



FINAL REPORT

BARBADOS TOURISM MASTER PLAN 2014-2023

REPORT I: THE MASTER PLAN

Environmental Planning Group Inc.

HLA Consultants

2014



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Ministry of Tourism and International Transport
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DISCLAIMER

This report, prepared by Environment Planning Group Inc. in association with HLA Consultants, has been reviewed and approved by the Ministry of Tourism and International Transport. The contents indicate the challenges that are existing as determined by the consultant, and the consultant's recommendations, strategies and actions for their mitigation. The foregoing does not signify that the contents always necessarily reflect the policies and views of the Ministry.

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Preface

The Barbados Tourism Master Plan 2014-2023 (TMP) was prepared in response to the objectives described in the Terms of Reference as provided by the Government of Barbados and comprises 6 separate reports as follows:

I – The Master Plan

II – The Environment

- Physical Environment
- Stewardship and Sustainable Tourism

III – People and Organizations

- Human Resource Development
- Social Impacts
- Institutional Strengthening
- Tourism Awareness
- Youth in Tourism
- Safety and Security
- Tourism Policy and Legislation

IV – Our Visitors and the Barbados Visitor Economy

- Marketing, ICTs and New Media
- Visitor Markets Research and Visitor Research Management
- Tourism Economics and Financing

V – Services, Infrastructure and Products

- Transportation (Ground, Airlift, Cruise, Sailing/Yachting/Ferries)
- Accommodation Sector
- Niche Markets

VI – Cultural Heritage and Attractions

- Development of New Attractions
- Existing Sites and Attractions
- Historic Bridgetown and Its Garrison

Report I contains the background and situation analysis regarding the current state of the tourism industry in Barbados, as well as an examination of where the nation should progress over the next decade. This information was used as a basis for developing the TMP Implementation Plan, which is comprised of strategic imperatives, strategies and priority actions that were guided by research, stakeholder consultations, and workshops. Each of the strategic imperatives is to be accomplished through the achievement of their corresponding strategies, which in turn are to be realized through a range of actions that are detailed with information on lead agencies, budgets, targets and outcomes.

Reports II through VI provide detailed descriptions of over 30 distinct, tourism-related subject areas, including those presented in the Terms of Reference, with recommended strategies and actions pertaining to each area. The priority actions presented in Report I are also found within their specific subject areas in Reports II through VI, where they are more broadly described, along with additional recommended actions. Linkages between subject areas are highlighted where relevant to establish a well-integrated TMP that has been designed to propel the Barbados tourism sector into the next decade.

1.0 Introduction

Overview

This Section presents the context of the Barbados Tourism Master Plan as guided by its Terms of Reference and relevant policy documents. It addresses the central themes and also the relationship between the White Paper and the TMP. The Section highlights critical success factors and further outlines the Plan's methodology and expected outcomes.



1.1 Background

In commissioning a Master Plan for the Development of Tourism in Barbados (2014-2023), the Government of Barbados, through its Terms of Reference, indicated that the Plan is to:

1. Provide a physical, environmental and economic plan for the balanced development of all aspects of Barbados' tourism product
2. Ensure the sustainable growth and development of the tourism industry to meet the current needs of Barbadians, visitors, investors and other stakeholders
3. Produce financially viable and environmentally sound tourism projects and programmes for the Barbados tourism sector as a whole, and
4. Provide a balance between economic benefits, Government's national objectives, the interests of private tourism stakeholders and the host population

The task of the Consultants is more fully described in the detailed Terms of Reference in Appendix I.

1.1.1 Central Challenges

What is not apparent from a cursory reading of these objectives is the fact that the sector traditionally referred to as tourism has been Barbados' main foreign exchange earner and most powerful economic driver for many years. It impacts, or has the potential to impact, every other sector.

In this sense, a clearly articulated vision for the tourism sector is essential as it grounds sector policies and strategies in a conceptual framework that may be used to orient critical decisions, plans, projects and activities affecting the country's economic sectors.

The main challenges, in this regard, are to understand where Barbados and Barbadians are now and what they have become in the current, increasingly disruptive, global context. In so doing, this Master Plan materializes the vision for the tourism sector set out in the White Paper.

1.1.2 Government's Stated Vision for Barbados Tourism

Notwithstanding these central challenges, on January 16, 2012, the Government of Barbados approved the following **Vision Statement** for the country's tourism industry: ***"to deliver an unmatched experience that is truly Barbadian, created by warm, welcoming, friendly people, ensuring benefits to the entire nation."***

The Master Plan consulting team has carefully studied this statement, exploring various methods for its articulation and expansion in the context of the contemporary opportunities and threats facing Barbados, and the tourism sector in particular. The team remains convinced that the people of Barbados and all stakeholders require a more comprehensive vision that clearly communicates the future direction for the industry in Barbados.

Such a vision would capture a new way of thinking for all involved in what has traditionally been called "tourism", from policymakers and stakeholders to residents and visitors alike.

This is no easy task given the complexities and pervasiveness of traditional tourism to the country's economic, social, environmental, political, and cultural interests. Barbados has no choice but to consider "tourism's" various impacts on the country's overall development plans and programmes.

In this regard, the 2012 White Paper on the Development of Tourism in Barbados further expands on the vision statement for Barbados tourism by stating, in part:

"By 2021, the vision is that Barbados will have become a sustainable, competitive, world-class destination with all-year-round tourism, picturesque landscapes, beautiful beaches, pristine waters and protected biodiversity. It will have preserved its heritage, cherished its traditions and proudly showcased them to the world, thus, successfully differentiating its product from the competition. The Barbados Brand will reflect the spirit of the Barbadian people and the memorable and unique experiences they deliver. Barbados would have earned its designation as being an 'aspirational' destination, through the alignment of its price point with the high quality of products and services available on the island and lived up to its reputation of being a friendly, safe and clean destination" (Strategic Solutions Inc., 2012, p. 33).

Yet, while these statements are a starting point for shaping the future of Barbados' traditional tourism sector, they will likely have to be interpreted with a view to their implications for a more expansive notion of the visitor economy, which is defined in Section 3.0.

1.1.3 Global Context

For the moment, there is no escaping the fact that the first decades of the 21st century are characterized by a level of political, social, cultural and economic disruption not seen on a global scale since the end of the Second World War. Clearly, Barbados in 2013 was quite different from the Barbados shaped in and by the post-colonial, post-Independence movements of the 1960s and early 1970s. The systems built by older generations to govern the affairs of a newly-minted member of the international community are, largely, in ruins.

What is more, the digital technology revolution is transforming the way people live, learn, have fun, do business and effect change in this unpredictable global environment. Simply put, the world is experiencing the demise of its old, antiquated frameworks and the birth of the new. New models require new modalities, new ways of perceiving emerging opportunities and threats, and new ways of addressing them.

Yet, in the face of national, regional and global upheaval, it has become difficult for small-island states like Barbados to govern, far less to prosper economically. Part of the reason for the latter is the "middle-income trap", which comes about when the economic growth of a country at that level stagnates due to rising labour costs and declining competitiveness. At that point, unable to compete with more sophisticated economies in areas requiring high levels of innovation, or with low-income, low-wage players in terms of the cheap production of manufactured goods, countries like Barbados find their economic growth stalled. In the case of Barbados, this decline is being felt most acutely in its traditional "tourism" sector.

In this sense, Barbados has clearly failed to make the transition from what the World Economic Forum's **Global Competitiveness Index (GCI)** calls an "efficiency economy" to an "innovation economy". According to the **GCI**:

The final pillar of competitiveness focuses on technological innovation. Although substantial gains can be obtained by improving institutions, building infrastructure, reducing macroeconomic instability, or improving human capital, all these factors eventually seem to run into diminishing returns. The same is true for the efficiency of the labour, financial, and goods markets. In the long run, standards of living can be largely enhanced by technological innovation. Firms in these countries must design and develop cutting-edge products and processes to maintain a competitive edge. This progression requires an environment that is conducive to innovative activity, supported by both the public and the private sectors (World Economic Forum, 2012).

Institutions do not innovate; confident, enterprising, inspired **people** do. As such, this Master Plan focuses on people and the ways in which Barbados might unleash their inherent, hidden capacities for creative problem solving and sustainable value generation.

Based on the Consultant Team's findings, therefore, four themes emerge around which Barbados might craft a vision, core objectives, and practical strategies and actions for the development of the Barbados tourism sector. These govern the Master Plan's strategic implementation framework, methodology, work plan, and all project deliverables. Ultimately, they give guidance and strategic focus to each thematic area, project and implementation structure developed as part of this comprehensive Master Plan.

1.2 Master Plan Themes

1.2.1 The People are Central

This Master Plan is based on the guiding theme that The People are Central, i.e. an Interactive Community creating sustainable, innovative ways to work together for the benefit of all. Thus, in order to transition from efficiency economy status to a coveted innovation economy ranking, the country must focus efforts, policies, strategies and activities on ensuring people are at the centre of the sector's evolution, and thus the evolution of Barbados.

People flourishing, connecting, creating, learning, growing, serving, innovating, being empowered at every level and in every area: this guiding theme lies at the heart of the Master Plan's desire to grow the Barbados economy, an approach that is presented in further detail in Section 3.0. These "people" include not only Barbadians, residents of Barbados, workers, and employers, but visitors, investors, entrepreneurs, clients, members of the Diaspora, Caribbean nationals, online communities, i.e. any individual or group anywhere, anytime with a desire to or purpose for connecting with the Barbados Brand.

Indeed, the Master Plan finds that the process of re-engineering the Barbados tourism sector must include a rethinking and a redefinition of what it means to be a Bajan. The notion of what is and is not Barbadian has, undoubtedly, changed since the country gained its Independence more than 40 years ago. In a far more multicultural society with innumerable

outside influences and generations not shaped in the immediate aftermath of colonialism and Independence, many non-nationals consider Barbados their home and have made significant contributions to the development of this nation in various sectors.

It certainly begs the question in relation to the Government's 2012 vision for tourism: what is "an unmatched experience that is truly Barbadian"? This question is at the heart of the Master Plan's guiding theme, ***The People are Central***. That guiding theme shapes every other area outlined in this document, and translates into three additional sub-themes intended to give it life.

These sub-themes include: (1) ***Sustainability and Change***; (2) ***Innovation***; and (3) ***Networks***, each of which also informs approaches to each of the Master Plan principles mentioned later in Section 1.0.

The TMP guiding theme and sub-themes are presented in Figure 1.1.

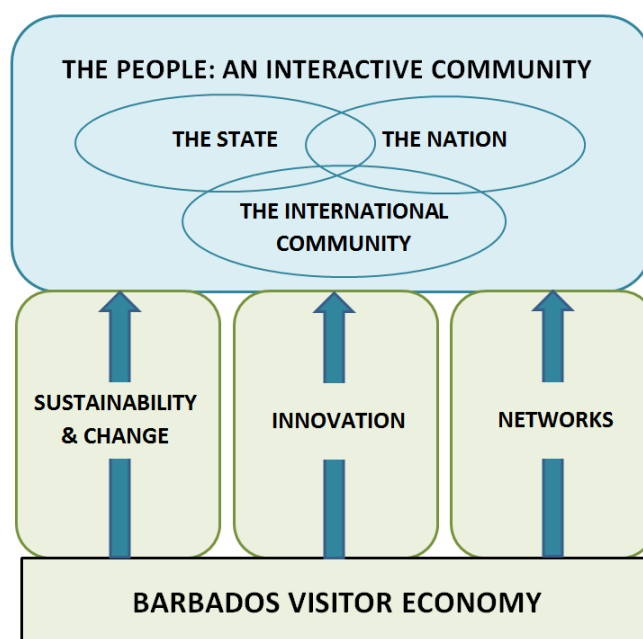


Figure 1.1. TMP guiding theme and associated sub-themes (EPG Inc., 2013).

1.2.2 Sustainability and Change

The notions of **Sustainability and Change** are not in opposition, but are sub-themes that the Barbados tourism sector should adopt to fuel its balanced development during the next ten years and beyond. They suggest continual renewal of Barbados' ecological, social, cultural, economic, infrastructural, institutional, and human capacities in the face of the

critical uncertainties driving transformation of the global environment. Sustainability does not simply involve addressing land and resource-use issues, but also the development of structures, processes, mechanisms, and attitudes that are likely to ensure a workable Master Plan. Change requires adaptability. Yet, the mechanisms that enable progressive change must, themselves, be sustainable.

1.2.3 Innovation

One way for Barbados to achieve more balanced development is to engender, nurture and diffuse a spirit of innovation and creative enterprise throughout the national psyche, led by its most important foreign exchange-earning sector. This innovation might encompass creativity in the use of digital technologies, new-media and marketing frameworks, and individual ingenuity to enhance Barbados' tourism product and the Barbados Brand across all sectors and Master Plan subject areas. It certainly should translate into a renewed spirit of resourcefulness built on ideals like value for money, individual responsibility, and genuine national cohesion.

1.2.4 Networks

Barbados is not alone in having failed to respond to the changing technology landscape by refashioning its institutional frameworks and decision-making processes to embrace the “networked society” in which previously disparate sectors are linked to achieve greater efficiency. This is one of the fundamental enablers of an innovation economy.

While Barbados has done myriad Information and Communications Technology (ICT) and other similar studies aimed at introducing a technology component into national development, it continues to implement them in a piecemeal manner that is creating more silos and greater fragmentation than ever before.

This sub-theme is therefore critical in that it focuses on creating and leveraging robust networks that build functioning linkages, connections, or synergies in ways that add value and usher in a more interconnected approach to public and private sector development.

Taken together, these themes have the potential to move Barbados away from a focus on rigid institutional structures to a stronger people-focused approach, to national development that designs solutions Barbadians and visitors actually want rather than solutions policymakers think they should have.

1.3 Master Plan Principles

The world is changing rapidly. This Master Plan outlines a path for the future growth of the tourism sector that suggests new ways of doing business internally and with the world. In order for it to bear fruit, however, Government, the private sector, and civil society must work in tandem to secure the nation's commitment to the following set of guiding principles, designed to jump-start an internal transformation:

- 1 **Knowledge-Based Development:** Promote interventions that are knowledge-based, leading to action and innovation in product development and marketing
- 2 **Action-Oriented Strategic Collaboration:** Develop strong, flexible and dynamic partnerships among tourism stakeholders and key decision makers at all levels
- 3 **Excellence in Capacity Building:** Enhance coordination and cooperation mechanisms to increase efficiency at all levels
- 4 **Community Engagement:** Develop priorities that are nationally focused and community sensitive
- 5 **National Conservation:** Develop strategies to foster and encourage sustainable environmental, ecological and institutional practices

1.4 The White Paper and the TMP

From November 2010 to January 2011, the Ministry of Tourism convened a series of town hall meetings to facilitate a national dialogue on the policy framework for the development of the tourism industry. All comments were documented in the official report of the town hall meetings and used to inform the preparation of the 2012 White Paper. In the same manner, the White Paper as a policy document was used as the basis for the design of this Master Plan and its recommended strategies and actions.

1.4.1 Summary Policy Statements from the 2012 White Paper

While the 2012 White Paper itself contains more than 250 pages of exacting detail on the strengths, weaknesses, opportunities and threats facing Barbados' traditional tourism sector in a demanding global environment, there are 18 key policy positions outlined in that document that lie at the core of the Master Plan strategies (Strategic Solutions Inc., 2012, pp. 216-252), namely:

- **National Tourism Policy:** *The Government of Barbados shall create an environment that facilitates the country's sustainable tourism growth by addressing human resource development, community development, infrastructure and transportation development, investment promotion, accommodation issues, product development, and marketing.*
- **National Values:** *The institutionalization of a national culture of excellence that needs to take root within Barbados will only be possible through a strong foundation of national pride. National pride will be the precursor to a clean, safe, and hospitable Barbados, where professionalism, innovation and efficiency become an ingrained part of the national DNA. Tourism will be developed for Barbadians first with our visitors reaping the spin-off benefits as Barbadians proudly showcase their island to the world.*
- **Participation and Collaboration:** *For tourism to be truly sustainable it cannot operate in isolation, rather it has to be effectively and fully integrated into the national development process. Effective synergies can only be established when there is consensus among the key decision makers at the institutional level. To achieve responsible tourism planning and management outcomes, partnerships must be holistic in outlook, based on sustainable development principles and exist at the national and at local levels. The Government, in an effort to provide efficient tourism management, will eliminate the fragmented approach to the management of the tourism product, and provide the organizational structure to support this mandate.*

- **Marketing and Promotion:** *Tourism is a global marketplace. Traditional experiences are now duplicated across the globe with new non-traditional market players entering the fray, creating a heightened competitive environment. It is within and because of this paradigm shift that it becomes imperative for Barbados to differentiate itself from its competition, utilising effective marketing tools to promote a consistent and identifiable brand. Consistency will be achieved through coordinated and structured strategies that apply across all geographic locations.*
- **Community Tourism:** *An element of a sustainable tourism model requires the critical involvement of communities. The people-centred approach to the development of Government's policy commits Government to involve local communities in the tourism development process. This sustainable development process is specifically designed to promote the diversification of product offering and foster facilitation of effective inter-sectoral linkages in non-traditional urban and rural areas. The multiplier effect through to the local communities generated by this all-inclusive form of tourism will bolster the impacts of tourism at the economic, social, cultural and environmental level. As a matter of priority, a tourism industry will be developed that is of the people, by the people, and for the people, where Barbadians see themselves reflected in the Barbadian tourism mirror. The aim is the empowerment of local communities.*
- **Cultural Heritage:** *Heritage tourism presents enormous potential for differentiating the Barbados Brand from its competitors and complements the development of a sustainable tourism product.*
- **Culture:** *Successful cultural heritage tourism strategies must necessarily uncompromisingly showcase the skills and abilities of our people. Government will therefore promote and facilitate the exhibition of the unique art forms of the island.*
- **Tourism Standards and Regulations:** *It is imperative that the products and services offered on the island must be commensurate with world class standards. To counteract this development, standards will have to be policed on an ongoing basis to ensure that they are being adhered to in order that a culture of excellence can be created*
- **Human Resource Development:** *In a globally competitive service environment, a sustainable tourism model requires competently trained personnel at each level of the service delivery chain. This emphasis on training and development is especially relevant to the Barbados brand as the expectation for a high-end destination is uncompromising and dependent on exceptional service delivery to provide value for money.*
- **Infrastructure:** *The infrastructure for tourism is critically important and wide-ranging. It includes telecommunications, road networks, signage, information centres, convention and conference facilities, etc. Barbados' excellent infrastructure is a source of competitive advantage in the region.*
- **Information Technology:** *Government will encourage and facilitate the effective use of the telecommunications infrastructure and technology in the development of sustainable tourism modelling.*
- **Product Enhancement and Development:** *The Barbados tourism industry must differentiate itself from the competition through the creation of innovative, creative, high quality product and services which offer unique, engaging and memorable experiences and value for money in a clean, safe and welcoming environment. Special emphasis must also now be placed on the expansion of the island's product offering to showcase everything that the island has to offer. This will call for a revolutionary approach being taken to product and marketing innovation and continuous improvement in order to remain competitive in the increasingly competitive environment.*
- **Unique Selling Points:** *The Government will build on the foundation of the core competencies identified from the audits and research and develop unique selling points*

that are 100% indigenous and specific to Barbados that will differentiate Barbados' product from every other competitor in the world.

- **Foreign Investment:** *The Government of Barbados recognises the importance of attracting foreign investment as an important element to achieve the growth and development objectives of the tourism sector. It further recognizes that systematic and sustained investment in product and infrastructure offerings will be essential over the coming years to improve the quality and standards of the overall tourism product in an increasingly competitive environment. It is therefore essential that a favourable business environment and efficient and well-maintained infrastructure be established and maintained.*
- **Health Safety and Security:** *In the face of increased incidences of terrorism, civil unrest, natural disaster, health pandemics around the globe, safety and security has become one of the major concerns of today's travellers and heavily influences their choice of destination. Therefore, successful and sustainable tourism efforts rely indispensably upon the provision of an environment in which guests feel safe and comfortable. Notwithstanding the increasing incidences of crime, harassment and other undesirable behaviours nationally, and specifically against tourists, Barbados has maintained a reputation as a relatively safe and healthy destination. For tourism to survive, this reputation has to be protected at all costs in order to promote an improved environment for the health, safety and security of residents and visitors.*

The rising incidence of crime and deviance is a national problem that will require a national response involving the assistance and attention of all Barbadians.

- **Research and Development:** *Government realises that contemporaneous and accurate research has to be at the epicenter of tourism development in order to inform effective product development and marketing and promotion strategies. As the global tourism market becomes increasingly competitive, timely, relevant and accurate research and statistics will be critical in maintaining Barbados' competitive edge and increasing market share. In order to drive innovation and develop a more crisis-resilient, strategically focused and competitive destination, a culture of research and development and analytical thinking has to be established across the Barbados tourism industry.*
- **Youth Development:** *The development of our youth will be one of the pillars upon which a sustainable tourism industry will be built. Necessarily, youth programmes are a component of training and development initiatives, but given the critical importance of tourism to the national economy, a strategic approach to youth involvement is required.*

It is imperative that our heritage, history, politics and current affairs are so infused into their knowledge base that they can instinctively and with conviction better interact with and educate tourists.

In pursuit of this objective, Government will forge closer ties with the Ministries responsible for Youth, Education, Community Development, Labour and the Environment.

- **Transportation:** *Barbados' geographic location dictates that the inbound tourism market is almost completely dependent on efficient air services delivery. The successful development of the Barbados tourism industry is heavily dependent on reliable and affordable air transportation.*

The Government is therefore committed to maintaining a policy and regulatory framework that stimulates demand and growth circumscribed by the optimum numbers determined from the carrying capacity audit, while ensuring competitive market access and a sustainable and safe aviation sector.

1.5 Critical Success Factors

According to the 2012 White Paper, in order for the country to achieve its vision for tourism, several key conditions must be realised. The White Paper identifies the following Critical Success Factors (CSFs) as the special actions necessary for effective implementation (Strategic Solutions Inc., 2012). These have helped to shape the strategies developed for this Master Plan:

- **Sustainable Development:** *Preserve natural, cultural and social assets for future generations through the implementation of a green economy, human resources development, community involvement and economic diversification, by taking a quality as opposed to quantity approach to tourism development.*
- **Innovation and Competitiveness:** *Revolutionising the tourism industry through the creation of a strong culture of creativity, productivity, efficiency, quality, excellence, continuous improvement, entrepreneurship and value for money.*
- **Research and Development:** *Accurate, timely and relevant data [as] the basis for strategic decision-making, planning, investment, product development and marketing and promotion.*
- **Awareness and Sensitisation:** *Enhancing Barbadians' knowledge of the importance of the tourism industry to Barbados' economy and their quality of life.*
- **Strengthening Core Brand Elements:** *Ensuring that measures are put in place to secure Barbados' reputation as being a friendly, clean and safe and secure destination.*
- **Market-Driven Product Development:** *Product development ... aligned with market trends and the demands and expectations of the contemporary traveller.*
- **Marketing and Promotion:** *Taking a more strategic, targeted, creative and integrated approach, which is research-driven and aligned with the needs of the customer and the existing product offering and utilising the appropriate distribution channels.*
- **Strengthen Inter-Sectoral Linkages:** *Diversifying the Barbados economy by reducing leakages and enhancing linkages, to create a greater multiplier effect of the tourism dollar, spur entrepreneurship and provide a differentiated, authentic experience to visitors.*
- **Participation and Involvement:** *Inclusion of stakeholders, especially local communities, at all levels of the tourism development process, including policy formulation and planning.*
- **Improved Incorporation of Resources:** *Better incorporation of natural and cultural heritage resources as part of the tourism product whilst ensuring their preservation and conservation.*
- **Favourable Investment Framework:** *Creation of a favourable investment-friendly and transparent framework to encourage both foreign and local investment.*
- **Development of Human Capital:** *Development of human resources with emphasis on strengthening leadership and innovation capacity, delivering quality and memorable tourism service experiences, whilst filling existing technical and technological skills gaps in the industry.*
- **Collaboration:** *Continued but improved efforts at collaboration at the local, sub-regional, regional and international levels to promote sustainability, improve synergies, pool resources and eliminate redundancies and wastage.*

1.6 Approach to Preparing the Master Plan

This Master Plan reflects the results of sectoral consultations as well as the findings of the 2012 White Paper. It is intended to provide the basis for enhanced coordination and collaboration between and within Government, stakeholders, and the people of Barbados. From the outset therefore, the Master Plan consulting team's approach to the deliverables was based on the following assumptions:

- This is a plan for growth
- The priority is to ensure realistic, achievable implementation of all strategies and actions
- The plan identifies, as far as possible, source funds for strategic implementation
- The plan identifies implementation agencies or recommends creation of new ones to support effective execution
- The plan is innovative, sometimes challenging conventional stakeholder wisdom
- The plan is not reticent in contradicting processes the Consultant team believes are likely to hinder or obstruct implementation
- Implementation is not the responsibility of one agency, but must be built on dynamic strategic partnerships and strong collaboration within and between all sectors
- The consultant team worked on the premise that there would be some visible implementation of strategies while the plan is still in preparation

Substantial research was conducted during the course of TMP preparation, including the assessment of surveys such as ongoing visitor exit surveys, a large sample survey of cruise ship passengers completed for the 1998 Barbados Tourism Development Programme, and a more recent cruise passenger survey conducted by the Florida Caribbean Cruise Association. Field visits to hotel properties were also conducted, as well as specialty surveys related to other tourism-related subject areas.

Stakeholder consultations were held throughout the Master Plan process and used to validate the strategic approach taken in order to ensure that the Master Plan was developed as a product of the widest possible national input. Consultations were conducted through one-on-one meetings, small group sessions, and a series of workshops held in February and November-December 2012. Further discussion on stakeholder consultations is presented in Section 2.4.

Based on these extensive consultations and research, as well as guidance from the TMP Terms of Reference, an organizational structure for the development of the Master Plan was prepared that covers over 30 subject areas relating to the Barbados tourism sector (see Table 1.1). The information presented in Reports II through VI all contributed to the development of the TMP Implementation Plan herein set out in Section 5.1 that features recommended strategies and actions for the way forward for the Barbados tourism sector, as guided by the overarching theme: 'The People are Central'.

Table 1.1. Organizational structure of the Barbados TMP.

Report Number & Title	Topic	Subject Areas/Focus
I – The Master Plan	Tourism Master Plan 2014-2023	TMP Implementation Plan
II – The Environment	Tourism Sustainability, Resilience and Adaptability	<ul style="list-style-type: none"> – Natural Environment – Built Environment – Climate Change/Disaster Management – Tourism Capacity
III – People and Organizations	People and Organizations	<ul style="list-style-type: none"> – Human Resource Development – Institutional Strengthening – Social Impacts – Tourism Awareness – Youth in Tourism – Safety and Security – Tourism Policy and Legislation
IV – Our Visitors and the Barbados Visitor Economy	Economy and Linkages	<ul style="list-style-type: none"> – Marketing, ICTs, and New Media – Visitor Markets Research and Data Management – Tourism Economics and Finance
V – Part 1: Services, Infrastructure and Products	Transportation and Accommodation	<ul style="list-style-type: none"> – Ground Transportation – Airlift – Cruise – Sailing/Yachting & Ferries – Accommodation
V – Part 2: Services, Infrastructure and Products	Niche Markets	<ul style="list-style-type: none"> – Accessible Tourism – Silver Market – Culinary Tourism – Health & Wellness Tourism – Conference Tourism – Sports Tourism – Diaspora – Domestic Tourism – Agro-Tourism – Creative & Performing Arts – Faith Tourism – Community Tourism – Medical Tourism – Education Tourism – Volunteer Tourism – Shopping Tourism
VI – Cultural Heritage and Attractions	Infrastructure and Experiences	<ul style="list-style-type: none"> – Built Heritage – Cultural Heritage – Nature Attractions

1.7 Expected Outcomes of Implementing the Master Plan

If implementation of the Tourism Master Plan is achieved consistent with the themes and principles herein described, then the results of implementation are expected as follows:

Economic growth	World-class product
Involved people and communities	Global competitiveness
Exemplary hosts	Visitor awareness
Exemplary experiences	Well educated and trained labour force
Exemplary reputation	Reduced import dependency
Sustainable practices	National self confidence
Accessible destination	National excellence
Adaptive management	Exemplary work ethic
Efficient experiences delivery	Fulfilled citizens

2.0 Historical and Current Perspectives

Overview

This Section includes a review of the historical performance of tourism in Barbados, the global and regional context within which Barbados tourism operates, a statement of its main strengths and weaknesses, the results of the stakeholder workshops demonstrating priority areas for attention, and information on policy and legislation, and tourism capacity.



2.1 Barbados Tourism Historical Review

Barbados is a small island developing state with a fragile, open economy and has a limited natural resource base. The tourism sector has been Barbados' main foreign exchange earner and most powerful economic driver for many years. As the leading economic sector in the country, its impacts spread over the entire economy and society.

During the four decades since Independence, the Government of Barbados has been working towards a sustainable economy based on local human resources and education, strong physical infrastructure, and investments in the global trade of goods and services.

Government recognized the critical importance of this sector as a foreign exchange earner and generator of employment, so it established the institutional framework to support the sector, and invested directly in tourism infrastructure. *“At the turn of the (21st) century, tourism accounted for two-thirds of foreign exchange earnings, with the international business and finance sector in second position”* (Worrell et al., undated).

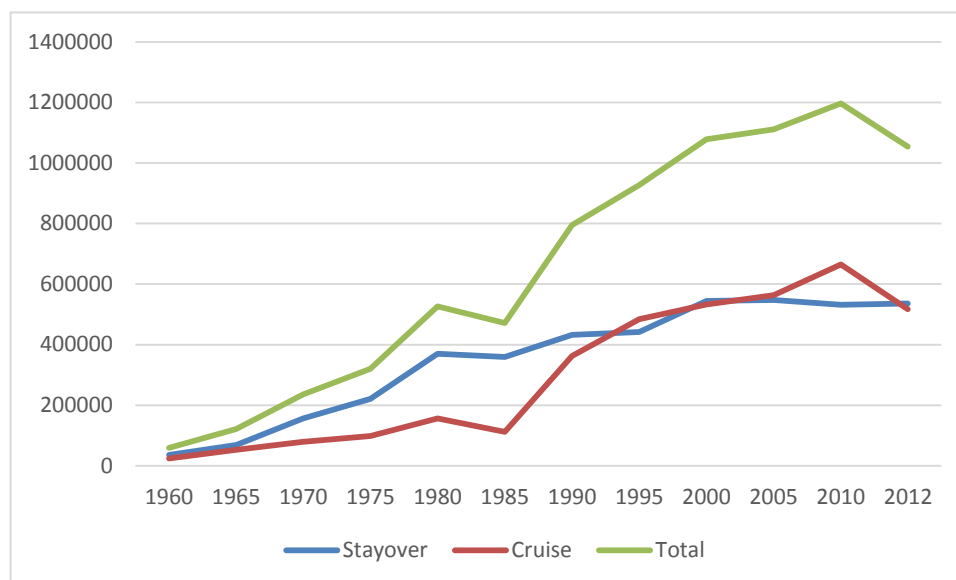
The National Tourism Policy Statement found in the White Paper on the Development of Tourism in Barbados (Strategic Solutions Inc., 2012) describes the importance of tourism in Barbados, stating that it:

- is the leading foreign exchange earner
- is a major contributor to Gross Domestic Product (GDP)
- is a major employer
- has a role in rural and urban development
- facilitates inter-sectoral linkages
- distributes benefits widely
- promotes social interaction, peace, tolerance and cross-cultural understanding
- promotes cultural development
- ignites a sense of national pride
- develops a country's image
- brings social benefits to local communities

In addition, tourism is a source of investment in infrastructure and public goods that benefits all, as well as a means of preserving the environment, culture and heritage of Barbados.

Figure 2.1 depicts visitor arrivals from 1960 to 2011 at 5 year intervals, as well as 2012. The historical growth in numbers of arrivals from 1960 onward has been impressive. Stayover visitors declined by an average of 1.4% per year from 2006 to 2010. In 2011, there was a remarkable increase in stayover arrivals of 6.7%. Then in 2012, there was a decline of 5.5%. The decline continued in 2013, with about 6% or 60,000 fewer stayover arrivals than in 2012 (BSS, 2013). Since stayover arrivals are worth much more than cruise arrivals in terms of expenditures, this decrease is of concern because stayover arrivals account for over 95% of all tourist direct expenditures, compared to less than 5% for cruise tourist visitors.

While cruise arrivals have shown a steady and substantial increase, peaking at over 721,000 in 2004, they have now declined to 517,436 in 2012. There was a very large decline of 15.2% in one year from 2011 to 2012 (Source: MTI). Recent indicators point to a resurgence in numbers of cruise visitors for the 2014 peak season.



Source: Ministry of Tourism & International Transport 2012

Figure 2.1. Barbados visitor arrivals (1960 – 2012).

2.1.1 International Stayover Arrivals

Based on BSS data for international *stayover arrivals* to Barbados:

- In 2012, international stayover arrivals totalled 536,300, which was only 2% lower than 2005 when the island attracted 547,500
- This drop was due largely to a significant decrease in arrivals from the United Kingdom and the United States, each experiencing an 8% decrease from 2011
- The peak year (ever) was 2007, with 572,900 stayover arrivals, and the slowest year since 2005 was 2009 (the height of the global economic crisis) with 518,600
- As presented above, recent data show further decline of 6% (60,000 visitors) in 2013 over 2012

2.1.2 International Cruise Passenger Arrivals

Information provided by the BSS with respect to international *cruise passenger arrivals* indicates the following:

- Since peaking in 2010 with 664,700 arrivals (and at 55% of total international arrivals), Barbados experienced annual declines of 8% in 2011, followed by 15% in 2012

- In 2012, there were 517,400 international cruise passenger arrivals, which is the lowest annual volume over an eight-year period, representing a 40% share of the total international arrivals market
- Recent data, as presented above, show an increase in cruise calls and passengers projected to 656,083 (2013). Projections for 2014 are for an additional 5% increase to over 700,000 cruise passengers

2.1.3 Leading International Origin Markets for Barbados

Recent trends in stayover arrivals from the more significant origin markets for Barbados are highlighted below and presented in Table 2.1, where origin country “standouts” are also identified by major region of origin as well as the reason for being considered significant for Barbados:

- The United Kingdom has long been and remains the most significant origin market for Barbados in terms of international stayover arrivals. However, its arrival numbers and market share have been slipping since peaking in 2007 (with 223,600) such that in 2012 it contributed its lowest number and share (less than one-third of Barbados’ total arrival market for the first time) of visitor arrivals to the island
- The United States has retained its second place position in terms of arrivals at a steady market share of 23% - 25%. However, its peak year in terms of arrival numbers occurred in 2011 (with 142,400), and was followed by a notable drop of 8% in 2012
- CARICOM is Barbados’ third largest market. Arrivals from the region peaked in 2006, reached a recent low in 2010, rose significantly in 2011, and dropped slightly in 2012. Its market share ranged between 16% and 21% of total arrivals over the eight years, and was 18% in 2012
- Canada is Barbados’ fourth largest origin market and its representative share has been rising steadily from nearly 9% in 2005 to over 13% in 2012. However, its actual visitor arrival numbers have been fairly constant over the past three years at around 72,000
- Even given the difficult economic climate in Europe over the past few years, its arrival numbers have recently surged such that they reached their highest level in 14 years in 2012. Europe’s market share has been rising at a modest rate, from 5% of arrivals in 2005 to 7% in 2012
- Germany is the largest source market from the European continent and experienced the fastest growth rate (of over 9%) between 2011 and 2012 among the individual countries and regions examined
- Trinidad and Tobago is the largest Caribbean source market for Barbados, currently representing nearly 40% of the regional market and 7% of the total arrival market. Increased arrivals from Trinidad helped moderate the overall decrease in arrivals from the Caribbean in 2012 that was due to a nearly 9% drop from the remainder of the Caribbean. This was the largest source market decrease in percentage terms in 2012 among the regions and countries examined for Barbados
- The average length of stay of all stayover visitors to Barbados has ranged from 10.3 to 11.5 days over the past several years, with no clear trend (i.e., increase or decrease) observed. Stayover visitors from the UK have generally stayed slightly longer (at 11.4 to 12.4 days) than the other origin markets, followed by Canadians and other European visitors

Table 2.1. Recent trends in stayover arrivals to Barbados by major origin market.

By Major Origin Market	Stayover Arrivals to Barbados (% of total)				Growth (%)			Standouts by Region + Rationale
	2005	2010	2011	2012 (P)	AAC 05-10	2011	2012	
Total to Barbados	547,500	532,200	567,700	536,300	-0.6%	6.7%	-5.5%	
Americas								<ul style="list-style-type: none"> • Significant volume and growth – Canada, Trinidad + Tobago • Significant volume (but little/no growth) – USA, CARICOM
<i>N. America</i>								
USA	131,000 (24%)	134,970 (25%)	142,400 (25%)	130,800 (24%)	0.6%	5.5%	-8.1%	
Canada	47,700 (9%)	72,400 (14%)	72,000 (13%)	72,000 (13%)	10.3%	-0.6%	0.0%	
CARICOM	114,500 (21%)	86,200 (16%)	101,000 (18%)	96,500 (18%)	-4.9%	17.2%	-4.5%	
Trinidad & Tobago	30,900 (6%)	27,300 (5%)	36,800 (7%)	38,000 (7%)	-2.3%	N/Av	3.3%	
Other CARICOM	83,700 (15%)	58,900 (11%)	64,200 (11%)	58,500 (11%)	-5.9%	N/Av	-8.9%	
Europe								<ul style="list-style-type: none"> • Significant volume and growth – Europe (excl. UK), Germany • Significant volume (but little/no growth) – UK
UK	202,800 (37%)	181,100 (34%)	189,200 (33%)	173,500 (32%)	-2.1%	4.5%	-8.3%	
Europe excl. UK	28,300 (5%)	31,200 (6%)	35,900 (6%)	37,100 (7%)	2.0%	15.1%	3.3%	
Germany	6,995 (1%)	7,260 (1%)	8,400 (1%)	9,200 (2%)	0.8%	N/Av	9.5%	
Other Europe	19,900 (4%)	24,000 (5%)	27,500 (5%)	27,900 (5%)	4.1%	N/Av	1.5%	
Other	24,400 (4%)	26,400 (5%)	27,400 (5%)	26,400 (5%)	1.6%	3.8%	-3.6%	• None identified

AAC = Annual Average Change (as a %)

Colour code: **Favourable indicator in blue, unfavourable indicator in red**

(P)= Provisional (as of April 2013)

Source: Barbados Statistical Services

2.1.4 Seasonality of International Stayover Arrivals

According to an assessment of BSS data:

- Although monthly occupancy rates for visitor accommodation may suggest otherwise, Barbados generally experiences modest to moderate seasonality variation from the perspective of international stayover arrivals

- Peak periods are the months of December through March or April (depending on when Easter is celebrated) when the Northern Hemisphere is in winter and early spring, as well as the month of July (the middle of the Northern Hemisphere's summer). During each of these months, international stayover arrivals represent 9% to 10% of the annual total. Collectively, these five to six months contribute anywhere from 47% to 58% of the annual total
- The slowest month of the year is September and this has been the case for the past several years, with 5% to 6% of international stayover arrivals occurring at that time
- Shoulder months continue to be May and June, and October and November (Atlantic hurricane season)
- Comparing the distribution of monthly stayover arrivals in 2012 with earlier years to as far back as 2007 does reveal a recent increase in seasonal variation, with the winter peak months receiving an increasing share of international stayover arrivals and the shoulder and slowest months receiving a decreasing share. Efforts should be made to reverse this trend given the impact on capacity and utilization of tourism and other infrastructure

2.1.5 Seasonality of Cruise Passenger Arrivals

By comparison, assessment of information on seasonality of cruise passenger arrivals from the BSS reveals that:

- Barbados experiences significantly greater seasonal variation in cruise passenger arrivals than in international stayover arrivals
- Its six-month peak cruise season, which runs from November through April, generates between 75% and 82% of annual cruise passenger arrivals (81% in 2012), with individual months contributing between 9% and 19% since 2007
- While December and January have typically been the two busiest months, since 2010 the differences across the peak months have been less pronounced. But it is too soon to say whether this is becoming what would be considered a favourable trend
- Nevertheless, Barbados experiences a dramatic decrease in cruise passenger arrivals during the remaining months of the year, with individual months contributing no more than 2% - 5% to the annual totals, and this situation does not appear to be improving

2.1.6 Visitor Expenditures

Total annual visitor expenditures reported by the BSS for Barbados are determined by extrapolating spending estimate responses of stayover visitors and cruise passengers in exit surveys conducted by the Caribbean Tourism Organization (CTO) on behalf of the Government of Barbados, and applying them to visitation levels. Based upon assessment of the information provided¹, the following should be noted:

- Since 2007, total visitor expenditures have been declining steadily
- Extrapolating from spending estimates of CTO survey respondents, total annual visitor expenditures of international stayover arrivals and cruise passengers combined for

¹ The values presented are in actual dollars, and do not account for inflation.

