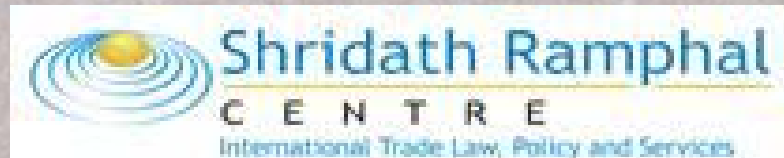


# Heritage Tourism in the Caribbean: Sustainable Strategic Business Management Models



Dr. Keith Nurse  
Director



# Outline of Presentation

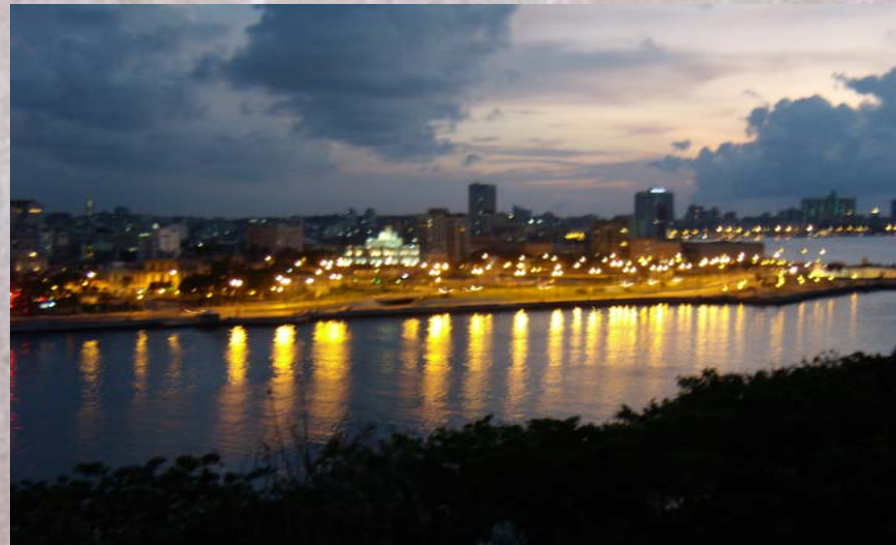
- Rationale for Study
- Defining Heritage Tourism
- The Heritage Tourism Case Studies
- Key Findings from Heritage Tourism Study
- Opportunities & Challenges in Heritage Tourism
- Key strategies for heritage tourism
- Critical Success Factors & Pearl Chain Model



