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# **Strategy and Action Plan: Draft Report**

## **St. Lucia Tourism Benchmarking and Competitiveness Assessment**

14 June 2013

### Acronyms and Abbreviations

ADR	Average Daily Rate
ALS	Average Length of Stay
B&B's	Bed and Breakfast
BOI	The Board of Investment (Mauritius)
BTA	Barbados Tourism Authority
BVI	British Virgin Islands
CAF	Community Adjustment Fund
CAGR	Compounded Annual Growth Rate
CAST	Caribbean Alliance for Sustainable Tourism
CTC	Canadian Tourism Commission
DMOs	Destination Marketing Organizations
EC's	European Commission
ECCO	Eastern Caribbean Collective Organization for Music Rights
F&B	Food and Beverage
FDI	Foreign Direct Investment
GSTC	Georgia Sea Turtle Center
	Tourism Awareness Unit and the Global Travel & Tourism
GTPP	Partnership
HR	Human Resources
IHRA	International Hotel and Restaurant Association
IAPINDO	Indonesia Hotelier Association
I.H.A	International Hotel and Restaurant Association
ICA	International Culinary Association
IDEA	International Design and Entertainment Associates
IICA	Inter-American Institute for Cooperation on Agriculture
ILO	International Labour Organization
IMG	International Management Group
INCAE	Instituto Centroamericano de Administración de Empresas
IPA	Investment Promotion Agency
ISO	International Organization for Standardization
ITC	Instituto Tecnológico de Canarias
L/T	Long term
LCD	Liquid Crystal Display
M/T	Medium Term

### Acronyms and Abbreviations

MESE	Meetings, Exhibitions and Special Events
MICE	Meetings, Incentives, Conferences, and Exhibitions
MT & LA	Ministry of Tourism and Legal Affairs
MTPA	Mauritius Tourism Promotion Authority
NEDLAC	National Economic Development and Labour Council
PATA	Pacific Asia Travel Association
PMOs	Provincial Marketing Organizations
PPP	Public-Private Partnerships
RevPAR	Revenue Per Available Room
S/T	Short Term
SFA	European Special Framework of Assistance
SLASPA	Saint Lucia Air and Sea Ports Authority
SLTB	Saint Lucia Tourism Board
SLHTA	Saint Lucia Hotel and Tourism Association
SME	Medium Size Enterprises
SPDC	State Property Development Company
TAC	Tourism Action Clubs
TEF	Tourism Enhancement Found
TQM	Total Quality Management
TTDA	Tourism Training Department Association
TVC	Tourism Value Chain
UNDP	United Nations Development Programme
ESCAP	Economic and Social Commission for Asia and the Pacific
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
USP	Unique Selling Proposition
USVI	United States Virgin Islands
VEMS	Visitor Expenditure and Motivation Surveys
WIFI	Wireless Fidelity
WTTC	World Travel and Tourism Council
YoY	Year on Year

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## **Introduction**

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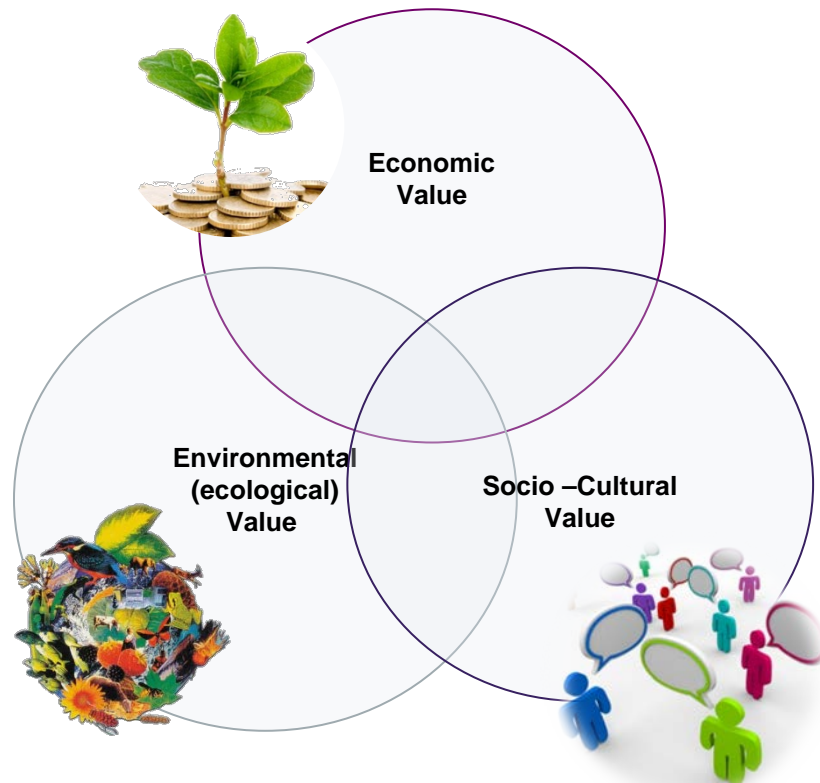
# The project has been elaborated in 3 phases with stakeholders from the public and private sector playing a key role throughout the project's development



More than 230 reports and sources were consulted, 39 interviews were conducted with stakeholders from the private and public sector and a Tour Operators Survey was elaborated.



## The project has been developed with a sustainable tourism development framework: value for local communities, the natural and cultural environment, business and tourists



- Sustainable Tourism development should ensure economic feasibility for host communities, socio-cultural equity, ecological quality and tourist satisfaction.
- Ensure viable, **long-term economic operations**
- Provides socio-economic benefits to all stakeholders
- Stable employment, income-earning opportunities, social services to host communities, and contributing to poverty alleviation.
- Respect **socio-cultural authenticity** of host communities, conserve living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- Make **optimal use of environmental resources** that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural resources and biodiversity.

Sustainable tourism makes business sense:  
creates economic, socio-cultural and environmental value over the long term

# The Tourism Value Chain (TVC) analysis has identified gaps and opportunities which can build competitiveness in Saint Lucia



Stakeholders across the Tourism Value Chain have an important role to play in building competitiveness. Consultation with the public and private sectors in these “links” has resulted in the identification of opportunities for building competitiveness.

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## Saint Lucia is a leading international tourist destination for luxury, romance and nature with great potential to further leverage natural and cultural resources

### Saint Lucia is already a leading international tourist destination for romance and luxury

- Leading international destination: **luxury, romance and natural beauty**
- **Unique natural and cultural heritage** (Pitons Mountains UNESCO World Heritage Site), world's only drive in volcano and its sulphur springs
- **"Best Island in the Caribbean"** in 2013 by Global Traveller
- Recognised internationally **8 times as the world's leading honeymoon destination** by World Travel Awards
- Most **luxurious boutique hotels** in the world as recognised by:
  - Travel & Leisure's 2012 "It list"
  - Condé Nast Traveler's 2012 "Hot List"
  - Best Romantic Resort and Best Luxury Resort (Caribbean Travel + Life's Readers' Choice),
  - TripAdvisor's Travelers' Choice Top 10 Hotels for Romance in the World
  - TripAdvisor's Travelers' op 25 Luxury Hotels in the Caribbean

### Tourism plays an important role in the economy of Saint Lucia

- **Contribution to GDP<sup>1</sup>: US\$ 169 million** directly to the GDP (**13%** contribution) in 2012
- **Jobs<sup>1</sup>: 13.500 direct jobs (18.6%** contribution) and 17.500 indirect jobs in 2012
- **Tourism expenditure<sup>2</sup>** (revenues for St Lucia): generated **US\$ 571 million** in 2012
- **Tax contributions<sup>3</sup>: 60%** to tax revenue in 2012

<sup>1</sup>Source: WTTC Country Report, Saint Lucia, 2012

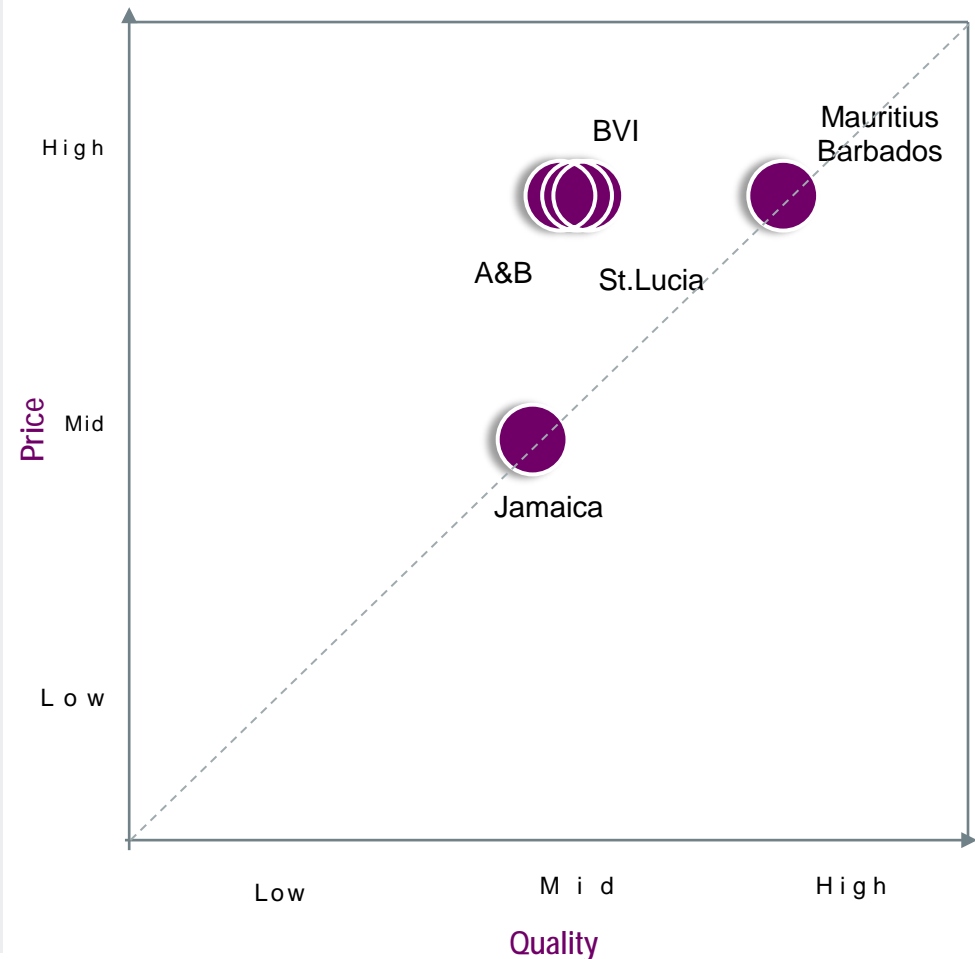
<sup>2</sup>Source: Saint Lucia Tourism Board, Annual Report, 2012

<sup>3</sup>Source: Saint Lucia House of Assembly, 12 July 2012.  
[http://www.htsstlucia.org/2012\\_News/July/HTS\\_News\\_July\\_12th\\_2012.htm](http://www.htsstlucia.org/2012_News/July/HTS_News_July_12th_2012.htm),

## Saint Lucia's value for money proposition is limited compared to Mauritius and Barbados; who are perceived as providing more products and quality experiences

- Antigua and Barbuda and Saint Lucia share a positioning with Saint Lucia as **an intimate luxury destination but has a limited value proposition.**
  - Antigua has adopted a new Tourism Master Plan (2012/2013) which defines new investment projects in new 5\* hotel properties, as well as facilities such as marinas, eco-lodges and wellness facilities.
- Mauritius and Barbados are **expensive and luxurious destinations, with a variety of services to satisfy the needs of demanding wealthy visitors.**
  - They have established a **high value proposition** which delivers on expected quality through a rich variety of activities including eco-tourism, wellness and spa, cultural heritage, local food and strong links with the agricultural sector. They have focused on HR capacity development.
- Jamaica is positioned as an affordable destination in the Caribbean, offering good value for money, with a lower comparative price but with good quality services.
  - Jamaica's positioning strategy, as stated in the Tourism Master Plan, will continue to focus on **value for money**, emphasizing the excellent food and accommodation and variety of experiences on offer.