Barbados in 2012 is estimated at US\$903.5 million. This is the lowest level achieved since 2005, and reflects a 5% decrease from the nearly \$953 million in 2011 and just under a 2% increase from the almost \$888 million in 2005

- Given the nature of their visit (primarily due to length of stay and need for accommodation in Barbados), the overwhelming majority of these expenditures comes from international stayover arrivals. In any given year, they contribute 96% to 97% of total expenditures, while cruise passenger arrivals generate only 3% to 4%
- Total annual visitor expenditures of international stayover arrivals to Barbados in 2012 are estimated at US\$872 million. Also, the lowest level achieved since 2005, this reflects close to a 5% decrease from the \$915 million in 2011
- However, the US\$872 million in 2012 shows a 2% increase from the \$851 million in 2005
- The peak year for visitor expenditures in Barbados – for the total international market and for its stayover component – was 2007 with \$1.19 billion total annual visitor expenditures. This differs from the peak year for total arrivals of 2004 when 1.27 million total visitors came to Barbados
- In 2012, 40% of total expenditure from stayover visitors was generated by those from the UK, followed by 21% from the US, 14% Canada, 12% Caribbean, 8% Other Europe and 5% other origin
- Also in 2012, 55% of total expenditure from stayover visitors was spent on accommodation, 16% meals and drinks, 8% entertainment and recreation, 7% transportation, 7% shopping, 3% souvenirs and 4% other

Comparing BSS arrival data with CTO spending estimates further reveals the following trends in average spending (commonly referred to as “spend”) among stayover arrivals and cruise passengers:

- In 2012, each stayover visitor to Barbados spent an average of US\$1,626 in Barbados. This is only slightly higher than their average spending of US\$1,612 in 2011
- By comparison, each cruise passenger only spent an average of approximately US\$61 in 2012, and this reflected a decrease from an average of approximately US\$62 the previous year

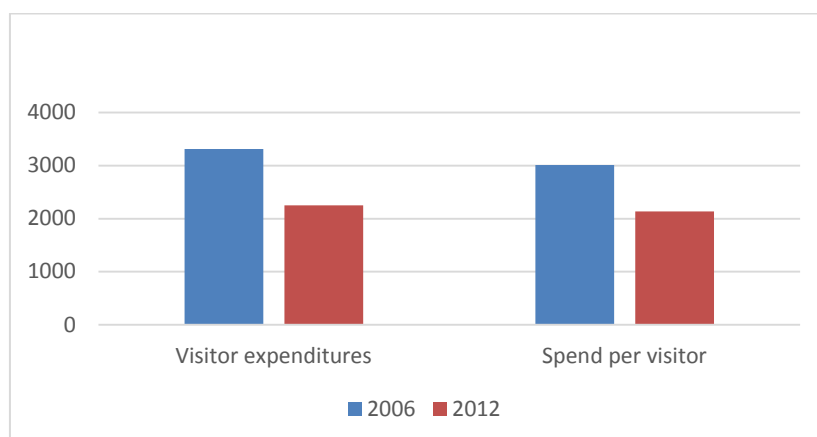
2.1.7 World Travel and Tourism Council’s Tourism Model for Barbados

The World Travel and Tourism Council (WTTC), on an annual basis, prepares tourism economic impact models for 181 countries, including Barbados. The following results are taken from the Barbados model². For some values it is used as a base from which to make calculations. The two following figures tell the story with respect to economic and employment impacts of recent years.

Figure 2.2 shows the economic impacts of the decline from 2006 to 2012 (the most recent year for which data is available). To negate the effects of inflation, the data are in constant

² The WTTC model is used because at this time there is no acceptable Barbados-made tourism model. The WTTC models are prepared in association with the Oxford School of Economics using accepted Tourism Satellite Accounting (TSA) approaches approved by the UNWTO. The WTTC values may differ, somewhat, from some Barbados generated data because they use a comprehensive approach which includes the direct, indirect and induced impacts. The specific values are not as important as the direction and general magnitudes of the change they indicate.

2011 dollars. Visitor expenditures are presented in millions of Barbados dollars, and the spend data in actual dollars.



Source: WTTC base data used to calculate visitor spend

Figure 2.2. Economic impacts (2006 – 2012).

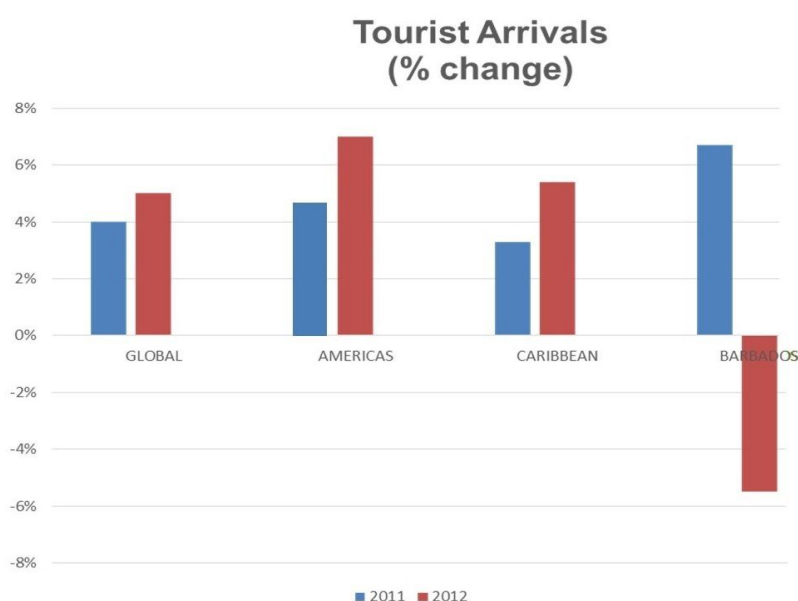
The economic decrease is caused by more than just a reduction in numbers of visitors; it is compounded by a decrease in how much each visitor spends. With the tourism contribution to the Barbados GDP at close to 43%, this large reduction is felt throughout the economy. Some of the most recent data (3rd Quarter 2013), collected through the Caribbean Tourism Organization (CTO) quarterly surveys, shows a reversal towards an increase in total visitor spend. Other data derived from the WTTC model include:

- Employment directly in tourism is estimated at 18,000 jobs in 2012
- Total jobs including direct, indirect and induced are estimated at about 60,000 in 2012, or about 42% of all jobs in Barbados
- In 2012, the total contribution of travel and tourism to the Barbados GDP was about BDS \$3.6 billion
- Each stayover visitor contributes approximately BDS\$6473 to the Barbados economy (direct, indirect, induced)
- According to the WTTC world rankings, out of 181 countries, tourism in Barbados ranks 10th in terms of its relative contribution to GDP; this is a strong indication of the importance of tourism to the total economy of Barbados

A more detailed presentation of the information presented in Section 2.1 can be found in Report IV, Sections 2.0 and 3.0.

2.2 Global and Regional Trends in Tourism

In the context of global tourism, the Americas and the Caribbean have been doing quite well as evidenced in Figure 2.3. It shows strong growth in all geographic areas (UNWTO, 2013). However by comparison, Barbados is losing market share globally and regionally. Between 2006 and 2012, visitor arrivals declined by an average of 0.6 % per year. There was a resurgence in 2011, with an increase of close to 7%. In 2012, a decline of 5.5% was recorded, and 2013 declines are estimated at 6%. More people from more countries are travelling now than ever before; this provides the potential for Barbados to regain the visitors it has lost.



Source: UNWTO, 2013

Figure 2.3. Comparative tourist arrivals for 2011 and 2012.

Recent travel trends to Barbados, the Caribbean and across the world are presented in Table 2.2, with the following significant findings:

- Aside from a couple of years, Barbados, in recent years, has been performing poorly in terms of attracting overseas visitors, and the situation appears to be worsening. Further, this has been in stark contrast to activity across the globe and in many other parts of the Caribbean
- At the global level, international and domestic travel is withstanding economic trends due to a combination of reasons. Many countries such as Brazil and China are experiencing strong economic growth and are creating a growing middle class, one with more disposable income that permits travel. Concurrently, residents of many developed countries are undergoing difficult economic times. However, they are resistant to giving up travel, although they may not be traveling as far, going away for as long, or spending as much while they travel

- This is demonstrated by the fact that global stayover arrivals have been increasing in recent years – by 4% in 2012 and by nearly 5% the previous year. As a result, a record level was reached in 2012 – the first year ever to exceed one billion international stayover arrivals. This is primarily due to strong growth in outbound travel from emerging economies in Asia, Latin America, the Middle East, and Africa
- Stayover arrivals to the Caribbean as a whole actually grew at a faster rate in 2012 than globally, but this followed from comparatively slower rates in 2011 (2.6%, excluding Trinidad and Tobago). The US territories (Puerto Rico, USVI), the Dutch islands (Aruba, Curacao, St. Maarten) and the Spanish-speaking Caribbean countries (Cuba, Dominican Republic) experienced the strongest growth rates – of 8.4%, 5.7% and 5.4%, respectively – in 2012. The Dutch islands have been particularly successful in achieving sustained growth over the past couple years, and this appears to be largely due to their effectiveness in attracting visitors from the emerging South American origin markets
- Barbados performed less impressively among the Caribbean's reporting countries for 2012. It experienced a decline of 5.5% in stayover arrivals compared to 2011 when it had actually been one of the better performing regional destinations with positive stayover arrival growth of 6.7% in that year. However, 2011 was an anomaly; it had been preceded by a five year period with an annual average rate of decline of 0.6%

Table 2.2. Recent trends in stayover arrivals to the Caribbean and globally.

Select Destinations	Stayover Arrivals				Growth (%)			Standout Origin Markets (size, growth)
	2005	2010	2011	2012 (P)	AAC 05-10	2011	2012	
Global Trend	807 M	949 M	995 M	1.035 B	3.3%	4.8%	4.0%	BRIC
Total Caribbean (25 excl. Trinidad & Tobago)	18.2 M	19.0 M	19.5 M	20.2 M (Cancun Jan-Oct)	0.9%	2.6%	4.6%	Canada, USA
CARICOM (16 excl. Trinidad & Tobago)	5.7 M	6.1 M	6.3 M	6.4 M	1.4%	2.2%	2.6%	Canada, USA
Aruba, Curacao, St. Maarten	1.5 M	1.6 M	1.7 M	1.8 M	1.3%	4.6%	5.7%	South America, USA, Canada
Martinique only	484.1 K	476.5 K	496.5 K	487.4	-0.3%	4.2%	-1.8%	N/Av
Cancun, Cuba, Dominican Republic	8.4 M	8.8 M	9.0 M	9.2 M (Cancun Jan-Oct)	0.9%	2.3%	5.4%	Canada, USA, Europe
Puerto Rico, US Virgin Islands	2.1 M	2.1 M	2.1 M	2.3 M	0%	0%	8.4%	Europe, USA, Canada
Aruba	732,500	824,300	869,000	903,900	2.4%	5.4%	4.0%	Canada, Latin America, Netherlands
Bahamas	1,514,500	1,370,100	1,346,400	1,421,300	-2.0%	-1.7%	5.6%	USA, Canada, Latin America
Barbados	547,500	532,200	567,700	536,300	-0.6%	6.7%	-5.5%	UK, USA, Canada, Europe (Germany), CARICOM (esp. T&T)
Cancun (Mexico)	2,134,200	2,106,500	1,940,700	1,826,100	-0.3%	-7.9%	N/Av	

Select Destinations	Stayover Arrivals				Growth (%)			Standout Origin Markets (size, growth)
	2005	2010	2011	2012 (P)	AAC 05-10	2011	2012	
Global Trend	807 M	949 M	995 M	1.035 B	3.3%	4.8%	4.0%	BRIC
Total Caribbean (25 excl. Trinidad & Tobago)	18.2 M	19.0 M	19.5 M	20.2 M (Cancun Jan-Oct)	0.9%	2.6%	4.6%	Canada, USA
CARICOM (16 excl. Trinidad & Tobago)	5.7 M	6.1 M	6.3 M	6.4 M	1.4%	2.2%	2.6%	Canada, USA
Aruba, Curacao, St. Maarten	1.5 M	1.6 M	1.7 M	1.8 M	1.3%	4.6%	5.7%	South America, USA, Canada
Martinique only	484.1 K	476.5 K	496.5 K	487.4	-0.3%	4.2%	-1.8%	N/Av
Cancun, Cuba, Dominican Republic	8.4 M	8.8 M	9.0 M	9.2 M (Cancun Jan-Oct)	0.9%	2.3%	5.4%	Canada, USA, Europe
Puerto Rico, US Virgin Islands	2.1 M	2.1 M	2.1 M	2.3 M (Jan-Oct)	0%	0%	8.4%	Europe, USA, Canada
Cuba	2,319,300	2,531,700	2,716,300	2,838,200	1.8%	7.3%	4.5%	Canada
Dominican Republic	3,690,700	4,124,500	4,306,400	4,562,600	2.2%	4.4%	5.9%	USA
Jamaica	1,478,700	1,921,700	1,951,800	1,986,100	5.4%	1.6%	1.8%	Canada, USA, Europe, Latin
Martinique	484,100	476,500	496,500	487,400	-0.3%	4.2%	-1.8%	N/Av
Puerto Rico	1,465,300	1,369,200	1,448,700	1,569,500	-1.3%	5.8%	8.4%	USA, Europe
St. Lucia	317,900	305,900	312,400	306,800	-0.8%	2.1%	-1.8%	Canada
St. Maarten	467,900	443,100	424,300	456,700	-1.1%	-4.2%	7.6%	Canada, USA
Trinidad & Tobago	460,200	388,300	N/Av	N/Av	-3.3%	N/Av	N/Av	N/Av
US Virgin Islands	697,000	691,200	679,000	737,700	-0.2%	-1.8%	8.6%	Europe, Canada

AAC = Annual Average Change (as a %)

Colour key:

Performance better than that of Caribbean overall in blue text

Performance worse than that of Caribbean overall in red text

Sources: Caribbean Tourism Organization – *Latest Tourism Statistics and Annual Tourism Reviews (June 2013)*; Integra Realty Resources – *Caribbean Market Update (January 2013)*; and UNWTO – *Tourism Highlights 2013 (June 2013)*

Barbados also needs to pay attention to its own domestic visitor market. Governments and tourism industries in many of the origin markets are aggressively targeting their own domestic markets to explore and spend within their own countries. This is the case for both countries experiencing difficult economic times (e.g. USA), as well as those currently prospering (e.g. Brazil). Not only is its domestic market a potentially significant untapped market for Barbados, but the effectiveness of Barbados' traditional and emerging origin markets to grow their domestic tourism markets will further impact outbound travel to overseas destinations, including Barbados.

2.3 Barbados' Strengths and Weaknesses

In order to grow the Barbados tourism sector, it is important to understand the weaknesses and threats likely to be encountered as the Master Plan is being implemented. Once these are identified, they can be addressed to enable effective strategic performance.

By the same token, knowing the opportunities and strengths likely to support the implementation effort takes Barbados another step closer to developing a strong, vibrant, and compelling visitor economy. This section outlines some of the strengths, weaknesses, opportunities and threats identified during stakeholder workshops, as well as by the consulting team during the research period.

Barbados' traditional tourism sector is under severe threat. All Master Plan findings suggest the country's market leadership is being eroded due to its failure to continuously enhance existing infrastructure and products, create appealing new infrastructure, products, attractions and services, and stay ahead of the marketing curve through the use of innovative media channels, technologies and messages in existing and new markets.

The country's longstanding weakness in implementing agreed strategies and policy decisions, as well as its failure to create the necessary enabling environment for Barbados' tourism development and investment, have further damaged the sector's ability to compete.

In fact, there is a new breed of visitor whose behaviours, interests, needs, motivations, and responses do not mirror the tourist of yesteryear. This new type of visitor is more knowledgeable, sophisticated, technologically savvy, discerning, and demanding. They seek out unique experiences that match their personal values, including a respect for the environment and social justice.

Additionally, the number of fresh, competitive destinations operating at world-class standard is increasing while at the same time niche players and markets offering specialized, unique experiences proliferate. In short, visitors have more choices than ever before.

The traditional approach of focusing on tourism as a separate and distinct component of the economy cannot meet the country's future growth requirements in terms of foreign exchange, jobs, tax revenues, skills and knowledge transfer, increased productivity, or competitiveness. In reality, the "tourism sector" is deeply embedded in the wider economy and society; so if tourism declines, every sector in Barbados is likely to follow suit. Therefore, it would be a mistake to create conditions that support the evolution of a well-resourced tourism silo without reference to the wider visitor economy.

Based on these realities, the Master Plan consulting team, utilizing the results of the stakeholder workshops in February 2012, has distilled the strengths, weaknesses, opportunities and threats facing the Barbados tourism sector (see Figure 2.5).

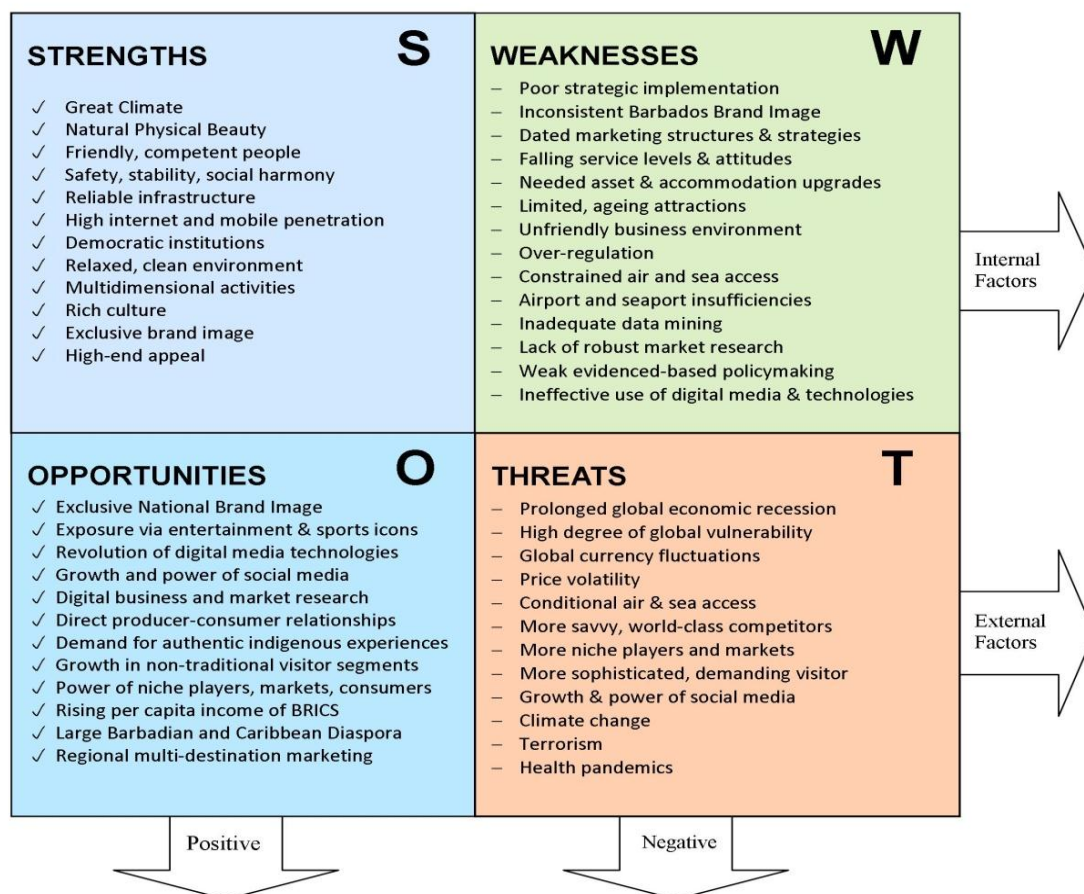


Figure 2.5. SWOT of the Barbados Tourism Sector (ACB Knowledge Consultants Inc., 2013).

2.4 Stakeholders

Stakeholder consultations held throughout the Master Plan process were used to validate the strategic approach contained herein. They ensure that the Master Plan is a product of the widest possible national input. Consultations were conducted through one-on-one meetings, small group sessions, and two series of workshops with four Master Plan Working Groups. Given the importance and spread of tourism throughout Barbados, there are many tourism stakeholders. A list of the approximately 100+ stakeholders that were consulted is presented in Appendix II. The extent of stakeholder consultations is demonstrated in Figure 2.6.

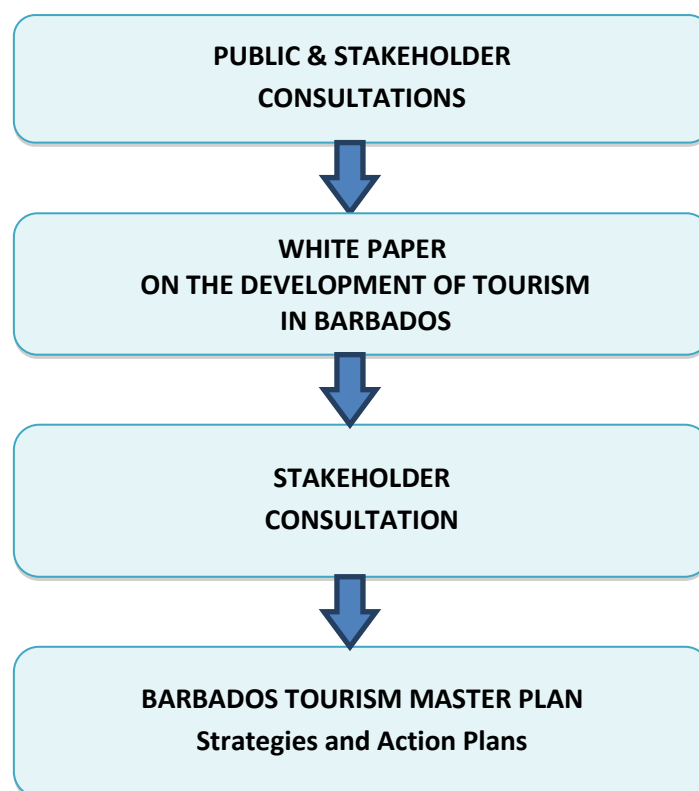


Figure 2.6. Consultation in the Tourism Master Plan process.

Detailed results of the stakeholder consultations at the TMP workshops are presented in Appendix III. Of special importance is the identification and prioritization of the strategic imperatives that the stakeholders considered essential to driving growth in the Barbados tourism sector. Their input was the basis for the development of the recommended strategies and actions whose implementation will guide growth strategies. The strategic imperatives, strategies and actions are presented in Sections 4.4 and form the basis of the Implementation Plan presented in Section 5.0.

2.5 Tourism Capacity

Like any industry, tourism brings both positive and negative impacts. If not recognized, the positive impacts may be missed, and the negative ones may become entrenched. Therefore it is important to continually check on the health of the tourism industry. This means comparing the amount and type of tourism activities with the nature and scale of the impacts caused by tourism.

2.5.1 Current Situation

Currently in Barbados, tourism capacity relates especially more to what visitors do and how they are managed than it does to numbers of visitors. In the next ten years, there are no foreseeable major concerns about the number of stayover visitors that Barbados can accommodate if the resources they enjoy and the visitor activities are well managed. The main reason is that given how the Barbados tourism economy has shrunk since 2006/2007,

in the next ten years it will be a challenge to get back to that level, let alone grow beyond it. This is independent of the current availability of visitor accommodation.

In considering the numbers of visitors for select years (see Table 2.3), it is important to assess (i) the numbers of visitors; (ii) the visitors' total expenditure; and (iii) the expenditure per visitor. A high value of visitor expenditure may indicate more varied visitor activities, thus more varied utilisation of the resources that cater to visitor needs and preferences. However, it could also be an indication of more expenditure on low-cost activities, such as beach utilization and staying in lower-priced accommodation, as well as visiting lower-cost restaurants.

In examining stayover tourist arrivals by month, the months of December to April are the busiest, with another peak in July. However, there is a good distribution of visitors throughout the year.

Table 2.3. Barbados visitor data for select years.

Item	2007	2010	2012	2013 (Estimated)
Total number of stayover visitors*	572,937	532,180	536,303	476,000
Total expenditures for stayover visitors* (BDS\$,000)	2,268,526	1,945,730	1,330,410	NA
Average expenditure per stayover visitor* (BDS\$)	3,959	3,656	2,456	3,722**
Total cruise ship visitors*	616,354	664,747	616,317*	656,083*
Total expenditures for cruise ship visitors* (BDS\$,000)	87,266.9	77,602.7	40,319.1	NA
Average expenditure per cruise ship visitor** (BDS\$)	142	117	65	63.3**
*Source: Barbados Statistical Service				
** Source: Caribbean Tourism Organization				

Cruise ships are likely to introduce more capacity issues because the majority of cruise ship calls occur from November to April. There are capacity issues with the port that largely relate to its design, the fact that many calls are on the same 2 days of the week, and the combination of the cruise port with the cargo port. However, these issues are largely being addressed through the Sugar Point project that will see a separation of the port functions, new berths, and an expanded commercial area.

2.5.2 Capacity Issues at Select Sites and Potential Mitigation

Barbados should be able to receive 1 million stayover visitors per year, plus another 1 million cruise visitors without negatively impacting the social and ecological environments, as long as there are proper practices addressing both visitor management and resource management as well as plans to address the existing 'bottleneck areas'. These numbers were projected by the Barbados Tourism Master Plan consulting team based on several years of intense study of the Barbados tourism markets and products.

The following analysis examines site capacity implications of 1 million stayover visitors, plus another million cruise visitors per year in Barbados. This is done only for select sites and events that are considered to currently have, or potentially have, capacity issues. The analysis is based on current utilization patterns while projecting ahead to the impacts of the projected increase in visitation in the future.

As presented in this section, it is wiser and to the greater benefit of all users, suppliers, residents, and the country to recognize that under current utilization there are substantial issues and concerns, and that these will only increase as utilization increases due to increasing numbers of tourists. In this context, 'carrying capacity' should focus on the adaptive management of resources and visitors to ensure the sustainability of the site. Adaptive management requires the integration of design, management and monitoring to systematically test assumptions in order to adapt and learn.

One factor which encumbered the analysis was the fact that there is limited and in some cases nonexistent, utilization data for the specific attractions / venues of concern. Therefore, the first step in the analyses of capacity was an estimation of utilization. These estimations were based on assumptions designed to reflect actual occurrences as best possible.

2.5.2.1 Oistins

Based on the best data currently available for numbers of visitors to Oistins and the timing of their visits, the following two tables model what current visitation approximates on the busy Friday evenings during high tourist season and July, as well as what visitation patterns might be when the total number of stayover visitors to Barbados reaches 1 million annually.

The analysis in Table 2.4 demonstrates, for the high season tourist months of November to April and the month of July, total visitors to Oistins on the Friday evenings of between 2,997 per evening in November and 3,782 in March. While all may not be there at the same time, since some will have arrived earlier and left before others arrive, the data nevertheless demonstrate considerable current Friday evening utilization pressures at Oistins.

Under the presented assumptions, Table 2.5 demonstrates the magnitude of potential increase in Friday night visitation to Oistins as the number of stayover visitors increases from 536,000 experienced in 2012 to 1,000,000 annually. The total number of Friday night visitors would range from 4,951 in November to 6,241 in March. This represents an increase of between 2,000 for November to 2,500 for March per Friday during high tourist months.

Table 2.4. Oistins estimated utilization (2012).

	Stayover Visitors to Barbados (2012)	Stayover Visitors to Oistins (26.5%/2006)	Local Visitors @ ratio of 1 to 3	Total/mo. Stayover and Local	Total per week @ 4/mo.	Friday Total Visitors @ 70%
Visitors annual (2012)	536,000	142,040				
November	42,925	11,375	3,754	15,129	3,782	2,648
December	52,174	13,826	4,563	18,389	4,597	3,218
January	52,619	13,944	4,602	18,546	4,636	3,245
February	54,056	14,325	4,727	19,052	4,763	3,334
March	54,164	14,353	4,737	19,090	4,773	3,341
April	47,979	12,714	4,196	16,910	4,228	2,959
July	51,253	13,582	4,482	18,064	4,516	3,161

- Notes:
1. Based on BSS visitor data
 2. 2006 CTO survey indicates 26.5% of stayover visitors go to Oistins
 3. Assumes a local resident to visitor ratio of 1 to 3 on busy evenings (based on TMP consultants observations over the course of 18 months)
 4. Assumes the monthly visitation is distributed equally per week
 5. Assumes 70% of total weekly tourist visitation is concentrated on Fridays

Table 2.5. Oistins estimated utilization at 1 million long-stay visitors.

	Stayover Visitors to Barbados	Stayover Visitors to Oistins (26.5%)	Local Visitors (same numbers above)	Total/mo. Stayover and Local	Total per week @ 4/mo.	Friday Total Visitors @70%
Visitors annual	1,000,000	265,000				
November	80,132	21,235	3,754	24,989	6,247	4,373
December	97,285	25,780	4,563	30,343	7,586	5,310
January	98,114	26,000	4,602	30,602	7,651	5,355
February	100,794	26,710	4,727	31,437	7,859	5,502
March	100,995	26,764	4,737	31,501	7,875	5,513
April	89,462	23,708	4,196	27,904	6,976	4,883
July	95,567	25,325	4,482	29,807	7,452	5,216

- Notes:
1. 2006 CTO survey indicates 26.5% of stayover visitors go to Oistins; assumes this will remain constant with the increase in numbers of visitors
 2. Assumes the number of local visitors will remain constant since their numbers are not increased as do long stay visitors
 3. Assumes the monthly visitation is distributed equally per week
 4. Assumes 70% of total weekly visitation is concentrated on the busy Fridays

Table 2.5 is a 'snapshot' of the potential numbers of visitors if the current utilization assumptions continued to hold. It shows that with current utilization patterns, the demand for

Oistins Friday night visits could reach in excess of 5,200 when 1 million long-stay visitors come to Barbados. Unfortunately, it would be expected that under the current set of utilization assumptions, the resources at Oistins would be so substantially downgraded that visitors would cease to attend in such large numbers.

Thus, it could be concluded that the maximum capacity at Oistins has already been reached since there are already capacity issues on the busy Friday evenings. Challenges relate to traffic congestion, visitor crowding in sections of the food court, and sanitation and sewage management issues, among others. However, if proper visitor management and resource management strategies as presented in Table 3 are implemented, the Oistins capacity would be greater than the current utilization.

Consistent with the philosophy of adaptive management, it is prudent to examine options for visitor and resource management. Table 2.6 presents an overview of key elements required for resource and visitor management in Oistins. These elements are further developed in Report VI on Cultural Heritage and Attractions which provides detailed strategies and actions for further development of Oistins as a heritage centre; and also in Report V Part 1 which addresses traffic management issues in Oistins. Additional elements are addressed in other TMP reports, and the references are contained in Table 2.6.

Table 2.6. Oistins Capacity: Issues and Mitigation.

Issue	Mitigation
Crowding/Congestion	<ul style="list-style-type: none"> • Extend the area by adding more vendors to the east side of the current area • Popularize an additional day(s) to Friday through promotion and staging of events • Develop and popularize the ‘fish fry’ event at other locations • Develop and popularize other attractions to spread visitors’ demand to a greater extent (Report V Part 1)
Poor Drainage	<ul style="list-style-type: none"> • Implement a drainage plan in order that wastewater and rainwater does not accumulate or stagnate
Poor Sanitation	<ul style="list-style-type: none"> • Increase the number of washrooms and improve their cleanliness • Remove garbage and litter more frequently • Do a general regular cleanup of the surrounding area, especially with respect to long-standing garbage and decaying materials (Report II)
Harassment	<ul style="list-style-type: none"> • Educate locals and visitors on acceptable and not so acceptable behaviours and their consequences • Given the importance of this resource to the country put more resources in enforcement (Report III)

Traffic Congestion	<ul style="list-style-type: none"> • Implement a traffic flow plan which utilizes alternate routes • Develop more park & ride, • Develop more pedestrian footpaths (Report V Part 1)
Lack of Guest Facilities	<ul style="list-style-type: none"> • Increased number of seating areas, and general rest areas • Increase numbers of washrooms, their lighting and cleanliness (Report VI)
Food Preparation Safety	<ul style="list-style-type: none"> • Develop implement and monitor health and safety standards associated with food preparation
Inebriated Individuals/Poor behaviour	<ul style="list-style-type: none"> • Patrol the site and enforce so individuals with inappropriate behaviours are removed (Report III) • Pay special attention to enforcement in the washroom and more poorly lit areas
Poor People Circulation	<ul style="list-style-type: none"> • Provide more spaces for people walking through and circulating
General Presentation and Aesthetics	<ul style="list-style-type: none"> • Improve lighting • Paint frequently • Build a well-lit well-designed Boardwalk along the waterfront (Report VI)

2.5.2.2 Harrison's Cave

In comparison to Oistins, Harrison's Cave is the next most popular attraction in Barbados. Based on 2006 CTO survey data, 16.8% of all stayover visitors to Barbados visited Harrison's Cave in comparison to 26.5% for Oistins. In 2000, Harrison's Cave underwent extensive development planning and redevelopment. It was estimated at that time that its visitation capacity was substantially in excess of the visitors it was receiving.

In 2000, a total of 179,570 visitors attended Harrison's Cave. Since then, visitation has declined to 103,451 in 2013. In one year alone, Harrison's Cave visitation decreased from 25.0% (2005) to 16.8% (2006). (*Source: Caves of Barbados Ltd., Visitor Arrivals 2000 – 2013*).

Given this substantial decline in visitor arrivals to Harrison's Cave, including August peak month declines of 18,938 in 2000 to 12,453 in 2013, it is important to address the substantial decline while ensuring the responsible management of the resource and its visitors. This is addressed in Strategy 2.4 and Action 2.4.1 that focuses on measures needed to conserve the natural heritage and promote their sustainable use.

2.5.2.3 Bridgetown

The main capacity issues in Bridgetown are centred around vehicular and pedestrian traffic congestion, both of which increase on cruise ship days and during the Christmas season when there is both an increase in locals and visitors in Bridgetown. Report V Part 1 comprehensively addresses issues related to vehicular traffic congestion.

Congestion in Bridgetown is particularly obvious on the days when there are peak cruise ship arrivals. Currently, these are Wednesdays and Fridays, and especially in the high tourist season during the winter months. When Barbados reaches 1 million each stayover and cruise visitors, if the 'status quo' was to prevail, the Bridgetown area of Barbados would receive approximately double the number of pedestrian visitors that it does now, i.e. the demand by tourists would be approximately double its current utilization. Without better visitor management and management of the city as a resource, it is likely that the demand would decrease because the experience would become unpleasant.

Table 2.7 identifies the issues and potential mitigation measures that would ease the negative conditions that could be exacerbated as the number of tourist arrivals in both cruise and stayover increases. References are made to the TMP Reports that contain detailed analysis and recommendations to address the issues identified.

Table 2.7. Bridgetown Capacity: Issues and Mitigation.

Issue	Mitigation
Crowding/Congestion	<ul style="list-style-type: none"> • Designate certain streets to be traffic-free during certain times (some tourist destinations, e.g. St. Marteen for popular tour centers designate the main streets as traffic-free between the hours of 6 pm and 9pm each evening). Merchants and visitors would benefit greatly from this • Encourage merchants to extend their opening hours into the evening and weekends to accommodate longer shopping periods for visitors • Increase the number of shaded rest areas • Improve signage directing visitors (Report V Part 1)
Poor Sanitation	<ul style="list-style-type: none"> • Increase the number of washrooms and improve their cleanliness • Remove garbage and litter more frequently • Increase attractive signage with respect to litter and cleanliness
Harassment/Safety	<ul style="list-style-type: none"> • Educate locals and visitors on acceptable and not so acceptable behaviours and their consequences (Report III on Education) • Given the importance of this resource to the country, put more resources into enforcement. Increase police presence (Report III Safety and Security)

Traffic / Pedestrian Conflict	<ul style="list-style-type: none"> • Implement a traffic flow plan which utilizes alternate routes (Report V Part 1) • Develop more park & ride (Report V Part 1) • Develop more pedestrian footpaths • Improve public transportation for visitors in and out of the city (Report V Part 1)
Lack of Guest Facilities	<ul style="list-style-type: none"> • Increase number of seating areas, and general rest areas • Increase numbers of washrooms, their lighting and cleanliness
Static/Boring	<ul style="list-style-type: none"> • Animate the city through special venues, entertainment, art, performances, exciting interpretation to bring Bridgetown to life • Focus on Bridgetown as a tremendous asset to both tourists and residents and not just as an incidental place • Restore, interpret and animate historical sites and buildings such as the Empire Theatre, The Dry Dock, and others (Report VI)
Inebriated Individuals /Poor Behaviour	<ul style="list-style-type: none"> • Patrol the site and pay special attention to enforcement (Report III on Safety and Security)

2.5.2.4 The Garrison

The designation of Historic Bridgetown and its Garrison as a World Heritage Property should lead to increased visitation of Barbados by international visitors as well as local residents (see Report VI). This, in large part, will be due to the many initiatives currently underway, including those under the auspices of the Barbados Garrison Historical Consortium Inc (BGHC), an organization representing the Garrison stakeholders. There are potentially 80 sites of interest within an area of 150 acres. These include the completed restoration and interpretation of George Washington House, the weekly Changing of the Sentry at the Clock Tower, introduction of a restaurant at George Washington House, and significantly, the opening to the public of the existing tunnels under the Garrison as an attraction.

Current utilization of the Garrison area occurs primarily for events such as parades on Independence Day, and during Barbados Turf Club horse racing days. In general, year round utilization of the Garrison is largely by residents of Barbados, with limited tourist utilization. However, the main exception is the annual Sandy Lane Gold Cup horse racing event. On that occasion, 3,000 attendees are accommodated in the Grand Stand and 50% of these are visitors (Barbados Turf Club, 2014).

In contrast, the grounds hold 5,000 - 6,000, of which approximately 25% are visitors. Currently, capacity issues occur only at the time of special events and peak race days. During the winter months from November to March annually, there is 90% patronage from overseas visitors in the Grand Stand section that accommodates 430 seats. This arises due to the fact that overseas repeat guests purchase their tickets for the Grand Stand well in advance of the next year's events.

It is anticipated that utilization by visitors to Barbados and residents acting as domestic tourists will increase substantially for the following reasons:

- The number of visitors is anticipated to increase and could potentially double if and when the stated tourist capacity of Barbados is achieved at 1 million visitors each for long-stay and cruise
- Increased awareness of the events and venues, existing and proposed, will result in an increased number of foreign and resident visitors
- The UNESCO designation, as people become more aware of it, will in itself serve to attract a considerable number of visitors, including many cruise visitors who are now finding a paucity of things to do in Barbados

Each of the current venues at the Garrison can accommodate more visitors but functional capacity is a concern. To maximize attendance at 'Changing of the Sentry' it would be necessary to install barricades, limit traffic movement and reconfigure the site layout. Based on the utilization data for other attractions, the demand for the venues and attractions at the Garrison once the proposed developments are in place, but not including special events such as at holidays and racetrack events, should exceed 20% for both stayover visitors and cruise visitors. The location of the Garrison on the busy tourist South Coast and relatively near the cruise port, will serve to enhance the demand because of its proximity and convenience.

On the basis of the above, the anticipated demand for Garrison experiences, not including Barbados resident demand, is likely to be in the neighbourhood of 150,000 visitors per year, with improved facilities (BGHC, 2014). Similar to the busy winter season peak months, it is anticipated that this demand will peak proportionately.

Some of the issues identified in Table 2.8 currently exist to a limited extent. However, these issues will certainly become very prevalent if no appropriate mitigation measures are taken.

Table 2.8. The Garrison: Issues and Mitigation.

Issue	Mitigation
Traffic Congestion	<ul style="list-style-type: none"> • Implement a traffic flow plan which utilizes alternate routes • Develop more park & ride opportunities • Develop more pedestrian footpaths • Do not provide on-site parking because: (a) there is a lack of space and would therefore compete with pedestrians; (b) it is not consistent with the heritage values of the Garrison (Report VI) • Provide off-site parking • Strictly enforce parking and traffic restrictions (Report V Part 1) • Develop tram transportation as proposed by The Garrison Historic Consortium • Provide adequate public transportation to and from The Garrison (Report VI)
Deterioration of the	<ul style="list-style-type: none"> • With increased utilization, a visitor management plan will be required (Report VI)

Heritage Values from Overuse	<ul style="list-style-type: none"> • Provide adequate enforcement • Educate visitors about the importance of their appropriate behaviours in contributing to the preservation of heritage values and the heritage itself (Report III)
Deteriorating Heritage Buildings	<ul style="list-style-type: none"> • Develop and implement, based on individual asset evaluations, a comprehensive restoration plan • Assure maintenance of the Garrison theme (Report VI)
Educational and Entertaining	<ul style="list-style-type: none"> • Animate the experiences to make them educational and entertaining as per the many recommendations in this TMP, and many of the Garrison Historic Consortium proposed projects • Develop signage and materials which are informative and positively grab the visitors' attention and interest (Report VI) • Provide many interactive, hands-on and participatory experiences (Report III and VI)
Crowding/Congestion	<ul style="list-style-type: none"> • Designate many pedestrian areas free of motor vehicles, except public transportation vehicles • Popularize activities and events throughout all days of the week • Link the Garrison to related experiences and attractions throughout the island (Report VI) • Ensure all stakeholders become active participants in meeting, greeting and hosting the visitors (Report III) • Avoid duplication of major events, such as on racetrack days
Sanitation	<ul style="list-style-type: none"> • Increase the number of washrooms and ensure cleanliness • Remove garbage and litter frequently • Keep the area fresh, clean and green
Harassment	<ul style="list-style-type: none"> • Educate locals and visitors on acceptable and unacceptable behaviours, and their consequences • Given the importance of this resource to the country put more resources in enforcement (Report III)
Lack of Guest Facilities	<ul style="list-style-type: none"> • Increase number of seating areas, and general cool rest areas • Increase numbers of washrooms, their lighting and cleanliness
Inebriated Individuals/Poor Behaviour	<ul style="list-style-type: none"> • Patrol the site and enforce so individuals with inappropriate behaviours are removed (Report V Part 1) • Pay special attention to enforcement in the washrooms and any poorly lit areas
General Presentation and Aesthetics	<ul style="list-style-type: none"> • Improve lighting where specified by BGHC • Ensure maintenance programme is sustained

2.5.2.5 St. Lawrence Gap

As a consequence of the large and small resorts and restaurants located in St. Lawrence Gap, as well as along the south coast, many tourists frequent The Gap during daytime hours, and even more so during evening hours. While it can be said that during the high tourist season The Gap is quite busy, it is never especially congested. Due to its substantial length and the fact that most of The Gap has controlled one way traffic and limited parking areas, the street is used as a spacious promenade. Therefore, there is no congestion and crowding. The 'bottlenecks' that occur are primarily at entry points to restaurants.

