



**Situation analysis of the sustainable tourism  
priorities of CTO member countries**

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# Overall Goals

- To determine the sustainable tourism priorities of CTO member countries
- To evaluate the extent to which sustainable tourism is still high on their respective agendas based on:
  - policy, programming, strong inter-sectoral linkages, entrepreneurial opportunities and access to funding

# Scope of Work

- To assess member countries' sustainable tourism priorities;
- To identify and assess the barriers to and opportunities for mainstreaming sustainable tourism programming into tourism and related initiatives;
- To assess the needs of CTO member countries and the mechanisms needed to assist them in advancing towards sustainable tourism goals;

# Scope of Work

- To provide recommendations that will assist regional governments and national tourism organisations in their individual and cooperative efforts towards sustainable development;
- To present the findings and recommendations to a high-level symposium on Sustainable Tourism and to input the feedback into a final report.

# Context of study

- The Caribbean is the most tourism dependent region in the world so sustainable tourism practice must be continually improved.
- The study is the first of its kind since the Regional Sustainable Tourism Policy Framework for the Caribbean, which was commissioned by the CTO in 2005-2008
  - – *“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 improved quality of life through partnerships among governments, the private sector and communities”*

# Context of study

- Recent changes in governments in some Caribbean islands as well as changes in governance arrangements.
- The global economic crisis
- UK Airline Passenger Duty (APD)
- Western Hemisphere Travel Initiative (WHTI)
- Growing incidence of environmental and health risks and crises – HIV/AIDS, hurricanes, Climate change

# Methodology

- Survey – survey monkey April – May 2012
- Response rate of 37% or 11 respondents out of the 30 CTO member states
- Secondary data sources - reports, tourism master plans, and tourism policy documents
- Desk research was conducted on some of the key donor agencies which are active in the region (IDB, CDB, OAS, CIDA, EU, DFID, WB, AUSAID, USAID)



# Countries that participated

- Antigua and Barbuda - Ministry of Tourism, Civil Aviation and Culture
- Anguilla – Government of Anguilla
- The Bahamas – Bahamas Ministry of Tourism
- Curacao – Curacao Tourist Board
- Dominica – Discover Dominica Authority
- Grenada – Ministry of Tourism
- Haiti – Ministry of Tourism
- Jamaica – Ministry of Tourism and Entertainment
- St. Eustatius- St. Eustatius Tourism Development Foundation
- St. Kitts – St. Kitts Tourism Authority
- Turks and Caicos – Turks and Caicos Tourist Board

# Thematic focus

- Sustainable tourism priorities of member states
- Enabling policy environment
- Mechanisms for achieving sustainable tourism
- Funding opportunities for sustainable tourism initiatives
- Barriers to the implementation of sustainable tourism initiatives
- Countries expressed needs for attaining sustainable tourism development

# Sustainable tourism priorities of member states

- High - marketing, policy implementation, transportation, safety and security, inter-sectoral linkages and human resource development
- Medium - HIV/AIDS, climate change and disaster management
- Low - Beach access

# Enabling policy environment (a sample)

- Anguilla Sustainable Tourism Master Plan (2010-2020)
- Bahamas Sustainable Tourism Policy
- Curacao Strategic Tourism Master Plan
- Dominica's Tourism Master Plan 2005-2012
- Jamaica's Master Plan for Sustainable Tourism Development

Country	National Policies and Plans
<b>Anguilla</b>	<p>Anguilla's Sustainable Tourism Master Plan</p> <p>Draft National Climate Change Strategy</p>
<b>The Bahamas</b>	<p>Sustainable Tourism Policy</p>
<b>Curacao</b>	<p>Island Wide Development Plan</p> <p>Strategic Tourism Master Plan</p>
<b>Dominica</b>	<p>Dominica's Tourism Master Plan 2005-2012</p> <p>Design Guidelines for Sustainable Tourism Development</p>
<b>Grenada</b>	<p>Tourism Policy Framework</p> <p>Grenada Board of Tourism Strategic Plan 2011-2014</p>
<b>Haiti</b>	<p>Policies for Protected Areas</p>
<b>Jamaica</b>	<p>Master Plan for Sustainable Tourism (2002)</p> <p>The Sustainable Rural Development Policy</p> <p>National Biodiversity Strategy and Action Plan</p>
<b>St. Kitts</b>	<p>National Conservation and Environment Protection Act (NCEPA)</p> <p>Development Control and Planning Act</p>