### Price/Quality comparison



## Visitor and industry perceptions confirm that Saint Lucia is recognised as a beautiful and unspoilt destination, however, it is perceived as relatively expensive

- Saint Lucia is perceived as a relaxing, beautiful, unspoilt and clean destination according to the visitors.
- According to visitors and Tour Operators, there are **great opportunities** to further **develop luxury products**.
- **Transportation** infrastructure is one of the main issues which **negatively** affect the tourism product in Saint Lucia
  - Half of tourists' recommendations to improve Saint Lucia's product are related to the improvement of transportation and includes improving the road network, **more direct flights**, improved **road** conditions and proper **road safety procedures**, more maps and **tourism signage**.
- Saint Lucia is an **expensive** destination with **high flight costs** and **over priced hotels** according to tourists.
- Relative high cost of accommodation and expensive flights are key reasons for not returning to Saint Lucia.
- There is a **perception** with some clientele that Saint Lucia is **not luxurious enough** due to the prominence of brands like **Virgin Holidays** (Rex Resorts property) and **the predominance of Sandals**.
- The **leisure and entertainment** offer in Saint Lucia is **limited** according to visitors who state that **more night life and entertainment** would improve the product.
- Tourists recommend that Saint Lucia may improve its product through **better customer service**.
- A **lack of safety outside hotels** negatively impacts the tourists' visit to Saint Lucia.
- Tours Operators stated that one of the biggest difficulties for Saint Lucia is that **the clients do not know anything about the island**.

Source: SLTB, Visitor Exit Survey Report, 2012; Tour Operator Survey, Tourism Competitiveness Benchmarking Assessment, 2013

# Top 5 challenges facing tourism development in Saint Lucia

## 1 Infrastructure

- Low competitiveness and major impact and quality and value of tourism
- Limited transportation and poor land infrastructure
- Waterfront underutilised
- Water connectivity underutilised
- Lack of tourism signage and information
- Limited internet and WIFI
- Limited environmental and ecological sustainability considerations

## 2 Product line development and facilities

- Limited quality of hotel product across sector
- Limited facilities: hotels and facilities
- Product offer does not satisfy new demand trends
- Product is relatively expensive compared to the quality and value proposition

## 3 Marketing

- Lack of international hotel and complementary brands
- Lack of consistency between brand perception (island perspective) and quality of the destination
- Lack of protection of St Lucian produced handcraft, design, art and gastronomy

## 4 Human Resources Capacity

- Limited HR skills and training in hospitality sector
- Limited international service standards across island.
- Lack of pride and awareness of the benefits of tourism
- Gaps in the value chain and limited synergies with agriculture and handcraft

## 5 Institutional Framework

- Limited buy-in across ministries and lack of coordinated approach for tourism development
- Lack of clear priority project targets for investment and clear investment objectives for tourism development
- Limited budgets and PPP for priority projects
- Limited incentive structure which supports target projects
- Need a champion to drive tourism agenda across private and public sector; need clear roles which align tourism development and investment
- Clear policies direction and financing framework needed (PPP)

## International trends show that the luxury and wellness segments continue to grow; and that customers seek value for money

### UNWTO 2020 International Trends

- Competitive destinations worldwide stimulate air travel demand through **attractive, authentic and quality products which deliver value for money throughout the Tourism Value Chain.**
- International tourists, particularly **luxury travellers**, are **highly informed and search for great value.**
- Visitors look for **authentic and once-in-a-lifetime experiences.**
- **Wellness and luxury tourism continue to grow** strongly despite the economic pressures; people are more conscious of looking after their physical and mental wellbeing.
- Visitors are increasingly looking for ways to enjoy and **re-connect with nature.**
- **“Eco-consciousness”** has been defined as the most dynamic trend in travel today.
- **Technology** will continue transform the tourist industry, influencing the decisions of consumers and the way in which information is disseminated.
- **“Creative Class”** continues to grow with tourists wanting to really live and experience the places that they visit – **the search for authenticity**
- **Gastronomy and Wine** tourism is expected to become even more popular in the future and today 12 million people travel worldwide **motivated by local gastronomy.**
- **Sport Tourism** continues to gain momentum and is offering solid growth opportunities as people search for **adventure and health.**
- It is expected that an increasing number of time-pressured **business travellers will incorporate leisure** elements into their work trips.
- Growth in Generation X , Generation Y , Baby Boomers and Families.
- **Growing BRICS**, Brazil and Russia are particularly important for the Caribbean as they look for **luxury destinations**



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- **Vision, objectives and goals**
- Infrastructure and Destination
- Tourism Product Development
- Marketing, commercial and branding
- Human Resources & Quality
- Governance, Investment & Funding

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# Vision and Strategic Objectives for Tourism Development

## Vision

“Our vision is that Saint Lucia be **recognized internationally** as having **unique competitive** and **high value** products that **meet the expectations** of visitors who will be sustained by a **well trained and customer** focused workforce and where the **benefits generated** by tourism are **widely shared**” (National Vision Plan, October 2008)

## Strategic objectives

### Infrastructure

- Build infrastructure capacity and competitiveness (land and air connectivity, signage, communication)
- Prioritize high impact/low and high impact/high investment projects
- Build environmental sustainability capacity

### Product Line Development

- Develop and enhance products to stimulate demand and leverage the uniqueness of St Lucia
- Identify and focus on key tourism product lines
- Develop new products lines (services, tours and attractions)
- High quality products and services

### Market Development

- Build and promote 100% authentic St Lucia,
- Attract new markets and penetrate key markets
- Identify and attract key international brands which add value to St Lucia
- Leverage uniqueness: unspoilt natural haven, boutique scale
- Focus on high net worth source markets

### Human Resources & Quality

- Develop HR Capacity and quality throughout the Tourism Value Chain
- Develop international standards
- Identify and prioritise skills development need programmes
- Develop pride in tourism and hospitality sector
- Identify key HR projects for agriculture and tourism

### Institutional Framework

- Common vision for tourism development across ministries and public-private sector
- Identify key priority projects
- Streamline processes
- Prioritization of development and investment hubs
- Strong investment support framework
- New funding mechanisms
- New approach to PPP

## Market objective: To increase arrivals and reach new records of 500,000 air arrivals; 76,000 yacht arrivals and a total of 1,150,000 total arrivals by 2022

Arrivals	Goals	2012 Base*	2017 Goals**	2022 Goals**
<b>Total</b>	<ul style="list-style-type: none"> <li>Increase total arrivals to new levels</li> </ul>	<b>920,868</b>	<b>1,021,327</b>	<b>1,150,032</b>
<b>Air</b>	<ul style="list-style-type: none"> <li>Increase air arrivals to new levels</li> <li>Recuperate in 2017 a 41% air vs 59% cruise balance</li> <li>Reach total air arrivals of 499,746.50 by 2022</li> </ul>	306,801	391,564	499,747
<b>Cruise</b>	<ul style="list-style-type: none"> <li>Stabilize cruise arrivals</li> </ul>	571,894	573,325	574,760
<b>Yacht</b>	<ul style="list-style-type: none"> <li>Increase yacht arrivals to new levels</li> </ul>	42,173	56,437	75,525

Sources: \*2012 Base: SLTB, Tourism Performance Report (2012);

\*\* 2017/2022 Goals: T&L projections based on UNWTO, Tourism Barometer (2012); Euromonitor Outbound Tourism Reports: USA, Canada, UK, Germany, France and BRICS (2012); Business Monitor International Report (2012/2013), Caribbean Tourism Report (2012)

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## Objective: Build infrastructure capacity to support tourism development

Infrastructure Strategy	
Land Connectivity	<ul style="list-style-type: none"> <li>• Create a land network with structured access points and clear options for visitors</li> <li>• Road improvement and expansion projects</li> <li>• Structured transportation plan to include pedestrian walkways, biking trails, parking allocation on the outskirts of the district; to encourage walk-ability, possible trolley services may prove beneficial to the congestion</li> </ul> <p><b>Note:</b> Land connectivity solutions are defined in the National Vision Plan which propose to relieve congestion and minimize travel time, open up new lands and link rural communities, improve and expand public transportation services. Transportation hubs are proposed which will improve transportation on island significantly.</p>
Water Connectivity	<ul style="list-style-type: none"> <li>• Growth of the potential water connectivity market within St. Lucia is paramount to ensure access throughout the island</li> <li>• Diminishing the current pressure on the road infrastructure is crucial</li> <li>• Provide value offer for visitors and create a pleasant experience</li> <li>• Create a water network of water taxis and ferries</li> </ul> <p><b>Note:</b> The National Vision Plan provides recommendations of locations for ferries and water taxis.</p>
Waterfront development	<ul style="list-style-type: none"> <li>• Create highly visible waterfront development as a world class destination with all amenities and facilities (retail, restaurants, information centre)</li> <li>• Leverage physical location as entrance point for cruise ships and water-side city hub</li> <li>• Improve facilities and services in Castries Port to accommodate visitors as they disembark from cruise ships. Encourage links with the city hub of Castries through an integrated waterfront development.</li> <li>• Potential re-location of cargo operations from Castries Port to Vieux Fort Port to reduce congestion and encouragement of zoning</li> </ul> <p><b>Note:</b> A conceptual Land Use Diagram for the Waterfront in Castries has already been developed (National Vision Plan)</p>
Tourism signage	<ul style="list-style-type: none"> <li>• Development of a signage network throughout the island is needed</li> <li>• Signage should clearly mark destinations, routes and links between places of interest and tourism hubs</li> </ul> <p><b>Note:</b> The National Vision Plan defines three types of signage as follows: roadway signage, places of interest and regional signage</p>
Air connectivity	<ul style="list-style-type: none"> <li>• Improve main entry points: Hewanorra International Airport, George F.L. Charles Airport</li> <li>• Renovation of Hewanorra International Airport and relocation of cargo areas</li> <li>• Redevelopment of George F.L. Charles Airport, including business centre and business hotel</li> </ul>
Facilities	<ul style="list-style-type: none"> <li>• Sport and MICE (conference center for medium size events) facilities are needed to support product development</li> <li>• Upgrade of hotels and reinvestment in 4 star offer</li> </ul>
Communications	<ul style="list-style-type: none"> <li>• Improve internet and WIFI connectivity across island.</li> </ul>