The Gap is one of the more animated areas that attracts people who desire a pedestrian environment and a light snack or drink along the way. While there are the regular scheduled transit buses that operate just outside The Gap, there is limited or no public transportation directly through The Gap itself. This, along with the very limited parking for private vehicles, is a deterrent for many people from more distant locations to visit The Gap.

The Gap is of appeal primarily to stayover visitors as opposed to cruise ship visitors because the area appeals primarily as an evening location. Therefore, an increase in future visitation will occur primarily as a result of an increase in numbers of long-stay visitors, and it can be expected that the demand for The Gap will increase at least proportionately to the increase in numbers of visitors to the island. If ongoing and proposed upgrades along The Gap continue and the existing negative issues are mitigated, then market demand will increase in greater proportion than visitor increases. With an increase of stayover visitors to 1 million per year, the demand for The Gap experiences will more than double. Table 2.9 presents the issues and mitigation measures that need to be addressed to make The Gap experiences pleasant for both visitors and residents, and thereby realize its full potential.

Table 2.9. St. Lawrence Gap: Issues and Mitigation.

Issue	Mitigation
Traffic Congestion	<ul style="list-style-type: none"> • Dedicate the main Western portion of The Gap as a promenade area only • Every evening of the week between the hours of six and 10 pm limit vehicle traffic along the main one-way portion, to taxis and private buses only • Have the remaining eastern portion of The Gap operate with only one-way traffic during the same hours • Develop more 'park & ride' areas • Provide more parking near the entrances to the Gap • Strictly enforce parking & traffic restrictions • Provide adequate public transportation to and from The Gap (Report V Part 1)
Ad hoc Development	<ul style="list-style-type: none"> • Prepare a Gap development plan with a focus on themed development as opposed to the ad hoc variety which has emerged over the last few years
Deteriorating Buildings	<ul style="list-style-type: none"> • Develop and implement, based on individual asset evaluations, a comprehensive restoration and/or replacement plan
Animated and Entertaining	<ul style="list-style-type: none"> • Animate The Gap with performers to make it more appealing and entertaining • Develop signage and materials which are informative and positively grab the visitors' attention

	<ul style="list-style-type: none"> • Popularize activities and events throughout all days of the week
Sanitation	<ul style="list-style-type: none"> • Increase the number of washrooms and ensure cleanliness • Remove garbage and litter frequently • Keep the area fresh, clean and green (Report III)
Harassment	<ul style="list-style-type: none"> • Strictly enforce removal of the obvious illegal and harassment activities now there (Report III) • Educate locals and visitors on acceptable and unacceptable behaviours, and their consequences • Given the importance of this resource to the country put substantial resources in enforcement
Lack of Guest Facilities	<ul style="list-style-type: none"> • Increased number of seating areas, and general cool rest areas • Increase numbers of washrooms, their lighting and cleanliness
Inebriated individuals /poor behaviour	<ul style="list-style-type: none"> • Patrol the site and enforce so individuals with inappropriate behaviours are removed • Pay special attention to enforcement in the washrooms and more poorly lit areas
General Presentation and Aesthetics, Safety	<ul style="list-style-type: none"> • Improve lighting which is badly needed • Clean and paint frequently

2.5.2.6 Gun Hill Signal Station

The Gun Hill Signal Station attraction is attended by visitors on island tours and also residents. Notwithstanding that January to March visitation is 80% tourists, in other months it comprises more residents. While it is a site of much historical interest and exhibiting attractive panoramic views, there are relatively limited opportunities for visitors to participate in any activities. Moreover at times it can be somewhat crowded.

In reviewing CTO visitor exit survey data, it is noted that in 2006, 9.4% of long-stay visitors indicated they attended Gun Hill; this was down from 10.3% who indicated attendance in 2005. Comparatively in 2012, 8.5% of cruise tourists surveyed indicated they had visited Gun Hill.

The majority of visits occur during the day. However, from mid-January to April, the Barbados National Trust hosts a monthly event 'Gun Hill by Moonlight'. On average, between 150 and 200 people attend. Visitation in 2013 was especially low; however that figure has already been surpassed by the January - April 2014 period (Barbados National Trust, 2014).

An increase could be anticipated as the number of visitors to the island increases as a consequence of (i) issues with the site being resolved; (ii) the product being enhanced and

animated; and (iii) marketing improved and targeted. Current capacity issues with the site are not a substantial problem, but could become a challenge with increased visitation due to the factors listed above. Table 2.10 lists current and potential issues and their mitigation.

Table 2.10. Gun Hill Signal Station: Issues and Mitigation.

Issue	Mitigation
Informative, Animated and Entertaining	<ul style="list-style-type: none"> • Develop signage and promotional materials which are informative and positively grab the visitors' attention • Reprint the small booklet about Gun Hill and other signal stations, to be sold on-site
Signage	<ul style="list-style-type: none"> • Replace directional signs at the top of the hill coming off the main highway to indicate how to find Gun Hill
Parking	<ul style="list-style-type: none"> • Improve the adequacy of the parking area
Maintenance	<ul style="list-style-type: none"> • Ensure implementation of the planned upgrade and maintenance programme, and ongoing initiatives in this area

2.5.2.7 Beaches

Cumberbatch and Moses published a study in 2011 that investigated Social Carrying Capacity (SCC) in the context of beach management in Barbados. Data was gathered from locals and tourists visiting several beaches over a four year period from 2005 to 2009. The study provided the following insights about visitor use and capacity issues on Barbados beaches:

- Browne's Beach, overall, had the highest number of users compared to all other beaches in other studies. This is not surprising since Carlisle Bay, where this beach is located, is in close proximity to Bridgetown, the most densely populated area of the island; it is also at the junction of the major tourist resort areas of the South and West coast of Barbados; and it is the nearest beach to the cruise terminal
- Local beach users outnumbered the tourists by as much as 11:1 at Browne's beach. However, at Coach House/Blue Monkey beach where there were more tourists than locals the ratio was only 2:1.
- Use increased on weekends and public holidays
- Children visited beaches mostly on weekends
- Local adults were seen at all of the beaches all of the time
- In contrast to the locals who revisited the beach at all hours including in the early morning and in the evening, tourists visited the beach most frequently in the middle of the day (9:00 am - 3:00 pm)
- Swimming emerged as the activity of choice among all users; other activities included ballgames, relaxation, walking, exercising, diving and snorkelling
- Browne's Beach was a hive of activity from as early as 4:30 am where retired persons from all over the island met to bathe in the water and to socialize

- Nationals on return to the island were drawn to Browne's Beach
- At the survey beaches there were numerous vendors selling a range of food products, crafts and jewellery
- There were water craft including catamarans, dive boats, glass bottom boats, kayaking and fishing
- Stable hands and jockeys brought horses from the nearby racetrack and stables for bathing and swimming in the morning at Pebbles Beach; this also brought complaints from beach users
- The Carlisle Bay beaches also receive complaints about stray dogs
- 70% of tourist walked to the beach, indicating that proximity to their accommodation is a major reason for selecting the beach
- 33% of survey respondents informed that "too many people" were the reason for feeling crowded; lack of personal space and noise were also reasons for feeling crowded
- The survey showed that quiet, uncrowded beaches are preferred, with positive aesthetics and calm water for swimming
- Also, the surveys showed that maintaining the areas, clean condition, having changing rooms and bathroom facilities, as well as a snack bar were the main things beach users would like to have

There have also been issues regarding discharge and runoff of contaminated water from the land areas that drain into Carlisle Bay. Proposals have been made to mitigate the situation.

Beaches, especially those in Carlisle Bay and at Blue Monkey Beach, enjoy especially strong utilization during the months of the high tourist season and, in particular, on the most popular days for cruise ship arrivals. As the numbers of visitors to Barbados increases and potentially reaches 1 million annually each for long-stay visitors and cruise visitors, the demand for the beaches will increase proportionately. Since the number of residents will not increase proportionately to the increase in visitors to the island, and since the current utilization ratio is approximately 2 to 1 tourists to locals, we can expect the demand for Carlisle Bay Beach experiences to increase by approximately 67%. However as capacity issues also increase, visitors will turn away from those beaches in favour of more distant beaches, or in favour of other experiences in Barbados. Mitigation of issues regarding capacity will become especially important.

Table 2.11 presents capacity issues and their mitigation tactics at these three Carlisle Bay beaches.

Table 2.11. Pebbles, Browne's and Boatyard Beaches at Carlisle Bay: Issues and Mitigation.

Issue	Mitigation
Water Contamination	<ul style="list-style-type: none"> • Implement recommendations which have been made to alleviate polluted water runoff from the land areas adjacent to the beaches (Report III)
Stray Dogs	<ul style="list-style-type: none"> • Remove stray dogs from the beaches

	<ul style="list-style-type: none"> • Develop and implement controls for pets on the beach
Water Safety	<ul style="list-style-type: none"> • Review safety issues regarding use of watercraft in the near beach areas • Strictly enforce regulations respecting water safety (Report V, Part 1)
Watercraft Noise	<ul style="list-style-type: none"> • Develop noise regulations regarding watercraft, and strictly enforce
Washrooms, Change Rooms, Showers and General Sanitation	<ul style="list-style-type: none"> • Increase the number of washrooms, change rooms and showers, and ensure cleanliness • Remove garbage and litter frequently, • Keep the area fresh and clean (Report II)
Harassment and Poor Behaviours	<ul style="list-style-type: none"> • Strictly enforce removal of the current obvious illegal and harassment activities • Educate locals and visitors on acceptable and unacceptable behaviours, and their consequences • Given the importance of this resource to the country, put substantial resources toward enforcement (Report III)
General Safety and Security	<ul style="list-style-type: none"> • Have numerous and visible police patrols along the beach to ensure the safety and security of users (Report III) • Provide adequate lighting in the access areas for early morning and evening use

2.5.2.8 Farley Hill

Farley Hill is a spectacular heritage site that is used primarily by locals for picnics and other social gatherings; although for special events, e.g. “Reggae on the Hill”, “Gospelfest”, and “Soca on the Hill”, tourists to Barbados also attend, but in much smaller numbers than locals. Attendance data provided by the National Conservation Commission (NCC) identifies the following utilization for 2013/2014:

- Reggae on the Hill 17,000
- Gospel fest 3,000
- Soca on the Hill 6,000

The principal assets of Farley Hill are its spectacular ruins and grounds. The site experiences a number of capacity issues currently, which are listed in Table 10. While an increase in tourism will have limited impact on total attendance due to the small numbers of tourists who now attend Farley Hill events, as events become more popular, there will be an increase in demand from visitors to Barbados as well as locals. With the current substantial capacity issues at the site, any increase in demand will more than exponentially increase the severity of the issues. As a last resort, it would be possible to ‘issue tickets for the venue’ on a first-come first serve basis, thereby limiting attendance to a maximum number. Table 2.12 presents capacity issues and their mitigation tactics with respect to Farley Hill.

Table 2.12. Farley Hill: Issues and Mitigation.

Issue	Mitigation
Access and Parking	<ul style="list-style-type: none"> • Currently very limited and problematic; requires an access and parking plan • Implement more 'park-and-ride' for large, special events
Deteriorating Ruins	<ul style="list-style-type: none"> • Stabilize the ruins to maintain its spectacular character; do not restore
Visitor Behaviours	<ul style="list-style-type: none"> • Conduct a site assessment to determine best visitor behaviours in terms of characteristics of use during special events • Ensure use characteristics that maintain the integrity of the area
Need for Washrooms	<ul style="list-style-type: none"> • Increase the number of washrooms, and ensure cleanliness
General Safety and Security	<ul style="list-style-type: none"> • Have police patrols • Provide adequate lighting
General Aesthetics	<ul style="list-style-type: none"> • Remove garbage and litter frequently, • Keep the area fresh, clean
Amenities	<ul style="list-style-type: none"> • Provide adequate picnic and rest areas

2.5.2.9 Agrofest

Agrofest, the annual weekend event held at Queens Park that brings vendors and agricultural specialties from throughout Barbados, is very well attended by locals and, to a more limited extent, tourists. The event has been increasing in popularity such that the attendance in 2013 and 2014 was estimated at 60,000 visitors (BAS, 2014).

With increasing awareness and popularity of the event, it is anticipated that attendance will continue to increase, and the proportion of island visitors attending will also increase. This increase will be further encouraged by an increase in the total number of visitors to the island. While there are not currently many capacity issues, their severity will increase, and new issues will emerge as utilization increases. Table 2.13 presents the issues and their mitigation.

Table 2.13. Agrofest: Issues and Mitigation.

Issue	Mitigation
Access and Parking	<ul style="list-style-type: none"> • Currently limited and problematic; requires an access management and parking plan • Implement more 'park-and-ride' to reduce impact on adjacent sports field
Visitor Behaviours	<ul style="list-style-type: none"> • Ensure use which maintains the integrity of the area

Need for Washrooms	<ul style="list-style-type: none"> • Increase the number of washrooms, and ensure cleanliness
General Safety & Security	<ul style="list-style-type: none"> • Maintain good police patrols • Provide adequate lighting
General Aesthetics	<ul style="list-style-type: none"> • Remove garbage and litter frequently, • Keep the area fresh, clean
Amenities	<ul style="list-style-type: none"> • Provide adequate picnic and rest areas

2.5.2.10 Holetown Festival

The Holetown Festival is an annual weekend event held along the West Coast road in popular Holetown that attracts many visitors to Barbados as well as local residents. It features local produce and arts and crafts from throughout the island, as well as special events and performances.

The Festival can become quite crowded at times. As awareness of the Festival and its popularity increases and the number of visitors to Barbados also increases, one can anticipate a commensurate increase in attendance at the Holetown Festival. The existing capacity issues will increase as its popularity increases, and the number of visitors to the island also rises. Table 2.14 addresses the capacity issues and their mitigation.

Table 2.14. Holetown Festival: Issues and Mitigation.

Issue	Mitigation
Parking	<ul style="list-style-type: none"> • A major issue surrounds the need for parking, which is currently very limited and problematic; requires an access management and parking plan • Implement more 'park-and-ride' to minimise impact on neighbouring residential community
Visitor Management	<ul style="list-style-type: none"> • Ensure use that maintains the integrity of the area
Need for Washrooms	<ul style="list-style-type: none"> • Increase the number of washrooms, and ensure cleanliness
General Safety and Security	<ul style="list-style-type: none"> • Maintain good police patrols • Provide adequate lighting
General Aesthetics	<ul style="list-style-type: none"> • The site can be fairly littered; remove garbage and litter frequently • Keep the area fresh, clean
Amenities	<ul style="list-style-type: none"> • Provide adequate picnic and rest areas

2.5.2.11 Cherry Tree Hill

Cherry Tree Hill is becoming an attraction in its own right because of the spectacular view it commands over the East Coast. It is one of the most photographed sites on the island. It is accessed by a narrow winding road, with St. Nicholas Abbey at one end and Morgan Lewis Sugar Mill near the other. Its popularity is evidenced by the increase in numbers of craft vendors, and more recently a vendor who provides fresh coconut water and rum to visitors. Virtually all vehicles along this route stop to enjoy and photograph the spectacular view.

While a very small parking lay-by has been built in recent years, it can only accommodate three or four vehicles. However, the many tour buses, private cars, and rental buses that stop, as well as visitors that disembark, means that parking space can be limited and the area can become hazardous. As the number of visitors to Barbados increases, the issues related to Cherry Tree Hill will also increase. Table 2.15 identifies some of the major issues and their mitigation.

Table 2.15. Cherry Tree Hill: Issues and Mitigation.

Issue	Mitigation
Parking	<ul style="list-style-type: none"> A major issue, since parking is currently limited to 3 or 4 parallel spaces; can be readily extended to provide more angled parking spaces (approximately 10 would likely suffice to accommodate both buses and passenger vehicles)
Visitor Management	<ul style="list-style-type: none"> Ensure usage that maintains the integrity of the area
Need for Washrooms	<ul style="list-style-type: none"> Provide a male/female washroom, and ensure cleanliness
General aesthetics	<ul style="list-style-type: none"> Remove garbage and litter frequently Keep the area fresh, clean

2.5.3 Accommodation Capacity

In addressing accommodation capacity, specific questions that are addressed and measured include:

- What is the total capacity of the Barbados room stock?
- Does Barbados require additional accommodation?
- Are certain types of accommodation required more than other types?
- Are there accommodation bottlenecks based on seasonality of use?

The results of the analysis are presented in Tables 2.16a through 2.16e. Of importance are the qualifying notes that are presented at the end of Table 2.16e; in addition, the data set presented in the tables applies to both “Tourism Capacity” and “Tourism Accommodation”.

Table 2.16a. Analysis of Barbados accommodation capacity: accommodation utilization.

ACCOMMODATION UTILIZATION (2013)	
Total number stayover visitors [2013 estimated]	476,000
Average length of stay [nights per party]	10.5
Average number of people per room [estimated based on average party size]	2
Total number of room nights utilized [all accommodation types - 2013]	2,499,000
Total number of room nights utilized in rental accommodation [excludes Cruise, Friends, and House categories – 2013]	1,881,747

Table 2.16b. Accommodation room stock – rooms registered 2012.

ACCOMMODATION ROOM STOCK (registered 2012)	
Hotels	4,918
Apartments	1,197
Guesthouses	134
Villas (not all for rent or registered)	2,340
Sandals Almond Beach (to come on stream)	395
Four Seasons (to come on stream)	172
Total current (2012)	8,589
Total hotels, apartments, guesthouses, including villas, Four Seasons & Sandals Beach	9,156
Total annual room night capacity (without Sandals Beaches & Four Seasons)	3,145,570
Total annual room night capacity (including Sandals Beaches and Four Seasons)	3,352,525
Capacity utilized in 2013 based on 476,000 total stayover visitors (excludes Friends and House categories)	59.8%

Table 2.16c. Number of guests capacity at 100% occupancy.

NUMBER OF GUESTS CAPACITY AT 100% OCCUPANCY	
All accommodation stock (2011) max daily @ average 2 per room	17,236
All accommodation stock including proposed Sandals Beaches & Four Seasons maximum daily @ average 2 per room	18,370
Annual guest capacity all accommodation stock (2011) at 10.5 days per party	599,156
Annual guest capacity all accommodation stock including Sandals Beaches & Four Seasons at 10.5 days per party	638,576
Total number of stayover visitors required given 24.7% stay in alternate accommodation such as Friends and Relatives based on 2011 accommodation stock	795,692
Total number required with Sandals Beaches & Four Seasons included	848,043

Table 2.16d. Visitor accommodation choice by type in 2012.

VISITOR ACCOMMODATION CHOICE BY TYPE (2012) - %		# VISITORS 2012	# VISITORS*	# ROOMS**
50 – 100 rooms	2.2	11,799	18,657	284
All-inclusive	13.3	71,328	112,790	1,715
Apartments	2.3	12,335	19,505	297
Cruise	0.2	1,073	1,696	NA
Friends	24.7	132,467	209,467	NA
Guesthouses	1.0	5,363	8,480	129
House	0.4	2,145	3,392	NA
Intimate	6	32,178	50,883	774
Luxury	16.8	90,099	142,471	2,166
Not stated	5.1	27,351	43,250	658
Other	2.3	12,335	19,505	297
Over 100 rooms	8.9	47,731	75,476	1,148
Under 50 rooms	3.7	19,843	31,378	477
Villa	13.2	70,792	111,942	1,702
Total	100%	536,839	848,891	

*Number of visitors booked by accommodation category with 100% occupancy based on 2011 room stock and assumes inclusion of Sandals Beaches and Four Seasons, and constant accommodation type preferences (i.e. given the total number of guests required to have 100% occupancy, the value in each category is the number required to have 100% occupancy in that particular category based on the expressed preference)

**Number of rooms required to achieve 100% occupancy in each accommodation category based on 2012 accommodation preferences

Table 2.16e. Travel preferences in 2012 by month.

MONTHLY TRAVEL PREFERENCES (2012) - %		# VISITORS (2012)	# VISITORS AT 100% CAPACITY*	# ROOMS FOR 100% OCCUP. **
January	9.8	52,619	83,108	14,879
February	10.1	54,056	85,652	12,784
March	10.1	54,164	85,652	11,547
April	8.9	47,979	75,476	10,514
May	7.1	37,935	60,211	8,388
June	6.8	36,656	57,667	8,033
July	9.6	51,253	81,412	10,975
August	8.1	43,191	68,691	9,260
September	5.1	27,230	43,250	6,025
October	6.7	36,071	56,819	7,660
November	8.0	42,975	67,843	9,451
December	9.7	52,174	82,260	11,090
Total	100	536,303	848,042	

*The total number of visitors required to have 100% capacity in each month based on constant 2012 preferences with 2011 accommodation stock and including the number of rooms represented by Sandals Beaches and Four Seasons

**Approximate number of rooms required to achieve 100% occupancy in any given month based on 2012 preferences and recognizing that 24.7% of visitors stay in private residences and/or with family and friends

Notes to Tables 2.16a - 2.16e:

- 1 As much as possible, the data utilized are for the most recent years available for that data category (data are from 2011, 2012, and 2013)
- 2 While the values may appear to be very specific, they are in fact approximations based on assumptions such as the accommodation stock of 2011 representing 2013, the two persons per room occupancy being relatively accurate is constant over time, the 10.5 days average length of stay being relatively accurate and constant, and the accommodation type and month of travel preferences being representative over time
- 3 The accommodation stock information is particularly of concern because of the low level of reporting and the built-in inaccuracies in reporting. This further emphasizes that the results are indicators only
- 4 The results in Tables 2.6d and 2.6e are derived from a model prepared specifically for this analysis

Accommodation can be an area of capacity concerns. In the Barbados context, if occupancy rates that average around 60% to 65% are considered, this is not indicative of large capacity

problems and it will vary according to cost factors and competitiveness in pricing. However, occupancy data is not well reported. Further, recent resort closures and delayed start-ups are not indicative of occupancy issues, but are likely to be more indicative of pricing issues. However, there may well be capacity issues with certain types of accommodation (e.g. conference hotel, family oriented, niche market specific needs). These are addressed more fully in the section of the TMP that specifically deals with Accommodation (refer Report V, Part 1, Section 2.0).

The main findings from Tables 2.16a – 2.16e include:

- The **total annual room night capacity** based on the 2011 registered accommodation stock is **3,145,570 room nights**
- **With the addition of Sandals Beaches and Four Seasons**, assuming 2011 stock remains constant, the annual room night capacity will be **3,352,525 room nights**
- The **capacity utilization** in 2013 based on 476,000 stayover visitors, and with 24.7% staying with friends, relatives, and private homes, is approximately **59.8%**
- The **daily maximum number of guests** (at 2 per room) that can be accommodated based on the 2011 reported stock of accommodation (8,618 units) is **17,236 persons**
- **Including the number of rooms represented by Sandals Beaches and Four Seasons**, the maximum number of guests which can be accommodated at any one time is **18,370 persons**
- **The annual capacity (100% occupancy)** of all accommodation stock (2011) at an average of 2 per room and a length of stay of 10.5 days per party, including Sandals Beaches and Four Seasons when on stream would be **638,576 persons**
- The **total number of stayover visitors to Barbados required to achieve 100% occupancy** in the registered accommodation stock (2011) of 9,185 units, including Sandals Beaches and Four Seasons, and recognizing that 24.7% stake in alternate accommodation, is **848,043 persons**
- The table segment that addresses visitor accommodation choices by type of accommodation identifies the number of rooms which, in 2012, would have been required for each type of accommodation listed to achieve 100% annual occupancy for that type. Because there is no data on the supply for each of the types, it is not possible to identify shortages or surpluses by type. However this may provide some indicators for managers and planners in the industry. **The types of accommodation of relatively high booking preference include all-inclusive, luxury, villa, and places with over 100 rooms**
- When examining the results by month of travel preference, it is noted, based on constant assumptions of accommodation stock, guests per room, and length of stay, that **there are bottlenecks in the months of January, February, March, April, July, and**

December where the number of rooms required, at full capacity, exceeds the number of rooms available. Even at 70% occupancy, some months would exceed supply. It is therefore likely that the numbers of guests per room would increase, the numbers of visitors to the island going to friends and relatives would increase, and the length of stay might decrease

- **The total number of visitors required to have 100% occupancy (848,891) may not be that far away in the future. At 70% to 75% occupancy, that number is even lower**
- **The difficulties encountered by the industry at this point in time, based on the data in Table 2.4, appear to not only be issues of occupancy, but also issues which deal with other variables related to accommodation prices that the market will accept, and high cost of operation**

A conclusion to be drawn from the above analysis is that Barbados will require additional accommodation capacity to accommodate a “healthy” occupancy level as the number of visitors increase with the implementation of the Tourism Master Plan. The types of accommodation in relatively high demand, as per booking preference, include all-inclusive, luxury, and villa categories, as well as the over 100-room category.

2.5.4 Capacity and Master Plan Implementation

Growth targets have been set that demonstrate increasing numbers of visitors as Master Plan implementation occurs over the next 10 years. The targets call for an increase in numbers of visitors and visitor spend. However, the only way that these targets can be realized will be through investment in services, products and infrastructure that comprise the Barbados tourism product, including accommodation, attractions, transportation, training and institutional capacity building, serving to make Barbados a more attractive and competitive tourism destination.

Of great relevance to the potential issues of capacity is that these investments would provide visitors with many more options on what they could choose to do. The result is that the visitors would become more dispersed and there would be less usage pressure on “potential bottleneck” areas. Also, as there are more things for visitors to do and spending increases, they will be drawn away from the beaches that may be areas of greater significance relative to capacity issues.

The conclusion over the next few years is that Barbados needs to be more concerned with growing its economy through attracting visitors and, especially, giving them choices so they can spend more money. Over the next few years, capacity issues should be addressed through behavior management and land-use management. To assure good visitor and

resident experiences, it will be essential to continue managing visitor activities and behaviours, and their impacts on the environment and society.

2.5.5 Managing for Desirable Conditions

A number of approaches have been formulated as management approaches for the natural environment and recreational or tourism settings. These include: Limits of Acceptable Change (LAC); Visitor Experience and Resource Protections (VERP); Visitor Impact Management (VIM); Tourism Optimization Management Model (Manidis Roberts, 1997; McVetty and Wight, 1999).

The thinking for some time has moved away from only asking questions about *numbers* of people, to determining the social, environmental and experiential conditions that should prevail.

It is a logical alternative to shift the focus from a relationship between levels of use and impact to identifying desirable conditions for sustainable tourism activity to occur at the outset. These desirable conditions (which may be regarded as optimal conditions or objectives) are typically focused on both the state of the environment and the quality of the visitor experience.

2.5.6 Management by Numbers Does Not Work Effectively

One of the main issues facing the management of tourism is how to check on the health of the industry and the resources it depends upon. The industry's health has often been considered in terms of identifying positive and negative impacts. The most commonly promoted positive impacts have been economic (such as earnings and jobs created), while the most commonly promoted negative impacts have been environmental (such as damage to natural ecosystems of various types) and social (such as the loss of lifestyle).

The health of the tourism industry has most often been measured by comparing the amount of tourism activity (number of visitors) with the scale of the impacts generated by tourism. Comparing numbers of visitors with scale of impacts is relatively simple, so it is common. The tourism industry often uses the relationship to promote the positives, while those responsible for managing negative impacts use the relationship to justify limiting visitor numbers, or limiting use.

Within the marine environment, health is often measured by the degree of degradation of the surrounding environs after use, either by locals or visitors. The time frame over which this degradation takes place should be taken into account. While the passing of laws and regulations may be one of the approaches adopted, policing and enforcement of such laws and regulations is necessary to combat the variable human behavioural patterns. For example, the health of reefs depends on the quality of the water surrounding them and the physical damage inflicted on them due to anchor drag, just to mention two areas of concern. These two issues are caused by human use, and need a suite of management approaches, from standards to best practices supported by regulatory or management measures. Therefore, in a perfect world, the numbers visiting the site may well be extremely elastic.

In any case, while simple to do, the *relationship* of numbers of visitors with the scale of impact is impossible to prove, because there are just too many variables. And not every tourist is the same, and each has different expectations, choices, behaviour and satisfaction. Extensive research into environmental and social impacts has failed to establish predictable links between different levels of use and their impacts (Washburne, 1982; Graefe et al., 1984; Wight, 1996; Ceballos-Lascurain, 1996; IUCN, 2002). And where a capacity approach has been used, typically the development of these capacities lacks accountability, and therefore lacks the ability to be defended in the face of criticism and conflict between stakeholders.

In addition, although it is a relatively easy approach, it may well be inappropriate, considering usage is critical to tourism as well as to local people, and it may also be inappropriate in terms of the best solution to problems and issues.

2.5.7 Managing for Sustainability

Other approaches and frameworks have been developed for managers, and are briefly encapsulated in Figure 2.7. Essentially, most management techniques can be viewed as taking one of four different approaches:

1. **Managing the supply** (of tourism or visitor opportunities, e.g. by increasing the space available or the time available to accommodate more use)
2. **Managing the demand** (e.g. through restrictions of length of stay, or total numbers, or type of use)
3. **Managing the resource** (e.g. through paving the site or specific locations, or developing facilities)
4. **Managing the impact** (reducing the impact of use, e.g. modifying the type of use, or dispersing or concentrating use)

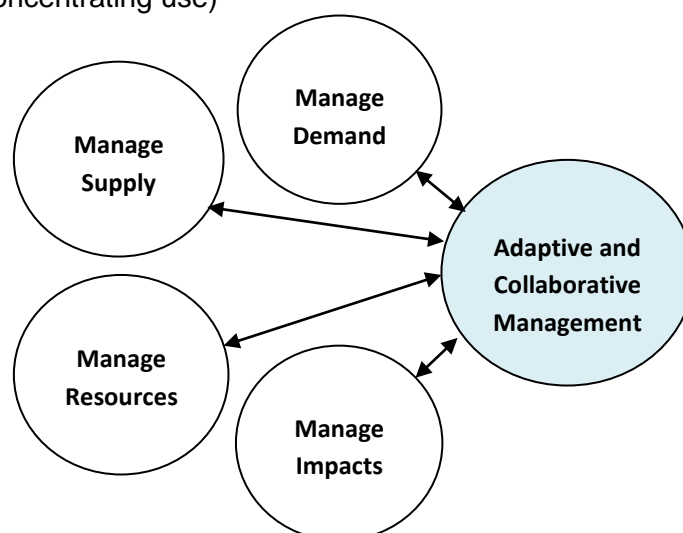


Figure 2.7. Managing for sustainability.

Figure 2.7 illustrates not only the various approaches to managing for sustainability, but how managers need to adapt their management tools as they learn what the responses are to various management techniques. In essence, with multiple variables at play, the management mix will likely need to change over time.

2.5.8 Managing Bottlenecks

In Barbados, there are a number of concerns relating to:

- Maintaining or increasing the contribution of tourists and tourism to the overall economy
- Ensuring that the visitor/user experience is maintained, so user satisfaction remains high
- Conserving Barbadian attractions, with particular attention to sensitive or high-visitation sites

In consultation, stakeholders expressed a desire to increase revenues from tourism, but at the same time they pointed out that there are specific locations in which the user experience is decreasing, or where the location itself may be subject to degradation. Locations of concern, with key issues include:

- **High-use beaches:** Carlisle Bay was of key concern, but other beaches, (e.g. Blue Monkey at Paynes Bay) were also mentioned. Issues included: crowding, proliferation of beach furniture, litter, peddling, access and parking, lack of facilities, random mooring and watercraft use, non-existent salvage laws, contaminated drainage, sensitivity of marine resources
- **St. Lawrence Gap:** Issues included: periodic crowding, litter, parking, noise, aesthetics / lack of sea views
- **Oistins:** Issues included: periodic crowding and congestion, litter, sewage management issues, health and safety
- **Bridgetown:** Issues included: difficult circulation, litter, health and safety, periodic traffic congestion, lack of signage, lack of guest facilities and parking

The essence of these issues includes:

- High visitation may be experienced in short time periods, thus exceeding the capability of human, infrastructure and management systems to maintain a high quality of experience
- Visitor experiences and expectations are diminished as a result of various issues related to congestion at peak periods
- Visitors have problems parking during congested periods because there are limited areas allocated for car parking; this causes traffic congestion and visitor frustration
- There needs to be more structured overall management responsibility for these attractions

There is a clear need to balance the quality of visitor experience with the impact on the environment, the local community, and the protection of natural and developed tourist sites.

In fact, it became evident as the issues were examined that many of them were evidenced periodically, rather than permanently. It also is clear that a variety of management techniques may be employed to manage the users, the sites, the demand for the destinations, or the impact.

As illustrated in Figure 2.7, a diversity of management options is available that can be used to address visitation and congestion issues, and a range of tactics are available for each. With specific reference to public areas, Government needs to have key input at the policy level regarding oversight of these spaces.

Table 2.17 adapted from Cole et al. (1987) lists the types of tactics that may be employed, with suggestions for what techniques might alleviate current or potential issues for each of the listed locations. It should also be possible for individual site managers throughout the island to check what approaches are suitable for their destinations (private or public), and to create their own list of management tools.

For example, as indicated earlier, a resource could be managed through selective placement hardscapes or expanding existing facilities. This could be applied in Barbados to address beach capacity issues. An overcrowded beach could be increased in size by introducing various marine structures to encourage accretion. In the case of Carlisle Bay, the entire stretch of beach is long and wide enough to accommodate many users. At present, users congregate in the area where the main car park is located, adjacent to the Coastal Zone Management Unit's Office. This leads to congestion in one location. Some management options could be:

- Provide more access points to the stretch of beach with adequate car parking, so that the additional parking areas help to spread the users. For example:
 - Remove the former fish market building at Browne's Beach and increase the size of the existing car park
 - Improve the parking facilities at the open area opposite Jemmotts Lane and upgrade the site
 - Improve access to the site opposite London Bourne Towers and develop the car park
- Upgrade of select parking facilities for beach access is recommended along the west coast in order to accommodate increased usage.

Table 2.17. Strategies for managing sensitive sites or high use areas (selected examples are ticked; adapted from Cole et al., 1987; IUCN 2002).

Strategy	Optional Management Tactics and Techniques	Beaches	Oistins	St. L. Gap
1. Reduce use of the entire area	<ul style="list-style-type: none"> Limit number of visitors in the entire area Encourage use of other areas (through advertisement, signs, etc.) Require certain skills &/or equipment Charge a visitor fee Make access more difficult in all the area 			
2. Reduce use of specific problem areas	<ul style="list-style-type: none"> Inform about problem areas & alternative areas Discourage or prohibit use of problem area Limit number of visitors in problem areas Encourage/require a stay limit, in problem areas Make access harder/easier, to select areas Eliminate facilities/attractions in problem areas, and/or Improve facilities/attractions in alternative areas. Establish different skill/equipment requirements (e.g. for use of sea craft) Charge differential visitor fees 	<ul style="list-style-type: none"> ✓ ✓ ✓ 		
3. Modify the location of use within the problem areas	<ul style="list-style-type: none"> Locate facilities on durable sites Segregate different types of visitor activities Concentrate use by facility or site design, or through information 	<ul style="list-style-type: none"> ✓ 	<ul style="list-style-type: none"> ✓ 	
4. Modify the timing of use	<ul style="list-style-type: none"> Encourage use outside the peak use periods Discourage/ban use when impact potential is high Fees in periods of high use/high impact potential 	<ul style="list-style-type: none"> ✓ ✓ 	<ul style="list-style-type: none"> ✓ 	<ul style="list-style-type: none"> ✓
5. Modify the type of use and visitor behaviour	<ul style="list-style-type: none"> Discourage/ban damaging practices &/or equipment Encourage/require behaviour, skills, or equipment Encourage/require a party size or limit Teach a user ethic Use interpretation as a multi-purpose tool 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ 	<ul style="list-style-type: none"> ✓ ✓ 	
6. Modify visitor expectations	<ul style="list-style-type: none"> Inform visitors about appropriate uses and behaviours Inform about potential conditions in area 	<ul style="list-style-type: none"> ✓ 	<ul style="list-style-type: none"> ✓ 	<ul style="list-style-type: none"> ✓
7. Increase the resistance of the resource	<ul style="list-style-type: none"> Shield the site/resources from impact Strengthen the site/resources 	<ul style="list-style-type: none"> ✓ ✓ 		
8. Maintain/rehabilitate/increase durability of resource	<ul style="list-style-type: none"> Maintain/rehabilitate impacted locations Harden the resource Expand the site or develop amenities and facilities 	<ul style="list-style-type: none"> ✓ 	<ul style="list-style-type: none"> ✓ 	

2.5.9 Interpretation

Interpretation is an underutilized management tool. Interpretation involves education, but should achieve much more than simply informing users. To be used as a visitor management tool, interpretation has to affect users' behaviour. In order to achieve this, appealing to their emotions and in so doing motivating them, can be very effective. This is relevant to the education of residents, as well as visitors.

The kinds of aspects that should be built into educational (interpretive) materials for residents and visitors should ideally impact all of their learning, behaviour and emotions (see Figure 2.8).

Learning	<ul style="list-style-type: none"> What visitors learn and remember This is the commonest application of interpretation
Behavioural	<ul style="list-style-type: none"> What visitors do and how they act Helps focus on what you want visitors to do, and how to use the information provided
Emotional	<ul style="list-style-type: none"> Must occur first, to alter visitor behaviour or attitudes Helps visitors remember the topic because of strong feelings created – such as feelings of surprise, anger, guilt, pride or other emotions

Figure 2.8. Interpretation objectives (Wight, 2002).

Not only does interpretation have a strong role in the management of visitors and their behaviour, but it also provides high added value to the visitor experience. It helps maintain high resource values, which are the very qualities that visitors wish to experience, and are prepared to pay for. In summary, managing behaviour is a critical capacity issue and this can be done through interpretation.

2.6 Policy and Legislation

Barbados has a comprehensive body of legislation, the majority of which has been in force since 1966.

Stakeholder opinions from the two sessions of TMP Workshops in 2012 suggest a common consensus that existing legislation in Barbados should be properly enforced to close the gap between policy formulation and implementation capacity. This applies to those acts that govern and regulate tourism.

Importantly, amongst the specific stakeholder contributions were the following points that relate to policy and legislation:

- Update legislation to ensure relevance to current situations
- Enact legislation to enforce fully accessible tourism plants
- Ensure stakeholders are familiar with legislation which affects them
- Revisit resource management legislation
- Institute a system of tax incentives
- Create philanthropic legislation relevant to attracting Foundations to Barbados
- Mandate hotels and restaurants to purchase a percentage of local produce by linking to other hotel sector incentives
- Consider enactment of cultural policies legislation
- Enforce legislation in the marine environment, e.g. beaches and water sports activities
- Promote incentives to maintain standards as it relates to attractions
- Ensure efficiency in services delivered by public sector agencies to facilitate foreign direct investment
- Consider legislation regarding agricultural linkages to hotels
- Ensure that to receive incentives, companies must promote Barbadian cultural products and services
- Review of zoning legislation, policies and plans with a view to effective management of tourist areas
- Draft legislation if casinos are to be a serious consideration in the future

The following is a brief review and analysis of existing and proposed legislation that is relevant to tourism services in Barbados. A review of the 'Study on the Regulation of Tourism Services in Barbados' compiled by the Commonwealth Secretariat (2011) was also conducted. Included below are recommendations for new legislation and amendments to existing legislation which address some of the issues listed above. Further discussion relative to tourism policy and legislation is presented in Report III, Section 7.0.

2.6.1 Review of Existing Acts Relevant to the Tourism Industry

2.6.1.1 Tourism Development Act 2002 CAP. 341

An Act to encourage the sustainable development of the tourism industry by providing duty-free concessions and income tax concessions for approved tourism projects and certain tourism entities and for other related matters.

This Act was amended on August 5, 2013 by the new Tourism Development Order 2013. The Order provides a more comprehensive list of items that may be imported without payment of customs duty.

Generally, the incentives provided in the Act are very broad in scope. Currently hotels, villas and timeshare properties stand to benefit under this Act along with other tourism enterprises given the 2013 amendments to the Act.

2.6.1.2 Barbados Tourism Authority Act 1995

This Act, listed under Administrative/Public law, serves the purpose of establishing the BTA with the associated legal and institutional framework, and is intended to facilitate the development of tourism through effective marketing strategies. It provides definitions for apartment, guesthouse, hotel, tourist accommodation, and villas.