# Mechanisms for achieving sustainable tourism

- Mechanisms and incentives for resource protection and conservation
- Monitoring systems
- Climate change mitigation and adaptation
- Tourism education, training and sustainable livelihoods
- Consultative, collaborative and participatory processes

# Mechanisms and incentives for resource protection and conservation

- Legislation and/or policies to preserve their natural and cultural heritage
  - Anguilla, The Bahamas, Curacao, Dominica, Grenada, Jamaica, St. Kitts and Turks and Caicos
- Instruments that focus on biodiversity conservation
  - Anguilla, The Bahamas, Curacao, Dominica, Grenada, Jamaica, St. Eustatius, St. Kitts and Turks and Caicos

# Mechanisms and incentives for resource protection and conservation

- Incentives available to encourage energy efficiency in the sector
  - The Bahamas, Curacao, Grenada, Jamaica, St. Kitts and Turks and Caicos Islands
- Incentives for water conservation
  - Curacao, Grenada, St. Kitts and Turks and Caicos Islands



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## Constraints

<b>Financial constraints</b>	7
<b>Limited human resource capacity</b>	2
<b>Educational level of individuals hinder participation</b>	1
<b>Lack of awareness of available courses</b>	1
<b>Lack of self-motivation</b>	1
<b>Lack of stakeholder collaboration</b>	1
<b>Poor transportation systems (for evening classes)</b>	1
<b>Private land tenure</b>	1

# Monitoring systems

- Antigua and Barbuda - Development Control Authority
- Dominica - Quality Assurance Unit as part of their Discover Dominica Authority
- St. Kitts - Product Standards Department under the St. Kitts Tourism Authority
  - development and monitoring of standards in the various supply sectors