# The Vision Plan needs to be adopted as the development framework which needs to be supported and implemented

Infrastructure Strategy	
<b>Welcome or Discovery Centres</b>	<ul style="list-style-type: none"> <li>Welcome Centres need to be developed in order to highlight attractions and places of interest to the tourist and visitor.</li> <li>Welcome Centres are a place of discovery of what St Lucia has to offer (local craft, markets, attractions, gastronomy) and also allows for booking of tours. The centers serve to showcase the places of interest and allows for linkages across the island.</li> </ul> <p><b>Note:</b> <i>The National Vision Plan provides recommendations of Welcome Centres (“Preview Centres”)</i></p>
<b>Sustainable land use and Development Framework</b>	<ul style="list-style-type: none"> <li>St. Lucia needs to encourage structured land use planning to provide a framework to ensure smart growth and reduce over-development.</li> <li><b>The Vision Plan needs to be adopted as the development framework which needs to be supported and implemented.</b></li> </ul>
<b>Resource Management</b>	<ul style="list-style-type: none"> <li>Resource management and sustainability best practices for consumption are required to lessen the burden on the current systems in place. Education and training components should be enhanced.</li> <li>Updated policies and implementation of the Sustainable Energy Plan (2001) and Draft Energy Policy (2003)</li> <li>Sewage system study, review and update throughout island to increase sanitation and avoid contamination of groundwater resources.</li> <li>Structured water management and supply improvements - particularly within the southern region where water supply disruptions are realised for a period of 50 – 150 days per year.</li> </ul> <p><b>Note:</b> <i>The island has created a National Water policy acknowledging the deficits with recommendations and corrective actions to provide a more sustainable water supply system – the level of implementation is unavailable. Sustainable Energy Plan is dated (10yr plan commenced in 2001 – needs to be revisited )</i></p>
<b>Waste management</b>	<ul style="list-style-type: none"> <li>The yachting and cruise shipping sectors require a more robust system for dealing with sewage wastes.</li> <li>Provided there is a large agricultural sector throughout the island, consideration of island-wide and/or region specific composting programs will assist in the diversion of waste from the landfill and treatment facilities, thus lessening the burden on the current infrastructure.</li> </ul>
<b>Preservation laws</b>	<ul style="list-style-type: none"> <li>Preservation laws and acts can be created based on the current roles of the National Trust and various community relations boards within each region of St. Lucia.</li> <li>Pigeon Point holds much historical integrity and can contribute to the island’s architectural vernacular and style. Leveraging this asset can provide a quick win for the islands natural assets and assist in preservation strategies.</li> <li>Landscaping is important in order to protect the beauty and authenticity of St Lucia’s flora. It also provides functional benefits such as buffer zones for pedestrian and motor traffic.</li> </ul> <p><b>Note:</b> <i>Leveraging the current works which have already been created along with the Vision Plan provide for a structured enforcement regime to ensure protection and preservation of natural and cultural heritage.</i></p>
<b>Safety and security</b>	<ul style="list-style-type: none"> <li>Safety strategies include, additional street lighting, ambient lighting around major buildings and tourists attractions, increase in police stations and police presence throughout the island.</li> <li>Locate helicopter pads throughout the island as part of a national emergency network.</li> </ul>

## The Vision Plan defines 4 quadrants and 11 regions which should be used as the basis in order to identify clusters or hubs with critical mass for tourism development

### Saint Lucia Quadrant and Regional Boundary Diagram: 4 Quadrants, 11 Regions

- In order to develop the St Lucia Vision Plan, IDEA merged three maps provided by government agencies (Quadrant map, Quarter Map, and Parliamentary District Map):
- The Saint Lucia Vision Plan presents a nation-wide development vision based on the current boundaries

#### North-east Quadrant

- Babonneau Region (which includes Grande Anse)
- Dennery Region

#### Southern Quadrant

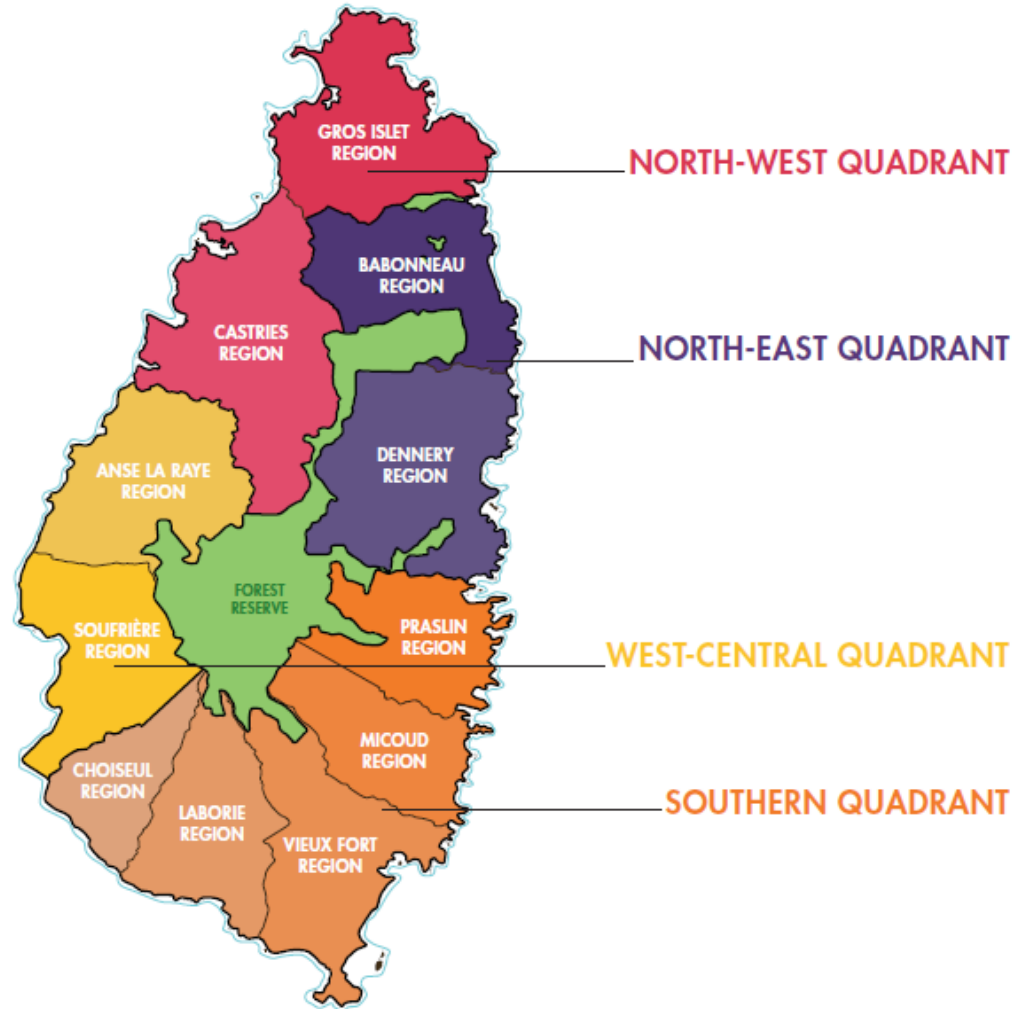
- Praslin Region
- Micoud Region
- Vieux Fort Region
- Laborie Region
- Choiseul Region

#### West-Central Quadrant

- Southern Region
- Anse la Roye Region (which included Canaries)

#### North-West Quadrant

- Castries Region
- Gros Islet Region



# The destination strategy is guided by the tourism project opportunities identified in the National Vision Plan



## 1 Dauphin & Dennery Region

- Promote development of boutique hotel , eco lodge, spa retreat and avoid 'All inclusive' resorts (Grande Anse, Font d'Or , Anse Povert, Riverfront Development, Dennery village)
- Enhance actual Golf Courses instead of new developments
- Development of Eco-parks supported by low density village development
- Camping , lodging and educational centers (Grande Anse)
- Creation of residential mixed-use with low impact, low density but high income

## 2 Praslin, Micoud, Vieux Fort, Laborie, Choiseul Region

- Resort development
- Welcome center to promote nature tours, attractions and excursions
- Hotel development on Troumassee Estate
- Convention hotel/ resort and Marina(Vieux fort )
- Cultural and performing arts center (Vieux Fort)
- Resort and Beach Club development ( Anse de Sable)
- Boutique hotel development at Rudy John Beach Park
- Rivière Dorée National Park

## 3 Soufrière and Anse La Raye Region

- Creation of berths for cruise and of small marina in La Soufrière
- Possible Boutique hotels development in the village La Soufrière, Anse la Raye and Canaries

## 4 Castries and Gros Islet Region

- Resort development in Marigot Bay Village
- Creation of a waterfront in Castries and Gros Islet
- Create an artistic community on Rat (Jacquot ) island
- Create a Health spa using sulfur springs
- Create a maritime museum
- Create a national amphitheater in Bexon
- Create a beach club , spa and residences with day slips in Mt Pinard
- Mixed use boutique hotel & residential next to the marina village development in Rodney Bay
- Creation of a dive park and Resort in Esperance Harbour

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# Objective: Develop and enhance products to stimulate demand and leverage the uniqueness of St Lucia

## Tourism Products Strategy

### Core tourism products

- Nature Tourism, Wellness Tourism and Luxury Tourism are core products of the destination in the introductory phase with high potential to increase volume.
- Focus on the development of new core tourism products:
  - **Wellness Tourism:** Increase the offer of Spa and Wellness and develop an iconic attraction through the sulphur springs linked with wellness. Upgrade the existing offer increase quality of spa experiences (trained therapists) and iconic branded destination spas.
- Further develop existing core tourism products:
  - **Nature & Eco Tourism:** Match of existing Natural Resources of the destination with the development of competitive tourism products (agriculture, adventure tourism, nature based attractions, hiking, trekking, touring). Focus on nature based experiences, agro tourism initiatives (plantations tours) eco tourism and adventure tourism.
  - **Luxury Tourism,** creating links with other core products (e.g. wellness). Take advantage of the St Lucia existing perception and link it to the Luxury offer (tranquil, isolated, small). Ensure that the luxury offer delivers on the value proposition. Support the specific development of the luxury component within each product offering
  - **Sun & Beach:** Strengthen and upgrade the existing product through the development of F&B facilities outside hotels (beach bars, etc.) to enhance the existing Sun & Beach Product
  - **Wedding & Honeymoon:** Continue to develop the Wedding & Honeymoon market, building competitiveness through links with luxury and spa. Penetrate new markets in the honeymoon segment
- Development of additional attractions (leisure and entertainment, gastronomy, shopping) and further complement the core products