Its functions are also to 'register, license and classify tourist accommodation according to the standard of amenities provided' and to register and classify restaurants catering primarily to tourists according to the standard of cuisine and amenities provided. The term 'tourist' however, is not defined in the Act.

It is understood that under final review at Cabinet is the provision for the BTA to be divided into 2 entities viz. Barbados Tourism Marketing Inc. and Barbados Tourism Product Authority. Discussions with key stakeholders during the process of developing the Master Plan revealed that a preferred option would be for the Product Development functions to be provided by the BTII, given its current structure and resources.

2.6.1.3 Special Development Areas (Amendment) Act 2001-20 CAP. 237A

An Act to provide for the designation of special development areas, relief to persons carrying out work in these areas, and to persons providing the financing of such work.

This Act was amended in August 2001. It is administered by the Ministry of Finance and specifically defines the following zones as areas where a range of concessions are provided to approved investors and developers for specific activities:

- Carlisle Bay Redevelopment Area
- Speightstown
- St. Lawrence Gap
- Scotland District Conservation Area

The Act has implications for land use planning and tourism planning. A developer may carry out a wide range of eligible activities that cover hotels, residential complexes, projects focused on heritage and the natural environment, arts and cultural investments, and agricultural projects. The Act allows exemptions from tax on interest earned on loans to an approved developer, exemption on land tax on the improved value of land, exemption from property transfer tax, and concessions which include reduced rates.

This legislation does not limit itself only to tourism incentives, allowances, taxes and duties since it also addresses commercial and industrial buildings and the various trades associated, including factories, mills, oil wells and agro-processing industries.

However, given the 2011 UNESCO World Heritage designation, city properties and buildings of a heritage nature have become more relevant since this legislation was passed. Consequently, the addition of Historic Bridgetown and Its Garrison should be considered important for inclusion in the aforementioned list of special development areas.

2.6.1.4 Town and Country Planning Act 1968 Cap. 240

An Act to make provision for the orderly and progressive development of land in both urban and rural areas and to preserve and improve the amenities thereof, for the grant of permission to develop land and for other powers of control over the use of land.

This Act governs the use and development of all lands including those set aside for tourism development. In this regard, lists of buildings of architectural or historic interest along with signage within the UNESCO World Heritage Property are administered by the Chief Town Planner in his capacity as head of the World Heritage Committee. These provisions are generally considered as adequate for Historic Bridgetown and Its Garrison. For the protection of the heritage tourism product island-wide, enforcement of planning controls should be consistently and stringently observed.

2.6.1.5 Transport Authority Act 2007-28 Cap. 295A

An Act to provide for the establishment of a Transport Authority and for related matters.

In support of the tourism sector, updating the Transport Authority Act 2007 to provide for tourism transport beyond the mandate for mass public transport is recommended. In this regard, a Tourism Planner and a Coordinator for Tourism Transport in the Ministry of Transport and Works may be required.

The TMP recommends further modification to other existing laws and/or the drafting of new legislation to promote better service to visitors and locals. For example, new legislation supporting the development of a ferry service between major towns in Barbados, as well as an inter-island ferry service between Barbados and other Caribbean islands is required to support recommended Actions 8.1-2 and 8.1-11 (see Report V, Part 1, Section 1.4.6). In addition, for the safety of all road users, the local laws must also deal with issues including the use of cell phones and gadgets while driving, increased regularity in the inspection of Public Service Vehicles, mandatory inspection of private vehicles, requirement for operators of Public Service Vehicles and Special Commercial Vehicles, early warnings to drivers approaching road work zones, illegal racing on highways, and vehicle emission and noise levels.

The 2009 draft Proposed Guidelines for the Operation of Transportation Services in Barbados should also be adopted to help regulate the transport industry, and achieve ISO recognition of high standards in the provision of transportation services to the tourism industry in Barbados.

2.6.1.6 Shipping Act 1994 Cap. 296 (Amended 1998 and 2001)

An Act to regulate the use of small commercial vessels within the Exclusive Economic Zone (EEZ) of Barbados; to regulate the safety of persons engaged in diving activity in the EEZ; to provide for the safety of passengers, crews, ships and cargo in conformity with international conventions; and to mitigate the effect of shipping activity on the marine environment in the EEZ. This Act does not apply to ships belonging to the Government of Barbados and employed in the defence of Barbados.

The Shipping (Water Sports) Regulations, enacted in 2004 under this Act, govern the operation and registration of small watercraft (e.g. jet skis, speed boats, catamarans), which offer services that can contribute significantly to the tourism product. Their operations have been under scrutiny in recent times, with concerns about the manner in which some watercrafts are controlled/regulated (refer Report V, Section 1.4.4). The existing regulations that control these vessels need to be enforced to ensure the safety of their operations in a vibrant tourism economy.

2.6.1.7 Draft Environmental Management Act (EMA)

This proposed Act was drafted over 15 years ago and has not yet been enacted. Having been submitted to the Chief Parliamentary Counsel, it is at the stage of being drafted with a view to enacting legislation. *It is critical that this legislation be enacted with supporting regulations and a strict enforcement regime* not only to promote and protect the environmental integrity of the island's fragile natural resources, but also to help achieve the objective of supporting a Green Economy and a sustainable tourism product for Barbados. Matters related to tourism development such as the National Park, other protected areas, biodiversity and the setting up of eco-sites for locals and visitors would benefit from the implementation of this policy.

Under a legislated EMA, there would be enhanced protection of the natural resources upon which the tourism sector depends. Public sector departments that are responsible for environmental matters, including the EPD, NHD, NCC, CZMU, SSA, BWA, Ministry of Energy, Ministry of Health, and Ministry of Environment, will have the basis upon which to operate more effectively, and be capable of driving environmental policy, programmes, and strategies that have been compiled to date and which will be developed in the future.

2.6.1.8 Coastal Zone Management Act 1998-39

An Act to provide for the more effective management of the coastal resources of Barbados, for the conservation and enhancement of those resources and for matters related thereto.

The preservation and enhancement of marine areas covered under this Act supports the sustainable development and green economy objectives of Barbados, and promotes those areas for public enjoyment, including for tourism purposes. The control of land-based practices that impact negatively on the integrity of marine areas (through the ratification, regulation and enforcement of the Draft Environmental Management Act), and the control of marine pollution (through the Marine Pollution Control Act 1998), will also support coastal zone regulation governed by this Act.

2.6.1.9 Marine Pollution Control Act 1998 Cap 392A

An Act to prevent, reduce and control pollution of the marine environment of Barbados from whatever source.

Marine pollution needs controlling through enforcement of this Act, and supporting legislation needs to be drafted that regulates the collection of rental fees from boats that berth in Barbados waters (see priority Action 12.1-5 in Report II, Section 3.0, which is included as part of the TMP Implementation Plan in Report I, Section 4.4). Carlisle Bay in particular has

been polluted due to lack of this type of regulatory enforcement. Reduction of marine pollution around Barbados will support the health of the near-shore environment and enhance the nature tourism potential for coastal recreation.

2.6.1.10 National Conservation Commission Act 1985 Cap. 393

An Act to revise and consolidate the law relating to public parks, beaches and caves and related matters, and to make provision for the conservation of sites and buildings of national interest.

Parks and beaches in Barbados are regulated in part for the enjoyment of locals and visitors. The NCC functions to conserve the natural beauty, historic buildings, and sites in Barbados, and to control, maintain and develop public parks, gardens, beaches and caves. Given the importance of the island's beaches as a major tourism attraction in Barbados, the TMP recommends that high quality standards for beaches and other popular tourism sites be instituted. In this regard, a high priority action to develop a beach accreditation programme is recommended through the CZMU in collaboration with the NCC to improve the environmental standards of this major tourism asset (refer Action 11.1-1 in Report I, Section 4.4). This may require amendment to some of the existing legislation pertaining to beach maintenance.

2.6.1.11 Barbados Shop Act CAP. 356A

This Act, listed under Labour Law, makes provision relating to shops. It limits opening of shops and hours that can be worked on public holidays, Good Friday, Easter Sunday and Christmas day, with the exception of shops at the Airport, Bridgetown Port and hotels.

Notwithstanding the original intent of the legislation, international tourism requires services 24 hours a day, 7 days per week. If Barbados is to remain competitive, particularly as a top end destination, this Act should be amended as a high priority to fully accommodate visitor needs and services.

2.6.1.12 Preservation of Antiquities and Relics Bill

Barbados has ratified the 1970 UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property, the purpose of which is intended to protect cultural and heritage property and artifacts whether on land or in the sea.

The Preservation of Antiquities and Relics Bill was recently debated in a public forum and was resubmitted with minor changes to Part II. However, it has not been enacted. Among various concerns, stakeholders indicated that there are no provisions to protect and/or retrieve wrecks, artifacts and other relics on the seabed, and this would be problematic with respect to areas such as Carlisle Bay. Therefore, seabed relics and artifacts should be addressed in the Act, and through coastal zone management activities.

In addition, areas of historic interest and heritage centres that are subject to development should be required to undergo archaeological investigations, to be financed by the developer prior to site alteration.

2.6.1.13 UN Convention on the Rights of Persons with Disabilities

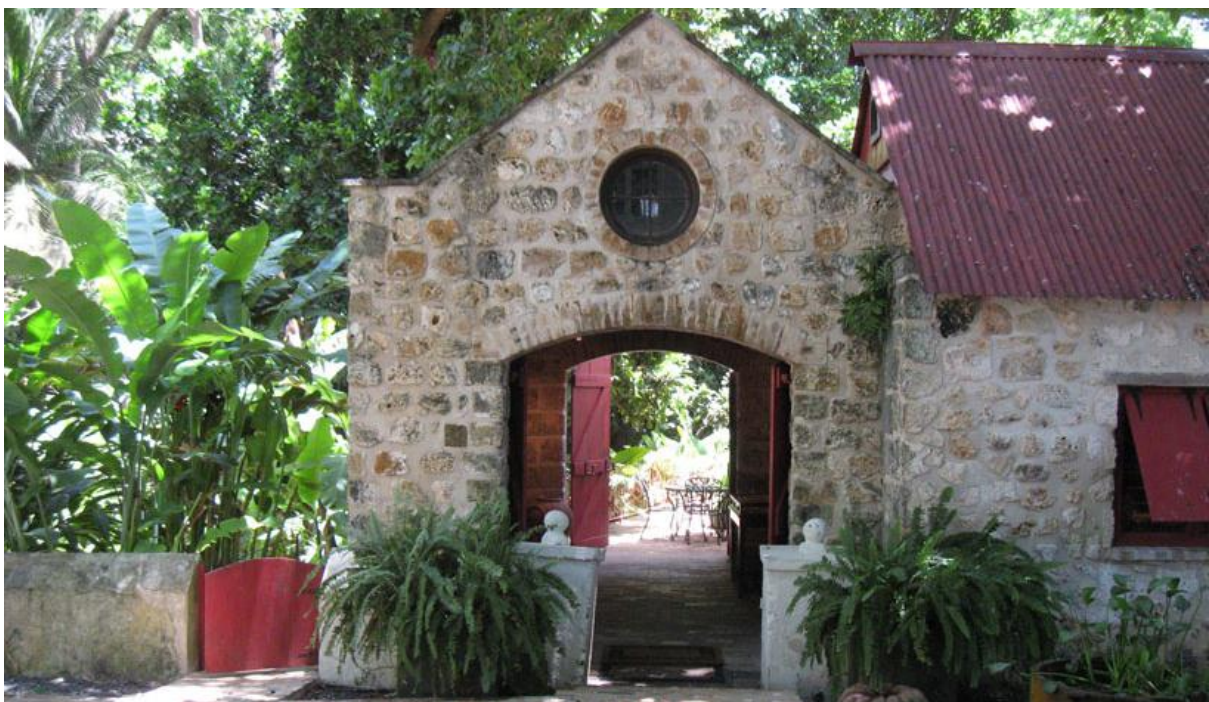
The Government of Barbados became a signatory to the UN Convention on the Rights of Persons with Disabilities in July 2007. Following a formal Resolution submitted to Government by the Barbados Council for the Disabled and the wider community of persons with disabilities, the Government ratified this Convention on February 27, 2013 to become a State Party. It is now critically important that this form the basis for enacting legislation that, *inter alia*, requires all new accommodation developments to incorporate infrastructure that enables full access by the physically challenged.

The legislation would also address the retrofitting of existing accommodation infrastructure to international standards required for access by people with disabilities. Given that approximately 10% of the world's population currently has some disability, and that persons with disabilities are interested in travel (Rhodda, 2008), this market may be lucrative for Barbados if the appropriate facilities are put in place to support them.

3.0 Tourism Outlook

Overview

This Section includes a presentation of the outlook for tourism in Barbados over the next 10 years and addresses the concept of the Barbados Visitor Economy. It indicates directions and performance targets for which Barbados may strive in realizing growth of its visitor economy. It identifies preferred priority origin markets, priority niche markets, target numbers of visitors, visitor spending, and other economic variables. These are the targets whose ongoing measures will indicate how well Barbados is realizing its objectives of growth in its visitor economy. The “strategic imperatives”, “strategies”, and “actions” presented in other parts of Report I as well as in Reports II to VI, all of which comprise the total Barbados Tourism Master Plan 2014 – 2023, were developed to guide growth and achieve targets.



3.1 The Barbados Visitor Economy

Historically, tourism's impact on the national economy has been measured by counting numbers of tourists, the money they spend, and the jobs created in businesses that cater directly to tourists (first-line businesses). Tourism is more than about international visitors arriving in the country and the extent of their expenditures. This is especially the case in a relatively small economy, such as Barbados.

The global economy is being reshaped by digital frameworks, technologies, products, and services, resulting in the creative destruction of traditional companies, industries and sectors and the rise of new players. Competition is fierce and consumers more discerning than ever. In this environment, Barbados must realign its approach to "tourism": how it defines the concept, how the sector impacts the wider development strategy, and how Government organises the economy and society to manage the industry.

For example, a clearer understanding of the existing ways in which agriculture and agro-processing, healthcare, the environment, education, sports, manufacturing, international business and financial services, foreign investment, entrepreneurship, philanthropy, the creative and culinary industries, commerce, and culture, among others, might attract or be driven by visiting populations is vital to imagining new ways of reconfiguring and revitalising the traditional tourism sector in Barbados.

Therefore a new, more holistic, way of looking at tourism has emerged: "The Visitor Economy". This Master Plan is intended to chart the future of Barbados' traditional tourism sector as well as the nature of "tourism" in the context of the national economy and the evolution of a networked global economy. Consequently, this Master Plan moves to language that captures the notion of the Barbados Visitor Economy (BVE) and sets out the most effective way to expand its footprint over the next ten years.

According to convention, the tourism sector encompasses those activities that directly service and engage with visitors such as airlines, hotels, and attractions. While this provides important information, it undervalues the contribution to the total economy. The "Visitor Economy" considers and measures not only the *direct impacts*, but also the indirect and induced impacts. Briefly described they are:

- **Indirect effects:** Include the purchases made by frontline businesses for the provisions they require (e.g. food purchases a hotel makes to feed its guests), and the purchases down the supply chain. Employment measures also include those of employees involved in the tourism supply chain
- **Induced effects:** From wages earned by employees of BVE businesses in direct and indirect receipt of visitor spending

The Visitor Economy includes expenditures made by Government in support of tourism (e.g. roads, ports, plans, attractions). Most importantly, it also measures the expenditure local residents make as visitors in their own country. This includes travelling for work purposes and going away from a residence for recreation or leisure (e.g. going to a restaurant for

dinner, deciding to take a vacation at a beach resort). Specific examples also include both locals and visitors attending events such as NIFCA and Agro-Fest.

The WTTC model, some of whose results for Barbados are presented earlier, is consistent with Tourism Satellite Accounting (TSA) approaches endorsed by the UNWTO. Barbados is in the initial stages, through IADB funding, of modeling its tourism sector using TSA methods. This TSA model will then enable an accurate, made in Barbados, measure of the value of the visitor economy, including indirect and induced impacts. Figure 3.1 depicts the holistic considerations of the Barbados Visitor Economy, and Figure 3.2 illustrates the Barbados Visitor Economy process flow.

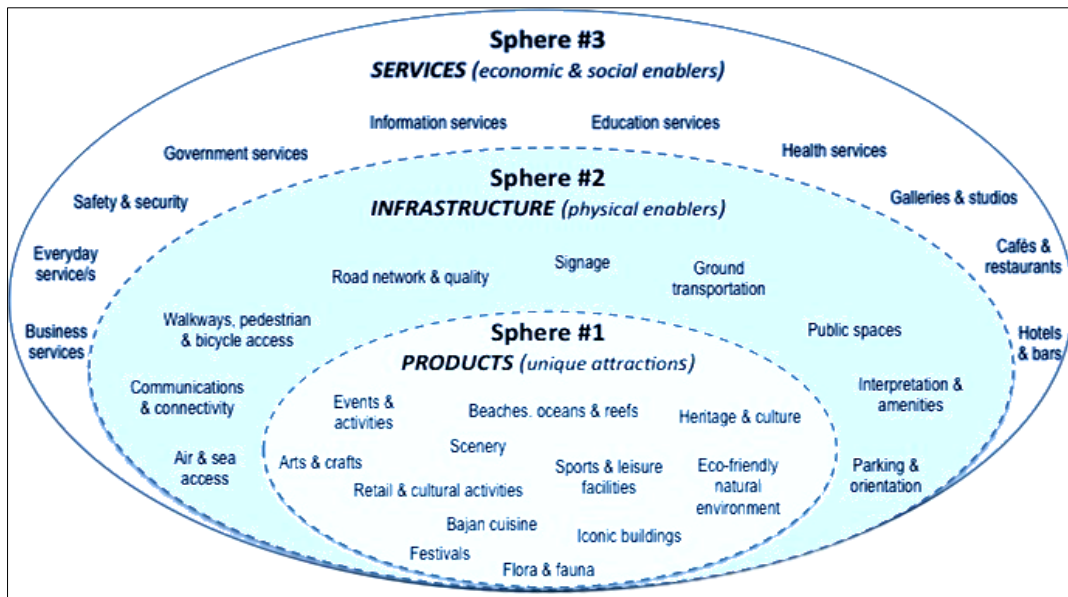


Figure 3.1. A schematic of the Barbados Visitor Economy (WTTC, 2012 - Barbados).

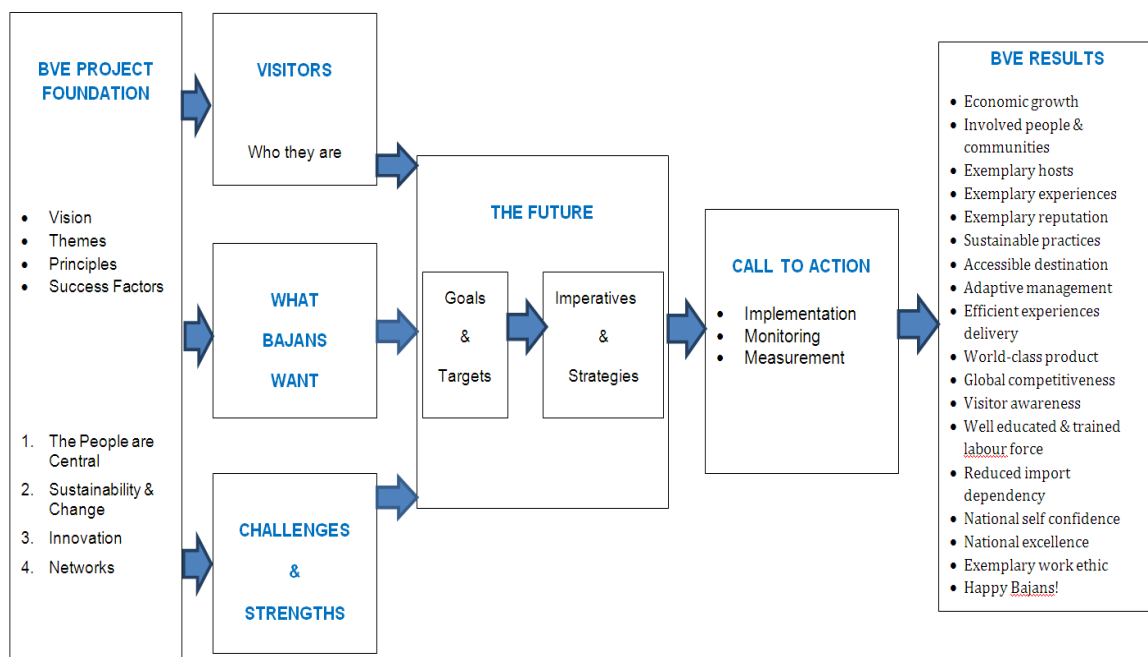


Figure 3.2. Barbados Visitor Economy process flow (TMP Consulting Team).

3.2 Barbados Visitor Economy Performance Targets

There are many considerations concerning the future number of visitors that are ideal for Barbados, including performance history, current numbers of visitors, the state of the economy, tourism capacity, infrastructure, the global economies, international tourism trends, Barbados' competitiveness, etc. These variables are discussed in detail in Report IV "Our Visitors and the Barbados Visitor Economy".

Currently, there is no Barbados-produced tourism model that can be used to forecast the future performance of the visitor economy. However, as mentioned previously, a tourism model based on "Tourism Satellite Account" (TSA) methodologies is currently being developed in Barbados. In the meantime, there is a Barbados tourism model (TSA based) developed by the World Tourism and Travel Council (WTTC) and Oxford Economics. While it provides ten-year forecasts, they can only be used as rough indicators because much of the base data they utilize is inferred rather than calculated specifically within the country. While any model of this type has significant limitations, it will nevertheless provide an informed basis for looking at the future performance of the Barbados Visitor Economy.

The WTTC model presents a positive ten-year outlook for tourism in Barbados, in spite of its limitations, and the fact that they do not build in an awareness of implementation of this 10 year Master Plan. Table 3.1 presents the WTTC projections.

While the WTTC model shows the substantial decline that has occurred in the BVE over the last few years (not presented here), their outlook for the future of tourism in Barbados is positive. They show an increase of over 100,000 annual stayover visitors over the next 10 years, representing a total of approximately 16%. This would bring total stayover visitors well beyond the near 573,000 experienced in 2007. Similarly, they show substantial increases in per visitor value of exports, value of direct contribution, and value of total contribution to the year 2022, reversing the downward trend of the last few years.

Table 3.2 examines total visitor spend based on numbers of visitors as calculated by the Barbados Statistical Services, and the Caribbean Tourism Organization quarterly visitor exit surveys expenditure data. The table also presents a historical perspective going back to the year 2007, since the recovery of the Barbados Visitor Economy must include not only an increase in the number of visitors, but also a reversal of the decrease in visitor spend.

Table 3.1. WTTC Tourism projections (2022).

WTTC Tourism Projections	2012	2022
Numbers of Visitors (stayover)	536,303*	638,000**
Numbers of Cruise Visitors *	517,436	NA
Visitor Exports (real 2011 BDS \$ millions)**	2,254.1	2,903.8
Value of visitor exports per visitor	4,203	4,551
Direct contribution to GDP (visitor exports less purchases by tourism providers – real 2011 BDS \$ millions)**	1,072.2	1,389
Value of direct contribution per visitor	1,999	2,177
Percentage contribution to GDP**	13.0	12.3
Total Contribution to the BVE (direct, indirect, induced, capital investment, government collective spending less imported goods from indirect sending-real 2011 BDS \$ millions)**	3,629.9	4,800.2
Value of total contribution per visitor	6,768	7,524
Percentage contribution to GDP**	42.7	42.6
Direct contribution of travel and tourism to employment ('000)**	18.2	19.9
Total contribution of travel and tourism to employment ('000)**	60	66
Annual capital investment attracted by travel and tourism (real 2011 BDS \$ millions)	414.1	768

*Source: Barbados Statistical Services

**Source: World Travel & Tourism and Council, Travel & Tourism Economic Impact 2012, Barbados – Visitor exports are defined as “spending within the country by international tourists for both business and leisure trips, including spending on transport”.

Table 3.2. Barbados visitor expenditures (BDS\$).

Item	2007	2012
Total number of stayover visitors	572,937	536,303
Total expenditure by stayover visitors (\$,000)*	2,333,824	1,726,473
Total expenditure per stayover visitor	4,073	3,219
Total number of cruise visitors	616,354	517,436
Total expenditure by cruise visitors (\$,000)	87,263	62,461
Total expenditure per cruise visitor	142	121
Percentage of total expenditure by stayover visitors	96.4%	96.5%
Percentage of total expenditure by cruise visitors	3.6%	3.5%

Source: Base data from Barbados Statistical Services, Caribbean Tourism Organization, and consultant calculations

*All financial data are in actual dollars not adjusted for inflation

It is evident from Table 3.2 that there have been decreases in all categories. Not only have decreases in the total number of visitors contributed to the decline in the BVE, but so have the decreases in the average expenditures per visitor for both stayover and cruise visitors.

Based on the data presented in Tables 3.1 and 3.2, and the information, data, and analyses presented in all the reports that comprise the Barbados Tourism Master Plan 2014 – 2023, Table 3.3 provides the targets that the Government of Barbados, stakeholders, and planners should set for the next 10 years.

Table 3.3. Annual Barbados Visitor Economy performance targets to 2022.

Item	Targets to 2022
Total number stayover visitors	750,000
Total number of cruise visitors	800,000
Total expenditure per stayover visitor (BDS actual dollars)	5,000
Total expenditure per cruise visitor \$BDS	175
Total direct contribution to GDP (visitor exports less purchases by tourism providers - constant 2011 \$BDS millions)	1,750
Percentage direct contribution to GDP	15
Total contribution to GDP (direct, indirect, induced, capital investment, government collective spending, all minus purchases by tourism providers and imported goods from indirect spending – constant 2011 \$BDS)	7,000
Percentage total contribution to GDP	45
Direct contribution to employment	30,000
Total contribution to employment	90,000
Annual capital investment (real 2011 \$ BDS millions)	1,000

Note: The above are targets and not forecasts. They are intended to guide achievement in growth of the Barbados Visitor Economy over the next 10 years. It is not intended that the growth in each of the variables should occur equally every year, as some may grow faster than others. The faster the targets are realized, the better the results are for the Barbados Visitor Economy.

The realization of these targets will occur through ongoing initiatives of the Government, stakeholders, investors and the people of Barbados, and through realization of the strategic imperatives and implementation of the strategies and actions presented in this Barbados Tourism Master Plan 2014 – 2023.

Periodic reviews to determine the level of achievement of the targets are recommended to obtain measures of their realization, and the need for updates to the targets, strategies and actions of the Tourism Master Plan.

3.3 Investment

Investment for implementation of the TMP will be required to realize growth in the BVE. The sources of investment will come from combinations of:

- Government of Barbados
- The local private sector
- International investors
- Development banks
- Non-governmental organizations
- Philanthropic contributions

Mechanisms, such as a foundation dedicated to raising funds specifically for implementing tourism projects, will need to be established. This, as well as other strategies and actions designed to secure funds for Tourism Master Plan implementation, are presented in a standard format in Sections 4.0 and 5.0 of this report, and in Report IV on “Our Visitors and the Barbados Visitor Economy”.

While this TMP recommends many strategies and actions designed to realise specific strategic imperatives that will grow the Barbados Visitor Economy, at the time of implementing any one of these actions, an assessment is required to examine the benefits and costs associated with implementation. This was done at a cursory level and presented in the broader description of each action found in Reports II to VI.

Costs of implementation for most of the recommended strategies and actions are estimated. Some estimates at this time are not possible and can only be determined at the time of implementation when other variables such as the scope of the project and design specifics are determined. An estimate of the costs of implementing each priority action that makes up the TMP Implementation Plan is presented in Section 4.4. These values should be considered as an estimate of costs that may be incurred, which may vary based on decisions made with respect to which strategies and actions to implement, along with the timing of implementation.

These proposed priority actions have a total estimated value of approximately BDS\$132,000,000, plus additional costs for those that could not be estimated at this time (projected at approximately BDS\$50 million). As mentioned above, these funds would come from various sources. Other actions recommended in the supporting Reports II to VI are also each presented with estimated costs.

It is important to note that the preferred timeframe for implementation of the priority actions is five years. However, this is a 10-year Master Plan whose implementation benefits will be realised from the time initial actions are implemented to well beyond the 10-year time frame.

An important question that financial planners will want to consider is: “what is the return on this investment?” This is an especially important question given the difficult economic times that Barbados is currently experiencing. The answer to this question is necessary since this will be difficult investment money to source, and yet critically important to driving the economy out of its current economic difficulties. As difficult as sourcing the investment may be, it is required to grow the economy based on the fact that tourism, as the dominant sector, contributes approximately 43% of GDP and is the major foreign-exchange earner in Barbados.

At a macro level, Table 3.4 provides an estimate of potential returns on investment resulting from implementation of the priority TMP actions (a note of caution: this is at a macro level, based on order-of-magnitude assumptions, and with results that serve to indicate general levels of magnitude, but not precision).

Table 3.4. Potential Return on Investment.

Estimated timeframe of investment	5 years
Estimated timeframe of benefits	10 years +
Sources of investment	Varied
Distribution of returns	Varied within and outside Barbados
Total cost of investment (BDS \$132 million) + undetermined costs (possibly BDS \$50 million)	\$182 million
Total number of annual stayover visitors estimated by WTTC in 2022 without TMP implementation	638,000
Total number of annual stayover visitors targeted by consulting team in 2022 with TMP implementation	750,000
Number of annual visitors attributable to TMP implementation [750,000-638,000] in 2022	112,000
Visitor growth timeframe assumed equally distributed from year 4 of implementation to year 10	16,000/yr. over 7 yrs.
Value of total contribution per visitor to the BVE (WTTC Table 3.1) – average over the benefit period (constant BDS 2011 dollars*)	7,000
Total accumulated return over 10-year benefit period based on WTTC contribution per visitor (BDS \$millions)	3,136
Direct expenditure per stayover visitor averaged over 10 year benefit period & based on CTO expenditure exit surveys, and with an estimated 50% cost of purchases by providers subtracted (BDS\$)	2,000
Total accumulated return over 10 year benefit period based on CTO expenditure surveys (BDS \$millions)	1,792
Benefit to cost ratio based on WTTC total per visitor contribution	17.23***
Benefit to cost ratio based on CTO expenditure surveys**	4.92****

*Both the benefits in terms of financial contribution per visitor and the costs estimated at current prices represent current dollars and not inflated dollars in future years.

**The ratios are not calculated from any particular accounting stance based on the source of funds and accrual of benefits to that particular source. Rather, they are broad-based to include a wide distribution of benefits regardless of the source of funds

***The cost benefit ratios are not based on a standard cost-benefit analysis; they provide indicators rather than specific measures

****This ratio does not include any indirect or induced benefits; it includes only direct benefits from visitor expenditures as per CTO expenditure surveys

It is also noted that the above projection does not include benefits that will accrue as a result of an increase in cruise tourism visitors attributable to implementation of the TMP. While these benefits, on a per visitor basis, are much smaller than those attributable to stayover visitors, they are nevertheless positive and would increase the benefit to cost ratios presented above. At this time, major developments at the port, independent of the Tourism Master Plan, are underway and it would not be possible to separate changes in cruise

tourism attributable to the Tourism Master Plan from those that will occur with the ongoing port development.

Precisely prepared cost-benefit analyses, on a project by project basis, would yield results that are different from the above, since they would take into account additional variables on both the costs and benefits side, including indirect, induced, social, and environmental; and all values would be discounted to a present value basis. They would also be prepared with the accounting stance from which the funds for implementation are sourced, and the distribution of benefits would be identified.

Regardless of how precisely the assumptions underlying the model (see Table 3.4) will be realised, **the magnitude of the benefits to cost ratios are such that investment in implementation of the strategies which comprise the Barbados Tourism Master Plan 2014 – 2023 will yield substantial returns distributed broadly.**

The ratios cannot be interpreted to imply that if you make only half the investment you will realize half the benefits; they assume a level of investment sufficient to attract a significant number of additional visitors. In particular, there is an assumed level of investment related to attracting and serving the priority niche and origin markets, as well as substantial additions and improvements to the array of attractions in Barbados. In other words, increased numbers of visitors and increased spending will only occur if there is more for visitors to do and more for visitors to spend money on, than is currently the situation.

3.4 Priority Niche Markets

Several niche markets were assessed with respect to their potential for Barbados (refer Report IV, Section 2.0 and Report V, Part 2, Section 3.0). Table 3.5 presents a synopsis of the niche markets that were identified as priority for Barbados. This is not an indication that other niches should be ignored, but that, at this time, Barbados is better suited to attracting the identified primary markets.

The rationale for the priority assessment of each niche market considered is from the perspective of supply, demand, match, and benefit as follows:

- *Supply* – Available and planned supply in Barbados, including provider support and competition
- *Demand* – Recent and anticipated demand in Barbados, and general niche market trends globally
- *Match* – Favourable product-market match in Barbados
- *Benefit* – Nature and extent of potential benefits to Barbados from niche markets

Table 3.5. Priority niche markets for Barbados.

NICHE MARKET	RATIONALE (SUPPLY, DEMAND, MATCH, BENEFITS)*
<i>Accessible Tourism</i>	<ul style="list-style-type: none"> ▪ Required facilities, services and information (e.g. accommodation, food and beverage) are not yet adequately provided in Barbados, although Fully Accessible Barbados (FAB) is aggressively making progress ▪ Nevertheless, Accessible Tourism is fast becoming a “Must Serve” market (with regulations and standards) in a growing number of source countries and competing destinations and Barbados should follow suit ahead of regional competitors ▪ A large and fast growing niche market, especially in traditional origin markets (aging population); loyal repeat visitors and unofficial “ambassadors” when needs are well met ▪ Facilities, services and information also serve local population in need
<i>Conference Tourism</i>	<ul style="list-style-type: none"> ▪ Barbados has new and renovated (e.g. Lloyd Erskine Sandiford Centre) meeting facilities and strong stakeholder support to target this niche, but lodging is not always adequate (re: size, standard, proximity) and target marketing is not aggressive enough ▪ Barbados has a growing international business sector and international business/MICE markets are significant in size and rebounding, although not as quickly as leisure markets ▪ Can complement leisure markets to reduce seasonality patterns; provides exposure to Barbados for return leisure visits
<i>Culinary Tourism</i>	<ul style="list-style-type: none"> ▪ Barbados has an abundant supply of good quality restaurants, noteworthy chefs and related events ▪ A major interest of the “new traveller” and a fast growing, often affluent niche market in itself (but still small), with great interest in local dishes and use of local ingredients ▪ Interest in local dishes benefits cultural exchange, international understanding and preservation of cultural heritage; greater use of local ingredients increases demand for local agricultural production and helps reduce foreign imports
<i>Diaspora</i>	<ul style="list-style-type: none"> ▪ The Government of Barbados is committed to attracting this already “vested” (i.e. family ties, roots) yet still largely untapped niche market, but current marketing mechanisms and strategies do not effectively reach it (e.g., database needed) ▪ A large and growing market; dispersed geographically but with some key nodes to effectively target (e.g. in Canada, USA, and UK) ▪ Return visits and investment by the Diaspora in Barbados strengthens pride and ties, generates social and economic benefits; become unofficial “ambassadors” for Barbados
<i>Domestic Tourism</i>	<ul style="list-style-type: none"> ▪ Limited understanding and consideration of domestic market in Barbados historically by local tourism industry, but mindset is slowly changing due to their recent poor performance and greater appreciation of both necessity and opportunity such that a moderate and increasing number of tourism facilities and services are now geared towards this niche market ▪ Niche is recognized as an important segment of the visitor market by international tourism bodies (e.g. WTTC) and most countries, with several of Barbados’ origin market countries (e.g. USA) aggressively and effectively targeting their domestic markets (e.g. staycations, weekend escapes) ▪ Barbados has a relatively large “captive” domestic market (i.e. already on-island), as compared to some other Caribbean islands with smaller populations ▪ Generates social and economic benefits (e.g. pride, reduces exports); can help improve seasonality patterns; in turn, more informed to become welcome ambassadors with Diaspora and tourists
<i>Health & Wellness Tourism</i>	<ul style="list-style-type: none"> ▪ Barbados has long been a destination for health & wellness, associated largely with its climate and its range of spa treatment offerings, and more recently through its alternative medicine and healthy food offerings; however there is a need to meet international certification standards (e.g. finalise and adopt standards now being developed through UWI) in order to become part of a new Caribbean-wide thrust and to compete effectively

	<p>with other regional destinations</p> <ul style="list-style-type: none"> ▪ A major interest of the “new traveller” and a fast growing, high spending niche market in itself ▪ Facilities and services provided also benefit the local population and provide employment opportunities
Silver Tourism	<ul style="list-style-type: none"> ▪ Barbados has a long history of serving older visitors from traditional origin markets (e.g. adequate accommodation and medical facilities) but it needs to improve facilities and services for the disabled, maintain and improve standards and safety, and offer more organised excursions to retain and grow this already significant repeat market in Barbados ▪ A major segment of the international travel market and a fast growing niche market in itself (aging population in traditional origin markets due to longer lifespan, healthier, declining birth rate) ▪ Ability to stay longer, improve seasonality and provide repeat visitation
Sports Tourism	<ul style="list-style-type: none"> ▪ Barbados has a strong sporting events schedule, legendary sports figures and an established reputation for sports tourism, but needs facility upgrades ▪ Barbados already has a significant sports tourism market (professional, amateur, youth), with great opportunity to further expand its range and reach ▪ International sporting events and figures foster national pride; sporting facilities and programmes can also serve and benefit locals; this niche can help improve seasonality
<p>The rationale for the priority assessment of each niche market considered is from the perspective of supply, demand, match, and benefit as follows:</p> <ul style="list-style-type: none"> • Supply – Available and planned supply in Barbados, including provider support and competition • Demand – Recent and anticipated demand in Barbados, and general niche market trends globally • Match – Favourable product-market match in Barbados • Benefit – Nature and extent of potential benefits to Barbados from niche markets 	

3.5 Priority Origin Markets

The *Primary* and *Secondary* priority origin markets to be targeted by Barbados over the 2014-2023 period are listed by region in Table 3.6.

Table 3.6. Primary and secondary target origin markets.

Primary Target Origin Markets	Secondary Target Origin Markets
<ul style="list-style-type: none"> • UK/Europe – UK, Northern Europe (Germany, Sweden, Switzerland) • North America – USA, Canada • CARICOM countries – Guyana, Suriname, Trinidad & Tobago • Latin America – Argentina, Brazil, Chile • Asia/Pacific – China, India, Japan, South Korea 	<ul style="list-style-type: none"> • UK/Europe – Finland, France, BENELUX • CARICOM countries – Remainder • Latin America – Colombia, Ecuador, Panama, Peru • Asia/Pacific – Hong Kong, Indonesia, Malaysia, Taiwan
<p><i>Source:</i> Barbados Tourism Master Plan Consulting Team and sources referenced in more detailed Tables in Report IV.</p>	

The rationale used to assess and prioritize the origin markets consisted of the following factors:

- **Broad socio/economic trends** – Whether population size and per capita gross domestic product (GDP) levels, GDP growth rates, unemployment and poverty rates, and degree of income distribution in the individual countries considered are currently favourable and anticipated to be so in the near future
- **International travel trends** – What the extent and nature of recent and anticipated trends in international travel from these origin market countries are in terms of outbound trips made (annual volumes, growth rates), top destinations visited, notable niche markets, recent trends in stayover visitation to Barbados, and air access to Barbados (distance, directness, frequency, cost), and whether these suggest a strong market-product match for Barbados
- **Ties with Barbados** – What the extent and nature of relationships between the governments of the origin countries being considered and Barbados are (e.g. diplomatic relations, members in common organizations, social or economic development support provided to Barbados), historical and cultural ties (e.g. population migrations, temporary work pursuits, cultural exchanges, prominent figures), trade and investment (e.g. activity, agreements, business ownership), resident expatriate population, visitor visa requirements, etc.

A summary of the origin country “standouts” for Barbados by region, broad rationale, and key factor is provided in Table 3.7. Origin countries identified in **blue text** are considered to have the greatest potential since they are prominent across several of the factors considered.

3.6 Enhancing Human and Institutional Capacity

Building human and institutional capacity is central to expanding the value of the visitor economy to Barbados. Quality service is one of the prerequisites for making Barbados the preferred destination for leisure and business. Yet at all levels of the sector, both organisations and people in general do not appreciate the link between their service and the experiences they create for an increasingly diverse mix of visitors. Changing the mindset towards service delivery is therefore one of the greatest challenges facing the development of a vibrant visitor economy. This will require specific interventions to build awareness, skills and commitment to action at individual, community and organisational levels.

3.6.1 People Focus

If indeed “people” are Barbados’ most valuable asset, then greater importance and resources need to be placed in strengthening human resources development. The people-focus of the TMP calls for more attention to be placed on getting people to “buy-in” and adopt different approaches to dealing with our visitors and managing the resources in this sector.

Table 3.7. Summary of Origin Market standouts by region and rationale.

