, as well as the travel media and the national citizens living in Caribbean countries.

The annual marketing budgets of the NTOs vary significantly, ranging from below 1 million US$ (18 percent) to in excess of 30 million US$ (11 percent). The majority of NTOs (35 percent) use between 1 – 5 million US$. Typical NTO activities range from fully developed and integrated advertising campaigns to tour operator support and general promotional activities. The main regional markets of the Caribbean are North America, Europe and the Caribbean, with the importance of each market varying from country to country.

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 remained relatively stable during that period. Table 2 presents a breakdown of the main Caribbean destinations per market in 2004.

Table 2. Main Caribbean Destinations per Market, 2004

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

Notes

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 between them 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).
In 2003, stay-over visitor expenditure in the Caribbean broke through the US$20,000 million ceiling for the first time. Estimates of average expenditure by stay-over and day visitors contra cruise passengers has shown that stay-over visitor spend as much as 20 times more per head than cruise passengers. 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.

2.2.2 Inbound and Outbound Logistics

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 CTO members of CTO indicated that three have domiciled airlines providing international service and limited intra-regional service, two of which are public sector owned.

As indicated in Table 3, 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 3. Cruise Berth Allocation 2004

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

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.

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, for example by relaxing restrictions like 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.

Other forms of transport like 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.

2.2.3 Accommodation

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. The number of main tourist establishments showed significant growth during the period 2000 – 2005, increasing from 3500 establishments to 5000 establishments. The main category of growth has been in the apartment sector. There has 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.

Figure 7. Number of Main Tourist Establishments in the Caribbean by Category

[Bar chart showing the number of main tourist establishments by category from 2000 to 2005.]

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.
Governments in CTO member countries have introduced a hotel room tax that constitutes an additional source of income. 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)\textsuperscript{28} generating a revenue of some US$80 million in 2000, compared to US$70 million in 1995\textsuperscript{29}.

### 2.2.4 Services

The tourism sector relies on the services of a wide range of sectors in the destinations, including (i) construction sector, (ii) eating and drinking, (iii) retail sector, (iv) transportation in the destination, (v) leisure activities, (vi) healthcare, and (vii) Information Communication Technologies (ICTs). These services constitute the linkages between the tourism sector and other areas of national economic activity and may be important providers of additional income.

### 2.3 Ancillary Activities

#### 2.3.1 Public Goods and Utilities

Tourism makes use of the marine and terrestrial environments, which are among the key assets of any country and a main source of comparative advantage in tourism. In the Caribbean, these public goods are managed by the national governments or municipalities and taking care of them is the responsibility of the entire society: the tourists, local communities and the public and private sectors.

The marine environment is a key and integral component of the traditional Caribbean tourism product, accounting for the 3 S’s of sun, sand and sea. As an example, the 2000 Barbados Stay-over Visitor Survey revealed that “climate/beaches” is the single most important reason for British holidaymakers to choose Barbados for a holiday, scoring 9.3 out of a possible 10. The next most important reason identified for choosing Barbados was its “accessibility”, which scored a total of 5.7\textsuperscript{30}. 
The Caribbean marine environment is typically rich in biodiversity and has an abundance of threatened species of international importance. 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 pressures resulting in coral reef bleaching, and habitat change. It is now estimated that nearly two thirds of coral reefs in the Caribbean are threatened by human activities, including tourism. 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 access to beaches and the ability to pursue traditional livelihoods in the coastal zone such as fishing.

The terrestrial environment is also fundamental to the product, and though the Caribbean islands do not feature as much biodiversity as the oceans that surround them, they can be equally significant in terms of endemic species that may only be found on that island and are therefore endangered at the global level. The 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 rivers catchments.

**Water**

The world’s climate is changing, with global warming affecting weather patterns such as rainfall across the world. Approximately 10 percent of the world’s desalination capacity is produced in the Caribbean and Florida to augment water supply, requiring significant amounts of energy at high cost. It’s prudent to integrate water conservation measures into the tourism value chain. Water use in the accommodation sector varies considerably according to the type of establishment.

Water consumption is related to personal use by guests and facility requirements for housekeeping, laundry, cooking, swimming pools, spa facilities and gardening. Luxury hotels and hotels with full service restaurant and on-site laundry facilities typically exhibit the highest water usage per room. Typical water usage in hotels may range from less than 300 litres per day per person to as much as 800 litres per day per person.

**Energy**

Electrical energy is generated from a variety of traditional sources, the most typical being diesel generators. Among CTO member countries, Venezuela and Trinidad and Tobago are the major producers of oil in the region. There is a trend to developing cleaner forms of electrical energy, with natural gas being integrated into the energy supply network. Alternative, renewable forms of energy are increasingly promoted by governments as a strategy to reduce emissions from the combustion of fossil fuels and to combat vulnerability arising from energy dependency on external sources.

Renewable sources of energy often mooted are: wind turbines, deep sea ocean thermal conversion plants and the use of biofuels. In terms of renewable thermal energy, many accommodation units in the Caribbean use small, roof-mounted solar water heaters to generate hot water. Space heating is not an issue in the Caribbean, although space cooling is an important energy consumer.
Waste Water Treatment
A 2003 study on environmental quality in the CARICOM countries showed that 50 percent of the 20 countries in the study had total sanitation coverage greater than 90 percent, though with two countries showing 50 percent or less total sanitation coverage\textsuperscript{34}. The quality of the treatment of waste water from communities, industry and the tourism sector will have a direct effect on the quality of the marine environment, which is in turn a core component of the Caribbean tourism product. Effective treatment of waste water is a major investment for any country. In addition, marine pollution may be caused by the indiscriminate emission of waste water from cruise ships and smaller leisure craft.

Solid Waste Management
Solid waste is typically collected by an authority-managed organisation and then driven to landfill for disposal. Solid waste planning is a critical issue in most Caribbean countries, with solid waste in the form of litter, fly tipping and uncollected garbage being a major source of visual pollution. Recycling options are limited, especially in the smaller island states, where the relatively small volumes of waste do not create the kinds of economies of scale necessary for market-driven recycling activities. This means that domestic solid waste may not be sorted before entering the landfill and potentially useful waste (organic fraction, paper etc) may be disposed of together with toxic waste materials such as used batteries.

2.3.2 Human Resource Management
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 intense 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 jobs\textsuperscript{35}.

Figure 9. Employment in Accommodation Establishments in the Caribbean\textsuperscript{36}

![Chart showing employment in accommodation establishments from 1999 to 2003.](chart.png)
2.3.3 Product Development

Continuous product development and innovative approaches to the packaging of the product are absolutely essential to sustain the Caribbean’s share of an increasingly competitive market. The Hispanic Caribbean 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). The average relative contribution of the tourism sector to total national investment capital is 21.7 percent\(^3\).7.

2.3.4 Procurement

The advent and rapid uptake of the internet has revolutionised patterns of procurement in the Caribbean tourism value chain. Customers and suppliers are in more direct contact and this is progressively impacting on the way that business is conducted. National and regional tourism organisations are also using the internet to give users direct access to information\(^3\).8. The UNWTO recently noted that although access to the consumer is becoming faster and cheaper, the unequal mastery of new technologies is creating a new gulf more marked than the inequitable distribution of capital on a world scale\(^3\).9. One of the fastest growing areas is Consumer Generated Media (CGM) including blogs and social network sites.

2.4 Conclusion of Value Chain Analysis

Stakeholders of the regional tourism industry have indicated that Caribbean tourism is now at a crossroads. On the one hand it faces increasing competition from emerging destinations, and on the other hand quality issues associated with its resource base are not being adequately addressed. The main issue is that the Caribbean tourism sector has itself become vulnerable. The next section addresses the critical issues contribute to that vulnerability, and highlights the key challenges to sustainability within each thematic area.
3 CRITICAL THEMATIC AREAS FOR THE SUSTAINABILITY OF CARIBBEAN TOURISM

3.1 Introduction

This section presents the thematic areas identified as critical at (i) the two CTO/CRSTDP Regional Inter-sectoral Policy Planning Workshops, (ii) the basic questionnaire survey of national bodies with tourism competence in the Caribbean conducted in 2005, and (iii) from the analytical study of the Caribbean tourism value chain presented in the previous section.

The critical thematic areas identified are as follows:

1. Tourism Management Capacity
2. Marketing
3. Transportation
4. Environment
5. Linkages
6. Health, Safety and Security

3.2 Tourism Management Capacity

The positive effect of tourism on the national economy depends on the instigation 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 the country’s tourism management capacity, i.e., the resources at its disposal for how it goes about the business of tourism.

The majority of Caribbean states have developed a national tourism policy, tourism legislation, and a tourism strategic plan that should be applied by government in order to meet its responsibility for providing the best possible conditions for the growth of the national tourism industry. 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 related Ministries and agencies;
- 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 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;
• Governments need to be aware of the challenges and opportunities offered by the WTO General Agreement on Trades and Services (GATS) process and its potential impact on tourism in the region.

3.3 Marketing

Successful marketing is a key to the long term sustainability of tourism in the Caribbean. The marketing of the Caribbean tourism product has been influenced by a range of factors including the growing trend towards vertical and horizontal integration in the generating markets, the opportunities offered by new information technologies (ICTs), and market-generated pressures on product development to meet minimum standards in areas such as safety and hygiene.

Critical sustainability challenges identified with respect to marketing are:

Market Intelligence
To be effective, marketing needs to be informed by accurate and up-to-date information on the profiles of the visiting tourists, including their country of origin, dates and length of stay, and accommodation used. This information is typically provided by embarkation cards. Countries need to have in place a central system that can collect and analyse this information for use in future marketing and in the general planning of the tourism sector. This kind of accurate information can also be used to communicate to key policy makers the importance of the national tourism sector.

Advances in Information Communication Technologies (ICTs)
A paper presented at the first CTO/CRSTDP Inter Sectoral Policy Workshop made the following observations on advances in the use of ICTs in tourism:

• ICTs are transforming the global economy and are creating new business linkages and opportunities that cross business sectors, cultures and distances;
• Tourism is an information intensive sector and ICTs are a key driver in the organisation and marketing of tourism products;
• ICT developments are having a range of implications for the functioning of the tourism sector, making it easier to market and distribute products, facilitating access to market and management data, use of e-business practices, enabling the sharing of information and encouraging cooperation among stakeholders;
• ICTs have become one of the most effective tools for addressing the imbalance between competing destinations in the global market, with marketing and selling via the Internet fast becoming the accepted and preferred method for many tourism market sectors and products; and
• Policy makers and tourism enterprises need to understand the implications of ICT developments.

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 ICTs.

Product Development
In the face of competition from long haul destinations in other parts of the world offering tourists equally impressive sun, sea and sand vacations, the Caribbean can no longer compete on these attributes alone. Instead, product development needs to take into account and build on the comparative advantages that the Caribbean has, in favour of other destinations.
A range of stakeholders are involved in tourism product development and improvement in the Caribbean. The government forms a key player in terms of incentive regimes, promotion campaigns to attract investment, and regulatory mechanisms to ensure that tourism developments fit into the overall strategy for the country, and the image that the country wants to present. Governments in the Caribbean provide a range of incentives to attract investors, with typical examples including:

- Incentives for hotels such as income tax relief, duty free importation of capital items for construction and furnishing of hotels;
- Incentives for renovating or expanding facilities through exemption of payment of tax on goods imported and purchased locally, including for example all building materials; and
- Tax holidays for investors.

Governments need to be aware of 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.