### Complementary tourism products

- Nautical Tourism, Culture & Heritage Tourism and Sport Tourism are products in the introductory phase with high potential to increase volume. However, all this products need to develop their existing offer in order to be competitive.
- Focus on new complementary tourism products and strengthening existing niche products which are in demand:
  - **Nautical Tourism:** Further develop new marinas and develop technical skills for people to provide the necessary services. Increase the number of yacht arrivals as a result of the upgrade of marina facilities. Develop Nautical Tourism Events
  - **Culture & Heritage Tourism:** Develop a competitive and authentic cultural offer. Develop the story telling of the destination linked to its living cultural expressions (carnival, rum, iconic architecture and local markets), military history and colonisation (French, British, Amerindian and Indian influences)
  - **MICE tourism:** Increase the number of facilities and enhance the offer of meeting venues
    - Enhance transportation facilities and connectivity to support this product
    - Develop executive retreats and conference market



# Objective: Develop and enhance products to stimulate demand and leverage the uniqueness of St Lucia

## Tourism Products Strategy

### Complementary tourism products

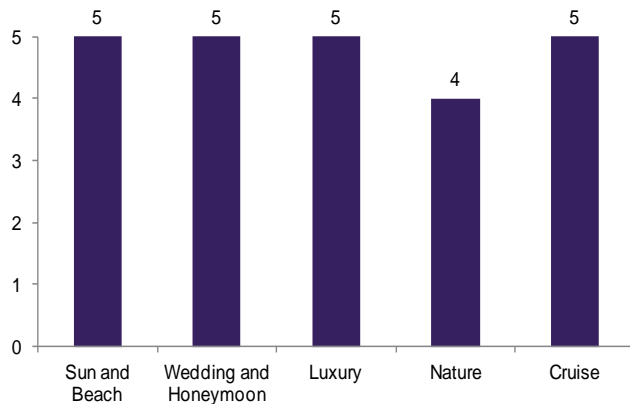
- **Events, Retail & Gastronomy** needs to be developed on the island in order to improve competitiveness (international guests are looking for entertainment, shopping and authentic restaurants)
  - Further development of retail facilities (duty free, marinas) and the increase the offer of locally produced goods (handicraft, local food, etc)
  - Improve existing local markets and handicraft markets (handicraft and branding)
  - Develop a competitive offer of entertainment (live music, nightlife, jazz, etc)
  - Events like Carnival, sport events, music festival during the year to reduce seasonality
  - Use niche products (executive retreats, small to medium sized conferences)
- **Cruise Tourism:** Cruise Tourism is already consolidated but needs to improve facilities to increase spending per cruise visitors .
  - Increase Cruise expenditure through the development of a competitive Leisure and Entertainment product (handicraft, local products and attractions).
  - Develop facilities like day resort, beach club, retail , craft market to increase spending of cruise visitors
- **Community and Village Tourism** is a specific product aimed at enhancing the local culture, lifestyle and population of a country. It is a new trend that is developing today. This tourism benefits locals and tourists through their interaction. It provides true authentic touristic experiences
  - **Sport Tourism:** Enhance the adventure sports offer: provide something to the more adventurous (sky diving, biking, cycling competitions).
    - Upgrade the existing Golf product (signature golf courses)
    - Further develop the existing game fishing product to appeal to the game fishing niche market
    - Increase the number of sport related events (individual and group sports like marathon, triathlon, iron man)
    - Ensure that sport related events are of international appeal and match visitor’s expectations

### Authenticity in product development and synergies with the agricultural sector

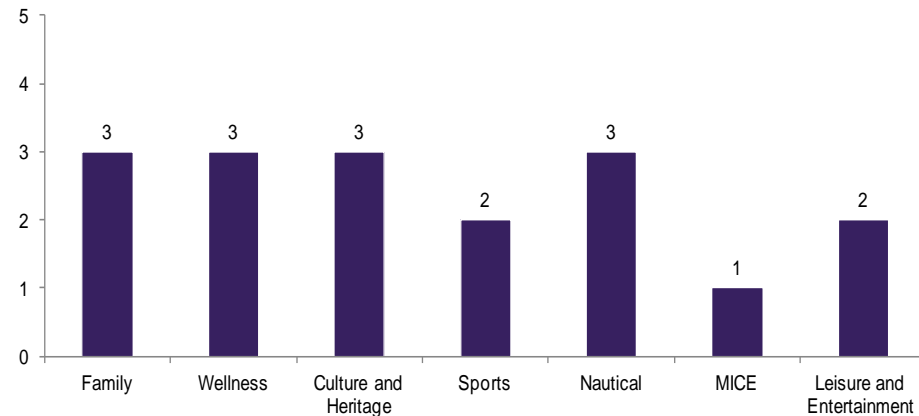
- Focus on the authenticity of St Lucia and links with the local community
- Link the agricultural sector and locally produced products with the tourism experience (in terms of suppliers and direct contact with tourists through Community and Village Tourism.
- Create an agricultural and tourism synergies Fund. Reactivate projects successful projects, such as Belle Vue Farmers Cooperative and showcase the positive impacts. Identify and highlight the real opportunities, build on current successes such as Sugar Beach Resort , Jade Mountain, Hotel Chocolat
- Identify and launch a pilot agricultural project which further develops initiative such as the Dennery and showcases its success

# Product development is essential in order to stimulate demand and consumer spending

Saint Lucia Core Product Line Mix



Saint Lucia Complementary Product Line Mix



Key to valuations

5	Core product with high level of international competitiveness
4	Core product with medium level of international competitiveness
3	Complementary product with average competitiveness
2	Complementary product with below average competitiveness
1	Very limited product offer

Source: T&L, Source: Diagnostic Report, Tourism Competitiveness of St Lucia, 2013

The evaluation of the core and complementary products, from 1 to 5 (1 being the lowest and 5 being the highest), based on primary (interviews with Tourism Board, Hotel & Tourism Association, Tour Operator surveys), secondary research (exit surveys, market analysis and trend reports) and a team of international tourism experts. The full list of reports and meetings is included in the Bibliography to this report.

The product lines with the greatest opportunities to build competitive advantage for St Lucia are :

- **Wedding and Honeymoon Tourism**
- **Luxury Tourism**
- **MICE Tourism**
- **Wellness Tourism**
- Sun and Beach remains an important product and is a “must have” in order to compete in the Caribbean.
- In addition to these products, it is essential the following products are developed and improved in order to meet the expectation of the demand: Family-, Culture & Heritage, Sports, Nautical, Leisure & Entertainment and Eco-Nature tourism has a role to play in reducing the impact of seasonality.

# Benchmarking shows that Saint Lucia has great potential to leverage Wellness Tourism into a core differentiating product; Nature& Eco Tourism also has great potential as a differentiator given the natural beauty and boutique scale of the island

	Tourism Product Lines	St Lucia	Barbados	Jamaica	Antigua and Barbuda	BVI	Mauritius
<b>Core</b>	Sun and Beach	5	5	5	5	4	5
	<b>Wedding &amp; Honeymoon</b>	5	4	3	5	4	5
	<b>Luxury</b>	5	5	4	5	4	5
	<b>Nature &amp; Eco</b>	4	3	5	2	3	5
	Cruise	5	5	4	5	5	3
<b>Complementary</b>	Family	3	3	4	2	2	3
	<b>Wellness</b>	3	4	3	2	2	5
	<b>Culture &amp; Heritage</b>	3	4	5	3	3	5
	<b>Sports</b>	2	4	4	3	3	4
	<b>Nautical</b>	3	3	2	5	4	2
	<b>MICE</b>	1	5	4	1	1	3
	<b>Leisure and Entertainment</b>	2	5	5	2	3	5

The evaluation of the core and complementary products, from 1 to 5 (1 being the lowest and 5 being the highest), based on primary (interviews with Tourism Board, Hotel & Tourism Association, Tour Operator surveys), secondary research (exit surveys, market analysis and trend reports) and a team of international tourism experts.

St Lucia are is behind the comparative set in terms of its offer of product lines which support the core products

- **MICE Tourism** facilities are limited (maximum capacity of 1,860 sqm at Sugar Beach, 78 rooms)
- **Wellness** resorts and facilities are limited to hotel SPA but has a great potetnial
- **Nautical Tourism** is limited due to scale of marinas, facilities and services; but has great potential
- **Leisure & Entertainment-Tourism** is limited (evening entertainment, limited retail, gastronomy) compared to other leading destinations
- **Cultural & Heritage**, authentic St Lucia experience

# Core Product Strategy Development Priorities – Luxury Tourism

## Segment description

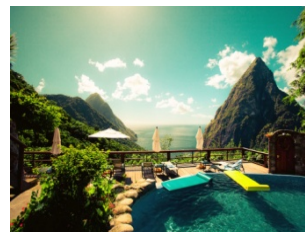
- Luxury is not a large tourism market but it contributes enormously to the tourism economy (25% of tourism revenues worldwide). In St Lucia this sector needs adjustments to match the current demand. The prime motivation why luxury customers travel is the quest for authentic experiences (75%), rest and relaxation (68%) and reconnecting with loved ones (48%) as well as personal enrichment (43%)

## Luxury product description

- **Exclusive authentic retreat:** This sub-product represents one of the newest luxury tourism trends: the understated luxury. Customers seek for authenticity, experiences and individualism
  - Development of eco-hotels, community driven, of a high quality level
- **Wedding and Honeymoons:** One of the key product for St Lucia. This product should be maintained and especially upgraded to offer a luxury wedding experience
- **Yachting:** Yachting is a luxury sub-product that should be further exploited by the country through the development of the infrastructures, the offering and the facility to enter the country by yacht
- **Real Estate:** Creation of high-end real estate market (Properties higher than US\$1 M). There is an important need to develop this offer to generate more revenues for the government.

## References-Benchmarks

- Six Senses- The brand core philosophy is **SLOWLIFE**: Sustainable – Local – Organic – Wellness -Learning – Inspiring – Fun – Experiences
- Alila Resorts- This hotel brand provides a memorable journey into the local culture for a total destination experience



## Product characteristics

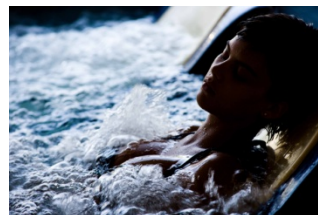
Hard		Soft	
<ul style="list-style-type: none"> <li>• High end real estate developments</li> <li>• Luxury eco-hotels</li> <li>• Yachting facilities</li> <li>• Wedding facilities</li> </ul>		<ul style="list-style-type: none"> <li>• Family activities</li> <li>• Activities linked with the community or nature</li> <li>• Request adequate training</li> </ul>	
Active		Passive	
		✓	
Tourists	Visitors		
	Locals	Cruise	
✓	✓	✓	
Edutainment components			
<ul style="list-style-type: none"> <li>• Learning by doing activities with the local community</li> </ul>			

Feel alive	Active Seniors	Family	Trendsetters	Wellbeing	Couples	MICE	Wedding/ Honeymooners	Regional travellers	Locals	Luxury	Creative Class	Nature Lovers
	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓

# Core Product Strategy Development Priorities - Wellness Tourism

## Product description

- Wellbeing travel motivations are gaining momentum due to the fast pace of life in many cities. For decades, the Caribbean has welcomed travellers thanks to its warm climate, fresh air, mineral springs and relaxing seas.
- Wellness tourism products have developed on a low-profile basis in St Lucia with an outstanding example like the Bodyholidays concept.
- St Lucia has the potential to develop luxury wellness centres to address these needs, especially in hotels and resorts. World-renown spa brands and a variety of ecological and nature-based products with exotic and local flavours should be included in the offer.
  - Mineral/Sulphur spring spas using sea water for hydrotherapy.
  - Resort/Hotel spas adding amenities to the resort offer.
- In addition, there is room for specialised medical centres targeting those travellers seeking curative treatments in their holiday.
  - Given the higher costs of healthcare services in developed countries, medical treatment in the Caribbean is an attractive alternative. Relaxation and recovery centres could be developed, aimed at travellers having undergone medical treatments and diseases.
  - Detox centres could be also further developed in St Lucia, given that discretion and anonymity is a key aspect for clients.