Major Regions	Origin Market “Standouts” by Region and Rationale		
	Socio-Economic	Outbound Travel Trends	Travel/Access/Ties to Barbados
Americas	<ul style="list-style-type: none"> • Large population, high per capita GDP and average/steady projected GDP growth – USA, Canada • Strong recent and projected GDP growth – Chile, Panama, Peru • Strong recent and average projected GDP growth – Argentina, Brazil, Colombia, Dominican Republic, Ecuador, Guyana, Mexico, Uruguay 	<ul style="list-style-type: none"> • Travel market size and growth – Argentina, Brazil, Canada • Travel market size – USA, Canada • Travel market growth – Chile, Colombia, Ecuador, Panama, Peru • Travel to Caribbean – USA, Canada, South America 	<p><u>Stayover Arrivals:</u></p> <ul style="list-style-type: none"> • Significant volume and growth – Canada, Trinidad and Tobago • Significant volume (but little/no growth) – USA, CARICOM <p><u>Air Access:</u></p> <ul style="list-style-type: none"> • All short to medium haul • Direct – USA, Canada, Argentina, Brazil, CARICOM <p><u>Ties to Barbados:</u></p> <ul style="list-style-type: none"> • N. America – Canada, USA • S. America – Brazil, Panama, • CARICOM – esp. Guyana, Suriname, Trinidad & Tobago
Asia Pacific	<ul style="list-style-type: none"> • Large population, high per capita GDP, strong recent and average projected GDP growth – Hong Kong, Singapore, South Korea, Taiwan • Large population, high per capita GDP - Japan • Large population, strong recent + projected GDP growth – China, India, Indonesia, Thailand, Vietnam • Large population, strong recent and average projected GDP growth – Malaysia, Philippines 	<ul style="list-style-type: none"> • Travel market size and growth – China, India • Travel market size – Hong Kong, Japan, Malaysia • Travel market growth – Indonesia, Philippines, Taiwan, Vietnam • Growing interest in new cultures – Malaysia, Taiwan 	<p><u>Stayover Arrivals:</u></p> <ul style="list-style-type: none"> • None identified <p><u>Air Access:</u></p> <ul style="list-style-type: none"> • All long haul; no direct flights <p><u>Ties to Barbados:</u></p> <ul style="list-style-type: none"> • Advanced – Japan • Developing – China, India
Europe / Russia	<ul style="list-style-type: none"> • High per capita GDP and strong projected GDP growth – Norway • High per capita GDP and strong recent GDP growth – Sweden • Large population and high per capita GDP – UK, France, Germany • High per cap GDP – Liechtenstein, Luxembourg, Switzerland 	<ul style="list-style-type: none"> • Travel market size and growth – Russia • Travel market size – UK, Germany • Travel market growth – Denmark, Finland, Sweden, Switzerland • Travel to Caribbean – UK, Europe 	<p><u>Stayover Arrivals:</u></p> <ul style="list-style-type: none"> • Significant volume and growth – Europe (excl. UK), Germany • Significant volume (but little/no growth) – UK <p><u>Air Access:</u></p> <ul style="list-style-type: none"> • All medium to long haul • Direct – UK, Germany <p><u>Ties to Barbados:</u></p> <ul style="list-style-type: none"> • EU, UK, France (departments in Americas), Germany
Middle East / Africa	<ul style="list-style-type: none"> • Strong recent and average projected GDP growth – Kuwait, Oman • High per capita GDP and strong recent and projected GDP growth – Qatar 	<ul style="list-style-type: none"> • None identified 	<p><u>Stayover Arrivals:</u></p> <ul style="list-style-type: none"> • None identified <p><u>Air Access:</u></p> <ul style="list-style-type: none"> • All long haul; no direct flights <p><u>Ties to Barbados:</u></p> <ul style="list-style-type: none"> • None identified

Note: Countries shown in bold are “Standouts” for Barbados according to several criteria considered.
Source: Barbados Tourism Master Plan Consulting Team and sources referenced in more detailed tables

Some of the key elements and challenges outlined in the 1998 Strategy for HR Development in the Tourism Sector (ARA, 1998) are as relevant today as they were 15 years ago, and are encapsulated in the following initiatives promoted in the TMP:

- **Creating an Effective Leadership and Performance Management Culture** which would encourage leaders and managers to operate more strategically, foster employee engagement and stimulate improvements in service quality linked to higher industry standards
- **Enhancing Education, Training and Development** within a vibrant policy framework towards increasing coordination, enhancing sensitivity given an increasingly diverse visitor mix, expanding integration of tourism concepts throughout the school system, and increasing practical training for persons working directly and indirectly throughout the visitor economy
- **Building an Entrepreneurial Spirit and Maximising ICT** to support innovative approaches for accessing emerging opportunities and markets

3.6.2 Institutional Capacity

Successful implementation of the Tourism Master Plan will depend to a significant degree on the organisations responsible for providing leadership for the process and their approach to planning, coordinating, implementing and monitoring the changes required. The 2012 White Paper noted the debilitating impacts of the fragmentation and 'ad hocism' in the sector, and underscored the need for the restructuring of key institutions. Enhancing communication and building more collaborative relationships in the sector is also essential in order to maximize the use of limited resources.

The TMP outlines the leadership role of key stakeholder institutions in implementing the recommendations. However, it would be unrealistic to expect that different results and benefits in the future will be achieved by utilising the same structures and approaches of the past. Achieving the expected outputs of the TMP will therefore require significant change and realignment of the focus and operations of the major institutions, primarily in the areas of structure, leadership, staffing and programme approaches.

Just as important as restructuring is an urgent need for a shift in norms, i.e. HOW people do things. The changes required will not be achieved through organisational restructuring alone, but will require deeper organisational change efforts to gain consensus and the buy-in of decision makers, leaders and line staff to a different modality of operation.

The level of organisational change required cannot be achieved through the approach that is typically used for restructuring and staffing a Government agency. This crisis demands more urgent and drastic solutions if critical institutions and their people are going to turn the industry around. Making the quantum shift required in the tourism industry and maximising the potential of the visitor economy will require organisations that are committed to changing their approaches – *at both management and operational levels.*

It is therefore critical to ensure that persons in leadership positions adopt the strategic approaches needed to achieve the goals of creating a more sustainable industry. Yet while this truism is repeated at all levels, from senior decision-makers in Government and within organisations themselves, the question is:

Is the crisis felt deeply enough to spark the willingness and commitment among senior decision-makers to make the hard decisions and undertake the critical changes that are required to turn the tourism industry around?

Regardless of the final decision and option selected by the Government of Barbados for the restructuring of the sector, there are priority areas that need to be addressed in the process of strengthening the tourism institutions as follows:

- **Vision** - ensuring that all the key tourism stakeholders buy-in to a common vision and use it as a focal point for their strategic objectives and activities
- **Leadership** - building strategic leadership skills and coaching skills which would enable the organisations to take a proactive role in planning in order to achieve their mandates
- **Building Collaboration, Cooperation and Communication** - countering the “silos” which are said to exist between the respective organisations. In this regard, the MTI needs to play a leadership role in facilitating inter-sectoral consultation and collaboration, and fostering more effective use of technology and ICT systems

3.7 Barbados' Attractions

This Section of the report addresses “tourism outlook”, i.e. where Barbados needs to go in the future to realize its visitor economy potential. The stakeholder consultation process, as well as observation, strongly indicated the need to improve existing attractions and develop new attractions of appeal to today’s international marketplace. The most common phrase heard from stakeholders was “the Barbados tourism product is tired”. The visitor targets and benefit to cost ratios presented above are only symbols on paper unless “attractions”, as a means of attracting visitors to the island and urging them to spend more money, are greatly improved. The presentation below addresses this need and introduces a new recommended theme **‘Discover Barbados - the Land of Legends’** (See Report VI on “Cultural Heritage and Attractions”).

3.7.1 What Barbados is Selling

The White Paper refers to the Barbados Brand as follows:

“There has been much discussion about the Barbados Brand and what actually defines it ... there exists no definitive statement of what the brand actually is” (Strategic Solutions Inc., 2012, p. 65).

“Barbados needs to identify its core competencies and unique attributes to create a distinct brand identity and positioning in the market that will successfully differentiate the Barbadian product and make the brand sustainable and enduring (Strategic Solutions Inc., 2012, p. 66).

“Defining the Brand is the root of any strategic marketing plan. It assists in identifying the type of customer or niche markets the destination is trying to attract and allows for a more strategic and targeted approach to be taken. It also eliminates ad hocism and wastage of scarce financial resources (Strategic Solutions Inc., 2012, p. 66).

Rationalising Barbados’ National Brand Image must involve moving beyond the ‘silo’ approach to tourism planning and development to a truly integrated policy design and implementation that accounts for the ways in which the BVE has evolved, as well as its embedded, symbiotic relationship with virtually every national economic sector.

Tourism globally has increased substantially, while in Barbados the numbers are declining. It has become clear that Barbados needs to “rejuvenate” its product in order to stop losing market share. The question is: how? The Tourism Master Plan represents a shift towards a balanced, sustainable, market-driven, visitor focused approach to tourism. While new products and programmes are essential to this revitalization, alone they will not be sufficient. Also required will be defining the “Barbados offer” and communicating it globally. This is part of the branding process discussed in Report IV, Section 1.0.

Most international tourism destinations adopt one, or several, themes or ‘hooks’ from which the international community can identify them. The themes emphasize what is best and most unique about a place, ranging from a natural asset, such as ecotourism in Costa Rica, or a cultural historical asset, such as the Mayan ruins in Mexico, to a theme focusing around more recent man-made features and activities, such as gambling and nightlife in the Bahamas.

Outside of “sun, sand and sea”, which is not unique to Barbados, the island has not had a clear product with which the international traveller can identify. A large number of themes are not necessary; indeed, many countries do very well on a single theme. Identifying Barbados’ main attractions, both existing and potential, has been an essential part of the Tourism Master Plan preparation. The thematic framework presented below provides a recommended thematic framework for the presentation of Barbados’ cultural heritage products.

3.7.2 Thematic Framework

The proposed thematic approach addresses what the White Paper emphasised as the need for Barbados to “*become a destination of choice globally based on the offering of its products, services, rich cultural heritage, affordability, and intrinsic value*” (Strategic Solutions Inc., 2012, p. 29).

The development of a framework, the filter through which all tourism is organized, is essential to capturing the visitor’s imagination, unifying content, and creating an overarching

context through which all themes are organized and delivered. Themes express ideas or concepts that, by acting as unique threads running across many topics, help us to understand a place. They reflect the core ideas communicated to visitors, and should provide elements that resonate with visitors after they leave Barbados.

3.7.3 How Barbados Attracts Visitors Now

The heritage tourism product in Barbados includes tangible heritage, such as attractions, and intangible heritage, such as traditions and cultural performances, all of which must be highlighted effectively to attract prospective visitors. Typical representations of Barbados' cultural heritage products include maps, signage, promotional videos, photographic exhibitions, booths, online descriptions / directories and varied print material. Performances, cultural displays or cameos by notable personalities have been used to promote heritage elements and spark interest in the visitor. How are visitors to be directed strategically through the maze of "must-do" activities? Local attractions, festivals, and other cultural heritage offerings are most often presented as:

- Singular tour attractions, e.g. Harrison's Cave
- Independent encounters such as a select performance
- Aggregations of disparate sites
- Broad groupings, such as Nature or Art that are primarily detailed at a site-specific level

The weakness of the current approach is the lack of connectivity of experiences within a more integrated framework. Progressively, Barbados' heritage would be more effectively developed as a Cultural Landscape connected by defined themes that can be followed through on the ground utilizing a unified stream of defined experiences.

In a Cultural Landscape, it is most important that before the international visitor arrives or the local visitor leaves home and sets out on their journey or tour, that they have a keen expectation of multiple interactions, not only at the destination, venue, or attraction that is the stage for the cultural experience, but particularly with the people and complementary places that uplift the experience as a whole. Visitors are strategically encouraged to explore a wide range of activities by increasing the visibility of core experiences encountered en route to any primary experience, rather than depending on the visitor to effectively distill their own perfect selection of activities from the volume of options or tour operator recommendations.

Competing destinations such as Cuba have embraced the notion of immersing visitors in holistic, handcrafted, private journeys that extend their initial concepts of exploration, inviting visitors to see through the eyes of its people, and aiming to treat visitors as individuals, mixing "must-see" sites with unique adventures and experiences, not all of which are in guide-books.

3.7.4 Lessons From Successful Thematic Presentations

Our most contiguous thematic presentation has been the UNESCO World Heritage Property, which while focusing strongly on built heritage, encompasses rich, underlying cultural stories that are also being explored in other parts of the island.

The recent designation of Historic Bridgetown and Its Garrison as a UNESCO World Heritage Site presents a tremendous opportunity for Barbados to put a commercial value on one of its indigenous cultural attractions, ensuring its conservation and the celebration of its uniqueness. As well as the Garrison, there are two Sites, i.e. the Scotland District and 'Barbados Industry -The Story of Sugar', which are to be recommended for addition to the UNESCO World Heritage List. The three can be the star attractions with international cache. World Heritage status acts as a magnet for visitors and helps build a destination image widely used in marketing campaigns to promote visibility and label destinations. The story of sugar, the Scotland District National Park, and Historic Bridgetown and Its Garrison as UNESCO World Heritage Sites are poised to be internationally recognised attractions/products that can deliver the best possible experience.

An important common element within many destinations that have UNESCO sites is the unique presentation of their sites - they present, with imagination, the legendary stories those sites have to tell and incorporate each site as an anchor to draw attention to the overall wonders of the destination. The rich potential for interpreting the natural and cultural heritage of Barbados makes it ideal for an overall thematic framework. The framework is an opportunity to present and interpret multiple perspectives and multiple meanings.

A key example of a recent successful thematic presentation that was a pilot project executed by the Ministry of Tourism and BMHS is the tour known as ***Freedom Footprints – the Barbados Story***. This experience combines distinctive and varied cultural elements in a cross-island journey encompassing:

- Heritage sites – Historic Bridgetown and its Garrison, Barbados Museum and Historical Society, 'The Cage', Newton Slave Burial Ground, Gun Hill Signal Station
- Local Guides
- Community Stops - Bourne's Land
- Local Shops and Traditional Foods - The Village Bar, Lemon Arbor and Sweet Bottom Bar

3.7.5 The Way Forward

The presentation of heritage products can be taken to a higher level of success through integrated promotion and packaging of a number of **legends** and **interpretive themes** that make up Barbados' rich cultural heritage. Extension of the foregoing principles of cultural immersion to the island's heritage assets, if carried through within a consistent system, will be instrumental in strengthening the sector by:

- Refining the content and modes in which the legends and stories are portrayed
- Guiding the visitor deliberately through the Cultural Landscape
- Ensuring that "No Attraction is an Island"

The primary objectives are to:

- Capture the visitor's attention and imagination

- Induce actual movement of the visitor across Barbados’ cultural heritage landscape
- Involve visitors in a wider cross section of activities
- Realize increased benefits to the economy

3.7.6 Thematic Structure

The main theme and sub-themes for Barbados’ attractions can be organised as follows:

Discover Barbados - the Land of Legends: This, as a *main theme*, pertains to Barbados as an evolving cultural heritage landscape. Since its origins, Barbados continues to evolve as a dynamic, culturally rich, and ecologically diverse country. The evolving complexity of the existing fabric offers a bounty made up of elements dating from the entire period of its existence. The three sub-themes described in Figure 3.3 provide cadence.

A strong rationale for the thematic structure is that it reflects the people, places, and events; and that it supports a vibrant lifestyle where oral histories, Bajan dialect, or folklore can enrich the legends and stories, as well as their portrayal.



Figure 3.3. Collage of interpretive themes for ‘Discover Barbados – the Island of Stories’.

Over Water: As an island nation, the sea has been an abiding part of Barbados’ colonial and mercantile history. Many of the stories relating to Barbados are nautical. The sea has a large effect on climate and the makeup of the flora and fauna. People chart their lives based on events at sea and natural disasters from storms and hurricanes.

Over Land: Challenged, shaped and strengthened by conflict and cooperation, the island’s strategic location has allowed it to develop a strong engagement with the wider world. At

one time considered Britain's most valuable possession, the island's legacy is rooted in both African and European values. Its terrestrial biodiversity, habitats, animals, and people populate numerous interesting stories.

Over Time: A place of diversity and continuing natural and cultural evolution. Both historically and presently, Barbados has influenced and been influenced by the world. Legends couched in time, such as the doctrine of independence penned at Oistins' Mermaid Tavern, or the underground tunnels at the Garrison, have tremendous appeal and are an important means of animating and entertaining.

Each segment of a visitor's journey through the Cultural Landscape would be maximised by using storylines to link visitors with memorable experiences along selected routes that feature primary attractions, sites and associated experiences along its length. This will allow for the **wider distribution of tourism value across the island to local people, service providers, product suppliers and event participants** comprising a heritage route.

The TMP **Discover Barbados** structure also outlines 10 key themes that would be instrumental for the successful delivery of the island's legends and storylines:

- Freedom and Resilience Stories
- Laying the Foundations
- Locals and Legends
- Ten Fathoms and Maritime Exploits
- The Story of Sugar
- Natural Treasures
- Wellness and Healing Arts
- Sports in Bim
- Cultural and Creative Arts
- Eat, Drink and Be Merry

Overall, the UNESCO attractions will serve as core venues for presentation of '**Discover Barbados - the Land of Legends**'. As well, strategies and actions have been recommended, including the development of several cultural, historical and natural resource-based interpretive facilities (see Section 4.4 and Report VI on "Cultural Heritage and Attractions"). Some, such as the proposed "Develop a Discover Barbados Centre" at the Bridgetown Port (Action 2.3-1) are new, while others, such as the "Develop a New Sugar Museum" (Action 2.3-2) are expansions of existing facilities and programmes.

The Cultural Landscape would thrive on a range of integrated cultural routes that link people with places in a recognizable framework that can be engaged wherever the visitor chooses to be. Figure 17 in Report VI, Section 4.0 presents an example of a key heritage route that can be used by all visitors to easily follow a guided or self-guided route with minimum translation.

3.7.7 The Process

In order to take full advantage of returns from each visitor's stay, it will be necessary to inspire them and facilitate their onward journey to as many sites as possible across the island's Cultural Landscape.

This is achieved through the presentation of pre-planned, themed heritage routes that connect major sites but also focus on people and local experiences along an identifiable trail and known ahead of time; the visitor would be able to anticipate a rich cultural encounter and seek it out. This does not exclude the incorporation of impromptu experiences.

The process would involve the following 8 steps:

Step 1. Get Our Story Straight

- Identify holistic themes that link heritage experiences
- Identify a stage or route along which the story will be presented
- Define key connections between primary experiences and personalities
- Select associated quality experiences including F&B and community links, particularly major Heritage Town Centres

Step 2. Engage the People who will Participate in Presenting the Story

- Involving tourism practitioners and service providers in developing the thematic framework

Step 3. Make Sure the Story Fits the Bill

- Upgrade those products that require improvement
- Add products, infrastructure or services where required to enrich the story
- Ensure that the quality of the products, infrastructure, and services are maintained at a high standard
- Establish funding opportunities for product development

Step 4. Equip the People to Convey Discover Barbados themes

- Involving tourism practitioners and service providers in assimilating the thematic elements, benefits and the part they play in everyone's success
- Providing training where required

Step 5. Get the Story Out

- Target existing and new source markets
- Attract the priority niche markets
- Promotion within the local and international arena of the refined story
- Focused incorporation of social media and new technologies

Step 6. Follow the Story Through on the Ground

- Ensure that the legends and stories can be upheld in policy and practice
- Minimize fragmentation and isolation of thematic elements
- Create sustainable linkages between Communities, Sites and People

- Provide visual markers and images that are easily recognizable in material presented, in media, and en route
- Provide efficient transportation linkages
- Allow for periodic evaluation of the effectiveness of the thematic framework

Step 7. Reward the Visitor who Participates in Multiple Experiences

- Maximize the use of heritage passports, packages and prepaid full services that allow pre-planning for visitor volume and facilitation of appropriate levels of discounts

Step 8. Reward the Practitioner, Service Provider or Community for Consistent Value Added

- Develop a dependable reward system to encourage stakeholder commitment to excellence
- Promote incentive programmes

Various strategies and actions would support these steps throughout the TMP.

Examples of four potential themed routes and options for presenting the island’s legends and associated experiences are illustrated below:

Theme: Locals and Legends
 Speightstown to Animal Flower Cave :

Archers Hall
 Roland Edward's House
 Charleston, South Carolina Connections
 Arlington House Museum, Caribbean Gallery of Art
 St Peter's Parish Church
 Speightstown Fruit Vendors
 Fisherman's Pub
 Orange Street Grocer
 Braddy's bar, Moon Town
 Hangman's Bay
 Animal Flower Cave



Through **Discover Barbados**, integration of George Washington House activities into the **Cultural Landscape** would explore tour and promotional links:

- **Health and Wellness** theme development:
 - Synthesis with TMP proposed **Bio-park Nature Centre** in the Scotland District and Natural Health sites and organic **F&B stops** highlighted
 - Addition of Sustainable Farms to tours
- **Natures Treasures** theme linkages:
 - Incorporation of **Maycocks Gully** tours
 - Planned linkages with other sites such as **Jack-in-the-Box Gully, Welchman Hall Gully , Andromeda Gardens**

Discover Barbados Theme: Nature's Treasures

Potential **Cultural Heritage** elements and associated Features:

- **Great Train Hike Route**
 - Bath, Martin's Bay, Bathsheba
- **Bajan Pride Exposition (Annual)**
- **Martin's Bay**
- **Bay Tavern Rum Shop**
- **Dorcas Delights**
- **Round House**
- **Atlantis**
- **Bathsheba**



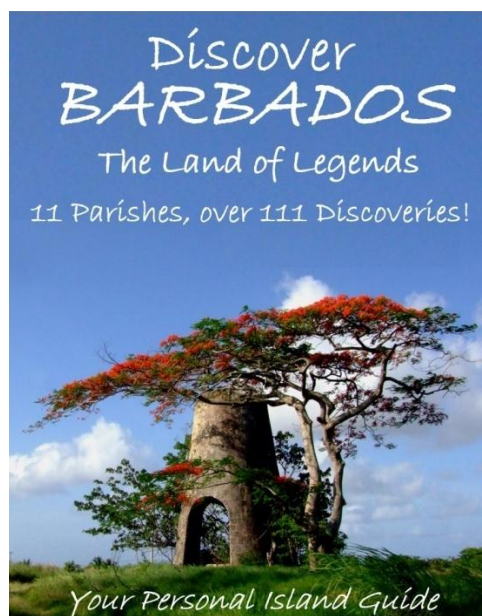


Discover Barbados Themes:

- **Sport in Bim**
- **Locals and Legends**
- Engage and uplift local cricket heritage, personalities and sites across the island

In addition, the proposed **Discover Barbados - The Land of Legends Guide** depicted below would introduce visitors to key storylines that:

- Occur in close proximity to their location, district, or parish, allowing visitors to recognize and access experiences more easily
- Draw visitors into the Cultural Landscape along either self-guided or guided routes that incorporate stops for sightseeing, dining or relaxing



It is recommended that Barbados develop and present itself as “DISCOVER BARBADOS - THE LAND OF LEGENDS”, and that the actions recommended to achieve this be implemented as priority ones in the short term.

The Tourism Master Plan aims to take full advantage of Barbados’ cultural heritage as the cornerstone of a unique marketing thrust that presents a vivid pattern of experiences that links the island as a whole and engages the visitor through its rich history.

Overall, given implementation of the TMP, the Barbados tourism sector is poised to benefit substantially through enhancement of existing attractions and associated services, and the unveiling of a dynamic range of experiences for both locals and visitors.

3.8 Promoting a Green Economy

Promoting sustainable resource management will require a range of responses necessary to develop a holistic approach to the management of the island’s natural resources that fosters a healthy environment in which the tourism industry, and indeed society as a whole, can thrive. These responses include local support, land stewardship practices, financial support, and political will, all contributing to the creation of fair decisions and sustainable practices, and ultimately the nurturing of resilient landscapes (see Figure 3.4). All strategies and actions proposed in this report contribute to the objective of a Green Economy (see Section 3.0).

Ogden (2009) outlined a number of challenges to achieving sustainable development, which are applicable to Barbados, including:

- Public apathy, lack of understanding and environmental awareness, and resistance to investment in national environmental programmes
- Lack of coordination between the various public sector departments whose mandate is to address environmental issues
- The need to implement initiatives required by any environmental conventions to which Barbados is a signatory
- The need to link private sector / NGO initiatives in environmental management with associated public sector ones
- Ongoing natural habitat fragmentation and associated loss of connectivity, within and between land and marine-based resources, driven by development pressures
- The competition for physical space, including terrestrial or marine, for the development of goods and services (e.g. tourism infrastructure, residential developments, commercial and agricultural industries, coupled with the need to adhere to strict zoning laws to minimize same)
- The lack of mature woodlands and the need for sustainable forest regeneration programmes, especially on abandoned agricultural lands

- Maintaining important areas of biodiversity through appropriate protection and management schemes
- The need to promote integrated and sustainable economies that reflect high environmental standards, and provide local food and energy security

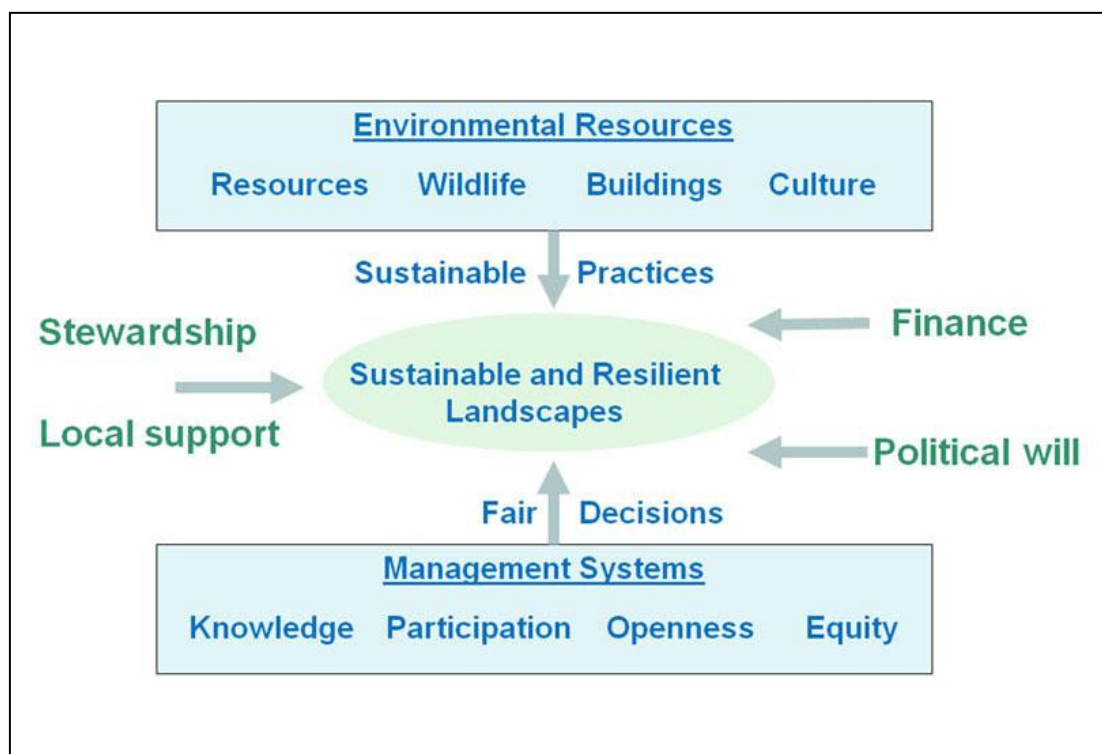


Figure 3.4. Responses (in green text) required to promote sustainable, integrated resource management based on the Wales model (Ogden, 2009).

Achieving a green economy, inclusive of a sustainable tourism product for Barbados, will be dependent on requisite regulations that are established to support development that is not harmful to the environment on which it depends. In this regard, passing the draft EMA Act with supporting regulations, along with strict enforcement regimes, is critical to achieving this objective. In the absence of such a regulatory framework for Barbados, the desire to establish a green economy can only be discussed, debated, and imagined, but impractical to put into practice.

Under a legislated EMA, public sector departments that are responsible for environmental matters, including the EPD, NHD, NCC, SSA, BWA, CZMU, Ministry of Energy, Ministry of Health, and Ministry of Environment, will have the basis upon which to operate more effectively, and be capable of driving environmental policy, programmes, and strategies that have been compiled to date, and which will be developed moving forward, in order to transition to a green economy for Barbados. Efforts to convert to renewable energy from our current fossil fuel-driven economy are well underway, and can be further promoted island-wide through ongoing and future initiatives and incentives, promoting greater buy-in from the

private sector, and stimulating developers and investors to embrace the goal of national sustainable development.

Barbadians collectively will require a paradigm shift in mindset that is geared towards greater land stewardship to foster a Barbados that visitors will seek, admire, and enjoy. Since residents of Barbados are also potential domestic tourists, this will entail a scenario similar to the concept of ‘cleaning up your own backyard’, for the benefit all. The younger generation will be best able to embrace this concept, but greater environmental awareness and training will be necessary for all levels of society. This concept is embraced through one of the White Paper’s sustainable tourism development policy statements (Strategic Solutions Inc., 2012, p. 217) that states that Government will:

“develop programmes to educate and sensitize all Barbadians, tourism and other businesses about the benefits of sustainable development and the Government’s alternate energy programmes, and acquaint them with the incentives and concessions available to encourage the transition to a more energy efficient nation”.

Developers will have to become greater land stewards and avoid the traditional practice of total site clearance before commencement of construction projects; planners will have to design sites that incorporate natural elements, maintain the integrity of the natural environment and promote the reduction of carbon footprints prior to seeking planning approvals.

Tree replanting schemes on existing properties that lack vegetation cover and those planned for all new developments, along with the promotion of reforestation projects will help to create an environment for users, both local and international, that is more comfortable, appealing and satisfying for the benefit of all.

Organic and sustainable farming practices that can feed the local population will help to reduce the heavy reliance on food importation, prevent the addition of toxins into the environment, and promote greater health and well-being for all. With an ideal year-round climate, and the incorporation of renewable energies that drive sustainable agriculture, Barbados can act as a model for sustainable living. Starting in the rural communities of St. Andrew, St. Joseph and St. John, these communities can become well established and foster other similar initiatives throughout the island. With the implementation of reliable Farm to Table programmes (see also Report V, Part 2, Section 3.6.1.3) that link with food outlets, restaurants, and visitor accommodation establishments, locals and visitors will be able to enjoy farm fresh, healthy Barbadian foods on a consistent basis, and be confident of where the food originated and how it was grown. The production of sustainable foods and promotion of local small businesses, while enhancing the tourism product offering, will drive the national economy towards a thriving tourism industry.

Section 4.0 that follows presents the TMP vision, goal, strategic imperatives, strategies and priority actions developed based on comprehensive research and stakeholder consultation; section 5.0 presents the plan for implementing these priority actions. Additional actions that were also developed for each strategic imperative can be found in the supporting TMP documents, Reports II to VI within their corresponding subject areas.

4.0 TMP Vision, Goal and Strategic Imperatives

Overview

This Section provides a reiteration of the vision for tourism development in Barbados, which leads to the primary goal of the Tourism Master Plan. The strategic imperatives required to achieve this vision and goal are presented, with strategies and actions that are intended to realize these imperatives.



4.1 Vision

The Barbados Tourism Master Plan 2014-2023 is a major initiative whose implementation will guide tourism development over the next 10 years.

The tourism sector has been Barbados's main foreign exchange earner and most powerful economic driver for many years. As the leading economic sector in the country, it impacts every other sector. As such, this Master Plan places the concept of "tourism" in its broader, more modern context of the "Visitor Economy". Given the current, increasingly disruptive global economic environment, and the consequent negative impacts on the Barbados Visitor Economy (BVE), a critical step necessary for producing the Tourism Master Plan (TMP) was the situation analysis of the country, its people, and what the future potentially holds.

This Master Plan sets out pathways for ensuring that the vision is achieved. Notwithstanding these difficult and challenging times, the people of Barbados, led by their Government, developed and approved the following Vision Statement for the country's tourism industry on January 16, 2012: **"to deliver an unmatched experience that is truly Barbadian, created by warm, welcoming, friendly people, ensuring benefits to the entire nation"** (May Hinds Consulting Inc, 2012). While this statement, also further expanded in the White Paper (see Section 1.1 above), is a starting point for shaping the future of Barbados' traditional tourism sector, it will likely have to be interpreted given the implications of a broader notion of the visitor economy as defined in Section 3.0.

4.2 Goal

In commissioning the Master Plan, the Government of Barbados indicated that its broad goals are to:

1. provide a physical, environmental and economic plan for balanced development of the Barbados tourism product
2. ensure the sustainable growth and development of the tourism industry to meet the needs of Barbadians, visitors, investors and other stakeholders
3. produce financially viable and environmentally sound tourism projects and programmes
4. provide a balance between economic benefits, Government's national objectives, the interests of private tourism stakeholders and the host population.

In summary, the primary goal recognized by the Tourism Master Plan for the next 10 years of tourism development in Barbados is to ***grow the Barbados Visitor Economy sustainably and responsibly in consideration of the people, the economy, and the natural environment.***

In the pages that follow, the strategic imperatives required to meet the articulated vision and goals are presented, along with the strategies required to realize these imperatives. It is the implementation of the strategies, along with their associated actions, that will grow the Barbados Visitor Economy in a sustainable and responsible manner.

4.3 Definitions

The following terms are used within the Tourism Master Plan and are defined below for shared understanding of their meaning and purpose:

Vision	A formal statement of the values embedded within the Master Plan
Goal	A broad statement of what is to be achieved through the implementation of the Master Plan
Strategic Imperative	Objective/aim given the highest priority and developed to realize the desired goal
Strategy	An approach designed to bring about the strategic imperative and meet the desired goal
Issue	The weakness or threat being addressed by the specific strategy and its associated actions
Action	Specific interventions or steps designed to address the issue, implement the strategy, and achieve the strategic imperative
Target	Output to be delivered or achieved by a designated date

4.4 Strategic Imperatives

To achieve the goal of the Tourism Master Plan and to pursue the vision, the following 12 strategic imperatives have been identified as the critical aims that must be the focus of the stakeholders within the BVE:

1. Base decisions on comprehensive, accurate, and timely data / information
2. Enhance the visitor experience
 - a. Niche markets
 - b. Built heritage
 - c. Cultural heritage
 - d. Natural heritage
3. Change the tourism mindset
4. Develop airlift capacity
5. Improve financial performance

6. Modernize accommodation and improve the performance of the sector
7. Enhance the cruise tourism product and experiences
8. Improve the transportation of people on land and near shore
9. Assure safety and security of visitors and residents
10. Effectively market Barbados
11. Mainstream environmental management
12. Update and enforce policy and legislation to support the BVE

Each strategic imperative will be accomplished through the achievement of a set of strategies. The strategies will be realized through a range of *priority* actions that have been detailed in terms of lead agencies, budgets, targets and outcomes. Reference numbers are coded relative to their associated strategic imperative and strategy, e.g. Action 7.1-2 refers to the 2nd Action recommended for Strategy 7.1 under Strategic Imperative 7. The actions are divided into three categories:

- **Urgent Actions** are highlighted in **RED**. They represent those actions that are required immediately to respond to the current economic situation and to increase visitor arrivals and visitor spend within the BVE.
- **Enabling Actions** are highlighted in **BLUE**. They represent actions that are required to support the effective and efficient functioning of the BVE; without these actions, the BVE would continue to operate at sub-optimum levels.
- **Sustaining Actions** are highlighted in **GREEN**. They represent the actions that are required to maintain the BVE and to ensure its sustainability and resilience into the future.

The 12 strategic imperatives of the TMP are presented separately overleaf with corresponding strategies and actions. The actions summarised in this section are the highest priority ones based on consultation with tourism stakeholders. Each priority action is also more fully described in the TMP supporting documents, Reports II to VI, as identified separately at the bottom of each action box below; additional actions are also found in the TMP supporting documents according to their specific Strategic Imperative category. All budgets / cost estimates are provided in Barbados dollars.

1 Base decisions on comprehensive, accurate, and timely data / information

Strategy:

- 1.1 Foster information-based decision-making through up-to-date research which is coordinated and integrated across the various stakeholder groups, and provide well archived, easily retrievable documentation which can support the BVE

Actions:

1.1-1 Consolidate Responsibilities Within the Ministry of Tourism

Issue: Multiple agencies are involved in tourism and visitor-related research in Barbados. This multi-agency approach lacks synergy and can be deficient in control, structure and priority sets; there are also data gaps and inconsistencies, release delays, and limited sharing and dissemination of information. There is not always a “natural fit” between agency mandate and current research responsibilities. It is confusing to external stakeholders and the public seeking to obtain information. While the recently formed Tourism Working Group is recognized, it is necessary to have data collection, management and dissemination the responsibility of one agency

Action: Create a one-window approach. Retain a consultancy to spearhead the development of the approach to, and implementation of, the transition process that successfully consolidates the primary responsibilities for tourism research within MTI, with coordinated involvement and support of other relevant agencies and organizations

Target: 2016

Lead Agency: Ministry of Tourism and International Transport

Cost Estimate: \$200,000 for consultancy and new personnel and training fees

Outcome: MTI attains the authority and capacity, and effectively manages, conducts, collects, analyses and disseminates all aspects of tourism-related research and information of importance to Barbados in a comprehensive, needs-based, efficient, timely and cost effective manner. This tourism-related research is effective in supporting the successful investment, development, management and operation of tourism initiatives and enterprises for Barbados

Refer: Action 1.1-1 in Report IV, Section 2.5

1.1-2 Assess Visitor Research Management Needs

Issue: The extent of tourism markets research currently conducted and disseminated in Barbados is limited (i.e. scope, timing, trends), making it difficult for Government and industry to make informed decisions, carry out strategies relating to tourism markets/marketing, and invest in tourism. Accurate, adequate and timely data is required to inform decision-making, which is not the current situation in Barbados

Action: Assess research needs of target users and determine the capacity to meet these needs. Assess extent to which a consultancy is needed to assist with this. This involves the completion of needs assessments and development of recommendations regarding the tourism research and information requirements of target users, and the Ministry's capacity building needs to satisfy these requirements. In turn, the findings and recommendations from these needs assessments guide the focus and directions taken with respect to the associated tourism research strategies and those relating to institutional strengthening and capacity building

Target: 2015

Lead Agency: Ministry of Tourism and International Transport

Cost Estimate: \$100,000 for consultancy

Outcome: MTI attains the authority and capacity to manage / oversee all aspects of tourism-related research and information dissemination of importance to Barbados in a comprehensive, needs-based, timely and cost effective manner. Needs assessments and accompanying recommendations addressing the research needs of target users and the Ministry's capacity-building needs to satisfy them have been prepared, and are effective in supporting the successful investment, development, management and operation of tourism initiatives and enterprises in Barbados

Refer: Action 1.1-2 in Report IV, Section 2.5

1.1-3 Build Capacity for Visitor Research Management

Issue: Capacity needs to be developed within the MTI in order to expand and consolidate research programmes and assume increased responsibilities

Action: Design and develop a research-oriented organizational structure and accompanying capacity building / training programmes for MTI that reflect the findings and recommendations of the needs assessments conducted in Action 1.1-2

Target: 2015

Lead Agency: Ministry of Tourism and International Transport

Cost Estimate: \$100,000 for consultancy

Outcome: An organizational structure and accompanying capacity building / training programmes are designed and developed for MTI to support the consolidation effort (Action 1.1-1). The required organizational structure established, and capacity building and training programmes initiated to enable MTI to effectively assume primary responsibility for visitor research management

Refer: Action 1.1-3 in Report IV, Section 2.5

1.1-4 Develop a Central Repository and Portal for Visitor Research

Issue: The focus of tourism markets research is currently too narrow in scope, and needs to be extended to encompass visitor research management, i.e. research on all aspects of the tourism sector in Barbados, including product inventory, performance and development, and economic, social and environmental impacts. It needs to incorporate all phases of visitor research management, from research, data collection, and analysis to reporting, information storage, and dissemination

Action: Retain IT experts to design, develop and create a central repository that stores tourism research and information of significance to Barbados. Retain IT experts to design, develop and create a central portal that disseminates tourism research and information of significance. Integrate both systems into an overall framework that links them with other related and relevant information sources. With reference to training provided through Action 1.1-3, employ trainers to prepare the Ministry of Tourism staff to operate and maintain the central repository and portal. Conduct and disseminate tourism research and information, with the Ministry of Tourism achieving cost recovery and revenue generation to compensate research contributors outside of the Ministry

Target: By 2017, and following completion of Actions 1.1-2 and 1.1-3

Lead Agency: Ministry of Tourism and International Transport

Cost Estimate: Cost of IT experts and staff training to be determined; cost of portal development depends on whether it becomes part of the official portal of the Government, or whether it is created as a stand-alone system

Outcome: A central repository that stores tourism research and information of significance to Barbados is created and fully integrated with a portal created to disseminate the same information; both are operated by the MTI. The stored tourism research is comprehensive, reliable and managed in an efficient and cost effective manner by MTI; it is effective in supporting the investment, development, management and operation of tourism initiatives; and is made available to the tourism industry at large and the general public through access that reflects rights, membership, purchase fees, etc.