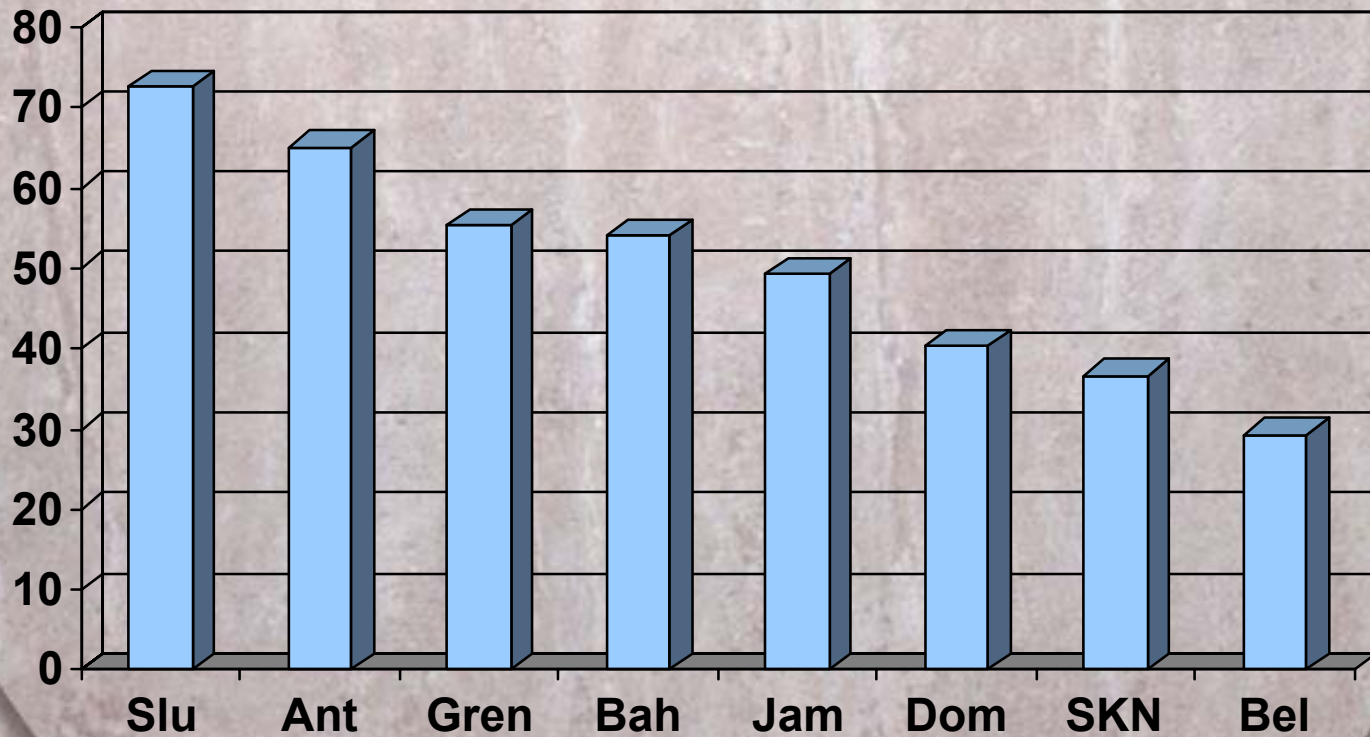
# Caribbean Tourism Context

# Caribbean Tourism Economics

- In 2005 the Caribbean received:
  - 22.5 million stay-over arrivals
  - 19.8 million cruise-ship passengers visits
  - 21.5 billion in expenditures