## Product characteristics

Hard		Soft	
<ul style="list-style-type: none"> <li>Wellness/spa centre in hotels</li> <li>Heath Spa</li> <li>Wellness centre</li> </ul>		• N/A	
Active		Passive	
		✓	
Tourists	Visitors		
	Locals	Cruise	
✓	✓		
Edutainment components			
• Training centers for the Caribbean			

## References-Benchmarks

- Six Senses**-This brand offers exceptional spa and treatments in each and every property they have

Feel alive	Active Seniors	Family	Trendsetters	Wellbeing	Couples	MICE	Wedding/ Honeymooners	Regional travellers	Locals	Luxury	Creative Class	Nature Lovers
✓	✓		✓	✓	✓		✓	✓	✓	✓		✓

# Core Product Strategy Development Priorities – Wedding & Honeymoon

## Segment description

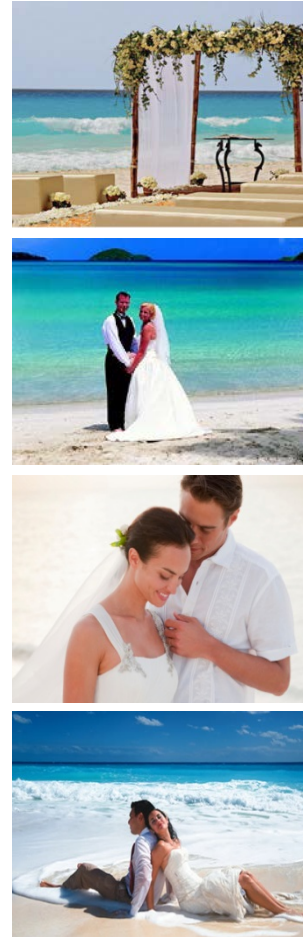
- Wedding & Honeymoon is a very strong product for St Lucia
- Hotels are organizing the wedding ceremony including decoration, flowers, romantic dinner, spa treatment, official paperwork,...
- Honeymooners look for sun & beach destination, tropical settings to enjoy a romantic and quiet holiday
- Activities and attractions are also important to attract this segment for more days

## Product description

- **Exclusive authentic retreat:** high level hotels that offers a unique and authentic experience
- **Small boutique hotel:** it has to be a charming and romantic hotel in a unique settings it can be 3\* to 4\*
- **Eco lodge experience**
- **Romantic wellness retreat**

## References-Benchmarks

- Most of the hotels in the Caribbean provide special services and facilities for weddings & Honeymoon
- International brands like Viceroy, Rosewood, St Regis, One & Only, Four Season, Six Senses, Alila..have developed unique settings for an unforgettable wedding and honeymoon



## Product characteristics

Hard		Soft	
<ul style="list-style-type: none"> <li>• Luxury eco-hotels</li> <li>• Wedding facilities</li> </ul>		<ul style="list-style-type: none"> <li>• N/A</li> </ul>	
Active		Passive	
		✓	
Tourists	Visitors		
	Locals	Cruise	
✓			
Edutainment components			
<ul style="list-style-type: none"> <li>• N/A</li> </ul>			

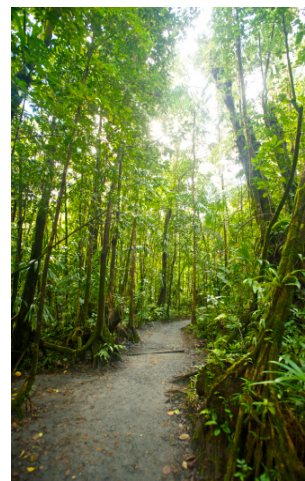
Feel alive	Active Seniors	Family	Trendsetters	Wellbeing	Couples	MICE	Wedding/ Honeymooners	Regional travellers	Locals	Luxury	Creative Class	Nature Lovers
			✓	✓	✓		✓	✓	✓	✓		✓



# Core Product Strategy Development Priorities – Nature & Eco Tourism

## Product description

- Nature & Eco Tourism is concerned with the discovery and protection of the natural features of the country.
- By developing the necessary infrastructures and developing the territory, the country creates a new and attractive sustainable tourism product for tourists and visitors.
- Rural accommodation could be developed in farms or in private houses, as well as agro tourism tours
- St Lucia must protect and take advantage of its natural resources to develop:
  - Attractions based around turtles, birds and marine life with a protection and interpretation centre, animation for children...
  - Attractions based around the flora, a proper botanic garden, new protected areas, guided tours, marked trekking trails, sponsorship to plant endemic trees in disaster-hit zones...
  - Development of nature sport trails for Mountain Bikes, Electric Quads, Electric Motorbikes in order to develop the practice and contain environmental impacts
  - Develop adventure activities such as kite surfing, zip line, parasailing,...
  - Campaigns and animation to raise the public and local awareness about the necessity to protect nature
  - Develop wellbeing products: organic spa, product brands



## Product characteristics

Hard		Soft	
<ul style="list-style-type: none"> <li>• Protection and interpretation centers</li> <li>• Botanic garden</li> <li>• Protected areas</li> <li>• Marked trekking trails</li> <li>• Sports trails</li> <li>• Adventure activities</li> <li>• Organic spa and wellness products</li> <li>• Eco-museum about the local culture and history</li> <li>• Farms open to tourist</li> </ul>		<ul style="list-style-type: none"> <li>• Animation for children</li> <li>• Sponsorship for trees and plants</li> <li>• Awareness campaign for nature protection</li> <li>• Guided tours of farms, fabrics and plantations</li> <li>• Animation to discover how</li> <li>• Learning by doing activities with the local community (farms and plantation)</li> </ul>	
Active		Passive	
✓		✓	
Tourists	Visitors		
	Locals	Cruise	
✓	✓	✓	
Edutainment components			
<ul style="list-style-type: none"> <li>• Protection and interpretation centers</li> <li>• Botanic garden</li> <li>• Visit of farm &amp; plantation with local products</li> <li>• Marked trekking trails</li> <li>• Animations for children</li> </ul>			

## References-Benchmarks

- Panama rainforest discovery centre, Panama – Ecotourism and environmental education centre
- Bali Bird Park, Bali, Indonesia – Park with almost 1,000 birds of 250 different species
- Rainforest Adventures Mystic Mountain - Jamaica
- Casela Nature and Leisure Park - Mauritius

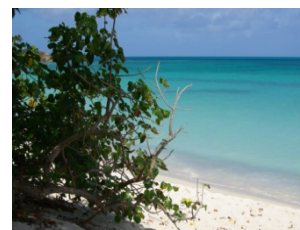
Feel alive	Active Seniors	Family	Trendsetters	Wellbeing	Couples	MICE	Wedding/ Honeymooners	Regional travellers	Locals	Luxury	Creative Class	Nature Lovers
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓



# Core Product Strategy Development Priorities – Sun & Beach Tourism

## Product description

- The sun & beach tourism product is the main tourism product in St Lucia. The natural features of the islands offers beautiful natural settings to tourists
- All beaches are accessible by the public. There are no private beaches in the country.
- To increase the attraction of these beaches, a cleaning program should be available to keep them in their natural state.
- On one hand some of the beaches should be developed with car and bus parking, bathrooms, restaurants, beach clubs, water sport schools which welcome tourists, visitors and in particular cruise visitors coming for one day.
- Some day use resorts could be dedicated to a high end market, others to cruise visitors and other to locals to create the best offer for each client segment
- On the other hand, some nesting beaches should be partially preserved to offer an adapted environment for turtles, birds and fishes that often come into these area to reproduce.
- Beaches are sensitive natural areas that are subject to pollution, seaweed and erosion. There is a need for action to solve these problems and keep these natural assets as attractive as possible



## Product characteristics

Hard		Soft	
<ul style="list-style-type: none"> <li>• Beach facilities development</li> <li>• Car parks</li> <li>• Beach clubs</li> <li>• Day-use resorts</li> </ul>		<ul style="list-style-type: none"> <li>• Improvement of the cleaning system of the islands beaches</li> <li>• Protected area for turtle nesting sites, birds...</li> </ul>	
Active		Passive	
✓		✓	
Tourists	Visitors		
	Locals	Cruise	
✓	✓	✓	
Edutainment components			
• N/A			

## References-Benchmarks

- Nikki Beach, USA, France, French West Indies...- With 13-prestigious venues in 10 different countries, Nikki Beach Club is the market leader in the luxury beach club concept

Feel alive	Active Seniors	Family	Trendsetters	Wellbeing	Couples	MICE	Wedding/ Honeymooners	Regional travellers	Locals	Luxury	Creative Class	Nature Lovers
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Introduction

Saint Lucia's Comparative Advantage

**Strategy**

- Vision, objectives and goals
- Infrastructure and Destination
- Tourism Product Development
- **Marketing, commercial and branding**
- Human Resources & Quality
- Governance, Investment & Funding