**Sector Diversity**

It is important for the Caribbean tourism sector to maintain its diversity, and to avoid the sameness that would be detrimental to the image of the region. This means that a range of different tourism products need to be encouraged. Governments need to facilitate the development of Community-Based Tourism (CBT) by creating an enabling environment for this. A range of tourism products can come out of a CBT approach: nature-based tourism excursions, celebrations of national cuisine and culture and opportunities to visit host families. Other market niches that the Caribbean countries are well positioned to explore include yachting tourism, wedding and honeymoon tourism, the business/MICE sector and adventure tourism.

**Quality**

Due to increased travel activity, visitors are tending to become more discerning and have larger frameworks of reference, which is in turn used to assess 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 stages of the Caribbean tourism value chain, to ensure that visitors feel that they are experiencing good value.

Tourism is essentially an export sector, and governments therefore need to cooperate with the private sector to assist the infrastructure, management and service levels of tourism enterprises meet international quality standards.

**Promotion**

Marketing and promotion activities need to target the key markets identified in the marketing policy for the country. Countries need to coordinate marketing and promotion between the different stakeholders to ensure that the same message is being given about the country, and the image that is being aimed at is not diluted.

The Caribbean is an extremely strong brand that unites the region, which would otherwise consist of a range of less well known destinations due to a lack of size and capacity. The brand value needs to be carefully maintained, with negative developments in countries (crime, environmental pollution, unfriendly service etc) being associated with the whole region.
3.4 Transportation

The geographic and economic structure of the Caribbean demands effective accessibility, which is vital for the overall economic development of the region, including tourism, social and cultural advancement and regional prospects for the future. The countries generally feel a strong sense of vulnerability in this regard, and that vulnerability is perhaps greatest in the tourism sector, with airlift being crucial for the continued existence of the Caribbean tourism industry.

Critical sustainability challenges identified with respect to transportation are:

**Air Transport**

A recent study on air transportation in the Caribbean made the following observations about the region’s airlift:

- Given the importance of air transportation to the Caribbean’s tourism and overall economic development, as well as its social and cultural advancement, the region’s development prospects, and that of each country therein, depend very much on the provision of reliable, efficient and affordable air transport both within and into the region;

- Risk mitigation mechanisms used by Caribbean governments in the air transportation sector have traditionally fallen into one of two categories:
  - Diversification of airlift sources i.e. liberalised air service agreements/practices (but with the Caribbean focusing on international air services) as well as through blanket subsidies to privately owned regional airlines, and in some cases by payment to international carriers for seat guarantees. The need is to optimise the value of diversification of air services (liberalisation including “open skies”),
  - Ownership of airlift capability i.e. domiciled airlines, preferably through private sector funding (but in the Caribbean usually through public sector funding). The need is to strengthen the domiciled airlines so that they can provide the sustained quality of service that the tourism sector needs;

- Evidence suggests that a less restrictive regime has been associated with expanded airlift, lower airfares, increased investment by private regional and international carriers and enhanced reliability and efficiency of air services; and

- It may now be opportune for regional governments to embrace policy reforms designed to facilitate increased airlift, more efficient and reliable intra-Caribbean air services and greater but fairer competition that provides more affordable and reliable services into and within the region.

**Cruise Transport**

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.

Regional governments need to focus on accessing the purchasing power of the cruise passengers to the greatest extent achievable by providing the best possible services, and by promotional activities to encourage the conversion of cruise passengers into stay-over visitors.

**Land-based Transportation**

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. Regional governments need to review the signage, especially leading to tourist sites and visitor attractions that are off the beaten track, and ensure that it is coherent. Regional governments also need to work on aspects such as road safety, public transport and road conditions.
3.5 Environment

Each year the Caribbean receives 20 million international tourist arrivals and a similar amount of cruise passenger arrivals. These volumes are forecast to grow bringing considerable pressures to 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.

Physical Environment

Certain types of location, including those listed below, are particularly vulnerable to pressure and their carrying capacity needs to be taken into consideration by Caribbean governments during tourism management and planning:

- Marine and coastal environments, where badly sited development, poor management of waste from resorts and cruise shipping, and general over-use by tourists leads to serious loss of amenity and natural habitats;
- Historic towns and cultural heritage sites where pressures and congestion from visitors and their traffic affect overall amenity and residents’ quality of life; and
- Fragile natural environments where even quite low levels of visitation can threaten biodiversity.

There is a need for:

- Restoration of degraded ecosystems to the extent possible;
- Official recognition and conservation of remaining areas of natural integrity, both terrestrial and marine;
- Use of innovative means to achieve sponsorship of conservation areas;
- Integration of water conservation and energy efficiency practices into all aspects of tourism value chain;
- Monitoring of threatened species;
- Studies on how visitors can assist in conservation; 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, with 13 percent having partially effective management.42

Cultural Environment

The potential of tourism to contribute to poverty reduction has long been recognised, and tourism development projects often feature as part of bilateral and multilateral aid programmes. Tourism is one of the few sectors where poor countries’ cultural and natural resources give them a comparative advantage. The development of tourism provides a good opportunity to help alleviate poverty because it may act as a new source of revenue in rural areas, where three quarters of the world’s poor live. It is also a labour intensive activity and one that has low entry barriers. The challenge is to find better ways of channelling visitor spending towards poor people, and to ensure that people employed in tourism are properly remunerated, receive proper treatment and are given opportunities for advancement.43

The people of the Caribbean, their living and cultural heritage as expressed in music, cuisine and style are an essential ingredient of Caribbean tourism, and their participation in the tourism product needs to be encouraged to help realise the economic benefits that the sector can bring and to ensure the authenticity of the product.
Climate Change
Climate change is a major issue for the long term sustainability of tourism in two senses: climate change will have consequences for tourism and tourism is itself a contributor to climate change. There is now widespread scientific consensus that global warming is a reality and it’s a man-made phenomenon. The principal greenhouse gas is carbon dioxide (CO₂), generated by the combustion of fossil fuels. In tourism this is primarily generated by air travel and ground activities such as road transport and electricity generation.

Although CO₂ emissions from aviation are only a small proportion of the total anthropogenic contribution (estimates range from 2 - 3.5 percent), the rapid growth rates forecast for international travel mean that aviation has been one focus of the climate change debate for governments, environmental organisations and the media.

The effect of changes in temperature and rainfall on market appeal of the Caribbean will depend on the interplay of push and pull effects in countries of origin and destination. Some of the effects of climate change are already being seen. The Belize Barrier Reef is the second largest barrier reef in the world and is currently under threat from coral bleaching and rising sea temperatures. The Caribbean Community Climate Change Centre (CCCCC) is the repository and clearing house for regional climate change data, providing climate change-related policy advice and guidelines to CARICOM. CCCCC has implemented a range of programmes to build capacity in the region for adapting to climate change.

Caribbean governments need to follow the debate with keen interest and work with the three areas identified in the Stern Report as being necessary to reduce emissions of greenhouse gases:

- Exploring opportunities presented by Carbon Pricing;
- Liaising with the tourism and travel industry to encourage developments in technology to reduce the climate impact of tourism transport; and
- Encouraging behavioural change by all stakeholders of the Caribbean tourism sector.

It is also important to point out that people should still fly, choosing not to fly is not a sustainable option because it will have serious consequences for the national and regional economies of the Caribbean.

3.6 Linkages
Tourism has done much to diversify the economies of Caribbean states, however, the tourism sector can make an even more significant contribution to this process if the linkages between tourism and other sectors of the economy are fully realised. The agriculture sector is struggling in many Caribbean countries, especially in the face of revised international trade agreements such as the EPAs with EU, and it would gain added impetus from trade with the tourism sector. On the other hand, 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. Building supplies can come from a variety of sources in the region, and should be produced/extracted in a sustainable manner. Critical sustainability challenges identified with respect to linkages are:

- Regional governments need to prioritise the integration of tourism into the rest of the economy;
- Community-Based Tourism needs to be introduced to help realise linkages by bringing local handicrafts and other producers in contact with tourists; and
- Governments need to help facilitate the development of niche markets that have a high utilisation of goods and services from other economic sectors, examples being eco-tourism, health tourism and sports tourism.
3.7 Health, Safety and Security

In recent years, uncertainty about the health, safety and security of travel to certain destinations around the world has caused significant fluctuations in tourism flows, and should be regarded as a regional issue for the sustainability of tourism in the Caribbean. A recent report from the World Bank found that the high levels of crime and violence threaten growth and prosperity of the region and is having a direct effect on the region’s attractiveness to investors.

There are policy implications for image, for management of information, and for specific measures to improve the safety and security of tourists. If health, safety and security issues are not managed in a proactive manner but only dealt with as and when they occur, the result can be negative media and a travel advisory for travellers to specific countries in the region. Critical sustainability challenges identified with respect to health, safety and security are:

- Tourism targeted crime such as visitor harassment – sometimes involving drug peddling, with more than half of all visitors in some destinations complaining of harassment;
- Terrorism – with tourist destinations being the target of terrorist attacks, the sector needs to put in place strategic plans at the national and regional levels to counter the threat of terrorism;
- Human health – 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 region is potentially affected by the spread of vector-borne diseases such as dengue, malaria and yellow fevers. Aviary influenza has also received much attention at the global level;
- Food safety – tourists coming to the Caribbean must be assured food safety, especially if linkages between the local food producers, small food stall operators and the tourism sector are to develop;
- Man-made disasters – of particular concern are the threats to the marine environment posed by oil spill emergencies and the transport of hazardous substances, through the region; and
- Natural disasters constitute a major threat to the Caribbean tourism sector. There is a need to work with disaster risk management covering preparedness, communication and training in all forms of natural disaster. There has been a natural 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. At the moment, the only tsunami warning system is in Puerto Rico.
4 REGIONAL POLICY FRAMEWORK FOR A MORE SUSTAINABLE TOURISM DEVELOPMENT IN THE CARIBBEAN – VISION AND OBJECTIVES

4.1 Introduction

This document provides a Regional Policy Framework to guide the sustainable development of Caribbean tourism. It sets forth 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 the critical issues relevant for CTO member states but they also have regional implications and, the diversity of the region not withstanding, a consensus-based approach to common challenges gives added value. A broad Regional Policy Framework that integrates harmoniously with the different national policies constitutes an effective tool to shape the impacts of the Caribbean region’s tourism sector by creating a base of manageable guidelines for a more sustainable tourism development, and a common framework of reference for all stakeholders.

It is intended that the establishment of the Regional Policy Framework can assist National Tourism Organisations to adapt, develop, revise and update their tourism policies and strategies. Regional governments are thus invited to benchmark their national situation against the Regional Policy Framework. The policy guidelines formulated can then be used as the point of departure for the development of national strategies for the areas where a need has been identified.

The Regional Policy Framework has been informed by the approaches taken across the region to address tourism development issues. Descriptions of concrete initiatives in the region and internationally are put forward to exemplify policy guidance. In a region as rich and diverse as the Caribbean, the intention has not been to list all activities in the region but rather to provide a cross section sample of what has been done, to provide inspiration for Caribbean tourism stakeholders.

4.2 The Vision

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

Viable: In the future, stakeholders of the Caribbean tourism sector agree that it is viable. It has increased the number of stay-over and cruise tourists that make the most significant contributions in terms of spending, they stay longer in the region and return year after year, after recommending to friends and family.

Quality: In the future, tourists to the Caribbean experience the quality product that they expect. The infrastructure is in place to look after the environment that they have come to enjoy and they appreciate the natural, built and living heritage that they encounter. The Caribbean is well known for its innovative and functional solutions to all aspects of the tourism value chain.

Empowerment: In the future, citizens of the Caribbean are proud of their region’s status as the world’s premium tourism destination – a status which is based on its unique assets. They are in a position to take advantage of the opportunities that tourism brings and to have their say integrated into the development that takes place around them.