# Tourist Receipts as a Share of Total Export Earnings, 2003



# CARICOM Balance on Travel Services, 1993-2003 (US\$m)



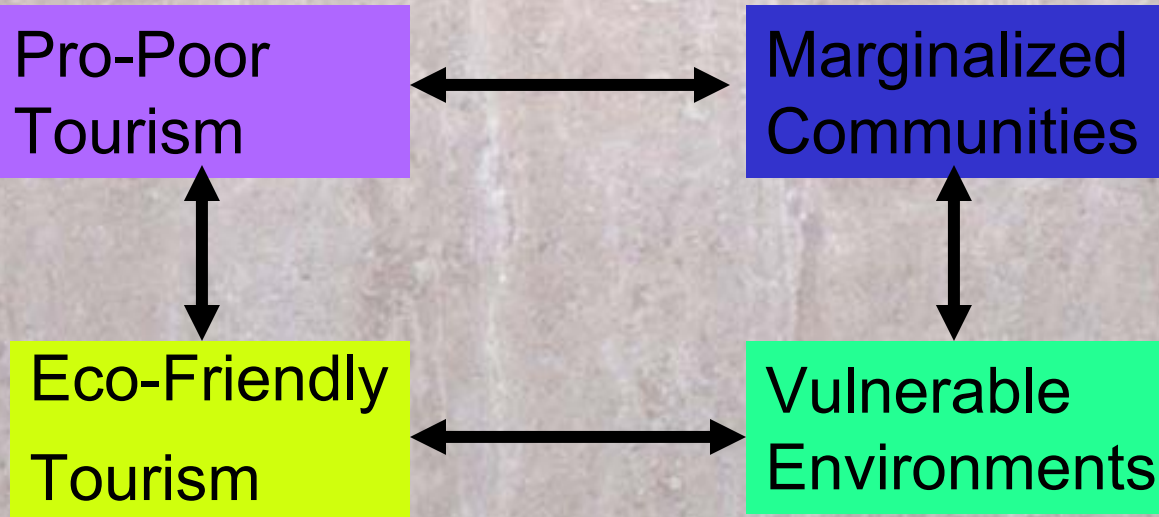
◆ Balance on Travel Services

# Caribbean Share (%) of Global Travel Services Exports, 1993-2003



# Why Sustainable Heritage Tourism?

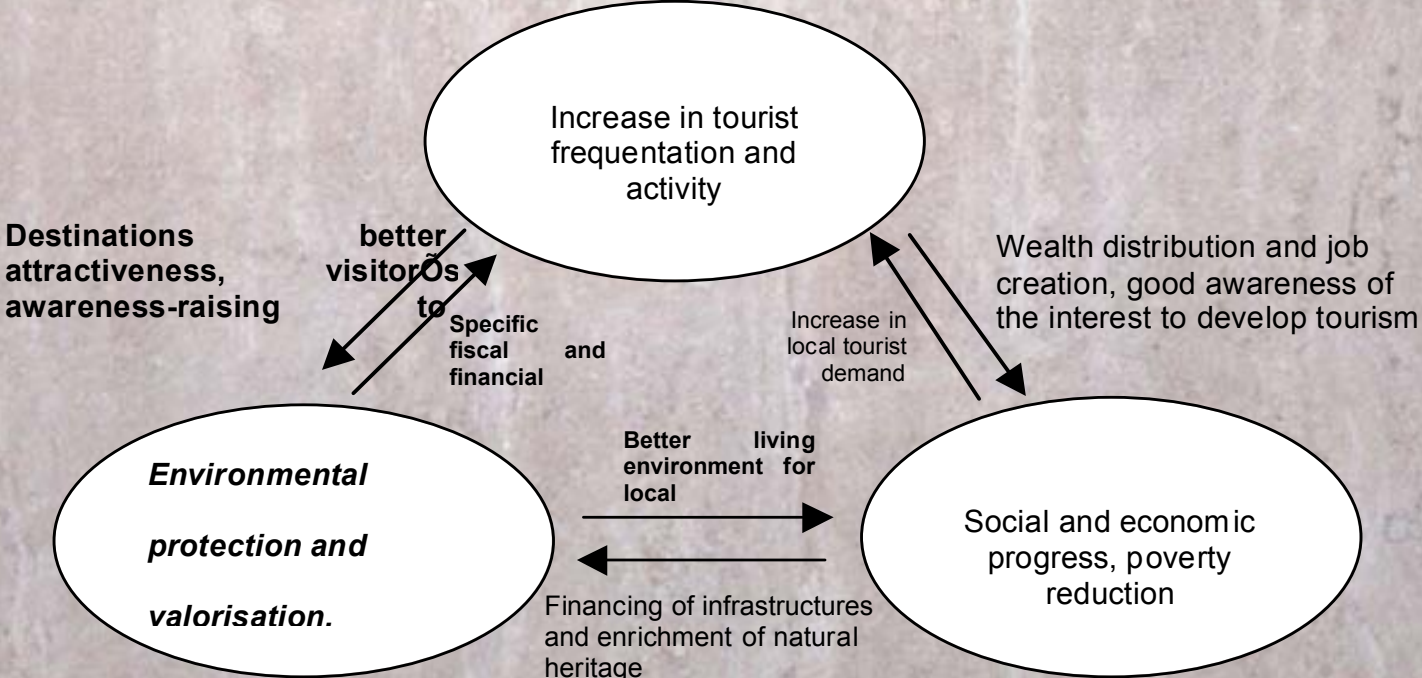
Making the linkages



# Political Economy of Tourism Economy in the Caribbean

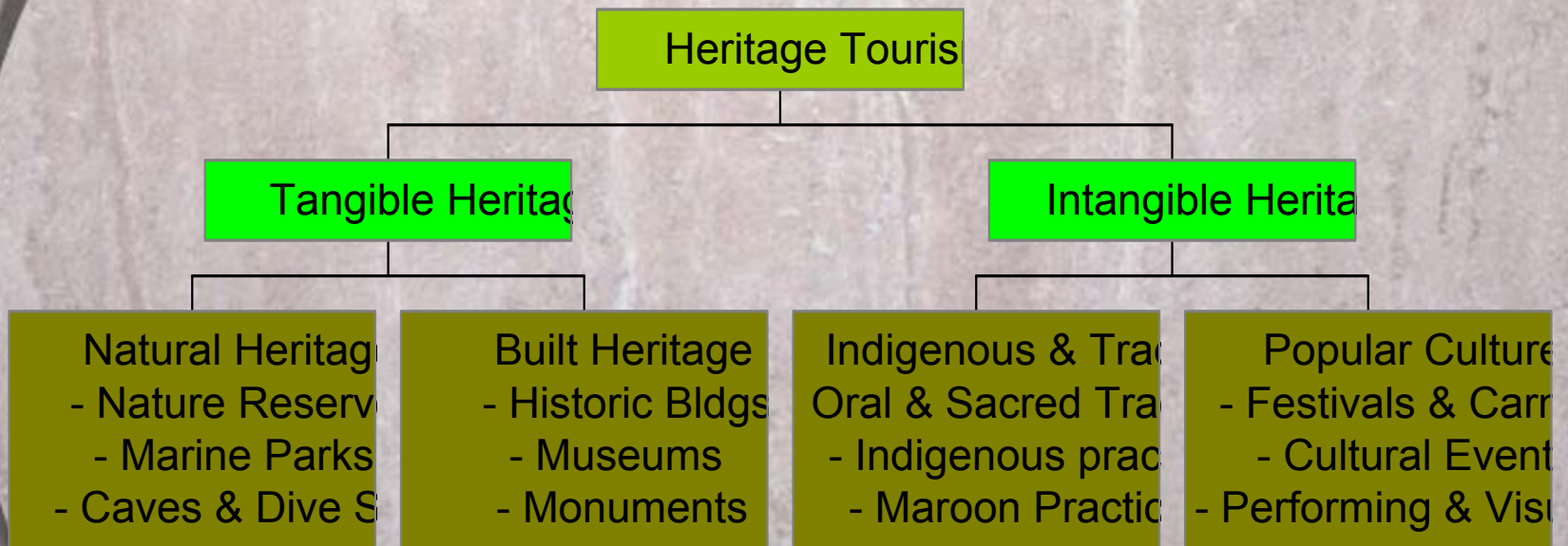
	Large Enterprises	Small/Medium/ Micro Enterprises
Competitiveness Issues	<ul style="list-style-type: none"><li>- Vertically integrated</li><li>- Globally connected</li><li>- Knowledge driven</li><li>- Marketing intelligence</li></ul>	<ul style="list-style-type: none"><li>- Fragmented</li><li>- Globally disconnected</li><li>- Limited ICT capabilities</li><li>- Poor marketing</li></ul>
Development Impact	<ul style="list-style-type: none"><li>- Foreign ownership</li><li>- Expatriate mgt</li><li>- Foreign brand/image</li><li>- Low local value-added</li></ul>	<ul style="list-style-type: none"><li>- Local ownership</li><li>- Local mgt</li><li>- Local brand/image</li><li>- Domestic content</li></ul>

**Figure 1:  
Principal Interactions Characterizing  
Sustainable Development of Tourism**



# Defining Heritage Tourism

# Typology of Heritage Tourism



# Heritage Tourism in the Caribbean



# The Heritage Tourism Case Studies

Natural Heritage	Built Heritage	Traditional Knowledge	Popular Culture
<ul style="list-style-type: none"><li>● Green Grotto (Jca)</li><li>● Asa Wright (T&amp;T)</li><li>● Harrison's Cave (B'dos)</li></ul>	<ul style="list-style-type: none"><li>● Brimstone Hill (SKN)</li><li>● B'dos Mus &amp; Hist. Soc (B'dos)</li><li>● Bob Marley Museum (J'ca)</li><li>● Rose Hall (J'ca)</li></ul>	<ul style="list-style-type: none"><li>● Santigron Maroon Tour (Sur)</li></ul>	<ul style="list-style-type: none"><li>● Trinidad &amp; Tobago Carnival (T&amp;T)</li><li>● Dominica World Creole Music Festival (Dom)</li></ul>