Action Plan

Priority Projects

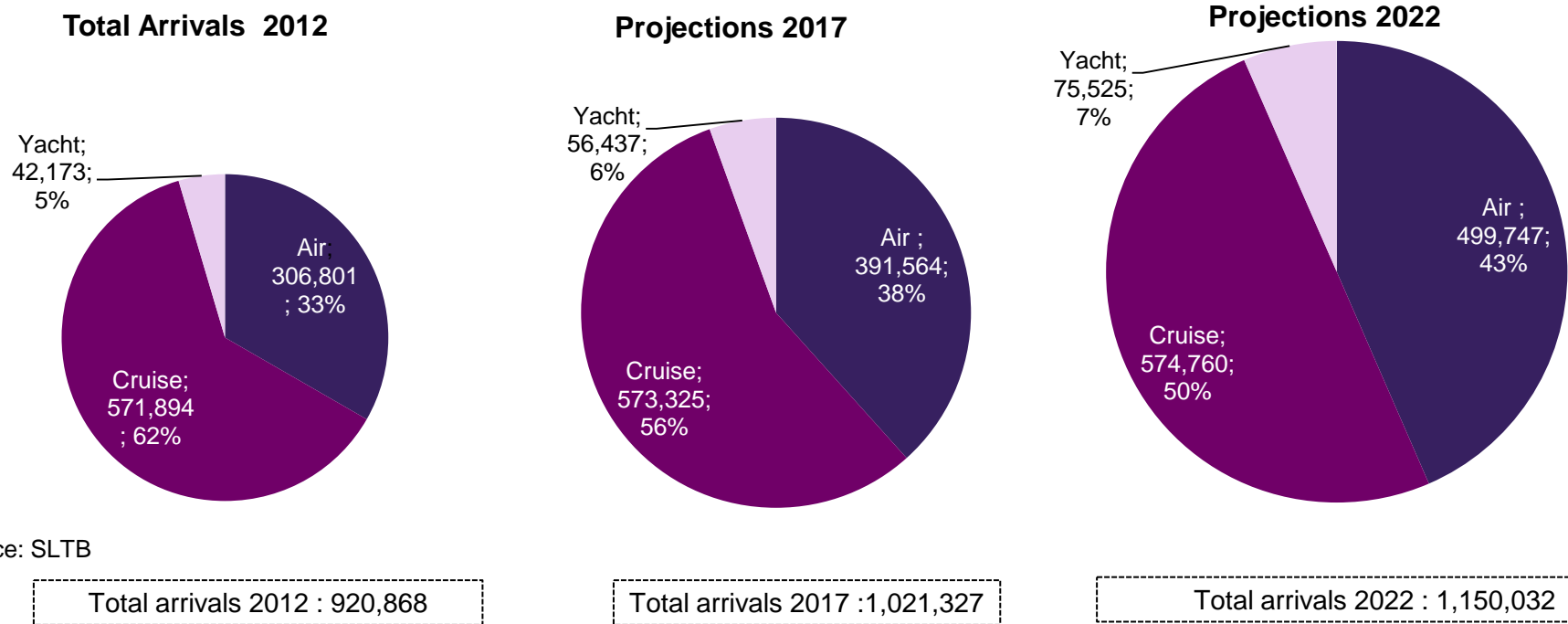
Benchmarks

## Objective: To build and promote 100% authentic St Lucia, to attract new markets and target niches

Marketing, Branding and Positioning Strategy	
100% St Lucia	<ul style="list-style-type: none"> <li>Brand and promote 100% St Lucia through branding of local handicraft, local produced goods. Tell the story of uniquely St Lucia. Leverage the emotional and physical attributes of the brand to emphasize authentic St Lucia. Develop the uniquely St Lucian tourism offer.</li> <li>Strengthen national and sub-brands</li> </ul> <p><b>Note:</b> <i>The National Vision Plan provides recommendations for sub-brands across the island</i></p>
Target markets	<ul style="list-style-type: none"> <li>Actively target traditional markets to increase market share (USA, Europe) and further penetration of high value tourism segments</li> <li>Actively target expanding markets: Canada</li> <li>Actively target growth markets such as France, Germany and the Caribbean</li> <li>Identify new market opportunities</li> </ul>
Target segments	<ul style="list-style-type: none"> <li>Actively target growing segments: <ul style="list-style-type: none"> <li>Couples</li> <li>Wedding/Honeymooners and Romance</li> <li>Nature lovers</li> <li>Creative Class</li> <li>Feel alive: Sport and adventure enthusiasts</li> <li>Luxury</li> <li>Wellbeing</li> <li>Trendsetters</li> <li>Regional travellers</li> <li>Active Seniors</li> <li>Family</li> <li>MICE</li> <li>Locals</li> </ul> </li> </ul>
Events	<ul style="list-style-type: none"> <li>Use niche products and events (sport, sailing, adventure, MICE) to increase occupancy rates</li> </ul>
Marketing Plan	<ul style="list-style-type: none"> <li>Develop a tourism ambassadors programme across the island</li> <li>Review and update the marketing, commercial and branding plan for St Lucia</li> <li>Create a special fund for small hotel's marketing</li> </ul>
International brands	<ul style="list-style-type: none"> <li>Attract top class international hotel brands and operators (e.g. Four Seasons, Rosewood, Wellness, sport)</li> </ul>
Market intelligence	<ul style="list-style-type: none"> <li>Improve data collection, monitoring and evaluation</li> </ul>

# Market objective: To develop a more balanced air and cruise arrivals market and to focus on the higher spending air and yacht markets, as well as the luxury cruise market

## St Lucia total arrivals per year: 2012 and projections



Source: SLTB

Note: The Compound Annual Growth Rate (CAGR) is a term for calculating smoothed annualized growth rates over a period of time. It calculates the trends over a time period instead of focusing on the year on year fluctuations. Industry practice is to use CAGR when analyzing trends over a period of time. In addition to CAGRs, Year on Year (YOY) rates are also used which compare the growth at one point in time with the growth rate in another point in time.

From 2012 to 2022, air arrivals growth will be 5.% Compound Annual Growth Rate (CAGR) 2012-2022); cruise arrivals growth will be 0.05% (CAGR 2012- 2022) and yacht arrivals growth will be 6% (CAGR 2012-2022) to rebalance air vs cruise arrivals

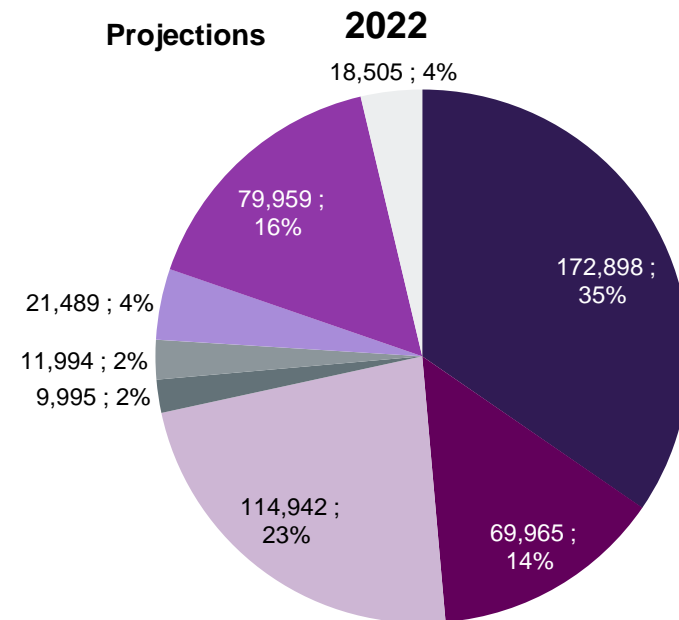
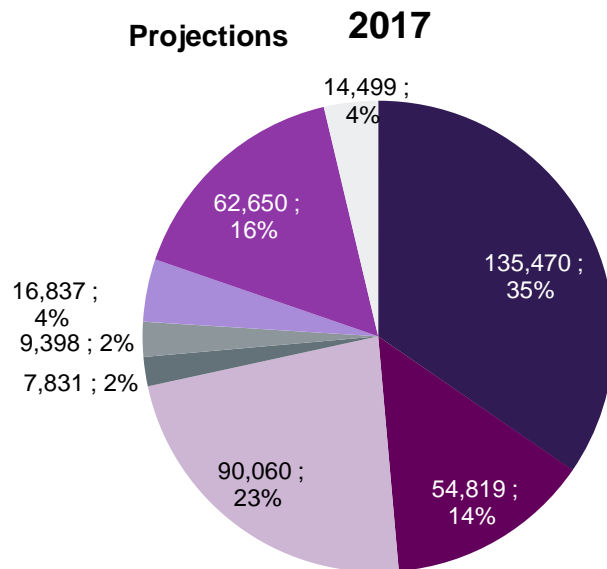
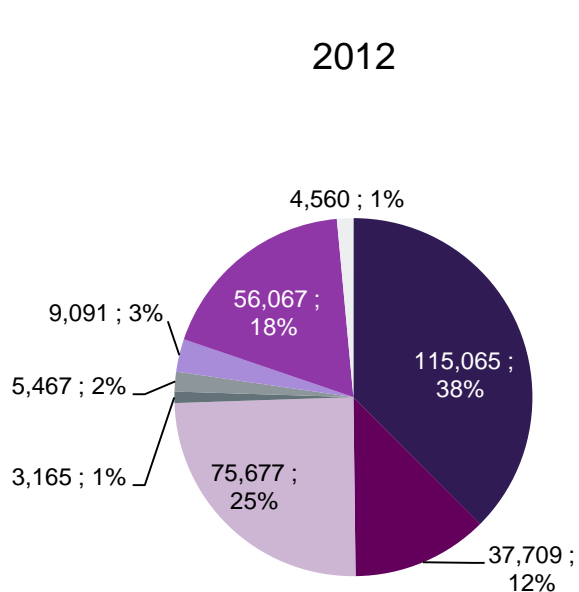
## Market projections are based on market reports forecasts and assume that the infrastructures are developed in order to support the increased arrivals

Market	Opportunities to build competitive advantage
<b>Air Market</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> Increase air arrivals by 5% CAGR<sup>1</sup> from 2013- 2017, reach approximately 500,000 air arrivals by 2022 which is comparable to the current air arrivals in Barbados.</li> <li>• UNWTO 2012 Tourism Barometer projects that Tourist Arrival Travelling to Emerging Economies will grow by 5% from 2010 to 2020, while World International Tourist arrivals will grow by 4%.</li> <li>• According to 2012 BMI report, air arrivals will grow by 5% CAGR in St Lucia for the 2011- 2015 period while tourist arrivals in the Caribbean will grow by 4% CAGR over the forecast period.</li> <li>• According to the 2013 BMI report the projection for 2012-2017 is an increase of a 2.2% CAGR in St Lucia and Caribbean total arrivals are expected to increase by a CAGR of 1.7%.</li> <li>• 2012 WTTC St Lucia Report states that Visitor Exports and International Tourist Arrivals are expected to grow by 5.6% p.a. until 2023.</li> </ul>
<b>Cruise Market</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> Maintain the current number of cruise arrivals and target the luxury cruise market (smaller vessels)</li> <li>• Diversify product offer focused on cruise arrivals in order to increase the average expenditure per disembarkation</li> </ul>
<b>Yacht Market</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> Increase yacht arrivals by 6% CAGR from 2013- 2017. The competitive analysis shows that yacht tourism is growing in islands like Antigua, which showed a 45% increase from 2010 to 2011 with a total of 45,811 yacht arrivals.</li> <li>• In St Lucia yacht arrival increased by 14% CAGR over the last five years, from 22,422 yacht arrivals in 2008 to 42,173 yacht arrivals in 2012.</li> <li>• If increased marinas are developed, with full services, supported by a strong marketing strategy, it is expected that Saint Lucia can reach these objectives.</li> </ul>

<sup>1</sup>Note: Compound Annual Growth Rate (CAGR) is a term for calculating smoothed annualized growth rates over a period of time  
 Source: UNWTO 2012 Tourism Barometer; BMI report 2012 and 2013, WTTC Saint Lucia Report 2012

# Market objective: To grow strategic high spending markets such as UK, US, Canada and Europe and to target new growth markets (Russian and Brazil)

## St Lucia air arrivals per country and per year: 2012 and projections

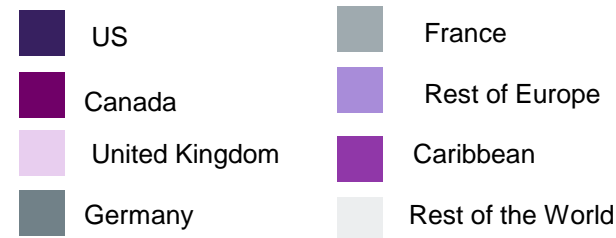


Source:SLTB

Total air arrivals 2012: 306,801

Total air arrivals 2017: 391,564

Total air arrivals 2022: 499,746.50



The strategy will target high spending capacity markets increasing Canada, Rest of Europe and Rest of the World (Brazil and Russia) market share and recuperating historic levels of US and UK air arrivals by 2017.