Ownership: In the future, citizens of the Caribbean are well aware of the contribution of the diverse aspects of tourism to their nation’s economic, cultural and natural wealth. They see the benefits that tourist spend has brought and feel ownership of the direction of tourism.
Cooperation: In the future, the Caribbean nations continue to cooperate regionally meeting the challenges engendered by an increasingly globalised tourism economy, and tackling at the regional level those policy issues where a regional approach gives added value.

4.3 Guiding Principles

The following principles, adapted from CTO, UNWTO and UNEP, are central to the Regional Policy Framework:

1. A 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.

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, maintains essential ecological processes and helps 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 to all stakeholders that are fairly distributed, including stable employment and income earning opportunities and social services to host communities and contributing to poverty alleviation.

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 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 implementing 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 Regional Policy Framework to stipulate specific policy options for uptake at the national level. Instead, a series of policy options are put forward for adaptation by decision makers on a needs basis.
10. This Regional Policy Framework should be a dynamic rather than static tool. Its validity should 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.

4.4 Development Goals

Therefore, bearing in mind the need for a more sustainable development of tourism in the region, this Regional Policy Framework urges industry stakeholders to:

**Goal 1:** Ensure sufficient national capacity to manage the sustainability aspects of the tourism sector.

**Goal 2:** Continuously improve the sustainability of the marketing and product mix.

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

**Goal 4:** Maintain the integrity of the cultural and physical environment in which tourism takes place in the Caribbean.

**Goal 5:** Realise the intrinsic linkages between tourism and national economic sectors, in order to maximise the multiplier effect of tourism on the economy and to reduce leakages.

**Goal 6:** Manage the health, safety and security issues that have a potential impact on the tourism industry.
5 POLICY ON TOURISM MANAGEMENT CAPACITY

5.1 Development Goal

**Goal 1:** Ensure sufficient national capacity to manage the sustainability aspects of the tourism sector.

5.2 Policy Strands

- Ensure that the principles of good governance are applied in the planning and development of a sustainable tourism sector.
- Raise awareness of tourism’s importance for the economic development of the country among citizens.
- 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 uptake of innovative practices.
- Embrace the information management and communication opportunities offered by ICTs by creating an enabling environment for their uptake.

5.3 Good Governance

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. Each of these principles is important for establishing good governance and they apply to all levels of government – global, transnational, 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 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:
Carefully consider at the highest political level, the present and future importance of tourism to contributing to meeting national social, economic 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 6.3 on Tourism 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:**
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”.

- If gauged to be a priority sector, carefully consider implementing Strategic Policy Reviews using an agreed and predefined methodology, of the potential impacts of proposed policy on the tourism sector before approving of that policy.

- 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 how the vision for tourism, its contribution to the overall national development goals and its sustainability objectives can be realised.

- A National Tourism Master Plan should be developed in accordance with the principles of good governance, which sets forth concrete targets and specific activities that are 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.

**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. 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:

- Actively communicate about the work performed by the Ministry of Tourism, and its relevant divisions, including the decisions that they take, and based on the edict of freedom of stakeholder access to information relevant to the sector. The language used in any communications should be accessible and understandable for the general public. This is of importance in order to engage civic society in governance issues and to engender public sector appreciation of the seriousness and the value of the tourism sector.
Example of approach taken - Barbados:
The 2001 Green Paper on the Sustainable Development of Tourism in Barbados pledges 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 in lieu of the public meetings that were planned to be held the proceeding month. Prior to this, the document had been widely circulated to all tourism and related organisations and 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, submitted to the Cabinet for comment and then permission to publish the policy document was granted, and public consultation began.

- Develop national policy relating to the tourism sector, including the National Tourism Policy and the National Tourism Master Plan, in an open manner and based on a participatory approach involving industry stakeholders, civil society and the general public. These sectors of society need to be informed of the policy development process and 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.

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 approach when developing and implementing policies. Improved participation is likely to create increase public confidence in the end result and in the Institutions which deliver policies.

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 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. 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.

- In acknowledgement of the linkages of tourism with other policy areas, and thus the importance of inter-sectoral coordination, seek to involve other governmental bodies in decision making processes so that tourism develops in harmony with overall economic, social and environmental goals.

- Seek to 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: e.g. land use plans, waste management strategies, planning of parks and protected areas, safety and security, cruise ship agreements, leasing of marking resource areas and concessions agreements related to resources of interest to the tourism sector.
Example of approach taken - Puerto Rico:
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 basic components of the Law on Sustainable Tourism are:

- 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 in order to implement the Law 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.
- Definitions are provided for relevant subject areas including Limits of Acceptable Change, Carrying Capacity and Infrastructure in publicly and privately owned natural areas.
- The activities of the Office for the Sustainable Development of Tourism are detailed, including the development of a Master Plan to identify the forms of tourism that are compatible with different areas of the country in respect to their carrying capacity, and taking into account other national policy such as the Land Use Plan and the Integrated Water Resource Management Plan; use of a participatory approach to involve interested parties; establishing strategic alliances with specialist organisations, development of criteria and standards for sustainable tourism projects and recommending a strategy for marketing of sustainable tourism products in Puerto Rico.
- The creation of an Inter-agency Commission to provide integrated coordination at the state level and comprised of the above organisations.
- 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 approach51.

Accountability
Accountability relates to the roles of the institutions involved in governance processes. 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 explain and take responsibility for their work through a clear mission statement that reflects the mandate given by central government.
- Disseminate information on the tourism sector and the legislation put in place, as well as that under development, to interested parties; and ensure that the accuracy of the information is continually maintained.
- The Ministry with responsibility for tourism should assess public opinion on its work on a regular basis, 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 reality that tourism faces. Effectiveness also depends on taking decisions on the implementation of policy at the most appropriate level. 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 with the view of consolidating them into comprehensive legislation and codification into national policies and priorities.
• Ensure that national tourism policy is monitored and revised on a continual basis in order to maximise its effectiveness.

• Develop and select the most realistic and appropriate instruments for effective regulatory policies and systems of economic and social incentives and disincentives.

• Monitor the effectiveness of national tourism policy with respect to the edicts put forward in this Regional Policy Framework for sustainable tourism. Any issues that arise from this process should be discussed with the partners and a solution proposed.

5.4 Public Awareness

The sustainable development of tourism in the Caribbean requires the support of the general public. 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.

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, and to increase its social acceptability:

• 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 forum.

• In line with the UNWTO banner slogan “Tourism Enriches”, 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.

Examples of approach taken – World Tourism Day:
Under the theme “Tourism Enriches” many of the UNWTO member countries in the Caribbean region use World Tourism Day on 29 September to raise awareness concerning the positive impacts tourism can have. 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 going back stage at the new Princess Juliana International Airport.

• Other initiatives to improve the public perception of tourism so that it becomes more socially acceptable include:
  o 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,
  o Providing specific training to media on the importance of tourism for the region and how they can participate in creating a stronger and newsworthy image for the sector,
  o Showcasing tourism and its linkages to other productive sectors of the economy,
  o 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, and
  o Encouraging tourism outreach to communities, for example a beach event was hosted in Barbados in 2007 the aim of which was to encourage the physical wellbeing of the local population. Called “phy-SEA-cal”, several tourism enterprises participated including a water sports provider that took children out on short kayak trips, and an Aquarium that gave anyone interested the chance to look and touch sea animals like starfish and sea urchins.
Example of approach taken – CMEx:
The Caribbean Media Exchange for Sustainable Tourism (CMEx) is a bi-annual event that 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.

5.5 Human Resource Development for Sustainable Tourism

The tourism sector in the Caribbean recognises that its service personnel are 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 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 carefully groomed 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 enterprise and public sector organisations. Despite being an economic heavyweight, due to misperceptions 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. The objective of this policy strand is to provide guidance on the mechanisms, programmes and actions at the regional and national levels which consistently address the salient issues related to the human resource needs and requirements of the tourism sector.

This Regional 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 old age essential for adaptation to the advent of the global knowledge based economy. National governments and their national and regional partners are invited to consider the following specific and cross-cutting policy guidelines to facilitate Human Resource Development for sustainable tourism:

- 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 establish standard requirements for entry into the industry, tourism professional certification programmes, review and approve existing and new curricula for certified training of personnel. This should start with the most critical areas first, for example taxi drivers who are a critical component of the overall visitor experience,
  - Ensure that the tourism sector is integrated into national policy on education,
  - Identify key public and private sector stakeholders and consider the development of a national HRD database,
  - Seek to support the establishment of sustainable funding mechanisms, including specific scholarships for tourism and hospitality studies, which will support and help meet the demand for tourism education and training at different levels and for different target groups,
  - Liaise with CTO to identify needs and capitalise on regional initiatives. In particular promotion of the mobility of 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, and
In addition, the need for a human resources strategy for Caribbean tourism at the regional level needs to be considered, especially bearing in mind 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 Tourism Human Resource Council (CTHRC):**

CTHRC was established by CTO in 1998 and is a regional body comprised of senior representatives from business, labour, government, industry associations and 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 is currently developing a Caribbean Tourism Learning System within the framework of the Caribbean Regional Sustainable Tourism Development Programme (CRSTDP). This will result in a system designed 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 include training modules for resource materials for primary and secondary school teachers, 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 and Programme for tourism and hospitality programmes in the region. Another regional initiative supported by CRSTDP is the PUCMM managed Tourism Internship Exchange System (TIES) which aims to provide experiential learning for hospitality workers and senior students.

- **Liaise with relevant national bodies to proactively raise the profile of careers in tourism sub-sectors by:**
  - Encouraging educators to include modules and/or elements that seek to instil confidence in workers based on history and culture,
  - 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, and
  - 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.

- **Coordinate with national education bodies and regional partners the integration of tourism education into the school curriculum, from pre-school and 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 all disciplines, such as physics, geography and mathematics,
  - Developing environmental education material to demonstrate the economic importance of a clean environment both for the civil society and for tourism, and
  - Establishment of a programme to bring young people into contact with tourism, for example the Antigua and Barbuda Informal Tourism Cadet Programme, which helps to guide the reactions of young people to 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,
  - Partner with colleges to promote market driven training with certification according to 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 their standard of ability,
  - Develop internship/training attachment programmes with local and regional enterprises and educational institutions,
Where employment of overseas nationals is necessary, and in accordance with local immigration laws, mentorship and understudy programmes should be encouraged to allow locals to eventually occupy specialist areas and management positions, and

Help foster interchange, cooperation and mobility between education and training institutions within the Caribbean.

In order to address the teaching and learning needs of those 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,
- 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 support and encouragement of private sector training,
- Promote the development of language training for example by involving language students and overseas nationals in the provision of training, and
- Promote the uptake of language learning, for example through the development of innovative ICT based content, services, pedagogies and practices.

5.6 Tourism Research and Development

In terms of capacity building, one of the challenges facing tourism policy makers is how to bridge the gap between the creation of knowledge and its practical application to specific, diverse situations. 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.

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 uptake of innovative practices:

- Encourage national bodies with tourism competence, for example tertiary institutions, development consultants etc. to share their knowledge in national forums on the management of tourism, to be attended by a broad stakeholder grouping.
- Seek to enter into strategic partnerships with regional universities to encourage transfer of knowledge-based skills into practice.
- The Ministry with responsibility for tourism should encourage its personnel to proactively use best practice forums on issues related to tourism development.
5.7 Information Communication Technologies (ICTs)

Tourism is an information intensive industry and developments within ICTs, in particular internet accessibility, are revolutionising the way that the business is being run. 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 St. Lucia Tourist Board and in the larger properties in St. Lucia like reservation systems, food and beverage systems, accounting and inventory controls, but take-up of ICT to manage accommodations in the small hotel sector and ancillary services remains limited”.