# Key Stakeholders in Heritage Tourism

## Heritage Suppliers:

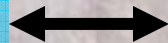
- Private Enterprises
- Gov't Agencies
- Heritage trusts
- Communities
- Tour operators
- Industry assoc.
- NGOs

## Facilitators & Intermediaries:

- Hoteliers
- Tour operators
- Tourism Agencies
- Cultural Agencies
- Airlines
- Cruiseships
- Ferry services
- Travel Agencies

## Heritage Tourists:

- Stayover
- Cruise
- Cultural
- Eco
- Diasporic
- Regional
- Short-break



# Micro Level - Financial Management

- Revenue generation
- Expenditures
- Capital expenditure
- User fees
- Employee turnover
- Internal rate of return



# Macro-economic & Environmental Impact

- Number and type of visitors
- Tourism impact (e.g. share of tourism)
- Number of employees
- Employment impact (direct & indirect)
- Economic rate of return (i.e. macro-economic impact)
- Environmental impact assessment



# Brand Impact and Performance

- Customer trust
- Stakeholder value
- Brand recognition & reputation
- Destination branding
- Media value
- Intellectual property value



# Key Attributes of Heritage Tourism

- Sites and experiences must be known beyond the local community.
- Attractions should provide experiences that can be consumed.
- Attractions should offer interesting and unique sites and experiences.
- Attractions need to be robust and manage carrying capacity.  
(Mc Kercher & Du Cros 2002)



# Key Attributes of Heritage Tourism

Attractions must be able to absorb visitation:

- They need to be accessible.
- They should provide the tourist with a compelling reason to visit.
- They must conserve and sustain the tangible and intangible heritage assets.

QuickTime™ and a  
TIFF (Uncompressed) decompressor  
are needed to see this picture.

# Heritage Tourism trades on Identity

- Authenticity
- Nostalgia
- Difference



# Rationale for Investing in Heritage Tourism

- Bolsters cultural confidence in society
- Strengthens the indigenous component of the tourism product
- Enhances destination image and branding.