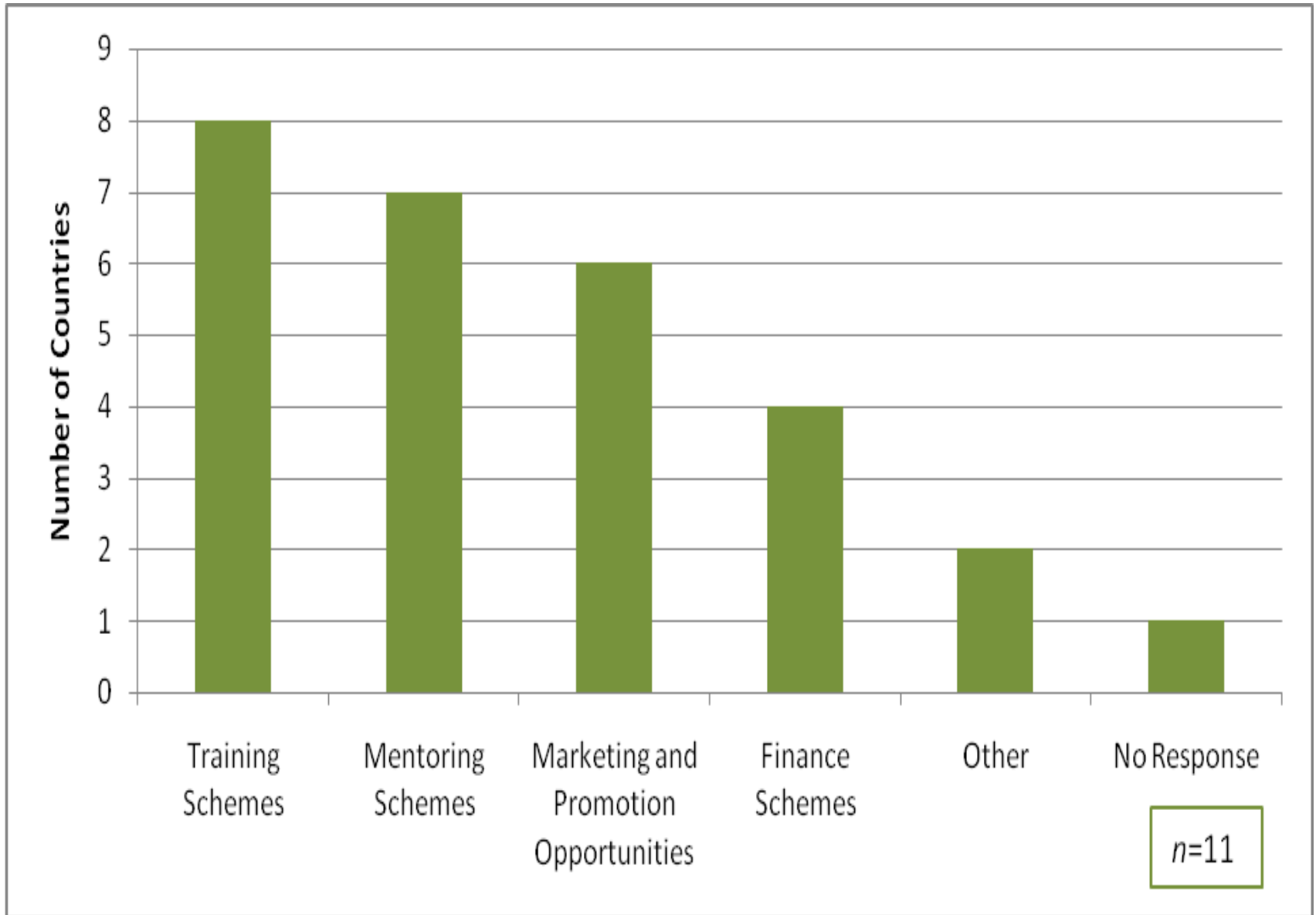
# Monitoring systems

- Integrated Coastal Zone Management (ICZM) systems:
  - Antigua and Barbuda, Jamaica, St. Eustatius, St. Kitts and Turks and Caicos Islands
- National disaster management systems
  - Anguilla, The Bahamas, Dominica, Grenada, Haiti, Jamaica, St. Eustatius, St. Kitts

# Climate change mitigation and adaptation

- Existing initiatives:
  - Anguilla, the Bahamas, Curacao, Grenada, Turks and Caicos and St. Kitts
- In the planning stage
  - St. Eustatius, Jamaica

**Figure 5: Types of schemes that support local level tourism initiatives**



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<b>Consultative and Participatory Processes</b>	<b><i>Frequency of Response</i></b>
<b>Conferences, seminars, workshops</b>	11
<b>Stakeholder consultations</b>	7
<b>Radio/Call-in programmes</b>	2
<b>Minister's weekly site visits</b>	1
<b>Newsletters</b>	1
<b>Representation on Government Boards and Policy Steering Committees</b>	1
<b>Tourism Awareness Month</b>	1
<b>Town Hall Meetings</b>	1

<b>Ministry of Agriculture</b>	8
<b>Hotel &amp; Tourism Association</b>	8
<b>Ministry of Defence/National Law Enforcement Agencies</b>	5
<b>Attractions</b>	5
<b>Physical Planning Departments</b>	4
<b>NGOs</b>	3
<b>Ministry of Finance</b>	3
<b>Ministry of Environment</b>	3
<b>Ministry of Education</b>	3
<b>Ports of Entry/Customs Department</b>	2
<b>National Trust</b>	2
<b>National Disaster Management Agencies</b>	2
<b>Ministry of Works</b>	2
<b>Investment Agencies</b>	2
<b>Educational Institutions</b>	2