It is vital that e-business is integrated into the daily operations of tourism enterprises in the Caribbean, such as accommodation facilities and tour operators, as well as 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 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 ICTs contribute to the sustainability of the tourism sector:

• As global developments towards the digital economy pick-up speed, 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, ICTs relevant to the national tourism sector.

• National tourism policy should address the need for a national enabling environment for the uptake of ICTs 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 preschools, 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 ICTs by SMEs and consumers, including those in remote areas, should be facilitated by providing:
  o Easy and low cost access to ICT solutions,
  o Easier access to expert knowledge regarding eBusiness for enterprises,
  o Increased cooperation between enterprises and knowledge institutions, and
  o Increased efforts in ICT research on eTourism innovation.

• Regular consultative meetings will be organised, and knowledge shared with other destinations in order to define appropriate ICT strategies and implementation plans and timetables.

• 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 business to business (B2B) mechanism for the rapid dissemination of market intelligence, statistics, marketing plans and development activities.
Example of approach taken - Belize:

*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 to:

- Operate a licensed property that follows the rules and regulations of the Hotel Act
- Ensure that all advertising and marketing for the property is 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.
6 TOURISM MARKETING POLICY

6.1 Development Goal

Goal 2: Continuously improve the sustainability of the marketing and product mix.

6.2 Policy Strands

- Capture and analyse information for market intelligence purposes to facilitate an informed tourism marketing policy.
- Ensure that the tourism sector embraces the opportunities offered by ICT in its tourism marketing.
- Provide an enabling environment for product development and improvement.
- Stimulate a diverse tourism sector by focusing on product areas where the Caribbean has added value.
- Ensure that international standards of quality are reached in the tourism product making it export ready.
- Ensure that effective marketing and promotion targets the priority markets identified in the marketing policy.

6.3 Tourism Market Intelligence

Market intelligence is essential to enable efficient planning and decision making with regard to marketing and investment. Furthermore, by facilitating Customer Relations Management (CRM), it can become a major element of competitive advantage for Caribbean countries. Information on where visitors come from and when they come, where they stay and how long they stay, as well as what they thought about their stay enables more targeted promotion of destinations to be carried out at the national and regional levels. It also assists in product development and improvement initiatives 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:

- 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 effects 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 5.3 on Good Governance). Operating a TSA requires inter-ministry cooperation and should be lead 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 lead of members.
• Utilise central information systems for the collection and management of tourism data. CTO is currently implementing a Management Information System for Tourism (MIST) within the framework of CRSTDP. MIST offers standardised data collection and management at the national level for information on visitors that can be used to improve promotion and for product improvement activities. This information is furthermore aggregated at the regional level, generating further useful investor-oriented sector development information.

**ICTs in Tourism Marketing**

Fundamental changes are taking place in user behaviour in key markets for the Caribbean as countries move towards a knowledge-based, digital economy. The evolution of the internet represents a paradigm shift in the information-intensive tourism industry, offering 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 grow and technologies improve.

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 related to online marketing and sale of destinations and changing visitor needs. As a matter of priority the national tourism organisation shall develop an effective e-marketing strategy.

• 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 ICTs in order to increase the attractiveness, competitiveness and uniqueness of the destination.

• Assess improvements to the quality of the destination marketing, for example by redesigning and dramatically expanding the content of the destination website by integrating all types of visitor information.

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

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:

- Searchable portal providing information on full range of tourism products
- 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
- Incorporate sections for the promotion of themes, niche products and sectors to support development areas

6.4 **Tourism Product Development**

National governments are able to shape tourism product development through a range of policy measures. 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 Foreign Direct Investment (FDI) and approve development projects is in full compliance with the edicts of the overall national tourism policy and the need for a more sustainable tourism development.

**Example of approach taken – Grenada:**

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 lead 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.

• Making it easier to invest in the Caribbean tourism sector may involve the establishment of specific 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.

• 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 time consuming 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 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.

• Whilst seeking to attract FDI for new developments primarily in the accommodation stock, the national tourism bodies should also recognise that an important component of product development is promoting the long-term viability of existing accommodation stock, with particular reference to the small hotel sector. Inns, hotels and guest houses are often an important component of the national tourism sector and the preferred accommodation choice for visitors in a number of source markets. At the same time, they signify local participation in the industry. 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:
  - Improving the aesthetic quality of the accommodation experience through technical assistance – experts attached to hotels and providing hand holding guidance to owners/operators,
  - Providing training through classroom and on the job to ensure consistency in quality of service,
o Providing technical assistance in marketing including the use of ICT to improve efficiency and reach of individual hotel efforts, and
o Establishing a Business Advisory Service to provide the above support.

Example of approach taken – Cayman Islands:
The 2003 A Focus for the Future, A Tourism Policy Framework for the Cayman Islands recognised that tourist accommodation and related supply e.g. restaurants exceeded demand and would do so in the near future. Occupancies were correspondingly low with businesses facing the wall. The policy recommends a temporary moratorium on new hotel developments in specific areas, over and above present commitments, until overall occupancies had reached 60 percent for two consecutive years. It was expected that this would help: sustain existing visitor accommodation businesses, control further development in areas where there was a sense of over-development, encourage investment in upgrading or replacement of existing stock and encourage more development in the less developed districts.

6.5 A Diverse Tourism Sector

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, and help tap into the “new tourists”, who are more likely to seek activities 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”.

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

<table>
<thead>
<tr>
<th>Area</th>
<th>Cruise segment</th>
<th>Stay-over segment</th>
<th>Nature tourism</th>
<th>Marine tourism</th>
<th>Adventure tourism</th>
<th>Heritage/cultural tourism</th>
<th>Sun, sea and sand</th>
<th>Meetings conventions &amp; conventions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belize District</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ambergris Caye</td>
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<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caye Caulker</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>Cayo</td>
<td>✓</td>
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</tr>
<tr>
<td>Corozal</td>
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<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orange Walk</td>
<td></td>
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<td>✓</td>
<td>✓</td>
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<tr>
<td>Stann Creek</td>
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<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
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<td>✓</td>
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<tr>
<td>Toledo</td>
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<td>✓</td>
<td>✓</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Outer Islands</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Belize, Draft Tourism Policy, 2005
• Continually review national product offer to maximise diversity in target areas where the Caribbean has competitive advantage. 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 for priority niche market sectors prior to initiation of product development activities. The strategy 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.

Example of approach taken – Jamaica:
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 Tourism Division Office of the Prime Minister (OPMT) and is also advised by the six Resort Boards. The Resort Boards are Public Private Partnerships established in each of the 6 resort areas (Negril, Montego Bay, Ocho Rios, Portland, Kingston and the South Coast) to work with product development within their resort

6.6 Quality Standards

Tourism is essentially an export industry, and it’s therefore vital that the products on offer meet internationally accepted and appreciated levels of quality. 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 put the 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 eschews the principles of continual quality improvement. Encourage a culture of quality performance assessment to help move the sector forward by:
  o Ensuring that feedback is gained from visitors on the quality of their experience, including perceptions of warmth of welcome, service levels and environmental quality,
  o Developing a central registry of complaints,
  o Collaborating with stakeholders to develop a national forum where quality issues in the tourism value chain can be identified, and
  o Encouraging suggestions for improvement from visitors.

• Support the development and uptake of so-called green tourism standards by the sector, with Green Globe and Blue Flag being arguably the most prevalent in the region. This should 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, and participate actively in their uptake. In a major development the internationally recognised Hospitality Assured® programme is being implemented by CTO within the framework of CRSTDP and with the support of 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 all tourism operators are registered with the agency for tourism promotion and obtain an operating license. Implement hygiene 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 to, and if possible recognised by tour operators who have to undertake health and safety audits of new products, which may in turn slow the process of bringing them online.

**Example of approach taken – Dominica:**
The Quality Assurance Unit at Dominica’s National Development Corporation has developed tourism standards for the full range of tourism sector services: accommodation, food and beverage, host homes, 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 a host home: Proof of registration, Public liability insurance, Food premises certificate, Fire certificate, Planning permission (if applicable), Food handlers permit, and Disaster management plan.

### 6.7 Effective Promotion

This policy strand relates to the design and development of effective marketing and promotion 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 and promotion 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 national tourism sector.

• 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.

• Caribbean countries will 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.

• Establish mechanisms for monitoring and evaluating the effectiveness of promotional activities undertaken by the agency/ies responsible for destination marketing. This feedback loop needs to evaluate using arrival statistics, surveys and observations in the field, 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.

**Example of approach taken – St. Lucia:**
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.61
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 government should commit sufficient funding for this enterprise.
- The relevant agency should use accurate market intelligence to give information on new and emerging markets offering the most potential.
7 TOURISM AND TRANSPORTATION POLICY

7.1 Development Goal

Goal 3: Develop transportation options to facilitate a sustainable level of destination accessibility.

7.2 Policy Strands

- Encourage the air transportation needed to facilitate a sustainable level of destination accessibility.
- Encourage the cruise and maritime transport needed to facilitate a sustainable level of destination accessibility.
- Achieve and maintain an optimal land-based transport infrastructure.

7.3 Air Transportation

The recent Caribbean Air Transportation study, commissioned by CTO under the EU-funded CRSTDP, concluded that “while all Caribbean countries are committed to the diversification risk mitigation mechanism, only a limited number have embraced the ownership mechanism, usually unsuccessfully and at greater cost to the taxpayer. These airlines are undercapitalised and are generally facing serious operational and financial problems, with a consequent negative impact on the quality and reliability of the regional services. Of course it can be argued that the financial losses suffered by those carriers and by extension governments must be seen within the context of the provision of guaranteed airlift to their respective countries. However, the evidence from Aruba, Chile, the Dominican Republic and Mauritius for example demonstrates that not only does full concentration on the diversification mechanism result in increased and more reliable airlift but also it does that at negligible cost to governments”.

With this in mind, the study went onto offer a series of recommendations to regional governments:

- Adopt a “regional open skies” regime that would remove all non-technical/non-safety and security restrictions on carriers, equipment, routes, schedule and airfares. Instead “regional open skies” is the aviation corollary to the CSME that would allow more efficient and profitable operation of regional airlines by giving them the freedom to find the optimum mix of destinations to fly as well as the framework for fairer competition. It could also allow other specialised carriers to use the appropriate equipment for servicing certain routes, as per Montserrat. Unserviced or “unprofitable” routes could then be specifically subsidised within agreed parameters as opposed to the current practice of blanket subsidisation even when airlines have the opportunity to operate profitably.

- The CARICOM Multilateral Air Services Agreement (MASA) should be amended and upgraded to reflect the decision to adopt a regional open skies regime. The current MASA does not now conform to the requirements of the Revised Treaty of Chaguaramas – it is not as liberal as regards removal of restrictions, and creation of a single economic space between member countries and must be amended accordingly if it is to remain a useful Agreement between CARICOM countries. It may also be useful to extend the MASA to non-CARICOM regional countries where feasible. The Agreement should allow for the CARICOM Competition Commission to have jurisdiction over unfair competition disputes, ensuring full compliance with the Revised Treaty of Chaguaramas.
• CARICOM and other Caribbean countries are strongly urged to negotiate “open skies” arrangements, or comparable liberal arrangements for international air service, with the USA, UK and other relevant developed countries using the Multilateral Agreement on the Liberalisation of International Air Transportation (MALIAT) as a model and incorporating the “community of interest” designation for those CARICOM airlines whose host countries are party to such agreements. The evidence is soundly supportive of the view that this brings increased services and generally lower prices and better quality through competition. This of course, should be subject to regional airlines having the reciprocal opportunity to compete and to the “community of interest” principle being accepted.