# Key Findings

# Global Trends and Prospects

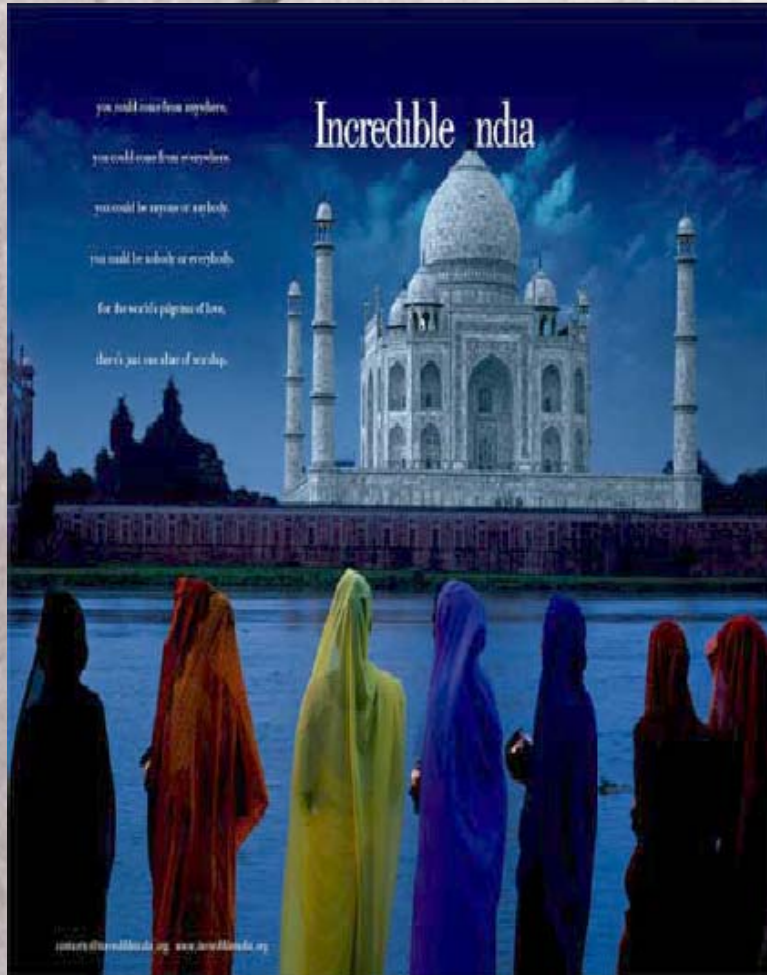


Heritage tourists are one of the highest yield tourism groups:

- Heritage tourists spend 38% more per day than traditional tourists.
- Heritage tourists stay 34% longer than traditional tourists.
- Heritage tourists spend 20% more and stay 22% longer than arts oriented tourists.

(Heritage Council of Western Australia 2006: 15).

Many countries and cities are using heritage to market the destination.



# The Key Challenge facing Heritage Tourism

It is sad to see the honest mistakes that well-meaning people have made by over-inflating the perceived tourism value of an asset when, indeed, it has limited appeal.

Valuable resources have been wasted developing infrastructure and services to cater for anticipated tourist use that has not eventuated.

(Mc Kercher & Du Cros 2002: 32)



# Tourism - Need for a Marketing Focus



“Tourism is fundamentally a demand-driven activity that is influenced more by market forces rather than governments that try to control or manage it.”

(Mc Kercher & Du Cros: 2002: 30).



# Caribbean Heritage Tourists

- Stayovers - 75% of adults that visited the Caribbean went to a cultural activity or event.
- Cruiseship passengers - this group of visitors is the largest market for heritage tourism but is not documented.
- Diasporic tourists - this group is large and rising share of cultural and festival tourism.
- Regional tourists - this group is large and rising share of cultural and festival tourism.

# Opportunities & Benefits of Heritage Tourism

- Heritage attractions increase local value-added through expanding visitor expenditures (entrance fees, tours, local transport, merchandising, etc).
- Diversification of the tourism experience beyond “sun, sea, sand, sex”.
- Differentiation of tourism product.
- Spreading tourism geographically beyond the hotel and the beach.

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are needed to see this picture.



# Opportunities & Benefits of Heritage Tourism

- Catalyst for urban & rural development and renewal.
- Promotes conservation of natural, built & traditional heritage.
- Destination imaging, intellectual property branding and media value.
- Breaks with “commodity tourism”.
- Builds society’s cultural confidence and image of self-worth.



## Challenges & Drawbacks of Heritage Tourism

- Low returns on high cost investments.
- Declining share of local value-added for heritage sites/experiences.
- Cruiseship and tour operators are the main beneficiaries from heritage tourism.
- Cruiseships and tour operators have excessive market power relative to attractions.



## Challenges & Drawbacks of Heritage Tourism

- Free rider problem with key stakeholders, especially for festivals.
- Representations of heritage make some histories invisible (e.g. plantation houses, forts).
- Marginalized communities can be further exploited (e.g. Maroons, Caribs).
- Over-investment in tangible heritage and under-investment in intangible heritage.

# Key Tactics for Branding Heritage Tourism

- Mythologize the asset
- Build a story around the asset
- Emphasize its otherness
- Show a direct link from the past to the present



# Key Tactics for Branding Heritage Tourism



- Make it triumphant
- Make it a spectacle
- Make it a fantasy
- Make it fun, light and entertaining

# Key Tactics for Branding Heritage Tourism

- Certification and standards (e.g. Green Globe, UNESCO World Heritage listing).
- Build visitor and stakeholder value.
- Build brand recognition (e.g. destination branding, media value).