Refer: Action 1.1-4 in Report IV. Section 2.5

Strategy:

- 1.2 Promote ongoing monitoring of the BVE within the wider regional and global environment to evaluate Barbados' performance against best practice in order to position it for enhanced competitiveness

Actions:

1.2-1 Create a Digital Dashboard for TMP Implementation and Performance

Issue: Lack of appropriate national mechanisms to assure accountability and responsibility in the delivery of strategic results in areas critical to the competitiveness of the BVE negatively impacts Barbados' National Brand Image and the success of all marketing efforts

Action: Design, launch, continuously monitor and upgrade as needed a web-based digital dashboard for the BVE to track the implementation status of all Master Plan strategies

Target: Digital dashboard with phased three-year strategy implementation linked to actions in order of critical priority, starting within six months of Master Plan initiation

Lead Agency: BTII

Cost Estimate: \$250,000 during the first three years

Outcomes: World-class delivery, including more efficient BVE strategy execution; increased transparency and openness; better access to information anywhere, any time, from any secure digital device; reduction in communications silos; higher levels of responsibility and accountability

Refer: Action 1.2-1 in Report IV, Section 1.5

1.2-2 Gain Feedback on Visitor and Local User Experience

Issue: Lack of a consistent mechanism or process to gather feedback from visitors and residents about their tourism experiences, perceptions and attitudes

Action: Design and deploy a short form visitor survey sheet at prime visitor locations to gather key data and information regarding tourism experiences. In consultation with key stakeholder agencies (including the MTI, BTA, BHTA, NTHP), design and utilise a research service (e.g. the Systematic Marketing and Research Services Inc.) to incorporate in the monthly sample Systematic Household Survey key issues related to how people view tourism. This will provide baseline and ongoing data on key issues central to TMP success, and information on attitudes and perceptions of stakeholder groups, as well as factors influencing change. Data would be analyzed monthly and distributed to relevant governmental and non-governmental stakeholder organizations for use in design and monitoring of national and community programmes.

Target: Baseline and ongoing feedback from 10% visitors and 2% locals on their perspectives of tourism products and services starting in 2015

Lead Agency: Ministry of Tourism and International Transport

Cost Estimate: \$32,000 for survey design/promotion and \$7,000 per month ongoing assessment

Outcome: A responsive tool for understanding human and social impacts and visitor and public perceptions that will enhance tourism planning and impact assessment of tourism related programs.

Refer: Action 1.2-2 in Report III, Section 2.4

2 Enhance the visitor experience

Enhance existing and create new top-quality, market-sensitive products and services to improve the visitor experience, and thereby increase visitor spending.

I. Niche Markets

Strategy:

- 2.1 Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending.

Actions:

- a. Accessible Tourism

2.1a-1 Make Bridgetown More Accessible for the Disabled

Issue: Historic Bridgetown is currently not fully accessible, making it difficult for people with disabilities, and seniors to manoeuvre

Action: Assess existing public areas, sidewalks and entrances to commercial buildings within the city centre core from GPO to Nelson's statue, and determine what is required to enhance accessibility for disabled users to international standards. Coordinate with the initiatives in progress through the Ministry of Public Works

Target: Accessibility enhancements in place by end of 2015

Lead Agency: Ministry of Public Works (in collaboration with Ministry of Health and BCCI)

Cost Estimate: \$500,000

Outcome: Accessible amenities in place in Bridgetown in accordance with international standards; would also assist visitors to the city who are from the silver market demographic; enhanced amenities for pedestrians and consumers in the city centre

Refer: Action 2.1a-1 in Report V, Part 2, Section 3.2.1.1

b. Silver Market

2.1b-1 Develop a Silver Market Activities Package

Issue: Lack of adequate local activities / attractions to capture the interest of visitors aged 50+, currently a major demographic in the global travel market comprising individuals who generally have more time and money to devote to travel.

Action: Develop and market an activities package geared specifically for visitors aged 50+, which can include, year-round: appropriate entertainment and sporting events, game activities such as tournament bridge, organized shopping excursions, seminar series with appealing topics, customized keep fit programs, guided nature and heritage tours that are safe and easy to access, and opportunities to volunteer in local education and art;

Target: Activities package available by early 2015

Lead Agency: BHTA (in association with the BTA and BARP)

Cost Estimate: Brochure production and marketing programme for activities package \$100,000

Outcome: An 'Enjoy Barbados' package for seniors that would help to attract more individuals in this demographic for extended stays

Refer: Action 2.1b-1 in Report V, Part 2, Section 3.2.1.2

2.1b-2 Promote Visitor Accommodation to Support Longer Stay-overs

Issue: Shortage of a range of affordable rental accommodation options for stay-over visitors that are seeking longer stays, especially in the silver market demographic

Action: Identify a range of affordable accommodation properties that would appeal to long term stay-over visitors; create a database category on the BHTA and BTA online databases that offers this type of accommodation (for occupancy from 1 – 6 months) and develop a marketing plan to attract this target market

Target: Database and marketing plan completed by early 2015

Lead Agency: BHTA

Cost Estimate: Initial \$200,000 marketing budget

Outcome: Increase in occupancy rates and length of visitor stay-overs, with associated increase in visitor spend

Refer: Action 2.1b-2 in Report V, Part 1, Section 2.9

c. Culinary Tourism

2.1c-1 Develop Culinary Trails

Issue: Enhance the opportunities for visitors seeking unique and authentic travel experiences, including local cuisine and information on local foods and delicacies

Action: Develop a well coordinated system of culinary trails featuring restaurants/eateries that offer dishes made from local foods and produce. Prepare a printed and electronic trail guide that visitors can use to navigate the trails, including restaurant locations, cooking class opportunities, and places providing information on the history of Bajan cuisine. 'Farm to Table' meals showcased through programmes including the Slow Food Barbados initiative. Advertise the culinary trail program in food magazines and on travel websites

Target: Trail development and guides by end of 2015

Lead Agency: BHTA, in association with the BTA

Cost Estimate: \$50 per printed guidebook; annual advertising budget of \$150,000

Outcome: A 'Savour Barbados' program of culinary trails. Visitors will have the opportunity to sample, learn, and experience the island's full range of traditional dishes and epicurean cuisine featuring local foods and talent

Refer: Action 2.1c-1 in Report V, Part 2, Section 3.2.1.3

2.1c-2 Develop a Caribbean Culinary Institute

Issue: Locals wishing to become professional Chefs must study abroad, outside of the Caribbean and at high cost, to gain qualifications to international standards. Grant funding that would cover these costs does not meet the current local annual demand

Action: Develop a Caribbean Culinary Institute in Barbados, affiliated with a recognized international culinary organization, that trains local and regional candidates as fully qualified Chefs

Target: Planning phase by end of 2015; completion of institution by 2019

Lead Agency: UWI, in association with the BHTA

Cost Estimate: Budget dependent on whether a new building is required: infrastructure and state of the art equipment costs estimated at \$1,500,000.

Outcome: Increased opportunity for locals to attend culinary school without having to self-fund their culinary education abroad; increased numbers of locals trained as qualified Chefs; increased standards of excellence in the field of culinary arts

Refer: Action 2.1c-2 in Report V, Part 2, Section 3.2.1.3

d. Health and Wellness

2.1d-1 Develop Capacity in Health and Wellness Tourism

Issue: The absence of comprehensive data on health and wellness services, and lack of accreditation in the health and wellness industry in Barbados is an ongoing constraint to the expansion of the sub-sector

Action: Research and document the supply capacity in the health and wellness sub-sector, including facilities, human resources and existing standards; develop a holistic website of the services available in Barbados; introduce a system of accreditation and recognized standards for the industry to ensure customer confidence and satisfaction; provide training and skills development to industry personnel; develop effective packaging and promotion for the industry, including outreach mechanisms to Diaspora; draft national policy for the health and wellness sub-sector

Target: 2015

Lead Agency: Ministry of Health (in collaboration with the Paramedical Professional Council)

Cost Estimate: \$25,000 for website development; supply capacity research and documentation within existing public sector budgets; marketing \$50,000 per annum; skills training \$30,000 per annum for scholarships and exchanges

Outcome: Inventory compiled and existing studies and reports consolidated; integrated web portal created; health and wellness sector marketed in both a local and Caribbean context through regional cooperation; spas marketed to cruise passengers; increased awareness of the scope of the industry by tour operators and travel agents; task force created to draft national policy for the sub-sector

Refer: Action 2.1d-1 in Report V, Part 2, Section 3.2.1.4

e. Conference (MICE) Tourism

2.1e-1 Create an Investor Package for a Conference Hotel

Issue: There are inadequate conference facilities with adjacent accommodation to attract medium-sized conferences (up to 1,200 persons) and support the Conference Tourism (MICE) niche market. The variety of accommodation offered should support this niche market and associated current trends in global visitor accommodation preferences

Action: Prepare a business plan and investment summary / package targeted at local and international investors for an upscale, mid-sized (up to 750 room) hotel that can service conferences for up to 1,200 persons

Target: Mid-2015

Lead Agency: Barbados Tourism Investment Inc. (BTII)

Cost Estimate: \$500,000

Outcome: Investor packages for a mid-sized (up to 750 room) conference hotel incorporating state-of-the-art presentations that can be customized to various types and levels of investors both locally and internationally.

Refer: Action 2.1e-1 in Report V, Part 2, Section 3.2.1.5

2.1e-2 Further Develop the MICE Product Club

Issue: Initiatives to target the MICE market have been ad hoc and sporadic

Action: Provide resources to strengthen the MICE Product Club to carry out its mandate and to develop strategic and systematic approaches for promoting what Barbados has to offer to the MICE market. Strategies include educating key stakeholders on the potential value of the MICE market for Barbados. Undertake training and related development activities for Marketing and Operations officers in Barbados hotels so they are better informed about the needs of the MICE market (from high-end to budget groups). Activities will also include identifying incentives for the MICE market and support participation of key stakeholders in MICE related international trade shows

Target: Increase visitors for MICE activities from 2% to 6% by 2016

Lead Agency: BHTA supporting the MICE Product Club

Cost Estimate: \$250,000

Outcome: Increased capacity of MICE Product Club to undertake initiatives to grow the MICE market in accordance with its strategic goals. Key stakeholders and partner agencies better positioned to attain MICE market requirements

Refer: Action 2.1e-2 in Report V, Part 2, Section 3.2.1.5

f. Sports Tourism

2.1f-1 Create the Barbados Sports Tourism Association

Issue: There are 42 different sporting associations in Barbados, each in need of funding support in order to fully develop and promote sports in Barbados. It is challenging for them to individually raise enough capital to fund and maintain sporting facilities, equipment, scholarships, etc.

Action: Create a Barbados Sports Tourism Association that will represent all sporting bodies at all levels in Barbados; develop with the Ministry of Culture, Sports and Youth the Association's policy framework to define membership, roles and scope of the Association; monitor and rationalize the annual scheduling of sporting events; generate a sporting fund enterprise through member subscriptions and sponsorships; market and develop sports in Barbados; ally with local, regional and international bodies to generate partnerships and mutually beneficial agreements toward the promotion of sports tourism in Barbados

Target: 2015

Lead Agency: BTA in association with the National Sports Council

Cost Estimate: Seed funds for an NGO to be determined

Outcome: The Association would help the sporting bodies to lobby funds locally, regionally and internationally to help develop the sports sector in Barbados; increase in awareness and participation in local sports; stimulating greater participation in sports; maximizing sporting opportunities and revenue streams that support the development of local athletes

Refer: Action 2.1f-1 in Report V, Part 2, Section 3.2.1.6

2.1f-2 Develop International Partnerships with Key Sports Personalities

Issue: Barbados needs to capitalize on opportunities to link with international sports and sports personalities that have strong ties to the island to increase its visibility abroad

Action: Develop an online contest to help Barbados build engagement and followings around social media touch points linked to international sports personalities who have strong links to Barbados; develop a Barbados Night of ice hockey at Scotiabank Place in Ottawa, linked to a local sports bar, with a night of contests, prizes and giveaways utilizing Barbados' ownership of online streaming of broadcasts by Hockey Night in Canada; develop an annual sports contest to win a fan trip to Barbados, to include an evening at a local sports bar with sports alumni/personalities; develop on-air commercials on major sports TV networks in North America, tapping into their major viewing audiences

Target: Early 2015

Lead Agency: BTA

Cost Estimate: Dependent on linkages established; \$10,000 per fan trip in winter season

Outcome: Greater exposure for and interest in Barbados as a destination; engaging millions of televised sporting events' viewers, especially in a prime market such as Canada; establishing beneficial sports tourism linkages through sports personalities abroad that have strong ties with Barbados; increasing the profile of Brand Barbados in a primary tourism market; Barbados differentiating itself from competing warm weather destinations through sports linkages abroad

Refer: Action 2.1f-2 in Report V, Part 2, Section 3.2.1.6

g. Diaspora

2.1g-1 Develop a Diaspora Philanthropy Programme

Issue: The potential financial contribution to the tourism sector by members of the Diaspora is not fully tapped

Action: Develop a not-for-profit agency with a formal institutional relationship with the Prime Minister's Office that spearheads and coordinates a philanthropy program for members of the Diaspora; develop a program that focuses on fund raising from members of the Diaspora that links tourism goals with these philanthropic resources; identify appropriate fund raising events that target the Diaspora, and market these locally and abroad

Target: 2015

Lead Agency: Not-for-profit agency (in collaboration with the BTA)

Cost Estimate: \$100,000 for agency establishment and \$50,000 minimum marketing budget per annum

Outcome: Agency established to raise and manage funds from the Diaspora, with funds channeled to tourism and community projects; stewardship of the island and greater involvement in helping to fund some of its national projects by members of the Diaspora; increased funding support from members of the Diaspora

Refer: Action 2.1g-1 in Report V, Part 2, Section 3.2.1.7

h. Domestic Tourism

2.1h-1 Develop a Framework to Enhance the Domestic Tourism Industry

Issue: Residents of Barbados lack holistic information on the opportunities to vacation 'at home' as an alternative to travelling abroad

Action: Incorporating the Staycation Barbados Programme, develop an effective framework to enhance the domestic tourism industry; create an inventory of all providers of domestic tourism accommodation and ancillary activities, and develop special packages that include rooms, meals, activities and attractions for the local market; market the inventory on relevant websites; promote onshore and offshore recreational activities with special rates for the domestic visitor participating in the programme

Target: 2015

Lead Agency: BHTA (in collaboration with the BTA)

Cost Estimate: \$25,000 per annum for marketing costs

Outcome: Enhanced promotion of special package rates for locals inclusive of attractions and restaurants; increase in local visitor spend; increased tourism awareness for locals

Refer: Action 2.1h-1 in Report V, Part 2, Section 3.2.1.8

II. Built HeritageStrategy:

2.2a Improve and enhance the inventory of built heritage attractions and their associated services to entice visitor interest and promote increased visitor spending.

Actions:**2.2a-1 Rejuvenate Historic Speightstown as a Heritage Centre**

Issue: Speightstown needs rejuvenation. Its unique character is based on an architectural heritage dating from colonial times. Many of the town's buildings have declined over the last 2-3 decades due to neglect and lack of funding for maintenance. The realignment of the main highway has led to a reduction in visitor traffic through the town centre; Arlington House, now a museum, is the only building which has been restored recently

Action: Create incentives for owners of private properties through provisions of the Tourism Development Act and other tax concessions; consider public/private sector partnerships; restore the public bus service in Speightstown and create a shuttle loop from the Town's Bus Terminal; redevelop/refurbish the old Post Office building as a Creative Arts Centre and information hub for cultural heritage activities; repair jetty; select other prime areas in need of refurbishment and generate cost estimates; install new street lighting and enhance signage showing heritage sites and other attractions; improve safety and security for pedestrians by further developing streetscape and sidewalks

Target: Completion by 2022

Lead Agency: BTII (in collaboration with MTI, BNT)

Cost Estimate: \$15 million to \$20 million

Outcome: Increased visitor numbers; enhanced physical environs and preservation of architectural heritage; improved facilities for commercial and retail services; accommodation for street vendors; increase in commercial activity for all businesses; increase in economic activity will benefit surrounding communities.

Refer: Action 2.2a-2 in Report VI, Section 4.8; see also Action 8.1-6 in Report V, Part 1, Section 1.1.8.1

2.2a-2 Refurbish Morgan Lewis Mill and Environs

Issue: Morgan Lewis Mill is the only remaining functional windmill in Barbados and the eastern Caribbean but is in a very fragile condition that requires immediate maintenance and restoration to preserve the integrity of this key attraction

Action: Develop a maintenance programme to improve access to the Mill and safety for the public; immediately restrict access of birds entering the mill; develop a facility featuring interpretive exhibits, and include a souvenir shop and café with a range of cultural products based on the sugar story; improve vehicular and pedestrian access and circulation, and the location of a picnic area; provide adequate vehicular parking

Target: Commencement in 2014 with completion by 2017

Lead Agency: Barbados National Trust

Cost Estimate: \$1.2 million

Outcome: Restoration of a prime tourism attraction for Barbados and the Caribbean; improved tours and interpretation related to the story of sugar and rum; heightened awareness of local heritage

Refer: Action 2.2a-3 in Report VI, Section 8.7

2.2a-3 Assess Heritage Properties

Issue: Lack of comprehensive information on heritage sites and attractions in Barbados

Action: Conduct an assessment of existing heritage properties throughout Barbados; develop an inventory with a focus initially on historic sites, historic towns and the UNESCO World Heritage Property; identify those properties in need of restoration or refurbishment; prepare shortlist of endangered properties and priority work programme for revitalization with a view to enhancing the sustainable tourism product

Target: End of 2015

Lead Agency: Barbados National Trust in collaboration with the World Heritage Committee

Cost Estimate: \$400,000

Outcome: Heightened awareness of private and public heritage properties and linkage with tourism sector; enables prioritization of work programme to target those properties on the critical list in need of restoration

Refer: Action 2.2a-4 in Report VI, Section 8.7

2.2a-4 Revitalize Historic Oistins as a Heritage Centre

Issue: The historic town of Oistins needs revitalization with improved town centre management. The Bay Garden has been subject to neglect in recent years with increasing public health concerns caused by challenges related to inadequate management. Its appeal as a major attraction needs to be strengthened and safeguarded

Action: Locate and provide interpretation of the old historic fort; convert disused government buildings to create a new Heritage Centre with interpretive displays; improve the public amenity along the waterfront; develop a boardwalk to connect Oistins to Enterprise beach with kiosks for community retail activities; remove dilapidated boats and provide additional lighting to enhance public safety; improve drainage in craft vending areas by resurfacing service delivery route; reconfigure bus terminus layout to provide additional vehicle parking; rationalize management of solid waste and improve the amenity of the area

Target: Project in phases with completion by 2022

Lead Agency: BTII

Cost Estimate: \$4.5 million

Outcome: Improved heritage aspects of Oistins. Improved sewage treatment/management and improved bathroom facilities. Enhanced waterfront environs and public amenities for increased visitor satisfaction and community activity

Refer: Action 2.2a-5 in Report VI, Section 4.9

Strategy:

- 2.2b The UNESCO designated World Heritage Site of Historic Bridgetown and its Garrison is a critically important part of the Barbados cultural heritage that needs to be further developed to attract visitors to the capital and its environs, thereby revitalizing Bridgetown and promoting increased economic activity.

Actions:

2.2b-1 Maintain the UNESCO World Heritage Designation

Issue: The need to maintain the UNESCO World Heritage designation for Historic Bridgetown and its Garrison

Action: Establish a multi-stakeholder group involving the wide range of agencies involved in maintaining and promoting the UNESCO designation, under the aegis of the Ministry of Culture, Sports and Youth, with the sole responsibility being maintenance of the designation and pursuing fundraising efforts

Target: 2014 and ongoing

Lead Agency: Ministry of Culture

Cost Estimate: Existing budgets

Outcome: Establishment of a professional team mandated to focus on safeguarding the designated UNESCO site; improvement in the quality of the World Heritage Property through planned maintenance, preservation and restoration of historical buildings; developing the interpretation programme in accordance with international standards

Refer: Action 2.2b-1 in Report VI, Section 5.8

2.2b-2 Develop the Nidhe Israel Synagogue and Its Historic Environs

Issue: It is critical to sustain the cultural, historic and heritage values of all key properties within the UNESCO World Heritage site in Barbados. The Nidhe Israel Synagogue and environs is one such site, with significant potential to contribute to heritage tourism activities. Dating back to 1654, it is considered the oldest synagogue in the Western Hemisphere. On the site, there is an original ritual bath (Mikvah) which may pre-date the synagogue, and a Museum with interpretive exhibits that describes the island's Jewish history and contribution to the development of Barbados

Action: Continue development and preservation of the site, including additional archaeological excavation, extension of the existing cemetery, creation of a meeting hall, development of a commemorative pavilion on the site of Codd's House, restore historic buildings on James Street; and convert the existing car park to accommodate tour buses. Proposed expansion of the existing site to include lands bounded by Coleridge and James Streets

Target: Project completion by the end of 2018

Lead Agency: Public-private partnership between the Barbados Jewish Community, Ministry of Culture, Sports and Youth, and Barbados National Trust

Cost Estimate: Private sector funded

Outcome: A major portion of Bridgetown developed as a prime heritage tourism attraction within the island's UNESCO World Heritage site; the Nidhe Israel Synagogue and environs developed into a prime tourism site with commemoration of Codd's House site

Refer: Action 2.2b-2 in Report VI, Section 7.7

2.2b-3 Enhance the Bay Street Corridor

Issue: The linkage between Historic Bridgetown and its Garrison along the Bay Street corridor is weak. The character of the area diminishes on leaving Bridgetown travelling southward along Bay Street

Action: Create tax incentives for property owners along the corridor; discourage major developments which may obliterate coastal views; retain all 'windows to the sea' and beach access points along Bay street; rationalize the need for sidewalks and pedestrian crossings; enhance signage and public amenity at Carlisle Bay and Browne's beach; promote upgrading of existing buildings through a programme of refurbishment and restoration; consider the proposed Pierhead Marina project proposal

Target: Completion by 2018

Lead Agency: BTII

Cost Estimate: \$1,250,000

Outcome: Enhancement of the existing urban environs on approach to the Garrison area via Bay Street, increased awareness of the World Heritage Property; preservation of buildings of architectural or historic significance.

Refer: Action 2.2b-3 in Report VI, Section 5.8

III. Cultural Heritage

Strategy:

- 2.3 Develop and promote the island's cultural heritage and its associated services, to increase its visibility to visitors, arouse their interest, and promote increased visitor spending.

Actions:

2.3-1 Develop a 'Discover Barbados' Centre at the Bridgetown Port

Issue: There is an urgent need for a major multi-use centre at the Port for locals and visitors to experience the history and cultural heritage of Barbados. The attraction should be on par with that of similar ports, such as those in Jamaica.

Action: Develop a 'Discover Barbados' Centre at the Port through the Sugar Point project to serve as an educational and entertainment resource for all residents and visitors. Include a presentation on the story of sugar and rum production in Barbados, and cultural and entertainment events, e.g. Crop Over

Target: 2018

Lead Agency: Barbados Port Inc.

Cost Estimate: \$30 million

Outcome: The Sugar Point project should meet the requirements of this recommended action and provide an opportunity for the major cruise market to discover the history and culture of the island; a revenue generation centre; an educational resource for all age groups; a focus on authentic Barbados that delivers interpretive experiences for locals and visitors; a prime multi-use entertainment centre

Refer: Action 2.3-1 in Report VI, Section 4.1

2.3-2 Develop a New Sugar Museum

Issue: There is a need for new heritage attractions to enhance the destination character of Barbados. The existing sugar museum at Portvale Factory has been closed for several years. The majority of the island's sugar factories, once a significant component of Barbados' agricultural industry, have become non-functional, with the exception of Portvale. The story of sugar and rum should be showcased as an important aspect of the island's heritage since colonization

Action: Conduct an assessment of the existing Sugar Cane Breeding research station and property at Groves, St. George and develop a concept plan for the creation of a Sugar Museum and interpretive centre with interactive media focusing on the science of sugar cane. Retain the Cotton Ginnery retail operation at Groves as an associated attraction. Promote the Museum as a guided package tour for visitors and locals

Target: Project completion in 2017

Lead Agency: Ministry of Agriculture

Cost Estimate: \$10 million

Outcome: Heightened awareness of the story of sugar and rum as a major part of the heritage of Barbados, and providing another key visitor attraction in a landmark location.

Refer: Action 2.2a-1 in Report VI, Section 4.5

2.3-3 Develop a 'Fight for Freedom' Interpretive Centre

Issue: There is no facility where the Barbados story of slavery and emancipation is presented and interpreted for locals and visitors, including the Diaspora

Action: Support the Barbados Museum and Historical Society's objective to acquire lands at Newton, Christ Church to build a new interpretive centre through further concept development. Develop terms of reference for a planning study to include feasibility, detailed design, costing, financing, education programming, impacts and mitigation, and operations planning. Implement the design at the intended site

Target: Planning and design phase completed by 2016; construction completed by 2018

Lead Agency: Barbados Museum and Historical Society (in collaboration with MTI)

Cost Estimate: \$35 million

Outcome: A 'Fight for Freedom' Interpretive Centre which encompasses the story of Slavery, Freedom and Emancipation; an educational resource for children and all age groups; would deliver an authentic and interpretive experience that visitors are seeking; a revenue generation centre; increased training of staff linked with improved quality assurance standards will provide greater visitor satisfaction; provides a significant opportunity to involve surrounding communities

Refer: Action 2.3-2 in Report VI, Section 4.2

IV. Natural Heritage

Strategy:

2.4 Conserve selected natural environment attractions and associated services and promote their sustainable use within the BVE for the enjoyment of all visitors and residents.

Actions:

2.4-1 Create Natural Heritage Tour Packages

Issue: Lack of awareness of, and focus on the natural heritage of Barbados. National Parks and other natural heritage sites have the potential to become prime tourist attractions. The east coast of Barbados is a unique natural attraction that needs to be promoted as one of the island's key natural sites, along with other sites that feature the island's biodiversity

Action:

- Develop tour packages highlighting the natural heritage of Barbados; tours to incorporate 3 biophysical categories: Coastal/Marine, Terrestrial, and Subterranean; develop interpretive hiking trails in terrestrial sites that don't contain endangered habitats; utilise existing natural sites as part of the tours
- Develop tours in the Barbados National Park that feature sites related to the historical and natural development of the Scotland District; provide tour guides that are trained in ecology/geology; develop interpretive signage at scenic points of interest along the route

Target: 2016

Lead Agency: Natural Heritage Department

Cost Estimate: Trail planning and design approximately \$40,000 per trail and interpretive signage at \$2,000 / sign; marketing budget of \$50,000 / annum; tour bus rentals \$700 / tour; guides at \$800 / hour

Outcome: Increased awareness of the biodiversity of Barbados; greater appreciation of the natural heritage of Barbados with a focus on the conservation of its natural resources; increased awareness of the Barbados National Park zone and its unique natural and geological features

Refer: Action 2.4-1 in Report VI, Section 8.6

2.4-2 Develop an Eco-Centre in the Scotland District

Issue: The Scotland District is underutilized as a natural heritage site with supporting health and wellness activities. This region can provide greater public services and benefits, and improve the public well being while increasing environmental awareness

Action: Develop an Eco-Park and Visitor Centre within the east coast Protected Area; include the promotion of indoor and outdoor spaces and programmes for environmental awareness and well-being; develop a Visitor Centre with interpretive exhibits that describe the biodiversity of Barbados, including the Scotland District and what makes it unique, a restaurant that serves healthy cuisine based on locally grown foods, and a programme of activities that focus on well-being; provide hiking/biking trails and bicycle rentals; establish linkages with adjacent sustainable farming operations that enable Farm-to-Table linkages; involve local communities to encourage sustainability of the Park; ensure ample parking and accessibility for the disabled

Target: 2018

Lead Agency: Natural Heritage Department

Cost Estimate: Use Crown lands for development of the Eco-Park and Visitor Centre; renovate an existing building/plantation/old factory for the development of the Visitor Centre with exhibits/amenities estimated at \$3 million; trail development and design \$30,000 per trail

Outcome: A new natural heritage attraction developed on the East Coast with a focus on environmental education, health & wellness, and sustainable living; greater appreciation of Barbados' natural heritage

Refer: Action 2.4-2 in Report VI, Section 8.6

3 Change the Tourism Mindset

Strategy

- 3.1 Enhance leadership capacity to promote visionary direction, energy, and focus among the diversity of stakeholders within the BVE.

Actions:

3.1-1 Enhance Tourism Stakeholder Collaboration

Issue: Inadequate communication, coordination, and collaboration (CCC) among key tourism stakeholders

Action: Gain the support of the Minister and relevant members of the Political Directorate, as well as organizational leaders to discuss the value and importance of developing better CCC between agencies, and gain commitment to take urgent action to promote this as a critical modality for TMP implementation. Organize a forum (symposium / conference / workshop) to facilitate an innovative process for sharing mandates, priorities and activities of each agency, and also to review areas of overlap, similarity, and gaps. Identify benefits, constraints and blockages to more effective CCC and ways of overcoming these, and determine processes for ongoing collaboration and follow-up

Target: Improved mechanisms and process for CCC by mid 2015

Lead Agency: MTI

Cost Estimate: \$20,000

Outcome: Mechanisms established to foster and facilitate more effective communication and collaboration between the major public and private sector stakeholder agencies to maximize limited human and financial resources

Refer: Action 3.1-1 in Report III, Section 3.9

3.1-2 Align Key Tourism Sector Institutions

Issue: Poor synergies within and between key public sector institutions in the Tourism sector

Action: Undertake a process to align key Tourism institutions (MTI, BTII and BTA). Develop communication strategies to gain the support of leaders and employees of the key institutions regarding the value of proposed restructuring and its implications for their ongoing programme activities. Undertake organizational reviews / assessments to clarify job positions and competencies required for restructured organizational roles and mandate. Develop and implement a holistic organizational change and development process, to gain staff buy-in to new or changed positions and for undertaking more strategic approaches to create value for the sector. Establish mechanisms for increased collection, evaluation and analysis of data on the outcomes and results of programmes and initiatives to monitor action taken and facilitate adjustments

Target: Streamlined structures and processes and improved synergies for primary tourism organizations by the end of 2016

Lead Agency: MTI

Cost Estimate: \$150,000

Outcome: Streamlined tourism organizations under the Ministry of Tourism and International Transport, facilitating greater synergies in the tourism sector, clear differentiation between the (continuing) role of the BTA for marketing and an expanded role for the BTII in product development. The Ministry develops and maintains its strategic mandate, focusing on research and policy

Refer: Action 3.1-2 in Report III. Section 3.9

3.1-3 Enhance Strategic Leadership in Tourism

Issue: Poor synergies within primary tourism stakeholder organizations (MTI, BTA, BHTA, BTII)

Action: Utilize outcomes of organizational assessment to establish the “burning platform” for a more strategic approach of key tourism stakeholders. Secure the buy-in from the political directorate and Board leadership, identifying the benefits to each organization. Involve leaders (Board and Senior Management) of key Tourism Stakeholders in identifying drivers and inhibitors (including internal resistance) to enhancing strategic approaches for their organization, and undertaking a systematic but simple process for implementation, monitoring and follow-up on commitments made

Target: Leadership in key tourism stakeholders to develop cohesive strategic approaches for their organizations by mid 2015

Lead Agency: MTI (with support of external change management consultant)

Cost Estimate: \$100,000

Outcome: Enhanced leadership and strategic approaches adopted by key tourism organizations

Refer: Action 3.1-3 in Report III, Section 3.9

3.1-4 Strengthen Leadership Capacity in Hospitality Organizations

Issue: Senior and middle level leaders and managers in key hospitality organizations (hotels, restaurants, tour companies) often lack performance management skills that foster employee engagement and productivity

Action: Develop targeted executive development and training programmes for senior and middle managers within hospitality organizations and tourism institutions to strengthen leadership and management skills. Integrate components on employee engagement and performance management that foster competency-based approaches to recruitment and job assessment, and standards-based approaches to operational management. Utilize existing resources, including the TVET Employment Training Fund and the CTO Hospitality Assured programme, to facilitate training and development activities

Target: Development and training of 1,000 leaders and managers by 2018

Lead Agency: BHTA

Cost Estimate: \$750,000 of which a portion will be sought from the TVET ETF

Outcome: Improved leadership capacity at senior and middle levels of hospitality organizations enabling them to function more effectively and improve organizational performance

Refer: Action 3.1-4 in Report III, Section 1.5

Strategy:

- 3.2 Increase awareness activities and provide formal and informal education opportunities to foster changes in perceptions, attitudes and behaviours within the Barbadian populace towards the BVE.

Actions:

3.2-1 Develop a Tourism Awareness Campaign for all Target Groups

Issue: Greater tourism awareness is needed in all target groups in Barbados, including politicians, public servants, private sector, stakeholders, educators, students, clergy, and the general public

Action: Retain TMP consultants to make a special presentation to Cabinet regarding the current state of tourism in Barbados and the recommended actions developed in the TMP over the next 10 years. Design and deliver a media / tourism awareness campaign to all other target groups that focuses on the visitor economy, their roles in it, and the opportunities it presents; this can form part of the initiative described in Action 3.2-3 regarding a tourism awareness caravan and would involve youth in tourism activities; sensitize youth to existing and emerging opportunities in the tourism sector via public fora

Target: 2014

Lead Agency: MTI (in collaboration with BTA, BHTA and BTII)

Cost Estimate: \$100,000 for initial design and delivery

Outcome: Increased tourism awareness in all target groups about the importance of the visitor economy

Refer: Action 3.2-1 in Report III, Section 4.6

3.2-2 Enhance Inter-Agency Coordination in Hospitality Training Organizations

Issue: Inadequate coordination, information sharing and articulation between the providers of tourism education and training, as well as limited opportunities for internships and practical skills development for students

Action: Organize a workshop for training organizations and other key stakeholders to review the findings of the Manpower Audit conducted by the Ministry of Labour, Social Security and Human Resource Development of the tourism sector. Analyze its implications for current and emerging training needs and job requirements. Determine an ongoing mechanism to foster coordination and collaboration, and credit articulation between training institutions that provide tourism training, education and development. Collaborate with hospitality organizations to identify opportunities and establish protocols for internships. Develop linkages with, and provide support to, the BHTA STEP programme and other related educational or tourism related programmes

Target: Mechanism for coordination of hospitality training, education, and development established by end of 2015

Lead Agency: MTI (in collaboration with Ministry of Education and Ministry of Labour)

Cost Estimate: \$30,000 for collaborative processes and \$200 per student internship

Outcome: Greater synergy between tourism education and training institutions, facilitating better informed student choices and movement between programmes, and expanded practical training to enhance the quality of graduates

Refer: Action 3.2-2 in Report III, Section 1.5

3.2-3 Develop a High Visibility Tourism Awareness Caravan

Issue: No systematic process for informing the general public of the value of tourism and the visitor economy to their lives and livelihoods

Action: Collaborate with the Barbados NTHP and STEP programmes to develop state-of-the-art exhibits, multi-media presentations using ICT and social media in innovative ways to promote a consistent tourism message to diverse target groups. Convert a bus to a high visibility tourism awareness caravan, utilising alternative energy sources for powering exhibits, and including hands-on activities inside and outside the caravan. Caravan should be available to schools and at various community functions / exhibitions where there are captive audiences. Exhibits will sensitize the general public and targeted groups on how they benefit from tourism and the visitor economy, spotlighting business opportunities in the tourism sector, and the positive roles each individual can play as a host to our visitors / guests.

Target: Caravan functional by mid 2015, reaching minimum of 20,000 persons per year

Lead Agency: MTI (in collaboration with BHTA)

Cost Estimate: \$1 million

Outcome: Improved public awareness of value and benefits derived from the visitor economy

Refer: Action 3.2-3 in Report III, Section 4.6

4 Develop Airlift Capacity

Strategy:

- 4.1 Increase airlift capacity from traditional source markets and new origin markets, and improve the visitor experience at the Grantley Adams International Airport.

Actions:

4.1-1 Obtain Category 1 Status for GAIA

Issue: Barbados has an 'Open Skies' Agreement, but it cannot be implemented without obtaining Category 1 status which has been pursued over the past 15 years. If Barbados had Category 1 status, it could fully exploit the 'Open Skies' Agreement

Action: Following the ICAO USOAP Audit in 2013, determine the requirements and finalize arrangements to obtain Category 1 status through the FAA to immediately make Barbados more attractive to new airlines and encourage investment. In addition, it will be necessary for GAIA to enhance its customer service and update training for Security, Immigration, Customs and other relevant areas. Government to provide the resources necessary to meet Category 1 status and to file the application

Lead Agency: MTI

Cost Estimate: \$1.3 million

Outcome: Achieving Category 1 status confers a number of benefits in addition to increasing marketability, including the opportunity to 'code share' with US airlines. Obtaining Category 1 status will greatly enhance the perception of Barbados as a safe destination and increase its attractiveness to airlines

Refer: Action 4.1-1 in Report V, Part 1, Section 1.2.6

4.1-2 Construct Air Bridges at GAIA

Issue: The lack of air bridges at GAIA can lead to negative visitor satisfaction levels, especially for passengers who may have difficulty disembarking via a stairway (e.g. the elderly and passengers who are physically challenged), and during inclement weather when disembarkation can be challenging

Action: Plan, design, cost and build air bridges for arrival gates at GAIA

Target: Planning and design phase in 2015; construction completed by end of 2016

Lead Agency: MTI (in collaboration with GAIA)

Cost Estimate: \$3 million

Outcome: A more positive and comfortable arrival experience for passengers disembarking aircraft at GAIA; improved arrivals infrastructure similar to most modern airports

Refer: Action 4.1-2 in Report V, Part 1, Section 1.2.6

5 Improve Financial Performance

Strategy:

- 5.1 Through a better knowledge/information base, improve the distribution of benefits, investment sourcing / opportunities, business development, and understanding of the economic impacts, linkages and leakages within the economy, and support local production to reduce import dependency.

Actions:

5.1-1 Mitigate Obstacles to Tourism Investment

Issue: There is an urgent need to re-invest in the tourism sector in order to lead Barbados' economic recovery. Lack of financial means to invest in tourism and implement the recommended TMP strategies can be a major constraint facing Barbados

Action: Identify, prioritize, and mitigate obstacles to tourism investment in Barbados, including the introduction of alternative means of financing TMP strategies. Develop a list of investor opportunities in tourism and circulate widely. Develop a fast-track process for high priority initiatives that have investor support. Develop a unified training programme for staff in relevant agencies to better assess and assist potential investors; introduce more flexible and innovative financial products. Secure Government commitment to provide timely budgetary and capital support to relevant Ministries, departments and lending companies (e.g. FundAccess). Develop informational materials for investors, provided on a website, that describe the delivery framework, improvements and investment opportunities in Barbados, and lead investors through the process of seeking funding or assistance

Target: Commence in 2014 and establish improvements by 2017

Lead Agency: BTII (in collaboration with BIDC, Invest Barbados and Central Bank)

Cost Estimate: Existing budgets

Outcome: A more streamlined delivery framework and approval process for finance, support services and development approvals for tourism investors to enable them to pursue available opportunities; accurate information on potential investment opportunities; more available credit sources, with lending terms better suited to the tourism sector; more flexible and innovative financial products and funding mechanisms; better trained agency staff to assist potential investors; greater number of qualified investors identified and served, more timely support received by investors; more successful pursuit of investment opportunities and improved satisfaction levels among investors; potentially billions of dollars in tourism investment, development and services that provide employment and better serve visitors and the visitor economy; higher levels of visitation and spending due to increased investment

Refer: Action 5.1-1 in Report IV, Section 3.4.3; see also Action 6.1-3

5.1-2 Identify Opportunities from the Visitor Economy Supply Chain

Issue: There are many items currently imported to supply the tourism industry that could be supplied locally to reduce the extent of the leakages out of the Barbados economy

Action: Retain economic consultants to design and conduct a study of the Visitor Economy supply chain. Identify all the products along the supply chain, sources of goods and services, degree of production in Barbados, need for imports, import regulations, quantities produced at home, quantities imported, quality adequacy of the home products, local product prices and import prices, and assurance of supply. Use results to produce an opportunity's handbook to provide to organizations, individuals and the private sector to enhance production from existing firms and identify new business opportunities. Identify where resources from Government & agencies might be devoted to assisting with more production in Barbados

Target: 2015

Lead Agency: MTI in collaboration with Central Bank, BTII, BSS and BHTA

Cost Estimate: \$800,000

Outcome: More local production of products and services; stimulation of spending, employment growth and creation; growth of the Visitor Economy; reduced dependence on imports, thereby reducing significant foreign exchange leakages; identified new and existing business opportunities; new opportunities for youth to get into business; greater visitor satisfaction through more opportunity to purchase local products

Refer: Action 5.1-2 in Report IV, Section 3.3.2

5.1-3 Establish a Philanthropic Foundation

Issue: There is an urgent need to raise funds to facilitate the implementation of tourism projects, and there is significant opportunity to raise these funds from the private sector, including the Diaspora

Action: Establish a philanthropic foundation (One Barbados Foundation) independent of Government to be operated and controlled by a volunteer Board appointed from stakeholders and other members of the public; enact legislation allowing tax exemption for contributions to the Foundation; establish project criteria and a fund management system; retain the services of a fund development specialist to prepare the fund development plan and feasibility study for the Foundation

Target: 2015

Lead Agency: TMP Consulting Team for initial set-up; then the volunteer Board of the Foundation

Cost Estimate: \$200,000 to retain the fund development specialist; seed funding for the Foundation of \$1 million from Government

Outcome: The creation of an effective, sustainable Foundation that will raise funds from a broad base for the implementation of tourism projects; increased financial capability to implement more tourism projects in Barbados; a strong visitor economy

Refer: Action 5.1-3 in Report IV, Section 3.4.3

5.1-4 Retain a Professional Grant Writer

Issue: There are many grants and financing programmes from a wide range of international organizations that can help fund tourism projects in Barbados. The process of identifying and applying for these programs can be tedious

Action: Retain a full-time, experienced professional with specific expertise in grant writing. Draft the terms of reference and secure the finances to fund the position

Target: 2015

Lead Agency: BTII (in collaboration with the BHTA)

Cost Estimate: Salary for grant writer of \$200,000 per annum

Outcome: Full-time professional grant writer hired; substantial increase in funding to help grow the visitor economy and finance tourism projects, including those recommended in the TMP

Refer: Action 5.1-4 in Report IV, Section 3.4.3

5.1-5 Develop the Local Souvenirs Market

Issue: A full range of authentic, locally made products, especially souvenirs and gifts that would appeal to visitors, is not available. This is a lost opportunity for the tourism sector and visitor economy

Action: Initiate a study of souvenir and gift products that are in demand by visitors and locals; identify those that are not produced in Barbados, but can be. Create awareness of these opportunities with the private sector. Develop programmes to enhance and stimulate the local production of these goods

Target: 2015

Lead Agency: BMA (in collaboration with BIDC)

Cost Estimate: \$250,000

Outcome: Identification of locally made souvenir and gift products desired by visitors and locals and increased production of same; business development; employment creation; greater appreciation of locally made products

Refer: Action 5.1-5 in Report IV, Section 3.3.2

5.1-6 Strengthen Cross-Sectoral Linkages with Tourism Across Barbados

Issue: Cross-sectoral linkages in the tourism sector need strengthening to increase the distribution of the economic impacts of tourism

Action: Create an inter-agency working group to identify, prioritize and adopt measures to strengthen cross-sectoral linkages with tourism across Barbados by working with sector representatives from financial services, international business, health, education, agriculture, construction, town planning, culture, environment, etc.