• Caribbean countries should adopt clear and suitably devised policies for supporting regional airlines; in particular those in which governments may still have a role as shareholder. The sustainability of inter-island air services, especially in the Eastern Caribbean, in a liberalised market is a legitimate concern. Many countries adopting liberal air service policies have recognised the importance of their public service obligation in situations of market failure. There are a number of working schemes in place for addressing this need and their applicability to the region would have to be studied carefully. Nevertheless, there should be no generalised financial subsidies. Rather, Caribbean nations would be well advised to adopt appropriate policies as regards their public service obligation, which would see, where necessary, the granting of subsidies to airlines for selected routes and services where competition in the market cannot be sustained. The policy should clearly establish objectives, target beneficiary groups or communities, payment arrangements, timelines and performance monitoring. Governments must however remove any artificial obstacles to the achievement of competition and where conditions change, necessitating a removal of subsidies, they should be removed forthwith.

Furthermore, national governments and their national and regional partners are invited to consider the following policy guidelines related to (i) provision of adequate airlift, (ii) improvement of existing infrastructure and related human resources and (iii) international policy developments:

• Government commitment to optimal airlift should be transposed into the National Economic Development Plan and National Tourism Policy.

• 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:
The Government of Trinidad and Tobago (GOTT) established the GOTT Air Committee in May 2005 and includes representatives from the Tobago Chamber of Commerce, the Trinidad Hotel and Tourism Association, The Tobago House of Assembly, the Tourism and Industrial Development Company (TIDCO), 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.

• Bearing in mind the need to reduce the vulnerability of airlift, and the poor financial state of the global airline industry, the Ministry with tourism responsibility should review the marketing support mechanism used for airline subsidisation 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 can’t 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.
• National government should commit additional resources to upgrade aviation safety and airport security in order to meet international standards. Civil Aviation Authorities should achieve and maintain IASA Category One status, the highest safety category possible, which is one of the prerequisites for ongoing route development.

Example of approach taken – OECS:
In 2006, the OECS was awarded Category One status by 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 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.

• National governments and their regional partners should liaise and coordinate air transport issues at the regional level in line with ICAO recommendations for the establishment of sub-regional bodies to address various aspects of civil aviation. RASOS, the Regional Aviation Safety Oversight System, is a joint initiative of 7 Caribbean Civil Aviation Authorities serving 13 states. It focuses on harmonising rules and standards, inspection procedures, sharing scarce technical resources and implementing recommendations with regard to flight safety oversight responsibilities.

• Ensure that the function of the airport infrastructure and its associated Human Resources is 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 red caps and the taxi dispatch services.

• Liaise with regional partners to monitor policy developments linked to the climate change debate, currently taking place in the main markets of Europe and North America. In 2007, CTO and CHA issued a joint position statement stating that the Caribbean will take a proactive stance to climate change regulation, whilst underlying the impacts on the region’s economic sustainability if international travel is impacted. Relevant policy developments include: the UK Aviation Tax, the EU’s move to integrate the civil aviation sector into the Kyoto mechanism and conscience campaigns by domestic tourism sectors to encourage citizens to reduce their carbon footprint and vacation in their home country.

7.4 Cruise and Maritime Transport

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) carrying capacity, (iii) visitor spending, and (iv) sector management issues:

• 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. Homeporting 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 provisioning of cruise ships offers a major opportunity that agricultural suppliers and local food and drinks manufacturers should seek to capitalise on. Unless steps are taken to broker local produce (see Section 9.3 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.

• Liaise with national organisations to ensure that the cruise visitation does not jeopardise the country's ability to meet its commitment to sustainable development and the vision put forward in the National Tourism Policy document. Excursions to fragile nature and culture-based heritage sites must provide a high quality experience for the cruise passengers, whilst at the same time respecting the carrying capacity of the site. Otherwise, the sustainability of niche products for the priority stay-over market may be jeopardised.

• Identify which sites are suitable for cruise passenger visitation and at what scale. Designate selected sites as primarily cruise market sites and ensure that the stay-over market is aware of this and encourage the development of private sector attractions that target the cruise market.

• 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 put on the crews, who constitute an important financial resource yet also need to be made feel welcome, for example through sports activities etc.

• Collaborate between relevant ministries and with 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 and complying 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 of cruise ship operators that frequently flout the rule of law should 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 5.3 Good Governance).

Example of approach taken – Belize:
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 – L’Express des Îles
Guadeloupe-based L’Express des Îles or The Island Express has operated a high speed ferry service between Guadeloupe, Dominica, Martinique and St. Lucia since 1989. L’Express des Îles services include daily return trips between Guadeloupe and Martinique, and Martinique and St. Lucia. There is also a special services between other Caribbean islands and covering St. Vincent, Barbados, Grenada, Antigua, Montserrat, St. Kitts, St. Martin and St. Bart\textsuperscript{65}.

7.5 Land-based Transport

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

- The Ministry with responsibility for tourism should liaise with the Ministry responsible for public works and lobby for more resources to be allocated to the development of an efficient road infrastructure. This implies good road quality and effective signage. Both are preconditions for allowing visitors to explore the country and generate custom in attractions, craft centres and the retail sector.

- The Ministry with responsibility for tourism should liaise with the organisation responsible for public transport to investigate options for the improvement of the public transport network.

- The Ministry with responsibility for tourism and its national partners should take steps to implement quality standards in the taxi and vehicle rental sectors (see Section 6.6 on Quality Standards).
8 POLICY ON TOURISM AND THE ENVIRONMENT

8.1 Development Goal

Goal 4: Maintain the integrity of the cultural and physical environment in which tourism takes place in the Caribbean.

8.2 Policy Strands

- Ensure effective planning, management and monitoring of the environment in which tourism takes place.
- Engender sustainable patterns of resource consumption practices in the Caribbean Tourism Value Chain.
- Benefit from the opportunities offered to the region by the international response to Climate Change.

8.3 Environmental Planning, Management and Monitoring and Tourism

CTO recognises that when it comes to tourism, 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 both the region’s cultural and physical resources. Regional stakeholders have expressed concern that the steps being taken to improve the quality of the environment are not making sufficient scale improvements, and this is endorsed by the feedback from the market.

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 in which tourism takes place:

- Develop National Physical Plans (NPPs) on a systematic basis that set down the regulatory framework for land-use planning and help protect the urban and natural environment, match infrastructure investments with development, and maintain and enhance property values. NPPs should classify development zones, and the Tourism Master Plan(s) should further extrapolate on how to facilitate strategic tourism development within these zones. Inter-agency coordination should be in place to ensure a consensus-based approach to support the planning process.

Example of approach taken – The System of Planning, Jamaica:

Two main statutes control development in Jamaica, the Town and Country Planning Act of 1954 and the Local Improvements Act of 1944. One of the most common forms of land use regulation and control is the Development Order. 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...
• Ensure that the principles of good governance are used in the application of planning regulations:
  o All developments should require planning permission from an authority with the necessary capacity to administer that function,
  o Legislation should be in place that requires Environmental Impact Assessments (EIAs) be carried out according to a standardised methodology, for example for tourism-related developments within the coastal zone or other ecologically sensitive areas, and
  o Legislation should be in place that requires Social Impact Assessments (SIAs) be carried out according to a standardised methodology, for example for tourism-related developments that require the compulsory purchase of property and the re-location of communities.

• Planning regulations might:
  o Discourage new developments within the boundaries or immediate environs of areas recognised as national parks or reserves,
  o Take into consideration the need for wildlife corridors connecting nature areas and allowing the interaction of flora and fauna populations,
  o Establish a coastal set-back requirement for all new developments,
  o Require special permission for constructions over a certain height,
  o 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,
  o Stipulate that new constructions use appropriate environmental technology to promote resource efficiency,
  o Encourage the use of local building materials,
  o Require that tourism development projects follow national building codes, where these are in place, in order to ensure high quality of build, and
  o Stipulate that due care must be taken during the design, construction, and operational phases of new developments in order to reduce the risk of damage from natural disaster events.

• Integrate the principles of sustainable tourism into specific environment-related national policy, including Natural Environmental Action Plans, energy policy and cultural policy. Ensure that the positive and negative impacts that tourism may have on the environment are thought into environmental planning at the highest levels.

• Ensure that tourism is represented in cross ministerial/departmental collaboration on environmental issues to ensure that a more coherent, integrated and comprehensive approach is taken.

• Protect the cultural heritage by:
  o Conducting an inventory of cultural heritage sites such as monuments and cultural landscapes, as well as the cultural patrimony including oral history, folk traditions, literary and performing arts and the collective memory,
  o Coordinating with relevant organisations to ensure that the demolition of listed buildings of architectural and/or historic importance is penalised, and
  o 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 9.4 Facilitate Linkages Between Communities and Tourism). 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 should therefore also be advocated, as well as careful management.
• Boost initiation of and participation in broad media programmes and events promoting history, 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 generate respect from the visitors to the region.

• 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, set up and carry out an Integrated Coast Zone Management plan in order to address the effects of intensive coastal tourism development on the marine environment. This should be set down in a formal framework, and establish management strategies that rely on a systems approach recognising the inter-connections between coastal and marine activities.

Example of approach taken – Coastal Zone Management Unit (CZMU), Barbados
CZMU was established in 1996 and developed out of the Coastal Conservation Project Unit. The Coastal Zone Management Act governs its primary functions. Other related legislation is the Town and Country Planning Act, Marine Pollution Control Act and the National Conservation Commission Act.

Its 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.

• Improve the existing management of Parks and Protected Areas. Specific site management plans should be developed for natural resources, and in particular those promoted to visitors. These should provide a framework for: visitation guidelines (codes of conduct), infrastructure improvement, trail development and maintenance, and interpretative facilities and services including signs rest areas and viewing platforms.

Example of approach taken – The Protected Area Conservation Trust (PACT), Belize
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.

• Support regional initiatives to define environmental standards for the Caribbean tourism industry by providing the necessary human and financial resources to facilitate their implementation. The Blue Flag for example is a voluntary certification scheme for beaches and marinas that has proven to be an effective environmental tool to enhance safety management and the environmental quality of beaches and marinas in the Caribbean. The Blue Flag is operated by Foundation for Environmental Education in Europe (FEEE), an European environmental NGO. What started out in the 1980s as a Euro-centric programme for the identification of sound bathing water quality, has now become a global brand with immediate recognition that lends itself to competitive advantage in a global market.
Example of approach taken – Blue Flag, Puerto Rico
The Puerto Rico Tourism Company initiated work with Blue Flag in 2002 and four beaches are awarded Blue Flag status and are allowed to fly the flag. 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. The tourists benefit for the same reasons. The uptake 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.

- Bearing in mind the ongoing regional and international initiatives to facilitate the use of indicators for measuring, monitoring and evaluating the impact of tourism on a (local) destination’s sustainability: 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 – Sustainable Tourism Zone of the Caribbean, Association of Caribbean States
The Association of Caribbean States (ACS) is developing a Sustainable Tourism Zone of the Caribbean, after the Convention for its establishment was signed in December 2001. 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 principals 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.

8.4 Sustainable Patterns of Consumption
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 user of resources in many areas. Ensuring that it uses resources efficiently is important for both the wellbeing of the local environment and host community and in maintaining global resources. Furthermore, the flow of energy through the Caribbean tourism value chain is likely to become an issue of key strategic importance in the future. It will become increasingly important that the Caribbean tourism sector is able to demonstrate that it recognises the need for energy efficiency and is taking steps to reduce its contribution to climate change.