# Funding opportunities for sustainable tourism initiatives

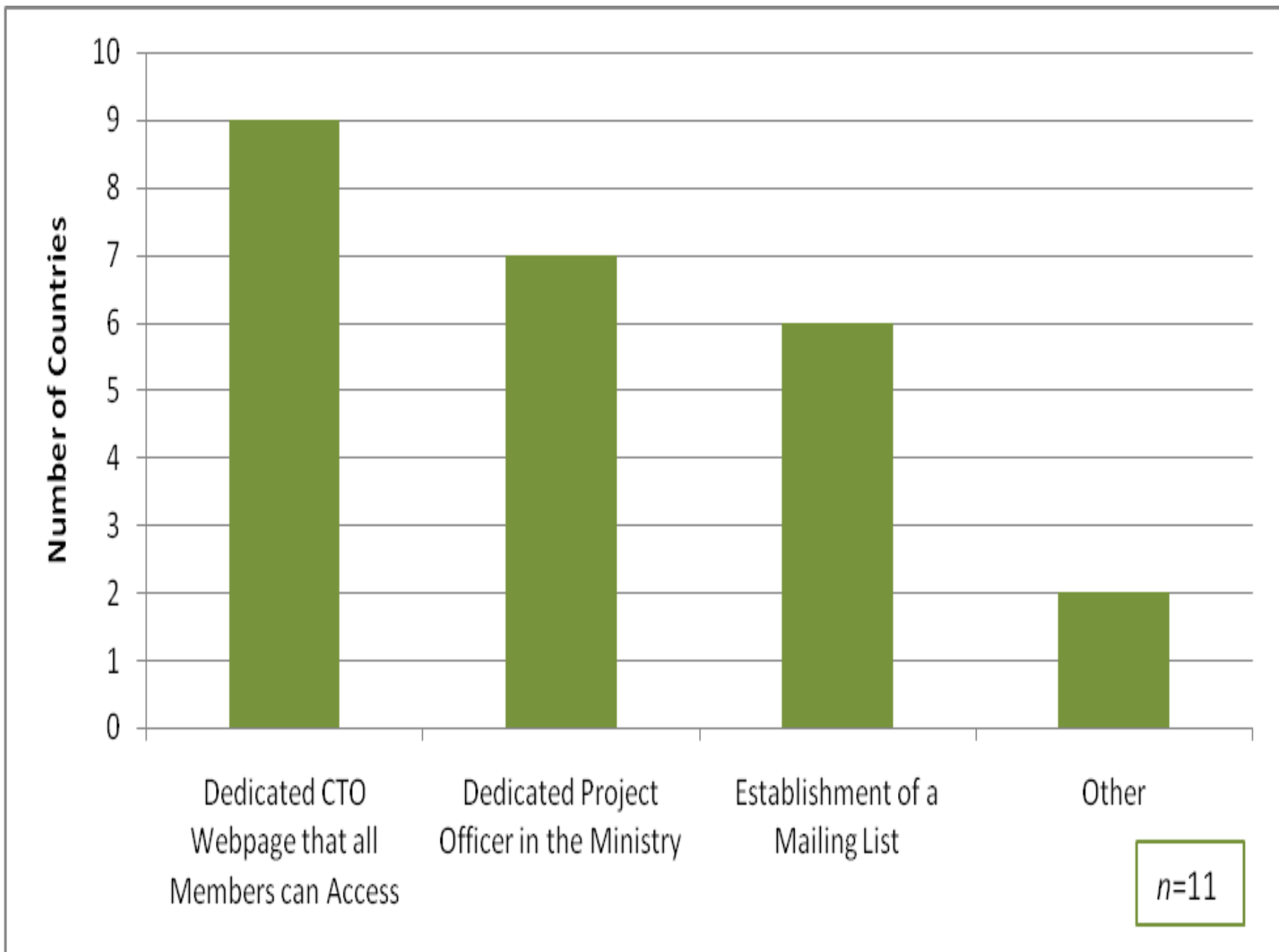
- The Caribbean Development Bank
- The European Commission
- The U.S. Agency for International Development
- The United Kingdom Department for International Development
- The Canadian International Development Agency
- The Inter-American Development Bank
- Australian Government Overseas Aid Programme
- The World Bank
- The Organisation of American States



# Relationship between areas of funding and sustainable tourism



# Mechanisms to improve information dissemination on funding opportunities



# Barriers to the implementation of sustainable tourism initiatives

- Lack of information on funding opportunities
- Lack of access to low-interest finance
- Low priority given to sustainability issues by the national Government
- Lack of clear objectives
- Lack of public awareness programmes to strengthen ministries'/departments' sustainable tourism initiatives

# Requirements for attaining sustainable tourism development

<b>Greater support and commitment by Government</b>	6
<b>Improved partnerships and stakeholder involvement</b>	6
<b>Increased public awareness of sustainable tourism</b>	5
<b>Enforcement of laws and regulations that support sustainable development</b>	5
<b>Human resources development</b>	5
<b>Increased investment and financing</b>	4
<b>Development of sustainable tourism policies</b>	3
<b>Improved marketing</b>	3
<b>Product enhancement and development</b>	3
<b>Improved airlift</b>	2