Target: 2014

Lead Agency: MTI (in collaboration with Central Bank of Barbados)

Cost Estimate: Existing budgets

Outcome: Increase in economic impacts of tourism and their distribution; a stronger visitor economy

Refer: Action 5.1-6 in Report IV, Section 3.3.2

6 Modernize Accommodation and Improve the Performance of the Sector

Strategy:

- 6.1 Improve infrastructure, products and services within the accommodation sector and enhance its overall financial performance.

Actions:

6.1-1 Strengthen Accommodation Quality Assurance

Issue: 'Tired' hotel plant

Action: Develop a public sector infrastructural review programme for visitor accommodation, inclusive of physical plant audits that detail key elements required to maintain a desired standard within the accommodation sector based on international norms (e.g. AAA diamond rating system). Technical advice provided to hoteliers on how to improve infrastructural standards, including recommendations from the CHENACT project.

Target: Improved physical standards of the hotel plant by end of 2015

Lead Agency: Ministry of Transport and Works Architectural Division

Cost Estimate: Public sector staff costs will vary according to property size and the existing standard of each facility; within existing budgets

Outcome: Enhanced/upgraded hotel plant

Refer: Action 6.1-1 in Report V, Part 1, Section 2.9

6.1-2 Mandate Registration and Develop Accurate Accommodation Supply Database

Issue: There is a lack of accurate, comprehensive data on the available room supply for all visitor accommodation types, and not all accommodation properties are registered with the BTA

Action:

- Mandate the registration of all visitor accommodation properties to enable an accurate database of room supply for the sector
- Establish a dedicated department in the Ministry of Tourism that develops an updated database of room supply for all accommodation types via an annual inventory of *registered* room supply by international classification relative to type, standard, and location
- Include all planned, approved, and under construction accommodation projects according to location, size, standard, and timing
- Data should be publicly available to enhance transparency and promote investment in the accommodation sector.
- Link with Actions 1.1-2 and 1.1-3

Target: Completed registered room supply database by the end of 2015

Lead Agency: Ministry of Tourism and International Transport

Cost Estimate: \$250,000

Outcome: Consolidation of room supply data in one central department; improved data research and collection that will help to inform forward planning in the sector

Refer: Action 6.1-2 in Report V, Part 1, Section 2.9

6.1-3 Create an Office of Tourism Accommodation

Issue: The process of registering and licensing accommodation properties is too burdensome

Action: Create a new, centralized public sector unit, the Office of Tourism Accommodation, that would coordinate all the necessary applications/documentation required by the relevant public sector departments towards the licensing and registration of all visitor accommodation properties

Target: New unit in operation by the end of 2015

Lead Agency: BTII (in collaboration with the BTA)

Cost Estimate: To work within existing budgets and staffing

Outcome: A coordinated, streamlined system of licensing and registration of all visitor accommodation properties relative to their statutory obligations within one centralized location to significantly enhance efficiencies in the sector

Refer: Action 6.1-3 in Report V, Part 1, Section 2.9; see also Action 5.1-1

6.1-4 Green the Accommodation Sector

Issue: The accommodation sector needs to operate in accordance with Barbados' sustainable development goals and objective to transition to a Green Economy

Action: Promote all new accommodation developments to install solar powered P.V. units as a means of harnessing electricity and hot water; encourage all existing accommodation properties to convert to solar powered electricity via incentive programs that make the technology conversion more affordable and payback periods shorter; review purchasing practices

Target: All existing accommodation properties to convert to solar powered electricity by 2020; all new accommodation properties required to utilize solar powered electricity from 2014 onwards

Lead Agency: Energy Division of the Ministry of Finance (in collaboration with the BHTA)

Cost Estimate: Will vary by accommodation size / electricity requirements

Outcome: Reduced utility costs in the accommodation sector through the use of renewable energy sources; supporting the initiatives of the ongoing Caribbean Hotel Energy Efficiency Action Program (CHENACT) project

Refer: Action 6.1-4 in Report V, Part 1, Section 2.9

7 Enhance the Cruise Tourism Product and Experiences

Strategy:

7.1 Improve infrastructure, products and services for the cruise tourism sector and develop new source markets.

Actions:

7.1-2 Create a Southern Caribbean Cruise Association

Issue: The southern Caribbean area needs further expansion of cruise tourism

Action: Form a Southern Caribbean Cruise Association (SCCA) to provide impetus for a regional approach to cruise tourism. This Barbados-based entity would coordinate the regional development of cruise tourism, with Barbados as the hub both politically and logistically. A Director General for the SCCA should be appointed to form and run the new organization. This has now commenced with the Southern Caribbean Cruise Alliance)

Target: 2014

Lead Agency: MTI (in collaboration with Barbados Port Inc.)

Cost Estimate: \$50,000 to \$100,000 to cover staff and marketing costs for the first year after SCCA is established

Outcome: Further growth of cruise tourism both in Barbados and in the region, with increased spending from the visiting cruise tourists and improved levels of returns of these visitors for land-based holidays and further cruises

Refer: Action 7.1-2 in Report V, Part 1, Section 1.3.3.6

7.1-3 Target New Source Markets for Cruise Tourism

Issue: There are limited source markets in the cruise tourism sector

Action: Develop new markets in Germany and other selected North European countries, (initially Austria, Luxembourg, Switzerland, followed by Norway, Sweden, Finland and Denmark); develop South America (especially Brazil and also Argentina) as one of the key source markets to provide new strategic direction for cruise tourism. Attendance at selected trade shows will be necessary. Consider appointing a Public Relations company to get coverage for Barbados in travel press and magazines

Target: A 5-year time horizon from 2014

Lead Agency: Barbados Port Inc.

Cost Estimate: \$300,000 allocation to project budgets

Outcome: Sustained growth of visits to Barbados of German speaking visitors and other Europeans in addition to Brazilian and other South American cruise tourists, mainly in the traditional peak winter season for cruising

Refer: Action 7.1-3 in Report V, Part 1, Section 1.3.3.6

8 Improve the Transportation of People on Land and Near Shore

Strategy:

- 8.1 Streamline the movement of people on land and in near-shore waters through enhanced infrastructure, products and services.

Actions:

8.1-1 Create a Traffic and Transport Inter-Agency Group

Issue: Poor road conditions in Barbados are a concern. Highways 1 and 7 do not meet the standards of roadways that are major transport arteries particularly to tourism venues

Action: Establish a broad-based Traffic and Transport Inter-Agency Group (including MTI, MTW, Transport Authority, Barbados Transport Board, BTII, BHTA); conduct assessment tours of Highways 1 and 7 initially; make recommendations for improvement to the road and transport facilities, including lighting, sidewalks, signage, pedestrian crossings, public transport passenger amenities, defined road edges, and road surface quality

Target: Inter-Agency Group established in 2015; bi-annual assessments ongoing

Lead Agency: MTW

Cost Estimate: \$5,000 per annum

Outcome: Inventory of roadway infrastructure requiring improvement on Highways 1 and 7; priority list of improvements required, with estimates; work program and implementation schedule prepared

Refer: Action 8.1-1 in Report V, Part 1, Section 1.1.8.1

8.1-2 Develop a Ferry Service Between Major Towns

Issue: Increasing vehicular traffic on the roads of Barbados has led to frequent congestion through and between major town centres and commercial districts

Action: Develop a sea transport facility by ferry between Speightstown, Holetown, Bridgetown and Oistins through a public/private partnership via a phased implementation process; develop landing facilities and associated infrastructure at the ports of call; acquire a ferry

Target: 2018

Lead Agency: MTW (in collaboration with MTI and BPI)

Cost Estimate: To be determined through a costing and feasibility study

Outcome: Alternative means of mass travel between major towns around the island and consequent reduction in ground traffic congestion; use of near-shore zone for transport purposes; increase in employment and entrepreneurship opportunities; increase in commercial and economic activities at these ports of call

Refer: Action 8.1-2 in Report V, Part 1, Section 1.4.6

8.1-3 Extend Road Signage Programme

Issue: Road signage throughout Barbados does not meet normal industry standards and is generally inadequate

Action: Progress the Directional and Information Signage Program that commenced with the Cricket World Cup in 2007; commence a new phase of the program to erect additional directional signs, places of interest signs, interpretive signs, and confirmatory signs relating to districts and villages

Target: 2018

Lead Agency: MTW (in collaboration with BTII and TDC)

Cost Estimate: \$7.5 million

Outcome: Improved signage across Barbados and easier movement of locals and visitors; increased advertising of sponsors

Refer: Action 8.1-3 in Report V, Part 1, Section 1.1.8.1

9 Assure Safety and Security of Visitors and Residents

Strategy:

- 9.1 Enhance the capacity of the security forces to assure the safety of all visitors and residents.

Actions:

9.1-1 Create a Rapid Response Team

Issue: Increased incidents of criminal activity have negatively impacted the safety and security of both locals and visitors. There is a need to develop a concerted action programme to fight crime in Barbados

Action: Establish a broad-based 'Rapid Response' Team to examine safety and security provisions, and respond to emergency situations throughout Barbados, especially at places frequented by visitors and locals, and make recommendations. The main security forces in Barbados would lead with representation from key stakeholders. Consider community-based initiatives.

Target: Rapid Response Team established by mid-2015

Lead Agency: MTI

Cost Estimate: \$20,000 annually

Outcome: Inventory of safety and security provisions at each locality; list of suggestions for actions to be taken in high risk tourism areas; list of recommendations for improvement of security throughout Barbados

Refer: Action 9.1-1 in Report III, Section 6.11

9.1-2 Train Safety and Security Personnel

Issue: The security standards of individuals entering the industry must be raised to help assure the safety and security of all residents and visitors

Action: Train unqualified security personnel and those seeking to enter the security industry; issue National Vocational Qualification accreditation certificates to successful candidates; develop a basic training module for all persons in the security industry to ensure uniform training;

Target: Ongoing training over a 10 year period starting 2014, targeting 3,000 persons

Lead Agency: Technical and Vocational Education and Training Council (in collaboration with the Ministry of Education)

Cost Estimate: \$3 million over the 10-year period, based on \$1,000 per person for 3,000 persons

Outcome: Trained security personnel accredited to international standards; improved safety and security; standardization of basic training for all safety and security personnel; greater degree of competence and confidence in execution of safety and security duties

Refer: Action 9.1-2 in Report III, Section 6.11

10 Effectively Market Barbados

Strategy:

10.1 Improve the effectiveness and efficiency for marketing Barbados internationally and domestically in terms of product, price, promotion and place.

Actions:

10.1-1 Sharpen Barbados' National Brand Image

Issue: Barbados' National Brand Image is tattered, weakened by years of delaying the structural transformations that are critical to aligning reality with visitor perceptions & market trends

Action: Agree on and align the elements necessary to develop and sustain a modern, compelling Barbados National Brand Image; include Barbados Island of Stories

Targets: Revitalised National Brand Image by end of 2015 that is compelling enough to attract key market segments back to Barbados

Lead Agency: Barbados Tourism Marketing Inc.

Cost Estimate: \$1 million

Outcomes: Coherent, relevant, fashionable National Brand Image, with a clear, unified vision, persuasive brand story, compelling brand values, concise, realistic objectives, and outcomes that align with brand promises and perceptions over time

Refer: Action 10.1-1 in Report IV. Section 1.5

10.1-2 Refine Barbados' Promotional Activities

Issue: Barbados' marketing activities are out of step with changing market segments, as well as with evolving digital, social and other media technologies and market trends

Action: Agree on and align the elements necessary to develop and sustain successful marketing, segmentation and promotional activities that are a match for Barbados' agreed National Brand Image

Targets: Stakeholder consensus by end of 2015 on competitive value propositions, niches, markets, and visitor segment profiles that match Barbados' agreed National Brand Image as defined by Action 10.1-1

Lead Agency: Barbados Tourism Marketing Inc.

Cost Estimate: Based on method of implementation, particularly in light of potential reallocation of existing resources and proposed restructuring efforts

Outcomes: Timely, targeted, appropriate, up-to-date market intelligence; pinpointing of specific geographical and consumer markets, niches and segments; detailed, targeted niche and visitor profiles by market segment; direct engagement with targets via appropriate channels and media messages to build awareness of and high regard for the Barbados Visitor Economy and Barbados' revived National Brand Image

Refer: Action 10.1-2 in Report IV, Section 1.5

10.1-3 Audit Barbados' Implementation Deficits

Issue: The consistent national failure over consecutive years to implement strategies to increase business climate efficiency, improve national competitiveness, and create an enabling environment for investment, innovation, and commercial enterprise to flourish has negatively impacted Barbados' National Brand Image and the competitiveness of the BVE

Action: Review, prioritise and implement critical recommendations emerging from a full-scale audit of the status of tourism development programmes since 2003

Targets: Catalogue of Barbados' strategic performance based on degree of priority by mid 2015; 50% improvement in strategy implementation by end 2015

Lead Agency: Ministry of Economic Affairs, in association with a consultancy

Cost Estimate: \$50,000

Outcome: Measurable review of Barbados' strategic performance that reduces implementation deficits by half within 12 months

Refer: Action 10.1-3 in Report IV, Section 1.5

10.1-4 Create a Mobile Applications Living Lab

Issue: Untapped potential for delivery of mobile technology innovations, experiences and services that enhance the value of tourism

Action: Create and successfully commercialise mobile applications that add value to the tourism experience while increasing jobs, visitor numbers and visitor expenditure

Target: Mobile Applications Living Lab formed and functioning in 2014, with competitive mobile applications being designed and introduced to market in time for the 2014-2015 winter season

Lead Agency: Barbados Tourism Marketing Inc. (in collaboration with Barbados ICT Professionals Association)

Cost Estimate: \$100,000 to \$250,000 for first year of operations

Outcomes:

- Mobile technology and open access data platforms that showcase the innovative ability of Barbados to deliver smarter visitor services
- eGovernment, BVE-related and other services designed around users' needs
- Better access to information
- Active citizen/visitor involvement in the creation of smart services
- Common architecture, shared services and standards
- Open access data in common formats, transparency and personal rights
- Mobile apps accessed easily and used anywhere by anyone at any time

Refer: Action 10.1-4 in Report IV, Section 1.5

10.1-5 Develop an Awareness Building Website with Mobile Extensions

Issue: Barbados' online image is fragmented, out of alignment with evolving digital and e-commerce platforms and potentially damaging to the BVE's long-term success

Action: Rationalise Barbados' official online image into one engaging interactive web presence with mobile extensions that captivates visitors and builds awareness of the unique value propositions available within the BVE

Targets: Rationalised online image for Barbados by the end of 2015

Lead Agency: Barbados Tourism Marketing Inc. (in collaboration with the BHTA)

Cost Estimate: \$225,000 for redesign and official launch, additional \$\$ for support

Outcomes:

- **Interactive BVE Presentations:** YouTube videos, social media feeds ... presenting the BVE as a more digital, interactive, exciting experience linked to Barbados' National Brand Image
- **BVE Research and Interesting Factoids:** In all applicable areas
- **Interactive Barbados National Brand Image Presentations:** Introducing Barbados at the digital cutting-edge of new visitor experiences that enhance Barbados' National Brand Image
- **e-Commerce Gateway:** Digital access to BVE products, services, experiences
- **Direct Connections to Social Media:** Facebook, Twitter, Instagram, Tumblr, LinkedIn, YouTube and other social network feeds hosted directly on website
- **Online Proposal Submissions:** EX: re the BVE Mobile Apps Living Lab
- **Live and Delayed Feedback:**
- **BVE Live Blogs/Sessions:** Live & interactive questions & answers
- **Live Barbados Radio and/or TV**

Refer: Action 10.1-5 in Report IV, Section 1.5

11 Mainstream Environmental Management

Strategy:

- 11.1 Bring environmental management into the mainstream through improved protected area management and enhanced physical environs, implementation of conservation initiatives, and expanded capacity to provide environmental education and public awareness.

Actions:

11.1-1 Develop a Beach Accreditation Programme

Issue: Lack of international environmental standards on Barbados beaches

Action: Develop a programme of local accreditation for beaches, guided by Blue Flag eco-label standards, which would include:

- Monitoring public health standards
- Highlighting the highest standard beaches through accreditation recognition labels and marketing these assets
- Defining primary beach assets and mapping of beaches
- Maintaining facilities and beach amenities to a high standard
- Improving beach amenities where required, including infrastructural changes to drainage outfalls

Target: End of 2015

Lead Agency: NCC in collaboration with Coastal Zone Management Unit (CZMU)

Cost Estimate: \$50,000 start-up

Outcome: Improved environmental standards on beaches and near-shore zone; increased levels of public health standards in the near-shore zone; increased competitiveness in the regional market; greater opportunities for promoting a significant natural asset that is also a major tourist attraction

Refer: Action 11.1-1 in Report II. Section 3.0

11.1-2 Implement an Energy Saving Program for the Tourism Sector

Issue: High energy costs have significantly impacted the tourism sector in Barbados. The provision of electricity through Direct Current (DC) operation is more efficient than through Alternating Current (AC), which is primarily used across Barbados

Action: Replace existing air conditioning units and swimming pool pumps in the tourism sector from AC to DC operation and encourage the use of energy efficient lighting such as compact fluorescent lamps and LED lights; develop an awareness programme for tourism managers to promote the adoption of this energy efficiency program

Target: 2015

Lead Agency: Division of Energy and Telecommunications

Cost Estimate: \$3,000 per DC air conditioner; \$1,800 per DC swimming pool pump

Outcome: Reduced energy costs in the tourism sector, greater energy efficiency, and reduction in operating costs through lower utility bills; supporting aspects of the CHENACT project

Refer: Action 11.1-2 in Report II, Section 3.0

11.1-3 Conduct a Sand Fluidization Program for Beaches

Issue: Sand deposits on beaches can regularly block surface water flows into the sea, which can cause stagnant bodies of water to form and contribute to potential public health risks

Action: Install and maintain mechanical fluidizing devices at the mouths of drainage channels across primary visitor beaches, construct drainage channels and catchment weirs where required

Target: Mechanical fluidizing devices installed by end of 2015, with ongoing maintenance programme

Lead Agency: CZMU

Cost Estimate: \$2 million

Outcome: Reduction in the lifespan of stagnant water pools that will help to minimize mosquito breeding grounds; minimize the entry of debris into the sea, promoting more consistent clean water discharge into the sea, and preventing associated public health risks

Refer: Action 11.1-3 in Report II, Section 3.0

11.1-4 Support the Waste Reduction Program

Issue: There is an excessive amount of solid waste going to the landfill

Action: Develop a programme that reduces the amount of waste generated through recycling programs. This can include reducing the number of plastic bags that are distributed at all retail outlets in Barbados. Provide the means for consumers to obtain reusable 'green' shopping bags that can be used in grocery stores and other similar commercial establishments; may include the development of a monetary incentive plan during the first year of program. Include the enhancement and upgrading of existing recycling initiatives in communities across the island, as well as composting projects

Target: Commencement by mid 2014

Lead Agency: Ministry of Environment and Drainage

Cost Estimate: Initial promotion / marketing of program \$20,000

Outcome: Reduction in the amount of waste ending up in the sanitary landfill; less plastic bags littering the land and seascape; a more visually appealing environment; promoting a greener Barbados via recycling initiatives and support for environmental initiatives that promote the national Green Economy program

Refer: Action 11.1-4 in Report II, Section 3.0

11.1-5 Develop a Programme for a Greener Bridgetown

Issue: Poor environmental quality and integrity of Historic Bridgetown and environs. There is an urgent need to improve the overall experience delivery in the capital city to help attract more commercial activity

Action:

- Place under the aegis of a new Town Centre Management office
- Identify location and ownership of disused / abandoned lots in the city
- Convert abandoned lots / open spaces into clean and functional surroundings
- Create high quality urban streetscapes with additional recreational areas and mini parks
- Promote a greener Bridgetown through shade tree planting with provision for seating
- Introduce a park-n-ride system, heritage electric trams to mitigate air and noise pollution
- Pedestrianize Broad Street by restructuring traffic flow patterns; develop appealing new streetscape
- Promote use of electric shuttles to transport City visitors to and from Port and other key nodes
- Increase number of public washrooms
- Link implementation with Action 2.2b-3

Target: Commencement in 2014 with a view to complete by 2018

Lead Agency: BTII (in collaboration with MTW, Ministry of Health)

Cost Estimate: Site specific (can vary from \$10,000 to \$20,000 per property)

Outcome: Improvement in the physical environs and public health standards of Bridgetown; creation of additional green spaces to enhance overall environmental quality; ensuring higher public health and safety standards in the nation's capital city; contributing to the awareness and retention of Bridgetown's designation as a UNESCO World Heritage Site

Refer: Action 11.1-5 in Report II, Section 3.0

11.1-6 Improve the Garrison to Oistins Corridor

Issue: The physical environment of the South Coast route from the Garrison to Oistins has become degraded. This zone has declined generally due to land use issues including lack of shade trees, dilapidated buildings, and abandoned properties, leading to harsh environmental conditions for all users

Action: Create tax incentives for owners of private property within this major tourism zone to refurbish properties, including chattel houses and Bajan rum shops; conduct a comprehensive survey of existing sidewalks, boundary walls and pedestrian crossings; promote redevelopment of existing tourism properties along the south coast; commence a street tree planting programme along the corridor and retain all 'open windows' to the sea; maintain or enhance all beach access points

Target: Planning in phases to commence in 2014, with completion by 2022

Lead Agency: BTII

Cost Estimate: \$2.5 million

Outcome: A higher standard of user experience in one of the highest density tourism zones on the island, and improved public amenity and pedestrian safety

Refer: Action 11.1-6 in Report II, Section 3.0

12 Update and Enforce Policy and Legislation to Support the BVE

Strategy:

- 12.1 Review existing legislation to identify gaps and enforcement measures, and enact new laws to support the functioning of the BVE

Actions:

12.1-1 Ratify the Draft Environmental Management Act

Issue: Overlapping environmental management responsibilities are currently spread across different public sector ministries/departments, creating challenges for effective management of the natural environment. There is a need for broad-based environmental protection through comprehensive regulations and enforcement procedures

Action: Ratify the draft Environmental Management Act (EMA) which would act as a basis for streamlining environmental management responsibilities / efforts within a centralized entity, and establish requisite regulations and enforcement guidelines for the EMA

Target: EMA ratification by end of 2014

Lead Agency: Ministry of Environment and Drainage

Cost Estimate: Government fiscal arrangements to be determined

Outcome: Greater management of Barbados National Park; biodiversity, critical habitats, and enhanced conservation of natural resources; setting up of eco-sites for locals and visitors; improved efficiencies in the implementation of environmental initiatives; establishment of a legal framework that supports sustainable tourism practices

Refer: Action 12.1-1 in Report II, Section 3.0

12.1-2 Develop an Incentives Approach through Policy and Legislation

Issue: A more concerted approach is required to achieving multiple objectives of the TMP through national tourism policy and legislation targeting quality and sustainability for the industry

Action: Conduct a senior level forum with Government and industry stakeholders to develop key incentives required for the enhancement of the tourism sector, including financial, marketing, concessions, etc.; develop an explanatory package to explain the benefits and the range of incentives that will stimulate the tourism industry; incentives to be developed in areas including quality assurance and safety standards, training and service levels above basic standards, sustainability features such as use of local products and authenticity of products, involvement of local communities, environmental conservation measures and activities

Target: 2015

Lead Agency: MTI (in collaboration with the BTA and BHTA)

Cost Estimate: Dependent on nature of the incentives

Outcome: An incentivized approach to achieving the TMP objectives via policy and legislation; improved tourism product and related services and enhanced economic development via improved agricultural linkages, increased training linked with improved quality assurance standards, improved environmental and social sustainability, increased focus on local products and delivering authentic experiences, increased product diversification, more community involvement in tourism activities;

Refer: Action 12.1-4 in Report III, Section 7.4

12.1-3 Enact Legislation to Enable Accessible Infrastructure

Issue: Barbados still needs to enable and promote full accessibility from all points of air/sea access including hotels and points of interest with reference to the UN Convention on Rights of Persons with Disabilities

Action: Enact legislation that, *inter alia*, requires all new development projects to incorporate infrastructure that enables full access by the physically challenged and would also address the retrofitting of existing accommodation infrastructure to existing standards required for access by people with disabilities. Establish a monitoring committee to oversee and guide the next steps. The Ministry of Health, Ministry of Housing, Lands and Rural Development and Ministry of Education, Science, Technology and Innovation will meet the requirements of accessible housing, education and awareness. MTW will promote specifications for public car parks. Currently, 19 hotels and 8 apartments are listed by the BTA as having facilities for persons living with disabilities

Target: 2017

Lead Agency: Government of Barbados (in collaboration with the Barbados Council for the Disabled)

Cost Estimate: Costs for enacting legislation to be determined

Outcome: Legislation enacted that would enable Barbados' physical infrastructure to be raised to international standards with respect to facilitating disabled users. More visitors requiring accessibility via services and accommodation would be attracted to the island. Employment opportunities would be increased

Refer: Action 12.1-3 in Report V, Part 2, Section 3.2.1.1

12.1-4 Create an Environmental Hotline

Issue: Barbados needs greater enforcement of environmental regulations

Action: Create an Environmental Hotline, equivalent to a Crime Stoppers model, that can be utilized by witnesses of environmental infractions. Improve awareness of the number, type and frequency of environmental infractions, and improve the performance in responding to them; provide a means for the public to assist

Target: Hotline operational in 2014

Lead Agency: EPD (in collaboration with the Ministry of Health)

Cost Estimate: Utilize existing budgets

Outcome: Improved standard of environmental health and cleanliness; increased local and visitor satisfaction regarding environmental health; increased environmental awareness; reduction in environmental infractions and support for the initiatives of the Ministry of Environment relative to the maintenance of a clean and healthy environment

Refer: Action 12.1-3 in Report II, Section 3.0

12.1-5 Enforce Marine Pollution Legislation

Issue: Marine pollution needs controlling through enforcement of existing environmental legislation. Carlisle Bay in particular has been polluted due to lack of this type of regulatory enforcement.

Action: Ensure enforcement of legislation that controls marine pollution in Barbados territorial waters. Draft supporting legislation that regulates the collection of rental fees from boats that berth in Barbados waters. In Carlisle Bay, clear debris from the seabed to encourage growth of marine life and improve the integrity of the marine environment, and appoint Bay wardens to ensure that the environmental regulations are upheld in that area.

Target: 2015

Lead Agency: CZMU (in collaboration with the EPD)

Cost Estimate: Clean-up of Carlisle Bay estimated at \$1 million for equipment and \$350,000 for work program

Outcome: Reduced marine pollution around Barbados and increase in marine life (both plant and animal species), thereby enhancing the nature tourism potential for sea divers / snorkelers and the environmental health and quality of near-shore waters

Refer: Action 12.1-5 in Report II, Section 3.0

5.0 TMP Implementation Plan

Overview

This Section presents the implementation for the Barbados Tourism Master Plan 2014-2023 and lists the requisite Strategic Imperatives, Strategies and priority Actions, inclusive of the corresponding Indicators and recommended Timeframe.



5.1 Introduction to the TMP Implementation Plan

Given the key subject areas reviewed to develop the TMP and the priority areas identified, the following Implementation Plan has been prepared as a way forward for Barbados in the development of its tourism sector to 2023.

The TMP Implementation Plan sets out the 12 Strategic Imperatives presented in Section 4.4 with their corresponding Strategies and Priority Actions required to meet the defined objectives within a designated Timeframe. The information presented is organized as follows:

Each strategic imperative will be accomplished through the achievement of a set of strategies. The strategies will be realized through a range of priority actions that are divided into the following three categories:

- **Urgent Actions** are highlighted in **RED**. They represent those actions that are required immediately to respond to the current economic situation and to increase visitor arrivals and visitor spend within the BVE
- **Enabling Actions** are highlighted in **BLUE**. They represent actions that are required to support the effective and efficient functioning of the BVE; without these actions, the BVE would continue to operate at sub-optimum levels
- **Sustaining Actions** are highlighted in **GREEN**. They represent the actions that are required to maintain the BVE and to ensure its sustainability and resilience into the future

Since the TMP is a living document, the Implementation Plan has been developed with an integral monitoring and evaluation system to ensure that the Plan is meeting its objectives through key Performance Indicators. These Indicators will provide an indication of the progress being made on each of the Strategic Imperatives.

The TMP Implementation Plan represents a framework to support the island's tourism industry with immediate effect, without which the direction of the sector could be compromised, given the current state of the economy.

5.2 Barbados TMP 2014-2023 Implementation Plan

The following matrix sets out the 73 *priority* TMP Action Plans that are recommended for achieving the vision, goal, strategic imperatives, and strategies that have been developed to grow the Barbados Visitor Economy.

The establishment of a special unit within the Ministry of Tourism & International Transport to oversee the implementation, review and monitoring of the Master Plan will be required. It will be important to make all citizens aware of the contents of the Plan through public awareness programmes and the use of print and electronic media.

Strategic Imperative	Strategy	Action	Indicators	Timeframe
1. Base decisions on comprehensive, accurate, and timely data / information	1.1 Foster information-based decision-making through up-to-date research which is coordinated and integrated across the various stakeholder groups, and provide well archived, easily retrievable documentation which can support the BVE	1.1-1 Consolidate Responsibilities within the Ministry of Tourism	All aspects of tourism-related research and information consolidated within the Ministry of Tourism	2014-2016
		1.1-2 Assess Visitor Research Management Needs	Needs assessments and recommendations addressing research needs of target users, and MTI's capacity-building needs to satisfy them prepared	2014-2015
	1.2 Promote ongoing monitoring of the BVE within the wider regional and global environment to evaluate Barbados' performance against best practice in order to position it for enhanced competitiveness			
2. Enhance the visitor experience	2.2a Improve and enhance the inventory of built heritage attractions and their associated services to entice visitor interest and promote increased visitor spending	2.2a-1 Rejuvenate Historic Speightstown as a Heritage Centre	Creative arts centre opened and key heritage properties restored by 2017; increase in number of visitors to Speightstown	2014-2022

Strategic Imperative	Strategy	Action	Indicators	Timeframe
		2.2a-2 Refurbish Morgan Lewis Mill and Environs	Morgan Lewis Mill and facilities restored and expanded; increase in revenue stream from the Mill	2014-2017
	2.3 Develop and promote the island's cultural heritage, and its associated services, to increase its visibility to visitors, arouse their interest, and promote increased visitor spending	2.3-1 Develop 'Discover Barbados Centre' at the Bridgetown Port	Multi-Use Centre opened at the Port	2014-2018
		2.3-2 Develop a New Sugar Museum	Sugar Museum Experience facilities opened	2014-2017
3. Change the Tourism Mindset	3.1 Enhance leadership capacity to promote visionary direction, energy, and focus among the diversity of stakeholders within the BVE	3.1-1 Enhance Tourism Stakeholders' Communication, Coordination, and Collaboration (CCC)	CCC forum conducted, leading to increased collaboration amongst tourism stakeholders	Mid-2015
	3.2 Increase awareness activities and provide formal and informal education opportunities to foster changes in perceptions, attitudes and behaviours within the Barbadian populace towards the BVE	3.2-1 Implement a Tourism Awareness Campaign for all Target Groups	Tourism awareness campaign prepared and delivered to senior public servants and the general public	2014-2015

Strategic Imperative	Strategy	Action	Indicators	Timeframe
4. Develop Airlift Capacity	4.1 Increase airlift capacity from the traditional source markets and new origin markets, and improve the visitor experience at the Grantley Adams International Airport	4.1-1 Obtain Category 1 Status for GAIA	Category 1 status achieved; % increase in airlift capacity from identified markets, and enhanced investment	2015
5. Improve Financial performance	5.1 Through a better knowledge/information base, improve the distribution of benefits, investment sourcing / opportunities, business development, and the understanding of the economic impacts, linkages and leakages within the economy, and support local production to reduce import dependency	5.1-1 Mitigate Obstacles to Tourism Investment in Barbados	Increase in qualified investors and tourism investments	2014-2017
		5.1-2 Identify Opportunities from the Visitor Economy Supply Chain	Increase in the supply of local products and decrease in goods imported	2015
6. Modernize Accommodation and Improve the Performance of the Sector	6.1 Improve infrastructure, products and services within the accommodation sector and enhance its overall financial performance	6.1-1 Strengthen Accommodation Quality Assurance	Infrastructural review programme established in 2014 and improved physical standards of hotel plant by 2015	2014-15
		6.1-2 Develop an Accommodation Registration and Database	Legislation that mandates the registration of accommodation enacted, all visitor	2015;ongoing

Strategic Imperative	Strategy	Action	Indicators	Timeframe
			accommodation properties registered, and accurate room supply database consolidated	
7. Enhance the Cruise Tourism Product and Experiences	7.1 Improve infrastructure, products and services for the cruise tourism sector and develop new source markets	7.1-1 Improve the Cruise Visitor Experience at the Bridgetown Port	Infrastructural and amenity improvements in place	2015
8. Improve the Transportation of People on Land and Near-Shore	8.1 Streamline the movement of people on land and in near-shore waters through enhanced infrastructure, products and services	8.1-1 Establish a Traffic and Transport Task Force	Traffic and Transport Team established, and Highways 1 and 7 assessed, with recommendations for improvement completed	2015;ongoing
9. Assure Safety & Security of Visitors & Residents	9.1 Boost the capacity of the security forces to assure the safety of all visitors and residents	9.1-1 Establish a Rapid Response Team for Visitor Safety Issues	Rapid Response Task Force established, and recommendations for improvement of safety and security made	2015;ongoing
10. Effectively Market Barbados	10.1 Improve the effectiveness and efficiency for marketing Barbados	10.1-1 Sharpen Barbados' National Brand Image	Barbados National Brand Image revitalized	2015;ongoing

Strategic Imperative	Strategy	Action	Indicators	Timeframe
	internationally and domestically in terms of product, price, promotion and place	10.1-2 Refine Barbados' Segmentation and Promotional Activities	Activities and promotional targets identified that match the revitalized National Brand Image	2015;ongoing
11. Mainstream Environmental Management	11.1 Bring environmental management into the mainstream through improved protected area management and enhanced physical environs, implementation of conservation initiatives, and expanded capacity to provide environmental education and public awareness	11.1-1 Implement a Beach Accreditation Programme	Beach accreditation programme launched	2015;ongoing
12. Update and Enforce Policy and Legislation to Support the BVE	12.1 Review existing legislation to identify gaps and enforcement measures, and enact new laws to support the functioning of the BVE	12.1-1 Ratify the Draft Environmental Management Act	Draft Environmental Management Act ratified	2014
		12.1-2 Develop an Incentives Approach through Policy and Legislation	Senior level forum conducted and programme established	2015

Strategic Imperative	Strategy	Action	Indicators	Timeframe
1. Base decisions on comprehensive, accurate, and timely data / information	1.1 Foster information-based decision-making through up-to-date research which is coordinated and integrated across the various stakeholder groups, and provide well archived, easily retrievable documentation which can support the BVE	1.1-3 Build Capacity for Visitor Research Management	Organizational structure and capacity building / training programmes designed and developed for MTI to assume primary responsibility for visitor research management	2014-2015
	1.2 Promote ongoing monitoring of the BVE within the wider regional and global environment to evaluate Barbados' performance against best practice in order to position it for enhanced competitiveness	1.2-1 Create a Digital Dashboard for TMP Implementation and Operational Performance	Digital dashboard created	2014-2016; ongoing
2. Enhance the visitor experience	2.1 Focus product development, including service delivery, as well as marketing and promotional efforts on the 8 identified priority niche markets to increase visitor numbers and spending	2.1a-1 Make Bridgetown More Accessible to the Disabled	Increase in accessible amenities in Bridgetown	2014-2015
		2.1b-1 Develop a Silver Market Activities Package	Silver Market activities package developed and distributed	2015
		2.1b-2 Identify and Market Visitor Accommodation to Support Longer Stays	Database and marketing plan established	2015

Strategic Imperative	Strategy	Action	Indicators	Timeframe
		2.1c-1 Develop Culinary Trails Featuring Local Cuisine	Culinary Trails developed and marketed	2015
		2.1d-1 Develop Capacity in Health and Wellness Tourism	Inventory of health and wellness services compiled and web portal launched	2015
		2.1e-1 Prepare an Investor Package for a Conference Hotel	Investor Package for Conference Hotel completed and potential investors invited	Mid-2015
		2.1e-2 Further Develop the MICE Product Club	% Increase in visitors for MICE activities	2016
		2.1f-1 Create the Barbados Sports Tourism Association (BSTA)	BSTA established	2015
		2.1g-1 Develop a Diaspora Philanthropy Programme	% increase in funding support from Diaspora, and agency established to raise and manage funds	2015;ongoing
		2.1h-1 Develop a Framework to Enhance the Domestic Tourism Industry	% increase in visitor spend and occupancy rates; reduced seasonality issues	2015; ongoing

Strategic Imperative	Strategy	Action	Indicators	Timeframe
	2.2a Improve and enhance the inventory of built heritage attractions and their associated services to entice visitor interest and promote increased visitor spending	2.2a-3 Assess Heritage Properties	Assessment of heritage properties conducted and priority restoration work programme developed	2014-2015
	2.3 Develop and promote the island's cultural heritage, and its associated services, to increase its visibility to visitors, arouse their interest, and promote increased visitor spending	2.3-3 Develop a Fight for Freedom Interpretive Centre	Fight for Freedom Centre opened	2014-2018
	2.4 Conserve selected natural environment attractions and associated services, and promote their sustainable use within the BVE for the enjoyment of all visitors and residents	2.4-1 Develop Natural Heritage Tour Packages	Number of Natural heritage tour packages and interpretive trails developed	2016
3. Change the Tourism Mindset	3.1 Enhance leadership capacity to promote visionary direction, energy, and focus among the diversity of stakeholders within the BVE	3.1-2 Align Key Tourism Sector Institutions	Processes and structures of primary tourism organizations coordinated	2014-2016
		3.1-3 Enhance Strategic Leadership within Key Tourism Stakeholders	Key tourism stakeholders empowered with	Mid-2015

Strategic Imperative	Strategy	Action	Indicators	Timeframe
			leadership tools	
		3.1-4 Strengthen Leadership Capacity in Hospitality Organizations	1,000 leaders and managers trained	2014-2018
	3.2 Increase awareness activities and provide formal and informal education opportunities to foster changes in perceptions, attitudes and behaviours within the Barbadian populace towards the BVE	3.2-2 Enhance Inter-Agency Coordination in Hospitality Training Organizations	Hospitality training and educational opportunities coordinated between training institutions; % increase in number of internships provided to hospitality students	2015
4. Develop Airlift Capacity	4.1 Increase airlift capacity from the traditional source markets and new origin markets, and improve the visitor experience at the Grantley Adams International Airport	4.1-2 Construct Air Bridges at GAIA	Air bridges constructed at GAIA and visitor experience enhanced	2015-2016
5. Improve Financial performance	5.1 Through a better knowledge/information base, improve the distribution of benefits, investment sourcing and opportunities, business development, and the understanding of the economic impacts, linkages and	5.1-3 Establish a Philanthropic Foundation ('One Barbados Foundation')	'One Barbados Foundation' established; increase in funds raised annually from the private sector after the Foundation is launched	2015
		5.1-4 Retain a Professional Grant Writer	Grant writer hired	2015