National governments and their national and regional partners are urged to consider the following policy guidelines in order to ensure more sustainable patterns of consumption:

- Provide technical assistance to tourism enterprises to train them in energy management techniques and to put in place concrete energy efficiency measures. Energy prices have been identified as a major constraint for the Caribbean tourism sector. Dominica’s 2010 Tourism Policy further states that the country’s high energy costs are contributing to profitability issues and deterring investors in new facilities. By reducing energy costs, enterprises will realise comparative advantage over competitors who have not taken such steps.
• Provide technical assistance to tourism enterprises to train them in water conservation techniques and put in place concrete measures. Water can be scarce in the Caribbean; for example 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 makes sense but it should not deter from the overall quality of the visitor’s experience.

• Public sector agencies related to tourism should set an example by investing in resource efficiency measures themselves, and communicating their success over time to stakeholders.

• Seek to benefit from the environmental management systems and standards currently available at the regional level. For example the QTC (Quality Tourism in the Caribbean) family of environmental standards for application at the facility level that is currently being developed. Encourage facilities to measure and monitor their resource consumption over time and benchmark against international water and energy consumption targets for hotels, which benefits the bottomline as well as the environment.

• Ensure that wastewater is properly treated, especially bearing in mind the porous nature of the limestone and volcanic bedrock of many Caribbean states, which allows the leaching of pollution fronts into ground water and/or marine areas.

• Reduce visual pollution from flytipping and littering by conducting public campaigns targeted at all levels of civil society, providing environmental education, establishing regular beach cleaning, enforcing fines for flytipping, and through the provision of waste bins at strategic locations in public spaces that are emptied on a needs basis.

• Encourage reuse and recycling in tourism enterprises to reduce the volume of waste being landfilled. Ensure proper sanitary landfiling in order to reduce groundwater and marine pollution by leachate.

• Lobby for alternative 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 due to the potential of contamination coming into the country in the waste.

• Initiate public information campaigns as well as trade-targetted campaigns on Environmental Technology, in particular that it can generate significant cost savings over the long term, helps reduce environmental impacts and is based on tried and tested technologies.

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

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

• Liaise with regional stakeholders to gather information on practices used by Caribbean countries to make their tourism sector more sustainable and present this in a user friendly format.

Example of approach taken – Caribbean Alliance for Sustainable Tourism (CAST)
CAST is CHA’s environmental wing 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 Green Globe environmental certification scheme in the Caribbean, and regularly carries out training and dissemination of best practices for resource efficiency in this context.
8.5 Climate Change

Governments, international organisations and the corporate sector are considering how to respond to climate change, which constitutes both a threat to, and an opportunity for, the Caribbean. It is vital for the sustainability of the sector in the Caribbean that governments and their regional partners take a proactive stand on the issue of climate change.

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:

- Cooperate with national and regional partners to communicate at relevant international forums, the importance of tourism, and inter alia air transport, to the economic sustainability of the Caribbean region.

- Encourage public and private tourism stakeholders as well as civil society to apply a mix of technology and behavioural change to address the issue of climate change. Governments may for example review their own travel consumption and assess whether new technologies for meetings can be used to replace a part of that travel.

**Example of approach taken – Caribbean Airlines**

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 bottomline. 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, in turn reducing noise pollution. The installation of winglets should result in 4-5000 tonnes of CO2 reduction in 2007, with the North American routes accounting for 3825 tonnes of CO2 reduction (New York: 1781 tonnes, Toronto: 1308 tonnes and Miami 736 tonnes)73.

- Communicate at relevant forums the steps that have been taken to reduce the so-called “carbon footprint” of the national tourism sector.

- Cooperate with national and regional partners to lever carbon offset funding into earmarked community and energy efficiency development projects in the region.

**Example of approach taken – ClimateCare, UK**

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 below74.

<table>
<thead>
<tr>
<th>Type</th>
<th>Projects initiated and locality</th>
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<tbody>
<tr>
<td>Human energy</td>
<td>Treadle irrigation pumps, India</td>
</tr>
<tr>
<td>Bio energy</td>
<td>Biogas digesters, India; Cooking oil project, The Bahamas; Biofuel from crop residue, India</td>
</tr>
<tr>
<td>Wind energy</td>
<td>Karnataka wind turbines, India</td>
</tr>
<tr>
<td>Efficient lights</td>
<td>Lighting-up education, Kazakhstan; Township community lighting, South Africa; Lighting project, Marshall Islands</td>
</tr>
<tr>
<td>Efficient stoves</td>
<td>Construction of closed stoves to replace open fireplaces, India and Honduras</td>
</tr>
<tr>
<td>Rainforest reforestation</td>
<td>Reforestation of rainforest, Uganda</td>
</tr>
</tbody>
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9 POLICY ON LINKAGES TO OTHER ECONOMIC SECTORS

9.1 Development Goal

**Goal 5:** Realise the intrinsic linkages between tourism and national economic sectors, in order to maximise the multiplier effect of tourism on the economy and reduce leakages.

9.2 Policy Strands

- Provide an enabling framework to realise inter-sectoral linkages.
- Ensure that communities are able to gain meaningful benefit from linkages with tourism.

9.3 Provide a Linkage Enabling Framework

CTO recognises that the task of extracting maximum economic benefits from tourism begins after the visitor arrives – the job is not over when the arrival of the visitor has been registered. However, the local producers who play a considerable role in maximising the economic benefits of tourism to the national economy, will not be competing on a level playing field. They face a globalised economy in which imported goods, thanks to economies of scale, retail at lower prices. Also the incentives regime may facilitate import of duty free goods, e.g. construction materials, even though these may be manufactured and available locally. 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 contribute to the sustainable development of tourism in the Caribbean:

- Review governmental policy to ensure that linkages between tourism and other economic sectors are prioritised, for example in the National Tourism Policy and in the National Agricultural Policy.

- Review governmental fiscal policy and the incentives regime for new and existing tourism operations to assist local suppliers to participate on a level playing field. Designated suppliers to the tourism sector may be treated as exporters in relation to matters such as sourcing of inputs, packaging materials, market development and training grants etc.

- Conduct ongoing research on the demand patterns of visitors and the potential for inter-sectoral linkages, for example information provided by exit surveys.

- Facilitate the development of niche markets that utilise goods and services from other sectors including health tourism, heritage tourism, sports tourism and agri-tourism.

**Example of approach taken – Walker’s Wood, Jamaica**

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 lead 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/CRSTDP publication *Competing with the Best – Good Practices in Community-Based Tourism in the Caribbean.*
Example of approach taken – Destination Valibèl, Haïti
This is one of the activities of the Association des Paysans de Vallue (APV), a NGO that was founded in 1987 to promote socio-economic development of the Vallue district. APV has developed tangible benefits for the local communities 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 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.

- Cooperate with other national agencies to build capacity among local suppliers by:
  - Working with farmers to improve seed selection, crop rotation, grading and selection and post harvest storage and packaging to ensure a uniform high level of quality produce presented as required,
  - Delivering technical support in business development to local entrepreneurs, for example via a Business Advisory Services Team, and
  - Training intermediaries to work with clients and farmers to ensure the regular supply of the produce required and on contractual relationships.

- Take an innovative approach to the identification of linkages. One major area of opportunity could be Environmental Technology (ET), as the sub-sectors in the region’s largest industry move towards fulfilling their obligations towards more sustainable patterns of resource consumption.

Example of approach taken – SUNPOWER Hot Water Systems
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 property across the Caribbean. The uptake of the Hot Water System in Barbados has been assisted by the government tax deduction on the purchase of a solar water heater.

- Review what tools are needed to ensure that linkages between tourism and other economic sectors are realised, for example:
  - Campaigns to sensitize the sector on the use of local products and their availability, such as the Adopt-a-Farmer schemes for hotels,
  - Systems for hoteliers to indicate their purchasing requirements on a set basis to be hosted by a relevant authority and disseminated to farmers able to supply these needs, and
  - A national and/or regional system for the accredited labelling of national and/or regional produce available in supermarkets.

Example of approach taken – Sandals Chain, Jamaica and Four Seasons, Nevis
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 RADA to provide training in horticultural methods and it has chosen crops that it has a year round demand for to ensure take-off. 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. The Nevis Model is an agro-tourism partnership between the Four Seasons Resort and the Nevis Growers Association with technical assistance from the Department of Agriculture.
Example of approach taken – Agrotourism Linkages Centre, Barbados
The Inter-American Institute for Cooperation on Agriculture (IICA) Agrotourism Linkage Centre in Barbados promotes partnerships between large all-inclusive and conventional hotels and local agricultural producer associations in the region.

Example of approach taken – Travel Foundation, Tobago
The Travel Foundation is working 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, seven farmers have been involved in supplying the Hilton with local produce. The consistent demand has led to a sharp increase in production from the farmer’s association. With this success, the plan now 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 who 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.

9.4 Facilitate Linkages between Communities and 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; specific case studies are documented in the CTO/CRSTDP manual Competing with the Best: Good Practices in Community-Based Tourism in the Caribbean. This document identifies four critical constraints for CBT:

1. Access to the market: in terms of physical location, economic elites and social constraints on local producers;

2. Commercial viability: in terms of product quality and price, marketing, strength of the broader destination and funding mechanisms;

3. Policy framework land tenure: in terms of land tenure, regulatory context, planning process, government attitudes and capacity; and

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, based on the research conducted by CTO/CRSTDP, 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:

Access to the Market
- Promote access to the market by:
  - Investing in infrastructure, particularly roads, harbours and communications, as well as vendor markets and sanitation facilities,
  - Facilitating marketing links, promotion of the product on offer and intensive communication,
Example of approach taken – La Ruta del Café, Dominican Republic:
La Ruta del Café is found in Salcedo, a rural community in the NE 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 and eat traditional foods at local restaurants as well as viewing 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.

Commercial Viability
- Promote the quality and attractiveness of individual products by:
  - 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,
  - Conducting market research with the private sector in product development to ensure viability,
  - Encouraging innovative approaches to authentic crafts, agricultural products and cultural events,
  - Growing local and regional markets to maintain visitation levels in low season,
  - Creating an ongoing review mechanism of product quality, and
  - Enabling CBT to be registered according to health and safety standards.

- Support marketing efforts of individual products by:
  - Developing effective marketing strategies for those CBT projects in the country that meet the stipulated levels of quality and attractiveness,
  - Supporting CBT to facilitate communications, bookings and/or payments,
  - Applying creative branding and unconventional marketing to reach niche markets, and
  - Monitoring how tourists hear about and visit CBT initiatives.

- Facilitate access to credit by:
  - Providing technical assistance in the preparation of business plans for CBT,
  - Providing start-up funds for CBT through micro-finance that is relatively easy to access,
  - Offering soft loan repayment terms that are flexible and take into account the seasonality of tourism,
  - Implementing workshops to sensitise the financial sector to CBT product potential, and
  - Investigating the investment of community equity in a project and other creative sources of funding for example co-operatives, backing from commercial companies and special events.

- Facilitate community/private sector contractual partnerships by:
  - Implementing effective community enterprise development programmes with skills development and job creation,
  - Promoting preferential procurement by the private sector partner to provide contracts and work for local small businesses, and
  - Ensuring a fair concession fee or rental for the communal land or asset used in a joint venture and a lease that gives the private sector partner enough time to make a return on the investment.