Then markets will continue growing and maintain 2017 market shares.

## The USA, UK and Canada are expected to grow as a result of product development and increased airlift capacity

Market	Opportunities to build competitive advantage
<b>US Market</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> Market recovery and a CAGR<sup>1</sup> of 3.3%. Arrivals in 5 years will reach 135,470 surpassing its historic peak in 2010 (129,085)</li> <li>• Should flight capacity be improved and the product be developed with high value for money, it is expected that the US can expected a recovery.</li> <li>• The US outbound market is expected to grow by 13% CAGR by 2016 (Euromonitor projections). Besides the US outbound -1% CAGR from 2006 to 2011 -1% , US arrivals to St. Lucia increased by a 1.5% CAGR during the same period. US arrivals decreased in 2011 and to 2012 due to decreased flights.</li> <li>• 2013 BMI Report states that North America air arrivals will grow by 2.1% CAGR in the Caribbean during 2012-2017 period.</li> </ul>
<b>UK Market</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> Arrivals are expected to continue recovering over the next 5 years to reach 90,059 arrivals representing a CAGR of 3.5%.</li> <li>• The UK outbound market is expected to grow by 2% CAGR by 2016 (Euromonitor projections).</li> <li>• The UK showed recovery in 201.</li> <li>• 2013 BMI Report states that Europe air arrivals in the Caribbean will grow by 2.7% CAGR from 2012-2017.</li> </ul>
<b>Canadian Market</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> Arrivals are expected to continue growing over the next 5 years at a CAGR of 7.8% to reach 54,819 arrivals by 2017, surpassing its peak of 37,709 in 2012.</li> <li>• St Lucia has registered a 9.4% growth (CAGR) of Canadian arrivals in the past five years.</li> <li>• The Canadian outbound market is expected to grow by 3% CAGR by 2016 (Euromonitor projections) and the Canadian market has increased by 6% over the past few years.</li> <li>• 2013 BMI Report states that North America air arrivals in the Caribbean will grow by 2.1% CAGR during 2012-2017.</li> </ul>
<b>Caribbean Market</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> Arrivals from other Caribbean countries are expected to recover after 5 years of negative 1.6% CAGR.</li> <li>• Based on projected growth rates from the UNWTO of 4.4% for emerging destinations, the Caribbean is expected to show a slow recovery.</li> </ul>

<sup>1</sup>Note: Compound Annual Growth Rate (CAGR) is a term for calculating smoothed annualized growth rates over a period of time  
 Source: UNWTO 2012 Tourism Barometer; BMI report 2012 and 2013, WTTC Saint Lucia Report 2012, Euromonitor 2012



## European markets are expected to grow, particularly due to products like wellness and eco-tourism; while new markets Brazil and Russia are expected to develop as they seek new luxury destinations

Market	Opportunities to build competitive advantage
<b>French Market</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> Arrivals in 5 years are expected to reach 9,397 with a CAGR<sup>1</sup> of 2.4% almost reaching its peak number of arrivals which was 10,992 in 2000.</li> <li>• The French outbound market is expected to grow by 1% CAGR by 2016 (Euromonitor projections) despite the market decreases (1.7%) in the last five years according to Euromonitor.</li> <li>• In St Lucia the number of air arrivals from France has grown by 6.4% in recent years (2006-2011), in 2012 the arrivals fell to 5,467 after the high arrivals in 2011 (7,428)</li> <li>• 2013 BMI Report states that European air arrivals in the Caribbean will grow by 2.7% CAGR from 2012-2017.</li> </ul>
<b>German Market</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> Arrivals in 5 years will reach 7,831 a CAGR of 20% almost reaching its peak number of arrivals which was 7,292 arrivals in 2000. The development of Wellness Tourism is particularly important for this market as it is the largest wellness market in the world.</li> <li>• The German outbound market is expected to recover from the economic instability period and grow by 1.0% CAGR by 2016 (Euromonitor projections).</li> <li>• In St Lucia the number of arrival from Germany to St. Lucia has grown by 14.8% in recent years (2006-2011), with the peak year in 2000 when it reached 7,292 arrivals.</li> <li>• 2013 BMI Report states that European air arrivals in the Caribbean will grow by 2.7% CAGR from 2012-2017.</li> </ul>
<b>Rest of Europe</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> European markets are expected to show recover following the recession.</li> <li>• St. Lucia will expand and promote in new markets</li> <li>• 2013 BMI Report states that Europe air arrivals in the Caribbean will grow by 2.7% CAGR from 2012-2017.</li> </ul>
<b>Rest of the World</b>	<ul style="list-style-type: none"> <li>• <b>Objective:</b> Two new potential markets: Brazil and Russia</li> <li>• Russia outbound tourism is expected to grow by 7% in the coming years (Euromonitor projections).</li> <li>• Brazil outbound tourism is expected to grow by 17% in the coming years (Euromonitor projections).</li> <li>• 2013 BMI Report states that Latin America air arrivals in the Caribbean will grow by 2.8% CAGR from 2012-2017.</li> <li>• 2013 BMI Report states that Asia Pacific air arrivals in the Caribbean will grow by 4.1% CAGR from 2012-2017.</li> </ul>

<sup>1</sup>Note: Compound Annual Growth Rate (CAGR) is a term for calculating smoothed annualized growth rates over a period of time  
 Source: UNWTO 2012 Tourism Barometer; BMI report 2012 and 2013, WTTC Saint Lucia Report 2012, Euromonitor 2012

# The expected outcomes for Saint Lucia include more jobs in tourism, more expenditure from tourists and more value across the TVC

## Quantitative Expected outcomes

	Expected outcomes	2012 Base	2017 Projection	2022 Projection
<b>Direct Jobs<sup>1</sup></b>	<ul style="list-style-type: none"> <li>Increase direct jobs to new levels</li> <li>2012-2022: increase of 4.1% p.a</li> </ul>	13,500	16,504	20,176
<b>Total Expenditures (Revenue for St Lucia)<sup>2</sup></b>	<ul style="list-style-type: none"> <li>Increase tourist expenditures to reach new record levels</li> </ul>	<b>US\$ 618 million</b>	<b>US\$ 866 million</b>	<b>US\$ 1,210 million</b>
<b>Air expenditure per trip</b>	<ul style="list-style-type: none"> <li>Air expenditure/ trip will increase by 2% per year (inflation rate)</li> </ul>	US\$ 1,864 <sup>3</sup> per trip	US\$ 2,067 per trip	US\$ 2,283 per trip
<b>Cruise expenditure per trip</b>	<ul style="list-style-type: none"> <li>Cruise expenditure/ trip will increase by 4% per year (2% inflation rate plus 2% for expected increased spending)</li> </ul>	US\$ 81 <sup>4</sup> per trip	US\$ 98 per trip	US\$ 119 per trip

## Qualitative Expected outcomes

- Increased competitiveness
- Improved value for money for clients: quality tourism offer for the price
- Sustainable tourism: economic, socio-cultural and environmental benefits for St Lucia and tourists
- Pride in the sector
- HR capacity and quality services
- New flagship projects which differentiate St Lucia and attract international investors and operators
- Aligned vision for tourism development and buy in across ministries and across sectors
- Differentiation of St Lucia in the Caribbean
- Protection of natural and cultural heritage
- Increased linkages across TVC (agriculture, handcraft etc.)

<sup>1</sup>Source: WTTC, St Lucia Economic Impact Report (2013)

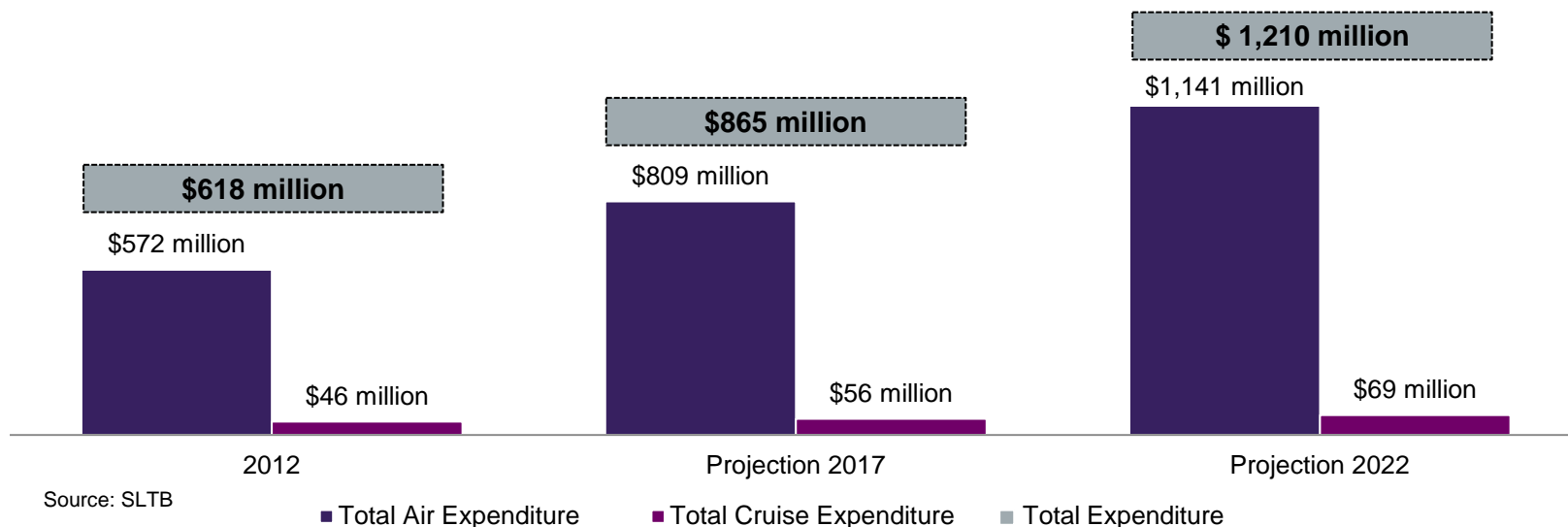
<sup>2</sup>Source: Calculations T&L based on arrivals projections (UNWTO 2012 Tourism Barometer; BMI report 2012 and 2013, WTTC Saint Lucia Report 2012, Euromonitor 2012) and average expenditure per source market according to SLTB 2012

<sup>3</sup>Source: Saint Lucia Tourism Board, 2012.

<sup>4</sup> Source: Saint Lucia Tourism Board, 2011. The 2012 base was calculated by inflating the 2011 amount by the 2012 inflation rate of 4%.