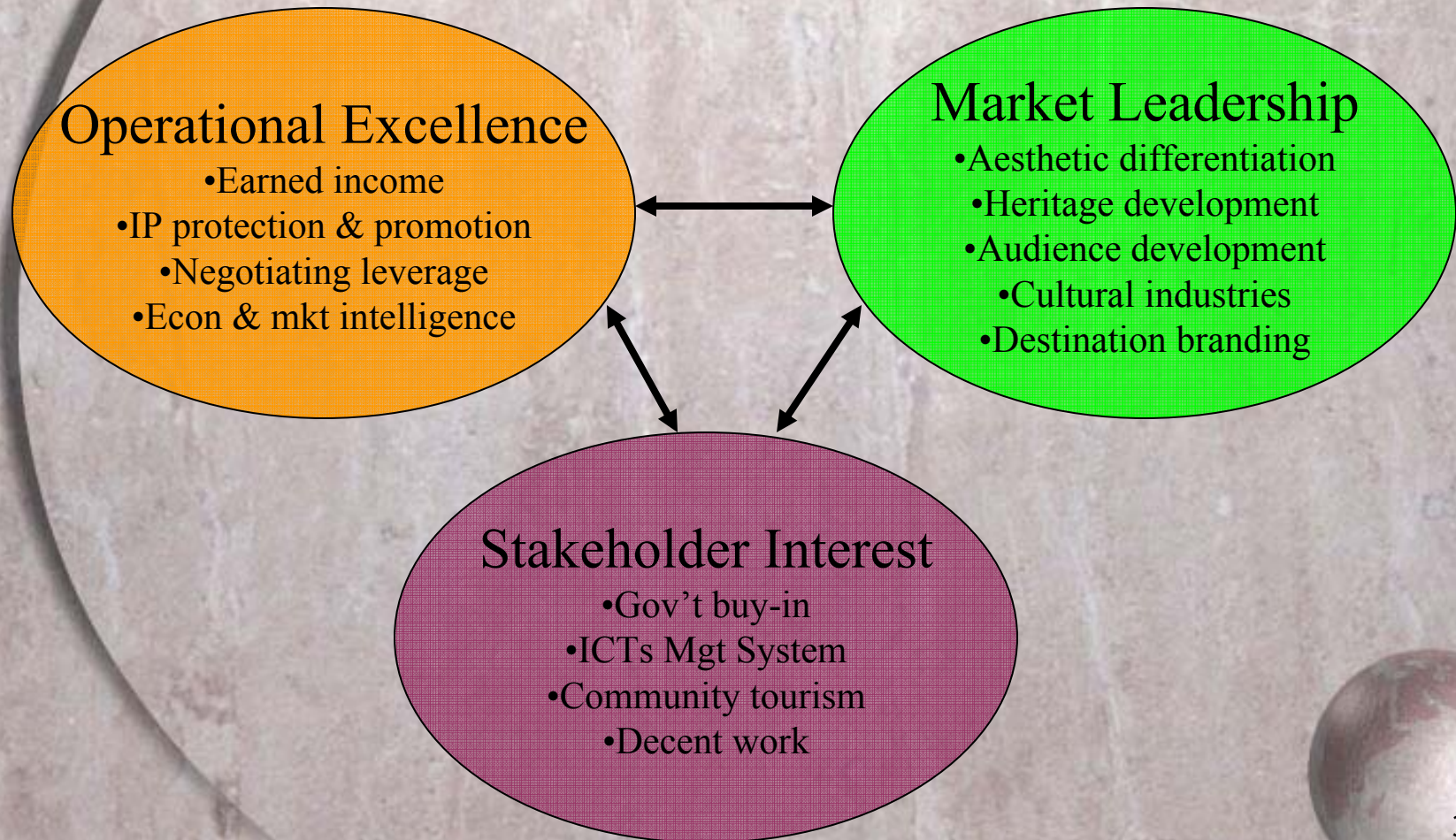


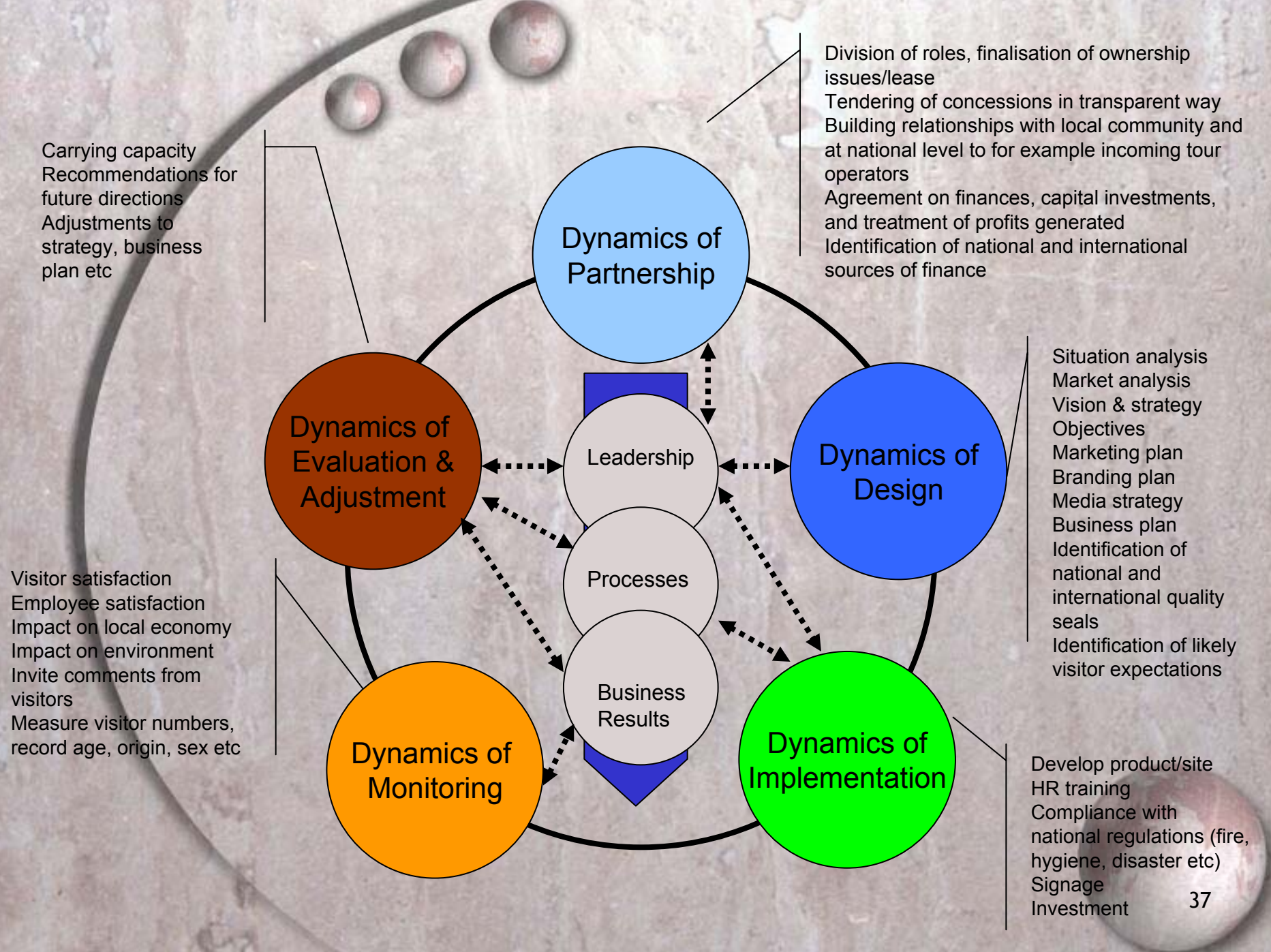
# Critical Success Factors

- Market leadership
- Operational excellence
- Stakeholder relations



# Critical Success Factors





# Caribbean Regional Creative Industries Exchange