Strategic Imperative	Strategy	Action	Indicators	Timeframe
	leakages within the economy, and support local production to reduce import dependency	5.1-5 Develop the Local Souvenirs Market	Increase in locally made souvenirs and gift products sought by visitors are identified and produced	2015;ongoing
6. Modernize Accommodation and Improve the Performance of the Sector	6.1 Improve infrastructure, products and services within the accommodation sector and enhance its overall financial performance	6.1-3 Establish an Office of Tourism Accommodation	Office of Tourism Accommodation established	2015
7. Enhance the Cruise Tourism Product and Experiences	7.1 Improve infrastructure, products and services for the cruise tourism sector and develop new source markets	7.1-2 Create a Southern Caribbean Cruise Association (SCCA)	SCCA formed, based in Barbados, and Director General appointed	2014
8. Improve the Transportation of People on Land and Near-Shore	8.1 Streamline the movement of people on land and in near-shore waters through enhanced infrastructure, products and services.	8.1-2 Develop a Ferry Service Between Major Towns	Ferry service developed	2018
9. Assure Safety and Security of Visitors and Residents	9.1 Boost the capacity of the security forces to assure the safety of all visitors and residents	9.1-2 Train Safety and Security Personnel	3,000 persons trained and accredited to international standards over a 10 year period	2014;ongoing
10. Effectively Market	10.1 Improve the effectiveness and efficiency for	10.1-3 Assess and Address Barbados' Deficits in Implementation	Catalogue of Barbados' strategic performance	2015

Strategic Imperative	Strategy	Action	Indicators	Timeframe
Barbados	marketing Barbados internationally and domestically in terms of product, price, promotion and place	Programmes	based on degree of priority by mid 2015; 50% improvement in strategy implementation	
11. Mainstream Environmental Management	11.1 Bring environmental management into the mainstream through improved protected area management and enhanced physical environs, implementation of conservation initiatives, and expanded capacity to provide environmental education and public awareness	11.1-2 Implement an Energy Saving Programme in the Tourism Sector	Energy saving programme implemented in the tourism sector	2015
		11.1-3 Develop a Sand Fluidization Programme for Beaches	Number of sand fluidization devices installed	2015;ongoing
12. Update and Enforce Policy and Legislation to support the BVE	12.1 Review existing legislation to identify gaps and enforcement measures, and enact new laws to support the functioning of the BVE	12.1-3 Enact Legislation to Enable Accessible Infrastructure	Legislation pertaining to accessible infrastructure enacted	2017
		12.1-4 Create Environmental Hotline to Support Environmental Regulations	Environmental Hotline launched	End of 2014

Strategic Imperative	Strategy	Action	Indicators	Timeframe
1. Base decisions on comprehensive, accurate, and timely data / information	1.1 Foster information-based decision-making through up-to-date research which is coordinated and integrated across the various stakeholder groups, and provide well archived, easily retrievable documentation which can support the BVE	1.1-4 Create and Operate a Central Repository and Portal for Visitor Research Management	Central repository and portal created and fully integrated and operated by MTI	2016-2017
	1.2 Promote ongoing monitoring of the BVE within the wider regional and global environment to evaluate Barbados' performance against best practice in order to position it for enhanced competitiveness	1.2-2 Obtain Feedback on Visitor and Local User Experience	Baseline and ongoing feedback from 10% visitors and 2% locals on their perspectives of tourism products and services	2015;ongoing
2. Enhance the visitor experience	2.1 Focus product development, including service delivery, as well as marketing and promotional efforts on the 8 identified priority niche markets to increase visitor numbers and spending	2.1c-2 Develop a Caribbean Culinary Institute	Caribbean Culinary Institute opened in Barbados	2015-2019
		2.1f-2 Establish International Partnerships with Key Sports Personalities to Market Barbados	Number of sports partnerships established that promote Barbados	2015;ongoing
	2.2a Improve and enhance the inventory of built heritage	2.2a-4 Revitalize Historic Oistins as a Heritage Centre	Infrastructure and amenities in Oistins	2014-2022

Strategic Imperative	Strategy	Action	Indicators	Timeframe
	attractions and their associated services to entice visitor interest and promote increased visitor spending		developed and improved that promote Barbados	
	2.2b The UNESCO designated World Heritage Site of Historic Bridgetown and its Garrison is a critically important part of the Barbados cultural heritage that needs to be further developed to attract visitors to the capital and its environs, thereby revitalizing Bridgetown and promoting increased economic activity	2.2b-1 Maintain the UNESCO World Heritage Designation for Bridgetown and Its Garrison	Annual maintenance of the UNESCO World Heritage designation	2014;ongoing
2.2b-2 Develop and Preserve the Nidhe Israel Synagogue and Environs in Bridgetown		Nidhe Israel Synagogue and environs developed into a prime heritage tourism site	2014-2018	
2.2b-3 Enhance the Bay Street Corridor		The Bay Street corridor is enhanced	2014-2018	
	2.4 Conserve selected natural environment attractions and associated services, and promote their sustainable use within the BVE for the enjoyment of all visitors and residents	2.4-2 Develop an Eco-Centre in the Scotland District	Eco-Centre opened on the East Coast/Scotland District	2018
3. Change the Tourism Mindset	3.2 Increase awareness activities and provide formal and informal education opportunities to foster changes in perceptions, attitudes and behaviours within the	3.2-3 Create a High Visibility Tourism Awareness Caravan	Minimum of 20,000 locals annually interacting with tourism awareness caravan	Mid-2015

Strategic Imperative	Strategy	Action	Indicators	Timeframe
	Barbadian populace towards the BVE			
5. Improve Financial performance	5.1 Through a better knowledge/information base, improve the distribution of benefits, investment sourcing and opportunities, business development, and the understanding of the economic impacts, linkages and leakages within the economy, and support local production to reduce import dependency	5.1-6 Improve Cross-Sectoral Linkages	Linkages between the Tourism Sector and a number of other sectors in Barbados is strengthened	2014
6. Modernize Accommodation and Improve the Performance of the Sector	6.1 Improve infrastructure, products and services within the accommodation sector and enhance its overall financial performance	6.1-4 Green the Accommodation Sector	Existing visitor accommodation properties converted to solar powered electricity by 2020 and new developments to utilize this solar technology	2014-2020
7. Enhance the Cruise Tourism Product and Experiences	7.1 Improve infrastructure, products and services for the cruise tourism sector and develop new source markets	7.1-3 Target New Source Markets	New source markets In Europe and South America developed	2014-2018
8. Improve the Transportation of People on Land and	8.1 Streamline the movement of people on land and in near-shore waters through	8.1-3 Extend Directional and Information Signage Programme	Directional and Information Signage Programme extended	2014-2018

Strategic Imperative	Strategy	Action	Indicators	Timeframe
Near-Shore	enhanced infrastructure, products and services		and signs in place	
10. Effectively Market Barbados	10.1 Improve the effectiveness and efficiency for marketing Barbados internationally and domestically in terms of product, price, promotion and place	10.1-4 Develop a Mobile Applications Living Lab	Mobile Living Lab formed with mobile applications designed and introduced to market	2014-2015
		10.1-5 Develop an Awareness Building Website with Mobile Extensions	Rationalized online image developed	2015
11. Mainstream Environmental Management	11.1 Bring environmental management into the mainstream through improved protected area management and enhanced physical environs, implementation of conservation initiatives, and expanded capacity to provide environmental education and public awareness	11.1-4 Support the Waste Reduction Programme	% reduction in the number of plastic bags ending up in the landfill	2014: ongoing
		11.1-5 Develop a Programme for a Greener Bridgetown	Physical environs and public health standards in Bridgetown improved	2014-17
		11.1-6 Improve the Garrison to Oistins Corridor	Physical environs of the south coast corridor improved	2014-22
12. Update and Enforce Policy and Legislation to Support the BVE	12.1 Review existing legislation to identify gaps and enforcement measures, and enact new laws to support the functioning of the BVE	12.1-5 Enforce Marine Pollution Legislation	Increase in nature tourists in the near-shore environment	2015;ongoing

5.3 Summary of Financial Plan

The financial plan is comprised of the cost estimates as presented in the list of 73 TMP *priority* Action Plans in Section 4.4. The projected total sum of these proposed Action Plans is estimated at BDS \$182 million, as previously outlined in Section 3.3 in the discussion on performance targets and required investment. For every BDS \$1 invested in the TMP, it is projected that the potential return on investment would be BDS \$17.23, as indicated in Table 3.4.

It has been previously noted in this Report that the 'preferred timeframe for implementation of the priority actions is five years'. It is therefore noted that benefits over the 10-year period can only be fully realised with investment occurring during the first 5-year period of the Implementation Plan; however, it is recommended that investment should continue throughout the life of the TMP period.

Recommended funding sources for full implementation of the Master Plan include:

- Government of Barbados
- Private sector
- International investors
- Development banks
- Non-governmental organizations
- Philanthropic contributions

The TMP proposes that, notwithstanding grants that may be received from various sources, a private/public sector Foundation should be established that is dedicated to attracting and facilitating receipt, through the appropriate mechanisms, of large donations from private benefactors locally and internationally for tourism investment purposes (refer Action 5.1-3 in Section 4.4). It is envisaged that such funds, including from the Diaspora, would be treated as tax-deductible contributions.

APPENDICES

Appendix I: Terms of Reference

Appendix II: List of Stakeholders Consulted

Appendix III: Stakeholder Workshop Results

APPENDIX I:
TERMS OF REFERENCE

TMP PROJECT DESCRIPTION AND TERMS OF REFERENCE

1. BACKGROUND AND RATIONALE

- 1.1 Tourism is the world's largest and fastest growing industry. It has been recognised for some time that it is a powerful instrument for economic transformation, economic development, income creation and employment and foreign exchange generation. According to World Tourism Organisation statistics, international tourist arrivals reached 880 million in 2009 while international tourist receipts totalled US\$852 billion during the same period. WTO forecasts that international tourist arrivals will reach 1.6 billion by the year 2020.
- 1.2 Tourism is potentially a very good catalyst for environmental conservation and improvement; however, if not properly managed, tourism growth in host destinations can have very deleterious effects environmentally, economically and socially.
- 1.3 Tourism has been the leading economic sector in Barbados and the major foreign exchange earner for over four decades, and has the potential to continue to be the major vehicle for economic and social transformation and development. In 2009, visitor arrivals to Barbados totalled 518,564 while cruise passenger arrivals numbered 635,212. Tourist expenditure totalled US\$1.2 billion. Over the past decade, with a few exceptions, tourism activity has contributed annually in excess of 15% to GDP and employed well over 12,000 persons.
- 1.4 Barbados is a mature tourism destination largely of the beach resort type, with most of the tourism related facilities and infrastructure concentrated on the south and west coasts. While there has been some broad and ad hoc planning of tourism developments over the years, there has never been a holistic approach to tourism planning at the national level. Destinations that do not take a conscious and planned approach to all aspects of their tourism sectors, are very likely to suffer from impaired environmental quality and a decline in the economic benefits of tourism.
- 1.5 Careful and comprehensive planning is essential to ensure that resources are managed wisely, so that optimum benefits are obtained not only at present, but also that the tourism assets are available for future harvesting by succeeding generations. This responsibility largely falls to Government working, symbiotically and synergistically with private stakeholders locally and externally.
- 1.6 Thus it is imperative that sound and holistic planning be paramount, if Barbados is to reap the maximum economic benefits from tourism development without deleterious social and environmental effects, while preserving tourism assets for future exploitation. Hence the need for the elaboration of a tourism master plan, with a time horizon of at least ten years, which describes the development plans and programmes that will realise the desired type of future tourism development.
- 1.7 It is noted that the Ministry of Tourism has engaged in a national exercise of developing a White Paper on Tourism Development in Barbados. The White Paper sets out the National Tourism Policy for Barbados, that is, how Government's vision for the tourism industry can be realized. The document has set the overall framework for tourism development necessary to achieving sustainable tourism development not only for the present period, but also for the future. The White Paper

having enunciated Barbados' National Tourism Policy will be followed by the Tourism Master Plan which will lay out the sub-sector plans, actions and projects that realize the national tourism policy.

- 1.8 In view of the foregoing, the Ministry of Tourism is seeking to recruit a multi-disciplinary team of consultants to prepare a Tourism Master Plan for Barbados, with a time horizon of ten years, which elaborates the development plans and programmes that will realise the desired type of in relation to:
- 1.8.1 Infrastructural and product development;
 - 1.8.2 The physical environment, including land use patterns and the carrying capacity of the destination;
 - 1.8.3 Transportation systems and infrastructure external to and within the destination;
 - 1.8.4 The legal, regulatory and institutional framework in relation tourism development environmentally, socially and economically;
 - 1.8.5 Human resource planning and development, especially in relation to education and training;
 - 1.8.6 The marketing, promotion and communications framework and systems, including tourist information services and information technology structures that encourage tourists to visit the country,
 - 1.8.7 Cooperation and coordination within the hospitality and tourism industry, and with GOB, and inter-sectoral linkages.

2. OBJECTIVES

- 2.1 The main objective of the consultancy is to prepare a Tourism Master Plan for Barbados for the ten (10) year period, 2012-2021, which will provide a physical, environmental and economic plan for the balanced development of all aspects of Barbados' tourism product, to ensure the sustainable growth and development of the tourism industry to meet the current needs of Barbadians, visitors, investors and other stakeholders.
- 2.2 The Plan should produce financially viable and environmentally sound tourism projects and programmes for the Barbados tourism sector as a whole. The Plan should also provide a balance between economic benefits, the Government's national objectives, the interests of private tourism stakeholders and the host population at large.

3. SCOPE OF SERVICES

- 3.1 The Consultants are expected to carry out the following general and specific tasks and any other tasks that are considered relevant. Such additional tasks will be implemented only upon mutual agreement between the Ministry and the Consultants.

-
- 3.2 The Consultants are expected to undertake a situational analysis geared towards producing a SWOT analysis of the tourism sector in Barbados. The situational analysis should include the following:
- 3.2.1 A review of the performance of the global and regional tourism industries over the last ten years;
 - 3.2.2 A review of the performance of the economy of Barbados with specific reference to the tourism industry over the last ten years;
 - 3.2.3 An analysis of the recent trends and developments in the global macro-environment, with special emphasis on Barbados' major source markets, and their effects on the growth and development of the country's tourism industry, under headings that should include, but not necessarily be limited to, the following: political, economic, social, technological, legal and regulatory, environmental, competition, prices and exchange rates;
 - 3.2.4 The conduct of a comprehensive audit of all the factors and resources within the country that could affect Barbados' tourism industry. This comprehensive audit should include, but not necessarily be limited to, the following elements:
 - 3.2.4.1 A review of all pertinent reports and studies related to the development of tourism in Barbados, and most importantly, the 2011 White Paper on Tourism Development, as well as a review of projects completed, those under implementation and those planned;
 - 3.2.4.2 An assessment of Barbados' tourism product and tourism infrastructure;
 - 3.2.4.3 An assessment of Barbados' tourist source markets, market environment and market planning;
 - 3.2.4.4 An appraisal of the characteristics of Barbados' tourism industry from the economic, social and environmental perspectives;
 - 3.2.4.5 An assessment of Barbados' tourism sector human resource, training and education needs and planning framework; and
 - 3.2.4.6 An analysis of Barbados' legal, institutional and organizational framework.
- 3.4 Using the situational and SWOT analyses, the Consultants should proceed to create a Tourism Master Plan for Barbados 2012 -2021.
- 3.5 The Tourism Master Plan should consist of a series of discrete though inter-related programmes and projects, which should include, but not necessarily be limited to, topics such as product and services, physical development and land use, the general

environment, the organisation and legal and regulatory framework, human resources development, information technology and tourism information, e-business, marketing, investment and financing.

- 3.6. The Master Plan should detail an Action Programme incorporating the profiles of several programmes and projects identified for implementation within the first five (5) years of the Plan period.
- 3.7. The Consultants are expected to provide a mechanism for the full implementation of the goals, objectives and strategies set out in the Master Plan.
- 3.8. A Financial Plan should also be produced by the Consultants which should detail the financial resources necessary to execute the programmes and projects to accomplish the vision for the tourism sector.

APPENDIX II:

LIST OF STAKEHOLDERS CONSULTED

Stakeholder consultations held throughout the Master Plan process were used to validate the strategic approach contained herein. They ensure that the Master Plan is a product of the widest possible national input. Consultations were conducted through one-on-one meetings, small group sessions, and a series of workshops with four Master Plan Working Groups. The first series of workshops was held in February 2012, and the second in November-December 2012. Specific stakeholders that were consulted included:

- Atlantis Submarines
- Barbados Agricultural Society
- Barbados Chamber of Commerce
- BCC Hospitality Institute
- Barbados Cruise Terminals Ltd.
- Barbados Council for the Disabled
- Barbados Fire Service
- Barbados Hotel and Tourism Association
- Barbados International Business Association
- Barbados Investment and Development Corporation
- Barbados Manufacturing Association
- Barbados Museum and Historical Society
- Barbados National Trust
- Barbados Port Authority Inc.
- Barbados Sailing Association
- Barbados Small Business Association
- Barbados Statistical Service
- Barbados Tourism Authority
- Barbados Tourism Investment Inc.
- Blackbird Design, Alberta, Canada (Folkestone Consultants)
- Caribbean Development Bank
- Caribbean Disaster Emergency Management Agency (CDEMA)
- Caribbean Tourism Organisation
- Caves of Barbados Ltd.
- Central Bank of Barbados
- Coastal Zone Management Unit
- Copyright Society of Composers, Authors and Publishers Inc. (COSCAP)
- Cruise Tourism Task Force
- Department of Emergency Management
- Dr. Scott Rains, US author & researcher on disabilities
- Division of International Transport
- Department of Emergency Management
- Enterprise Growth Fund
- Environmental Protection Department
- Federation of Motor Sport
- Folkestone Marine Park
- Foster & Ince
- Food and Agriculture Organisation (FAO)
- Fund Access
- Future Centre Trust
- Garrison Consortium Inc.
- Goddard's Shipping & Tours
- Government Information Service
- Grantley Adams International Airport Inc.
- Holetown Chamber of Commerce
- Inter-American Development Bank
- Invest Barbados
- Intimate Hotels of Barbados
- Lands and Surveys Department
- Land Tax Department
- May Hinds Consulting Inc.
- Medical Tourism Association, USA
- Ministry of Agriculture
- Ministry of Environment, Water Resources and Drainage
- Ministry of Culture, Sports & Youth
- Ministry of Finance, Investment, Telecommunications and Energy
- Ministry of Foreign Affairs and Foreign Trade
- Ministry of Health
- Ministry of Tourism
- Ministry of Trade
- Ministry of Transport, Works & International Transport
- National Conservation Commission
- National Cultural Foundation
- Premier Attractions of Barbados
- Sanitation Service Authority
- Small Farm Producers
- Simon Fraser University, Canada
- Speightstown Small Business Association
- The Silvertones Ministries

- Tourism Development Corporation
- Tour Operators and other Stakeholders
- Town and Country Development Planning Office
- UWI Hospitality Studies Department

In addition, time was spent visiting numerous sites and accommodations island-wide, including the following:

- Agrofest
- Andromeda Gardens, Atlantis Submarines, Bridgetown
- Carlisle Bay
- Cherry Tree Hill
- Codrington College
- Colleton Plantation House
- Folkestone Park
- Harrison's Cave
- Glitter Bay Estate
- Healing Waters, Barbados Wellness Centre
- Holetown Festival
- Lone Star Hotel and Restaurant
- Mango Bay, Barbados
- Morgan Lewis Sugar Mill
- Ocean Two Resort and Residences
- Oistins Bay Gardens
- Orchid World
- Pelican Village
- Portvale Factory
- Many Hotels & Resorts
- Sir Frank Hutson Museum
- Speightstown
- St James Church & other churches
- St Nicholas Abbey
- St. John's Church
- The Cruise Terminal & seaport
- The East Coast
- The Garrison
- The Grantley Adams Airport
- The Lighthouses
- Tyrol Cot
- Vue Mont Residences
- The Flower Forest
- Graeme Hall Nature Sanctuary
- The Dry Dock
- Bridgetown
- St Lawrence Gap
- All areas of Barbados
- The Airport
- The Soup Bowl
- Hunte's Gardens
- Six Men's Bay
- Rum Distilleries
- Atlantis Submarines
- Beaches

APPENDIX III:
STAKEHOLDER WORKSHOP RESULTS

First Series of Workshops (February 2012)

Tables 1 to 21 summarize the responses on a prioritized basis from the first workshop series. Table 1 presents in order of priority the existing attractions that participants felt were most important in terms of their potential to attract visitors, and ensure they are well presented. The following tables are defined through their titles.

Table 1. Prioritized list of existing attractions to be enhanced to attract visitors.

Existing Attractions Which Could Use Improvement
Bridgetown – interpretation, signage
Beaches
Morgan Lewis Sugar Mill
Pelican Craft Village - covered walks, energy, life
Speightstown
Farley Hill
Garrison area needs to be brought alive - signage, tunnels
Barbados Museum – upgrade exhibits, make more exciting
Queen’s Park
Portvale Factory and Sugar Museum
Andromeda Gardens
Bathsheba
Flower Forest
Folkestone Marine Park
Graeme Hall Sanctuary
Gun Hill Signal Station
Codrington College Site
Welchman Hall Gully
Barbados Museum
Orchid World
Cherry Tree Hill
St. Lawrence Gap
Oistins
Speightstown
Welchman Hall Gully and Jack-in-the-Box Gully
Barclays Park
Gun Hill Signal Station
Mount Gay Visitor Centre
Chalky Mount/Scotland District
Arlington Museum and Great House
Agrofest
Tyrol Cot
Animal Flower Cave
King George V Memorial Park
St. Thomas Church and St John’s Church
Kensington Oval
Brighton Market

Table 2. Potential new tourism attractions.

Potential New Attractions
Sugar Museum - larger than existing, one central location (factory conversion)
Cruise Port Interpretive Centre - to encourage returns / introduction to Barbados
Garrison tunnels and gully
Lighthouses
Marine Park - Carlisle Bay
Speightstown to Holetown
Queen's Park
Fight for freedom, emancipation and survival Interpretive Centre
Gully Walks - trail system
Barbados National Park
Marine Interpretive Centre
Sam Lord's Castle
Potteries at Chalky Mount
Chattel Houses of Barbados
Old Train Trail Line
Cotton production and clothing
Craft market
Rum shops of Barbados
Baxter's Road
Mermaid Tavern (Oistins) - charter signing
Tours for niche markets - genealogy, sports
Dry Dock (screw)
Chase Vault
Observatory
Golden Square - Bridgetown, trade unions
King George 5 th Memorial Park
Her Majesty's Prison
Cemeteries - St. James, Christ Church - genealogy links
Perfume Garden/Spice Garden
Water Park
National Aquarium

Table 3. Some tourism opportunities in Barbados.

Tourism Opportunities in Barbados
High value tourism - a new generation
Medical
Heritage
Education
Agro-tourism - link with incentives

Table 4. The stories we need to tell our visitors.

Stories we Need to Tell our Visitors / Things we Want to Share and Show
Crop Over – what it means, it's origin
Sugar and rum
Aspects of our history
National heroes/people
Bridgetown stories – e.g. camels in the 1600s
Independence - Rock Hall – slavery, first free village
Our food
Our music
Folklore, traditions and festivals
Arawaks and Amerindians
The island that invented rum and rum shops
Sam Lord's Castle – legend, pirates
Cricket legacies
Use of resources – water, sun, land, coastal environment, caves
Old customs, traditions and pastimes
Our military history – e.g. WWII, Carlisle Bay, British military forces
Our outstanding athletes & sports personalities
Our Parliament
Our characters
Our longevity
Our Christian religions / churches
Medicinal Plants
Bajan discipline - child rearing

Table 5. Benefits of tourism in Barbados.

Benefits of Tourism
• Foreign exchange
• Employment
• Opportunity - show off culture, lifestyle/cultural exchange
• Inclusion of all in the economy - local, visitors, handicapped
• Standard of living increased
• Economic gains through foreign exchange
• Environment – more awareness
• More entrepreneurs
• Cultural exchange/preservation of culture
• Development of individual creativity to meet visitor needs
• Development of craft
• Increase in physical services development/infrastructure
• Fosters education, training and IT development
• Improved infrastructure benefits all
• Safety net for Barbadians

Table 6. Barbados' greatest strengths.

Greatest Strengths
The people
Political stability
Infrastructure - communication, technology
Escape
Safety
Mobility (transportation systems)
Environmental protection policies
Commitment to coastal zone management

Table 7. Barbados' weaknesses.

Weaknesses
Poor service
Poor enforcement of legislation
Finance - lack of
Environmental services/strain on resources (waste, energy consumption)
Lack of knowledge of Barbados' beauty
Transportation system not reliable
Poor signage
Poor execution
Current infrastructure does not fit future direction
Degrading environment - impacted by limited capacity
Local appreciation of value of natural resources/open spaces - lacking
Tired product

Table 8. How tourism harms Barbados.

How Tourism Harms Barbados
Health risks - diseases and stress on the health system
Impacts environment - overuse of natural resources
Causes pollution
Blocks access of locals to environment
Impacts local cultural traditions - being staged, but visitors want authentic
Land costs increases - not accessible to locals - affordability - hostility results/alienation
Mass influx pressures carrying capacity
Dependence on tourism is a risk factor
Need to sanitize the past for visitor comfort
Mimicking other cultures for acceptability
Americanization of our culture

Table 9. How to overcome barriers.

How to Overcome Barriers
Present benefits to the people
Keep it simple
Get people to see they're part of process/ get them involved
Get feedback
Monitor impact of implementation/modify as required in time
Internal and external finance
Implementation plans - actions, responsibilities, monitoring
Contingency plans (for disasters)
More informal interaction with community
Get political buy-in from both political parties
Empower and provide support

Table 10. How to increase tourism awareness.

How to Increase Tourism Awareness
Information dissemination re: tourism benefits to the communities /money spent (public education, e.g. video)
Take the message to the people (e.g. at rum shops)
Draw tourists to destinations where they can mix with locals
Tour guide training
Enhance corporate responsibility
Make the message "sexy"/appealing
Help locals see local areas through eyes of visitor
Tourism Jingle re: importance of tourism
Mandatory classes at all primary/secondary/tertiary education levels (on sustainability, tourism development)
"Fam tours" (familiarization tours) to competing destinations and share experience back home

Table 11. Major issues affecting cruise tourism.

Major Issues Affecting Cruise Tourism
Recent ship sinking
Regional tax
High oil prices
Expense / high prices in Barbados
Accessibility and getting from ship to attraction
World economy
Limited access of cruise passengers to tourism officials / vendors
Treatment of visitors
Taxi operator attitude, service issues at port
"Accessible tourism" services; special land transport requirements, growth of aging & handicapped
Poor quality / lack of attractions in Barbados

Table 12. Getting more ships to visit and home port in Barbados.

Getting more ships to Visit Barbados and Home Port
More activities - land-based
Revamp package
Make Pelican Village more inviting/visible
Make Bridgetown more lively at night
Provide more value for money - shopping
Ask cruise tourists what they are looking for
Have more Barbados Tourism Staff work/interact with cruise companies
Incentives to encourage cruise staff to encourage tourists to visit Barbados
Find something special/unique re: Barbados to sell
More marketing budget

Table 13. Encouraging cruise passengers to spend more time and want to return.

Getting Cruise Passengers to Spend More Time & Want to Return as Stayover Visitors
More accessible Port for all family members
Greater value for money
Proper, purpose-built cruise facility (existing: ex-cargo port)
Incentive/discount vouchers for use upon return
More exciting attractions/activities - sights, sounds, smells
Attractive directional signage
Better combo-cruise stay-over for cruise return
Higher level customer service
Reduce harassment
Music at port
Free samples as exit ship (food) outside Port gate

Table 14. How to increase airline capacity.

How to Increase Airline Capacity
Determine internally in Barbados what we want/ Have more dialogue between agencies
Increase market demand at departure point (via marketing)
More incentives at different levels - e.g. landing fees, fuel costs, waivers
Promote/encourage airlines to send and receive passengers

Table 15. How to improve the airport passenger experience.

How to Improve Passenger Experience at the Airport
Sensitivity training for front line (disabled)
Improve immigration services – faster service
More welcoming/colourful
Announcements/promote attractions on large screen
Increase number of Customs officers on duty
More welcoming people/airport staff, locals, Customs, etc.
Local music playing
Speedier baggage handling
Feature festivals
Welcome ambassadors / more visible
Rain cover improved
Sick Bay facilities - more visible
Dedicated facilities / services for private jets

Table 16. Major issues affecting airlift capacity.

Major Issues Affecting Airlift Capacity
Cost - too high
Capacity limited
Lack of direct flights
Cost of fuel
Airport services
Language restrictions
Destination marketing
Downturn in global economy
Air passenger taxes - UK, Germany

Table 17. Suggestions relating to Policy and Legislation.

Policy & Legislation	
First response	Second response
Legislation required to ensure our destination is accessible to PWD. Our major markets all have acts in place which promote travel in this demographic	Policy making it mandatory for all service providers to be trained in how to deal with ALL of their customers
There should always be a clear path where policy and legislation can be implemented. The gap between policy formulation and implementation capacity should be closed	The availability of information and data to monitor the implementation process
Ensure adherence to international health regulations and compliance with health services act by service providers	Develop quality assurance mechanisms
Enact legislation to enforce fully accessible tourism plants	Enactment of cultural properties legislation
Incentives to implement and maintain standards	Enforce legislation
Make information on relevant legislation available. Ensure players are knowledgeable about the legislation affecting them	Enforce legislation especially in marine environment; especially when it deals with safety of persons on the beach and water sports activities
A thorough review of all existing legislation and replacing them with a new tourism act	In the new tourism act, ensure that to receive incentives the companies must promote Barbados cultural products and services
Having quality assurance checks and balances for the activities and attractions	Adopt more effective and efficient policies that can be easily processed
Enforcement of existing legislation after making any necessary amendments or improvements ensuring it is relevant to current situations	Streamline policies and legislation to ensure no duplication exists while making that information available to all
Enforce existing legislation	Incentives to maintain standards as it relates to attractions
Tax incentives for both individuals and corporations to contribute to the development and sustainability of the tourism industry	Efficiency in services delivered by public sector agencies to facilitate foreign direct investment
Revisit resource management legislation - e.g. Antiquities bill, traffic impact, mitigation, coastal zone management, natural resource management	Review of zoning legislation / plans with a view to effective management, planning & etc., policies of tourist areas
Much better communication by the Government of Barbados and other tourism development agencies; BTA, BHTA, BTII, etc., as to what funding and incentives are available, because often much of this information is hidden - one document to list all	From the perspective of the development of heritage tourism, legislation which is balanced needs to be developed to preserve man-made and natural heritage
Legislation re: health and environment	Legislation re: agriculture linkages in the hotels
Philanthropic legislation pertinent for the	If casinos will be an idea going forward, legislation will

attraction of foundations to the island which in turn would encourage an influx of funds	need be drafted
Keep regulations simple and at a minimum so that they don't become obstacles to progress	
Proper enforcement of legislation	Proper/correct transparency and accountability of the management of funds and the entire functioning of the business environment
Having incentives for consumption of our cultural services and products and use of agricultural goods and services	Update all legislation and decrease the number of pieces of legislation
Update legislation to make it current with present and future needs / requirements	Monitoring and evaluation of the regulations
Mandating hotels and restaurants to purchase a percentage of local produce - tie this to incentives which are currently offered to the hotel industry	
Create philanthropic opportunities to move the economy - but to meet individual criteria (taxes, etc.) - need legislation to make this possible	Tie incentives to cultural product (e.g. Visual arts)
Tax incentives for both individuals and corporations to contribute to the development and sustainability of the tourism industry	Efficiency in services delivered by public sector agencies to facilitate foreign direct investment

Table 18. Sources of finance for Master Plan implementation.

Potential Sources of Finance For TMP Implementation
Private investment
Development banks – e.g. CDB, IADB, UN, EU
Tap into improved international business
JV's / PPP's - lure outside entities
Philanthropy
NGO's International
Independent fund/foundation
Taxation and levies/small voluntary tax on visitors
Commercial banks/financial sector
Government of Barbados funding facilities
Build/operate/lease/transfer
External/private investors/entrepreneurs
In-kind technical services
Create investment company and sell shares
Greater effort to collect existing fees
Visitor contributions / user pay
Diaspora - more conferences; encourage their support; make it easier for them
Locals make donations; small contributions
Expand the BHTA voluntary fund
Stakeholder fund

Table 19. Why Barbados is a good place to invest.

Why Barbados is a Good Place to Invest
Good ROI
Stable economy
Political stability
Safety
Barbados has developed physical infrastructure
Barbados has an administrative framework
Barbados has human resources with skills
Quality of life / standards of living appeals to niche markets
New niche markets - education, medical

Table 20. Negative factors about investing in Barbados tourism.

The Negative Factors About Investing in Barbados Tourism
Concern regarding inadequate ROI
Comparatively higher wages
Crime and violence here
High prices
Existing tourism product needs attention
Slow growth rate
Other sectors performing better than tourism
Global economic climate
Costly and difficult for foreign investors in Barbados - plus time involved
Aging visitor base - not sustainable in long run
Sun-sea-sand model not sustainable

Table 21. The one thing for organizations in the sector to be more efficient and effective.

The One Thing to Assist Tourism Sector Organizations be more Efficient/Effective
Research - plans - focus
Encourage collaboration to avoid duplication
Make sure all agencies and stakeholders are on the same page
Use technology to save time
Incorporate needs and plans of stakeholder organizations
Plan evaluation and monitoring mechanisms
Provide forum for information exchange
Training staff to give best
Combine some Government agencies
Shared secretary

Second Series of Workshops (November/December 2012)

The second series of workshops was held closer to the end of the TMP preparation. They were designed primarily to obtain stakeholder input to the TMP strategies that were evolving. Tables 22 to 28 present, on a prioritized basis, the results of the discussions and the rankings and ratings using the modified Delphi process.

Table 22 demonstrates the application of the Modified Delphi process. For example, the highest-rated strategic objective is *Improve the Visitor Experience* with a weighted average of 4.74 out of a maximum of 5.0. Of the total 42 participants who rated the question, 35 assign it a rating of one, 5 of two, etc. The results obtained by a weighted average provide both a ranking and an absolute rating. This information is valuable in indicating how strongly the stakeholders feel about the items they rate after discussion and consideration. This is then translated into strategies for developing the Barbados tourism sector.

Table 22. Strategic objectives reviewed at 2012 workshops.

Ranking	Strategic Objectives	Weighted Average	Weighted Average (Sub-category)	1	2	3	4	5	Total	n
1	Improve the Visitor Experience:	4.74		35	5		2		199	42
	A) Environmental Management		4.55	25	9	4			173	38
	B) UNESCO Historic Bridgetown + Its Garrison		4.41	23	6	8			163	37
	C) Cultural Heritage		4.34	21	10	6	1		165	38
	D) Natural Heritage		4.29	18	15	4		1	163	38
	E) Built Heritage/Attractions		4.19	20	13	6	3		176	42
	F) Culinary		4.08	10	21	7			155	38
	G) Other Niche Markets		4.07	11	11	7	1		122	30
2	Increase Total Visitor Spend	4.60		29	9	4			193	42
3	Base decisions on good information & measure results	4.50		25	12	1	2		180	40
4	Change the Tourism Mindset	4.43		30	4	4	4		186	42
5	Enable Tourism Delivery	4.15		17	14	7	2		166	40
6	Meet Airlift Needs	4.14		20	12	7	2	1	174	42
7	Decrease Import Dependency	4.14		19	13	7	3		174	42
8	Have a Vibrant Accommodation Sector	4.09		21	9	10	2	1	176	43
9	Implement Low Cost/ No Cost Strategies	3.93		13	17	6	2	2	157	40
10	Meet Cruise Tourism Needs	3.90		12	15	10	3		156	40
11	Improve the Movement of People of Barbados	3.15		2	15	15	3	5	126	40

Table 23. UNESCO World Heritage Site in Barbados.

UNESCO: Historic Bridgetown and Its Garrison
Preserve and extend the character of the Garrison area to strengthen greater linkages with the Carlisle Bay area and the Historic City Centre
Open a larger section of the underground tunnels
Restore buildings at the Garrison
Assist development of programmes that interpret and animate the UNESCO site
Improve amenity and infrastructure of the coastal route from Garrison to Oistins
Link the UNESCO site to the Cruise Port Terminal through programmes and transportation
Purchase three electric trams to move visitors through the UNESCO site
Purchase Maycock's Gully
Obtain draft horses and buggies for Garrison area visitors
Build a tree top canopy walk over Maycock's Gully
Open a food court at the old barracks kitchen

Table 24. Tourism research management.

Tourism Research Management
Consolidate primary responsibility under the MOT
Assess and prioritize research needs and research management needs
Build capacity for tourism research management within MOT
Develop a funding model and 5-year operating budget for this MOT function
Create a central repository/public portal for research storage and access
Address specific data needs for the accommodation sector
Quantify the economic impacts of tourism more comprehensively
Measure the impacts of tourism on the local community and environment
Gain a better understanding of public views and perceptions on tourism
Create a public website on the benefits of tourism

Table 25. Change the tourism mindset.

Change the Tourism Mindset
Improve stakeholders communication, coordination and collaboration
Develop programme “Youth in Tourism Speak-out Activities”
Hold a Series of workshops throughout the Island
Form a Council of Champions
Address the House of Assembly on the TMP and importance of tourism
Prepare information bulletins for the business sector
Create a mobile tourism awareness exhibit
Re-activate the White Paper Website
Politicians and industry leaders take on tourism jobs
Introduce an iconic character

Table 26. Built attractions in Barbados.

Built Attractions
Rehabilitation of Barbados, many existing heritage / natural attractions
Discover Barbados Interpretive centre near the cruise port
Interpretation at the Cane breeding Station and Cotton Ginney
Interpretation on fight for freedom, emancipation and survival
Resolution of conflict and re-opening of Graeme Hall Nature Sanctuary
Interpretive attraction about Barbados' marine environment
Interpretive project at Oistins (Mermaid Tavern, history, fishing)
Hands-on perfume garden

Table 27. Natural attractions.

Natural Attractions
Keep all coastal areas not currently developed as natural as possible and ensure all coastal areas are completely accessible to the public
Develop themed environmental walking routes from the Bridgetown port that feature small murals and plaques with environmental scenes that lead visitors through Bridgetown areas
Develop a series of interpretive nature trails - marine and terrestrial
Use incentives to implement a "clean-up Barbados" programme
Resolve issues with Graeme Hall Nature sanctuary and re-open
Develop a botanical garden
Design and construct a herb and medicinal garden

Table 28. Meet cruise tourism needs.

Meet Cruise Tourism Needs
Improve the walk and shopping offer for cruise tourists travelling independently from the cruise terminal into Bridgetown
Improve the offer for cruise tourists visiting the UNESCO site and other attractions
Develop themed walking routes from the Bridgetown Port that feature small murals / plaques with environmental scenes and lead visitors through shopping and waterfront areas
Tourism in the coastal zone – revitalize Carlisle Bay
Increase home porting by ships that source cruise tourists from primarily Brazil and South America
Increase home porting by ships that source cruise tourists from primarily Germany, Austria and Switzerland
Encourage development of new ship berth and terminal
Separate cruise activity from cargo operations
Target the German-speaking people of Germany, Austria and Switzerland as a key source market for Barbados in addition to the traditional main markets of UK and North America
Form a Southern Caribbean Cruise Association (SCCA) with headquarters in Barbados
Provide internationally-recognized, secure, transparent packaging

List of Acronyms

BARP	Barbados Association of Retired Persons
BAS	Barbados Agricultural Society
BCC	Barbados Community College
BCCI	Barbados Chamber of Commerce and Industry
BDS\$	Barbados Dollar
BGHC	Barbados Garrison Historical Consortium
BHTA	Barbados Hotel and Tourism Association
BMA	Barbados Manufacturers Association
BMHS	Barbados Museum and Historical Society
BPI	Barbados Port Inc.
BSS	Barbados Statistical Services
BTA	Barbados Tourism Authority
BTII	Barbados Tourism Investment Inc.
BVE	Barbados Visitor Economy
BWA	Barbados Water Authority
CARICOM	Caribbean Community
CCC	Communication, Coordination and Collaboration
CDEMA	Caribbean Disaster Emergency Management Agency
CFR	Code of Federal Regulations
CPC	Chief Parliamentary Council
CSF	Critical Success Factor
CTO	Caribbean Tourism Organization
CZMU	Coastal Zone Management Unit
DEM	Department of Emergency Management
EMA	Environmental Management Act (Draft)
EPD	Environmental Protection Department
FAB	Fully Accessible Barbados
GAIA	Grantley Adams International Airport
GCI	Global Competitiveness Index
GDP	Gross Domestic Product
GOB	Government of Barbados
GWH	George Washington House
IADB	Inter-American Development Bank
ICT	Information and Communications Technology
IICA	Inter-American Institute for Cooperation in Agriculture
MICE	Meetings, Incentives, Conferences, Conventions, Events and Exhibitions / Conference Tourism
MTI	Ministry of Tourism and International Transport
MTW	Ministry of Transport and Works
NA or N/Av	Not Available
NCC	National Conservation Commission
NCF	National Cultural Foundation
NGO	Non-Governmental Organization
NHD	Natural Heritage Department
NSC	National Sports Council

NTHP	National Tourism Host Program
PWD	Persons with Disabilities
SCCA	Southern Caribbean Cruise Association
SME	Small and Medium-Sized Enterprises
SSA	Sanitation Services Authority
SWOT	Strengths, Weaknesses, Opportunities, and Threats
TCPO	Town and Country Planning Office
TDC	Tourism Development Corporation
TMP	Tourism Master Plan (Barbados)
TSA	Tourism Satellite Account
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
US	United States (same as USA)
UWI	University of the West Indies
WHS	World Heritage Site
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council

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