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 a complementary sub-sector of community based Heritage Tourism and strengthen 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, for example the Plas Kassav enterprise that celebrates cassave and creole cuisine, and has 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.
Policy Framework

- Incorporate the principles of CBT into National Tourism Policy.
- Incorporate CBT into development strategies and initiatives outside tourism such as land tenure, the use development and management of common property, and small enterprise development; including the design and use of appropriate approaches and instruments for planning and management and the establishment of suitable institutional arrangements.
- 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 had a central CBT component. The programme developed a Community Tourism Policy that forms part of the national Tourism 2010 Policy, established a Community Tourism Development Fund that disbursed grants to 20 community based organisations for infrastructure development, for example the construction of a retaining wall to stabilise the embankment and upgrade the embarkation jetty for the Indian River Tour, and provided 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 sustainable mechanisms are put in place for the equitable distribution of benefits. For example, a community development fee is charged on La Ruta del Café in the Dominican Republic.
- The behaviour and attitudes of tourists and community members alike can be influenced by:
  - Developing a code of conduct for hosts and guests,
  - Providing cultural awareness information resources for tourists,
  - Implementing voluntary self regulatory instruments to ensure appropriate behaviour in environmentally sensitive areas, and
  - Monitoring environmental impacts and the setting of and periodic review of carrying capacity.
- Monitoring and evaluation can be facilitated by:
  - Conducting baseline studies at the start of a CBT initiative from which to measure progress and to capture and deal with potentially negative effects of community tourism projects on the community and the environment at an early stage, and
  - Developing participatory monitoring and evaluation involving the beneficiaries, for example the impacts of the Anse La Raye Seafood Friday on vendor livelihoods have been evaluated.

Example of approach taken – The Bahamas:
Grand Bahama Island’s “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 Grand Bahama Island. 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.
10 POLICY ON HEALTH, SAFETY AND SECURITY ISSUES AND TOURISM

10.1 Development Goal

Goal 6: Manage the health, safety and security issues that have a potential impact on the tourism industry.

10.2 Policy Strands

- Manage health and safety issues to reduce potential negative impacts on the sustainability of tourism.
- Manage security issues to reinforce the reputation of the Caribbean as a secure destination.
- Integrate disaster risk management into the tourism sector to reduce the vulnerability of the sector to natural disasters.

10.3 Health and Safety Issues and Tourism

Health and safety issues can play a major role in influencing a tourist’s choice of destination. The issue of a travel advisory 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 the spread of communicable diseases, vector-borne diseases and sexually transmitted diseases (STDs) among local and visitor populations. In the context of this Regional Policy Framework, the term safety is used to cover the set of precautions put in place to prevent tourists from being exposed to situations where they feel in personal danger, including 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:

- Seek to benefit from the 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. Relevant regional initiatives include CAREC’s ongoing work to develop an ill health monitoring system specifically for the Caribbean tourism sector.
- Take action to minimise the spread of STDs in the tourism sector 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.
- Liaise with planning and infrastructure bodies to put in place public health and sanitation programmes for communities that already (or may in the near future) cater for visitors. Ensure that visitors are able to access health care facilities, including emergency services.
- Cooperate with regional crime and security organisations to monitor visitor-targeted crime developments. CTO will promote knowledge sharing between member countries on the issue of how to prevent crime targeted 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 the penal code to address visitor safety. Review of the penal code to improve visitor security might include:
  o Swifter trials and severe penalties (custodial sentences) for repeat offenders,
  o The possibility for trial in absentia,
  o 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. This has proved to be unpopular with local communities as it seen as criminalising the innocent and licensing programmes need to be carefully communicated, and
  o Put in place 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 and out in place an adequate enforcement and licensing framework.

• If necessary, and in cooperation with relevant national and community organisations, review on a continual basis the effectiveness of legal and institutional efforts to deter crime against tourists. In particular, 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:
  o Establish a Tourism Protection Unit within the national police force, with specific responsibility for visitor security. Training on interactions with tourists and the local community may be given to the local police force,
  o Ensure a clear communications policy between police, Tourist Board, Hotel and Tourist Association and private establishments, including the establishment of an appropriate reporting system of all incidents,
  o Ensure effective policing of harassment – where visitor harassment is a particular problem, a foot patrol service can be put in place to prevent situations arising,
  o Review use of security guards in resorts – encourage effective partnership among private security organisations and police for the efficient management and control of crime and other undesirable behaviour. Police force may consider mandatory training of hotel security guards,
  o Encourage community-related crime prevention groups in tourism-related areas,
  o Train vendors so that a sale is made without the feeling of harassment,
  o When feasible, assist harassers to find a place in the system, i.e. as vendors or guides, and
  o Provide visitors with information on local ways, and how to react in given situations, as well as emergency numbers etc.

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. In 2003, personnel graduating from the police training school underwent a week of specialised Team Jamaica training, which was offered by the Tourism Product Development Company (TPDCo).

• Requirements relating to safety as well as adequate insurance, will be placed on operators and integrated into licensing of operations. For example tour operators and guides will be required to have adequate safety equipment, training in first aid, CPR; and accommodation facilities will be required to have emergency evacuation plans and procedures (see Section 6.6 Quality Standards).

• Support the implementation of a Building Code that would articulate standards to ensure the safety of all users of tourism facilities and encourage its enforcement (see Section 8.3 Environmental Management, Planning and Monitoring and Tourism).
10.4 Security Issues and Tourism

In the context of this Regional 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 for maximum economic disruption. Popular tourist destinations around the world have become targets for 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 subsectors 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 and share best practices. CDERA is developing 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.

10.5 Disaster Risk Management in the Tourism Sector

In the context of this Regional Policy Framework, the term disaster risk management is used to cover the set of precautionary measures put in place at the national and regional levels to prepare for the event of a natural disaster, whether it be climatic (hurricanes, storm surges etc.) or anthropogenic (oil spill, chemical pollution etc.). Natural disasters, in the form of hurricanes and flooding in particular, have in the past wreaked havoc on the region’s tourism sector by causing (i) significant damage to property and (ii) affecting the market’s sense of safety with regard to vacationing or planning an event. Furthermore, scientists now predict that the occurrence of freak weather events will increase in the future as a result of global warming. National governments and their regional partners are thus invited to consider the following policy guidelines with relation to disaster risk management:

- Monitor relevant developments at the regional level. CDERA is the executing agency for the IDB funded project *Regional Disaster Risk Management for Sustainable Tourism in the Caribbean* that leads to the development of a regional disaster risk management strategy and action plan for the tourism sector, including standards for vulnerability assessments and risk mapping.

- Make tourism enterprises aware of their responsibility to plan for disasters. This can be incorporated into the planning regulations, for example with regard to the siting of the development and the use of building codes to control construction build quality, as well as in the license to operate for example by stipulating that emergency contingency plans shall be in place.

- Prepare a disaster preparedness programme for the national tourism sector to reduce the scope and the extent of negative impacts from such disasters in collaboration with emergency preparedness authorities.

*Example of approach taken – Barbados:*

The Ministry of Tourism is in the process of developing a comprehensive disaster management strategy for the tourism sector in collaboration with the Central Emergency Relief Organisation and the Caribbean Disaster and Emergency Response Agency. 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.
ANNEX

Annex 1. Glossary

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Definition</th>
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<tr>
<td>ACCC</td>
<td>Adaption to Climate Change in the Caribbean</td>
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<td>ACP</td>
<td>Africa, Caribbean and Pacific States</td>
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<td>ACS</td>
<td>Association of Caribbean States</td>
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<td>ACSAC</td>
<td>Association of Commonwealth Societies of Architects in the Caribbean</td>
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<td>APV</td>
<td>L’Association des Paysans de Vallée</td>
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<td>CAA</td>
<td>Commonwealth Association of Architects</td>
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<td>CANARI</td>
<td>Caribbean Natural Resources Institute</td>
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<td>CARICOM</td>
<td>Caribbean Community and Common Market</td>
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<td>CARIFORUM</td>
<td>Caribbean Forum of ACP States</td>
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<td>CAST</td>
<td>Caribbean Alliance for Sustainable Tourism</td>
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<td>CBT</td>
<td>Community-based Tourism</td>
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<td>CCA</td>
<td>Caribbean Conservation Association</td>
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<td>CCCCC</td>
<td>Caribbean Community Climate Change Centre</td>
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<td>CCLEC</td>
<td>Caribbean Customs Law Enforcement Council</td>
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<td>CCWA</td>
<td>Caribbean Water and Wastewater Association</td>
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<td>CDB</td>
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<td>CDERA</td>
<td>Caribbean Disaster Emergency Response Agency</td>
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<td>CEHI</td>
<td>CARICOM Caribbean Environmental Health Institute</td>
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<td>CER</td>
<td>Certified Emission Reductions</td>
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<td>CFTC</td>
<td>Commonwealth Fund for Technical Cooperation</td>
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<td>CGM</td>
<td>Consumer Generated Media</td>
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<td>Caribbean Planning for Adaption to Climate Change</td>
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<td>CREDP</td>
<td>Caribbean Renewable Energy Development Programme</td>
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<td>CREF</td>
<td>Caribbean Renewable Energy Fund</td>
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<td>CRETAF</td>
<td>Caribbean Renewable Energy Technical Assistance Fund</td>
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<td>CROSQ</td>
<td>CARICOM Regional Organization for Standards and Quality</td>
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<td>CRSTDP</td>
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<td>CSHAE</td>
<td>Caribbean Society of Hotel Association Executives</td>
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<td>CSME</td>
<td>Caribbean Single Market and Economy</td>
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<td>CSR</td>
<td>Corporate Social Responsibility</td>
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<td>CTDC</td>
<td>Caribbean Tourism Development Company</td>
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<td>Caribbean Tourism Organization</td>
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<td>CTPU</td>
<td>CARIFORUM Tourism Programme Unit</td>
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<td>DCA</td>
<td>Development Credit Authority</td>
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<td>EC</td>
<td>European Commission</td>
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<td>ECCAA</td>
<td>Eastern Caribbean Civil Aviation Authority</td>
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<td>EPA</td>
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<td>FEEE</td>
<td>Foundation for Environmental Education in Europe</td>
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<td>FP7</td>
<td>Seventh Research Framework Programme</td>
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<td>GDP</td>
<td>Gross Domestic Product</td>
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<td>GEF</td>
<td>Global Environment Facility</td>
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<td>GHG</td>
<td>Greenhouse gas</td>
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<td>ICT</td>
<td>Information Communication Technologies</td>
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<td>IFC</td>
<td>International Finance Corporation</td>
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<td>IMPACS</td>
<td>Implementation Agency for Crime and Security</td>
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<td>IPCC</td>
<td>Inter-governmental Panel on Climate Change</td>
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ISO  International Standards Organisation
IWCAM  Implementing Watershed and Coastal Area Management in Small Island Developing States of the Caribbean (IWCAM)
MACC  Mainstreaming Adaption to Climate Change
MASA  Multilateral Air Services Agreement
MICE  Meetings Incentives Conferences and Exhibitions
MPA  Marine Protected Area
NTO  National Tourism Organisation
OAS  Organization of American States
OECD  Organisation for Economic Cooperation and Development
OECS  Organisation of East Commonwealth States
PANCAP  Pan Caribbean Partnership Against HIV/AIDS
PUCMM  Pontificia Universidad Catolica Madre y Maestra
QTC  Quality Tourism for the Caribbean
RADA  Rural Agricultural Development Authority, Jamaica
RSS  The Regional Security System
SIDS  Small Island Developing States
ST-EP  Sustainable Tourism – Eliminating Poverty
STD  Sexually Transmitted Disease
STZC  Sustainable Tourism Zone of the Caribbean
TOI  Tour Operators’ Initiative
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
USFAA  United States Federal Aviation Authority
US$  United States Dollar
VER  Voluntary Emission Reductions
WTO  World Trade Organisation
WTTC  World Travel and Tourism Council
### Annex 2. Definitions

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<tr>
<th>CTO member countries</th>
<th>Anguilla, Antigua and Barbuda, Aruba, The Bahamas, Barbados, Belize, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Cuba, Curacao, 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.</th>
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<td>Caribbean statistical region</td>
<td>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, Curacao, 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.</td>
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<td>CARICOM member states</td>
<td>Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago.</td>
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<td>CARICOM associate member states</td>
<td>Anguilla, Bermuda, British Virgin Islands, Cayman Islands, Turks and Caicos Islands.</td>
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<td>CARIFORUM member states</td>
<td>Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, Montserrat, Saint Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago.</td>
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<td>CCLEC member listing</td>
<td>Anguilla, Antigua and Barbuda, Aruba, The Bahamas, Barbados, Belize, 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.</td>
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<td>CDERA definition of disaster</td>
<td>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.</td>
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<td>CEHI member states</td>
<td>Anguilla, Antigua and Barbuda, The Bahamas, Barbados, Belize, British Virgin Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines, Trinidad and Tobago, and Turks and Caicos Islands.</td>
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<td>Commonwealth Caribbean</td>
<td>Anguilla, Antigua and Barbuda, The Bahamas, Barbados, Belize, British Virgin Islands, Cayman Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines.</td>
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<td>Dutch West Indies</td>
<td>Aruba, Bonaire, Curacao, Saba, St. Eustatius, St. Maarten.</td>
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<td>French West Indies</td>
<td>Guadeloupe, Martinique.</td>
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<td>Hispanic Caribbean</td>
<td>Cancun, Cozumel, Cuba, Dominican Republic, Puerto Rico.</td>
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<td>OECs member states</td>
<td>Anguilla, Antigua and Barbuda, British Virgin Islands, Dominica, Grenada, Jamaica, Trinidad and Tobago, Turks and Caicos Islands.</td>
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<td>Other Countries</td>
<td>Cancun, Cozumel, Cuba, Dominican Republic, Haiti and Suriname.</td>
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<td>PANCAP Member Countries</td>
<td>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, Saint Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, Turks and Caicos Islands, US Virgin Islands.</td>
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<td>Regional Security System (RSS) Member States</td>
<td>Antigua, Barbados, Dominica, Grenada, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines.</td>
</tr>
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### Annex 4. Websites Consulted

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<tr>
<th>URL</th>
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<td>Association of Caribbean Commissioners of Police (ACCP)</td>
<td>13-02-2007</td>
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<td><a href="http://www.acs-aec.org">www.acs-aec.org</a></td>
<td>Association of Caribbean States (ACS)</td>
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<td>Association of Commonwealth Societies of Architects in the Caribbean (ACSAC)</td>
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<td>Convention on Biological Diversity (CBD)</td>
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<td>Caribbean Hotel Association (CHA)</td>
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<td>Caribbean Community (CARI COM)</td>
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<td><a href="http://www.caribbeanclimate.bz">www.caribbeanclimate.bz</a></td>
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<td><a href="http://www.cehi.org.lc">www.cehi.org.lc</a></td>
<td>Caribbean Environmental Health Institute (CEHI)</td>
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<td>14-02-2007</td>
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<td><a href="http://www.cclec.net">www.cclec.net</a></td>
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<td><a href="http://www.cha-cast.com">www.cha-cast.com</a></td>
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<td>Inter-American Institute for Cooperation on Agriculture (IICA)</td>
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<td><a href="http://www.ipcc.ch">www.ipcc.ch</a></td>
<td>Intergovernmental Panel on Climate Change (IPCC)</td>
<td>11-02-2007</td>
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<td><a href="http://www.iucn.org">www.iucn.org</a></td>
<td>World Conservation Union (IUCN)</td>
<td>13-02-2007</td>
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<td><a href="http://www.iucnredlist.org">www.iucnredlist.org</a></td>
<td>World Conservation Union’s (IUCN) Red List site</td>
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<td><a href="http://www.onecaribbean.org">www.onecaribbean.org</a></td>
<td>Caribbean Tourism Organization’s “back-office site”</td>
<td>19-02-2007</td>
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<td><a href="http://www.propoortourism.org.uk">www.propoortourism.org.uk</a></td>
<td>Pro-Poor Tourism Partnership, UK</td>
<td>28-11-2006</td>
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<td><a href="http://www.sustainableaviation.co.uk">www.sustainableaviation.co.uk</a></td>
<td>Sustainable Aviation: UK network of aviation sector stakeholders</td>
<td>11-02-2007</td>
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<td><a href="http://www.tot.org.uk">www.tot.org.uk</a></td>
<td>UNEP Tour Operators’ Initiative</td>
<td>10-02-2007</td>
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<td><a href="http://www.unfccc.int">www.unfccc.int</a></td>
<td>United Nations Framework Convention on Climate Change (UNFCCC)</td>
<td>11-02-2007</td>
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<td><a href="http://www.vallue.org">www.vallue.org</a></td>
<td>L’Association des Paysans de Vallue (APV)</td>
<td>17-05-2007</td>
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<td><a href="http://www.world-tourism.org">www.world-tourism.org</a></td>
<td>UN World Tourism Organization (UNWTO)</td>
<td>26-01-2007</td>
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<td><a href="http://www.wttc.org">www.wttc.org</a></td>
<td>World Travel and Tourism Council (WTTC)</td>
<td>05-02-2007</td>
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### Annex 5. Relevant Regional and International Stakeholders for Policy Interventions

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<th>Regional</th>
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<td><strong>Tourism Management Capacity</strong></td>
<td>United Nations World Tourism Organization (UNWTO)</td>
<td>Caribbean Tourism Organisation (CTO)</td>
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<td>World Travel and Tourism Council (WTTC)</td>
<td>Caribbean Hotel Association (CHA)</td>
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<td>Organisation for Economic Cooperation and Development (OECD)</td>
<td>Caribbean Alliance for Sustainable Tourism (CAST)</td>
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<td><strong>Marketing</strong></td>
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<td><strong>Transportation</strong></td>
<td>International Civil Aviation Organisation (ICAO)</td>
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<td><strong>Environment</strong></td>
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<td>United Nations Framework Convention of Climate Change (UNFCCC)</td>
<td>Caribbean Environmental Health Institute (CEHI)</td>
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<td>World Wide Fund for Nature (WWF)</td>
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<td>World Conservation Union (IUCN)</td>
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<td>Global Environment Facility (GEF)</td>
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<td>Rainforest Alliance</td>
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<td>The International Ecotourism Society (TIES)</td>
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<td>International Council on Monuments and Sites (ICOMOS)</td>
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<td><strong>Health, safety and security</strong></td>
<td>World Health Organisation (WHO)</td>
<td>Caribbean Epidemiology Center (CAREC)</td>
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<td>Pan American Health Organisation (PAHO)</td>
<td>CARICOM Council on Human and Social Development (COHSOD)</td>
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<td>Caribbean Customs Law Enforcement Council (CCLEC)</td>
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<td>Caribbean Community Implementation Agency for Crime and Security (IMPACS)</td>
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<td>Regional Security System (RSS)</td>
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<td>Caribbean Disaster Emergency Response Agency (CDERA)</td>
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<td>Caribbean Cooperation in Health Initiative</td>
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<td><strong>Linkages</strong></td>
<td>UN Food and Agricultural Organisation (FAO)</td>
<td>The Travel Foundation, Tobago</td>
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<td>Pro Poor Tourism Foundation (PPTF)</td>
<td>Inter-American Institute for Cooperation in Agriculture (IICA)</td>
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Annex 6. Endnotes

2 See www.un.org/millenniumgoals/
4 Caribbean Tourism Organization (CTO), Caribbean Tourism Statistical Report 2002-2003, 3.9.2.2 Total Employment Dependent on Tourism, p.103, Bridgetown, Barbados, March 2004
5 Reference is made to two seminal documents that have guided the development of this Regional 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.
6 CTO member countries are: Anguilla, Antigua and Barbuda, Aruba, The Bahamas, Barbados, Belize, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Cuba, Curacao, 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.
7 Regional Sustainable Tourism Policy Development And Intersectoral Planning Workshop, Barbados, 1-3 December, 2006
8 Regional Sustainable Tourism Policy Development And Intersectoral Planning Workshop, St. Lucia, 21-23 March, 2006
9 Competitive Advantage: Creating and Sustaining Superior Performance, Michael E. Porter, New York, 1985
10 It should be noted that this data is provided as a yardstick to identify trends. Some data sets are inconsistent making accurate comparison using absolute data difficult.
13 For sub-regional country groupings, please see Annex 2 of this report
20 Caribbean Tourism Organization (CTO)/Caribbean Regional Sustainable Tourism Development Programme (CRSTDP), Caribbean Air Transport Study Synopsis of Findings and Recommendations, Barbados, 2006
24 Commonwealth Fund for Technical Cooperation (CFTC), Caribbean Tourism Strategic Plan Final Report, p. 22, Bridgetown, Barbados, July 2002
49 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 Regional Policy Framework
49 Caribbean Tourism Organization (CTO), *Sustainable Tourism in the Caribbean, Regional Sustainable Tourism Policy Framework*, Prepared by Pauline McHardy, p. 2, Bridgetown, Barbados, August 1999
52 *The Daily Herald*, St. Maarten, N.A.
53 www.counterpart.org
55 EC DG ENTR *Tourism Learning Areas Handbook*, 2006, Brussels, Belgium
57 www.jamaicatradeandinvest.org
58 Facilitating Investment in Antigua and Barbuda, Domestic Policies to Unlock Global Opportunities in the Tourism Sector, Presentation made by Cartwright Marshall
60 Jamaica Master Plan for the Sustainable Tourism Development Master Plan
62 Ministry of Tourism, Trinidad and Tobago, *National Tourism Policy*, Draft, September 2005
64 According to Wikipedia, some examples of the amount of resources consumed during one week on the Royal Caribbean International ship *Mariner of the Sea* are: nine tonnes of beef, 28,000 eggs, and 8,000 gallons of ice cream. Article: *Cruise Ship from Wikipedia*, the free encyclopedia at http://en.wikipedia.org/wiki/cruise_ship
65 www.express-des-iles.com/historique-gb.htm
67 www.coastal.gov.bb
69 Presentation by Lourdes Diaz, Puerto Rico Tourism Company, of Puerto Rico’s Blue Flag experiences at National Blue Flag Coordinators Meeting, 25 January 2007, Barbados
70 www.acs-aec.org/column/index115.htm
72 For example, International Finance Corporation (IFC), Environmental Health and Safety Guidelines for Tourism and Hospitality Development, Draft, Washington DC, USA, August 2006
73 Caribbean Airlines, *Sustainable Air Travel in the Caribbean*, Presentation at second UK Caribbean Business Forum in Trinidad & Tobago by Benjamin Leon, 8th June 2007
74 www.climatecare.co.uk
75 www.value.org
76 www.thetravelfoundation.org.uk/tobago_cons.asp
77 CTO’s proposed working definition of sustainable Community-Based Tourism is: “A collaborative approach to tourism in which community members exercise control through active participation in appraisal, development, management and/or ownership (whole or in part) of enterprises that delivers net socio-economic benefits to community members, conserves natural and cultural resources and adds value to the experiences of local and foreign visitors. This encompasses both tourism activities in a community and goods and services supplied to the tourism industry by one or more community members”.
78 http://www.grand-bahama.com/people2people.htm
79 www.SOS.travel
80 The Barbados Advocate, *Disaster management plan for Barbados tourism sector*, 6 February 2007