# The expected outcome is to increase tourism expenditure through increased air arrivals (particularly from high spending markets); increased yacht arrivals and increased expenditure per air and cruise arrival

## St Lucia total expenditure per year: 2012 and projections



### In 2022, total expenditure will reach US\$1,210 million due to the projected increased air and cruise arrivals<sup>1</sup>:

#### Air arrivals expenditures

- From 2013 to 2022 air expenditure/ trip will increase by 2% per year<sup>2</sup> (based on inflation rates)
- Total air expenditure will increase as a result of the increased number of air arrivals (from 306,801 in 2012 to 499,747 in 2022, which represents an annual increase of 5%).

#### Cruise arrivals expenditures

- From 2013 to 2022 cruise expenditure/ trip will increase by 4% per year<sup>2</sup> (based on 2% inflation rate plus an additional 2% for expected increased spending per trip)
- Total cruise expenditure will increase as a result of the increased number of cruise arrivals (from 571,894 in 2012 to 574,760 in 2022) which represents an annual increase of 0.05%.

<sup>1</sup>Note that yacht expenditures have not been included as they are not available in Saint Lucia. It should be taken into account that yacht expenditures are expected to increase tourism revenues on island.

<sup>2</sup>The expected inflation rate as projected by the IMF is between 5% and 2.6% for Saint Lucia from 2013 to 2018. The expenditure per arrivals has been increased by a conservative 2% p.a.

<sup>3</sup>Note: Compound Annual Growth Rate (CAGR) is a term for calculating smoothed annualized growth rates over a period of time



# US Market Snapshot

Departures stayed flat recording 60 million trips with outgoing tourist expenditure increasing by 6% (US\$108.5 billion). US consumers resume outbound travel as the US emerges from recession. **Outbound trips are expected to increase by 13% over the forecast period, to reach 68 million trips in 2016, whilst outgoing tourist expenditure is expected to increase by 14% in constant value terms, to reach US\$123.5 billion.**

	Description
<b>Behavior Characteristics</b>	<ul style="list-style-type: none"> <li>• Large range of youthful and growing population.</li> <li>• Over-worked, stressed and time- pressed citizens.</li> <li>• Demanding and experienced travellers.</li> <li>• Growth in single parent households.</li> <li>• Only 2 week vacation.</li> <li>• 6 out of 10 Americans actively follow sports.</li> <li>• American traveller segments are style setters, traditionalists and environmentalists.</li> </ul>
<b>Trip Characteristics</b>	<ul style="list-style-type: none"> <li>• On average American travellers decide to take trip well in advance over three month of the actual trip itself.</li> <li>• The airline ticket is actually booked two months in advance .</li> <li>• 38% of American leisure travellers booked their trip via the Internet.</li> <li>• 77% of American travellers are looking for relaxation on holiday.</li> <li>• 70% of American travellers are looking for natural beauty.</li> <li>• 25% Americans travellers visit the Caribbean each year.</li> <li>• Sport is an important activity.</li> </ul>

	Description
<b>Leisure</b>	<ul style="list-style-type: none"> <li>• Outbound leisure travel continued to dominate, accounting for 80% of all outbound travel in 2011.</li> <li>• Total leisure departures saw a 1% decline in 2011.</li> <li>• Single travellers accounted for 32% of trips in 2011.</li> <li>• Couples were the next largest group, comprising 29% of all leisure travellers.</li> <li>• Share of families stayed flat at 25% in 2011.</li> </ul>
<b>Business</b>	<ul style="list-style-type: none"> <li>• Business departures increased by 3% in 2011, and comprised 20% of all outbound travel.</li> <li>• During the recession businesses took a hard look at travel spending, and took steps to cut back, including requiring employees to fly economy instead of business class and to stay in mid-grade instead of luxury hotels.</li> <li>• More business travel, as well as air fare and hotel rate increases, accounted for much of the increase in outbound expenditure.</li> </ul>



# UK Market Snapshot

Outbound tourism volume fell by 3% in 2011 to 52 million trips, whilst outbound tourist expenditure grew by 3% (£32.2 billion, US\$ 48.7 billion). Spending per outgoing trip increased by 5% to reach £615 (US\$ 932). **Over the forecast period, outbound tourism volume is likely to recover with a projected 2% CAGR whilst expenditure is also expected to increase at a 3% constant value CAGR.**

	Description
<b>Behavior Characteristics</b>	<ul style="list-style-type: none"> <li>• Most experienced travellers in the world: mature, sophisticated and demanding.</li> <li>• British residents are overworked and time-pressed citizens.</li> <li>• British are independent travellers par excellence.</li> <li>• British place great deal of importance on having a good main holiday.</li> <li>• Cost is a factor but travellers somehow manage to find the money.</li> <li>• Aging population</li> <li>• 80% of travel comes from the over 50 age group and the main growth will come from the over 50s market.</li> <li>• Single and single mother households are on the rise.</li> <li>• 90% of high-income earners take at least one trip abroad.</li> <li>• 75% of high-income earners stay at least 5 nights per trip.</li> </ul>
<b>Trip Characteristics</b>	<ul style="list-style-type: none"> <li>• British travellers will be more interested in price and value for money versus sustainability, safety and security in the next 5 years.</li> <li>• There is a growing interest in combining health and wellness during their trips.</li> <li>• Warm weather and sunshine are important for the British traveller.</li> <li>• Quality and standards of hygiene are also important factors.</li> <li>• 63% of British Travellers have a preference for a high standard of accommodation.</li> <li>• 25% increase in bookings made less than one week before departure.</li> <li>• UK bookings travel online rose 17% approaching 50% level.</li> <li>• The average Length of Stay (ALS) declined 7% to 8 nights, with a 10% rise in the number of short trips(1-3 nights).</li> <li>• Short haul air travel remains very price-sensitive, there is a comeback for the premium long-haul market.</li> <li>• 44% plans the same amount on travel next year.</li> <li>• 37% plan to reduce travel spending.</li> <li>• The main 5 destinations for the UK Market are Other Destinations, Spain, France, US and Ireland.</li> </ul>

	Description
<b>Leisure</b>	<ul style="list-style-type: none"> <li>• Leisure was the main purpose of expenditure for outbound tourists in 2011, accounting for 88% of total expenditure.</li> <li>• Both leisure and business outbound travel continues to face difficulties in the face of further economic concerns in the UK.</li> <li>• Organised tour groups accounted for 25% of total trips in 2011,</li> <li>• Singles represented 19%, also increasing from 2010.</li> <li>• There was a slight fall in the number of trips taken by couples and families as household budgets tightened.</li> </ul>
<b>Business</b>	<ul style="list-style-type: none"> <li>• The number of business departures decreased by 4% to six million business trips in 2011.</li> <li>• Companies remained cautious and continued to reduce operational costs and cut back on travel budgets in 2011.</li> <li>• Business departures represented 11% of total outbound tourism.</li> <li>• MICE represented 14% of total business departures from the UK in 2011.</li> <li>• MICE continued to be negatively impacted by the fragile state of the economy and corporate budget constraints. As a result, MICE volume experienced a 4% decrease.</li> </ul>

Sources: 2012 Outbound Travel Euromonitor Report; BDOT 2012; BDOT 2012 Driving the Growth and Competitiveness of the Antigua & Barbuda Tourism Sector Report 2012-2015, Tourism Intelligence International.



# Canadian Market Snapshot

The number of outbound trips increased by 6% in 2011, reaching a record 30 million, whilst outbound tourist expenditure increased by 7% to reach US\$28 billion. The continuing strength of the Canadian dollar in 2011 made travelling to the US and Europe significantly less expensive than in previous years, boosting the flow of Canadian tourists abroad. On average Canadians spend US\$918 per outbound trip in 2011, with increases seen for most countries. **The number of outbound trips is expected to continue to increase, by a CAGR of 3% over the forecast period, to reach 34 million departures by 2016.**

	Description
<b>Behavior Characteristics</b>	<ul style="list-style-type: none"> <li>• 54% of Canadian visitors are in their mid- forties.</li> <li>• Pensioners (over 65 years old) account for nearly 15% of the Canadian travel market.</li> <li>• 54% of the Canadian travellers are women.</li> <li>• Canadians have extremely high internet usage.</li> <li>• Canadian consumer is looking for something different.</li> <li>• The demand for environmentally-friendly or “green” travel continues to grow.</li> <li>• Canadian travellers are willing to pay a premium price for trips and getaways which are environmentally-friendly.</li> </ul>
<b>Trip Characteristics</b>	<ul style="list-style-type: none"> <li>• Nearly half of all Canadians outbound trips are for less than one week’s duration.</li> <li>• The main outbound travel destination is the US (68%).</li> <li>• Bermuda and the Caribbean account for one third of Canadian visits.</li> <li>• The most popular months for travel to overseas countries (excluding US) are January- March (33% of all trips).</li> <li>• The most favoured types of holidays are sun, sand and sea, cruises, sightseeing and cultural trips.</li> <li>• 77% of Canadian Travellers plan to take a vacation in the next 24 months (2009 was only 32%) .</li> <li>• Cruises continue to growth +7% over last 3 years.</li> <li>• Market overall continues to be last minute, within 10 days.</li> <li>• The main 5 destinations for the Canadian Market are US, Other Destinations, Mexico, Cuba and UK.</li> </ul>

	Description
<b>Leisure</b>	<ul style="list-style-type: none"> <li>• Travel for leisure purposes accounted for 87% of all outbound trips by Canadians in 2011, reaching 26 million trips; this was 6% more than in the previous year.</li> <li>• Single travellers continued to represent the largest share of outbound trips by Canadians in 2011, accounting for a third of all trips.</li> <li>• Couples trips and families and friends travelling together were increasingly popular in 2011, reflecting the desire of Canadians to travel with a companion.</li> </ul>
<b>Business</b>	<ul style="list-style-type: none"> <li>• There were four million overnight business trips abroad in 2011, which represented an increase of 8% compared with the previous year .</li> <li>• MICE travel by Canadians increased by 9% in 2011.</li> <li>• Canadian companies looked to take advantage of the strong Canadian dollar to meet their clients in person.</li> <li>• Companies continued to return to attending international trade shows and conventions.</li> </ul>

Sources: 2012 Outbound Travel Euromonitor Report; BDOT 2012; , Driving the Growth and Competitiveness of the Antigua & Barbuda Tourism Sector Report 2012-2015 , Tourism Intelligence International.

# Germany Market Snapshot

Departures increased by 2% from 2010 to reach 90 million trips in 2011, with growth slowing from almost 3% in 2010. The economic situation had an impact on consumer economic confidence and resulted in slower growth in departures. Outgoing tourist expenditure grew slightly stronger than outbound departures by 2% from 2010 to reach €61.6 billion in 2011(US\$ 79.7 billion) . **Departures are expected to increase by a CAGR of 1% for the overall forecast period to reach 90.6 million trips in 2016 and by a 6% CAGR growth rate for outgoing tourist expenditure is expected for forecast period.**

	Description
<b>Behavior Characteristics</b>	<ul style="list-style-type: none"> <li>• An annual holiday is highly important to most Germans and considered to be remuneration for working hard throughout the year.</li> <li>• The relatively high savings ratio in Germany in comparison with other Western European countries also enables many to afford holidays during difficult economic times.</li> <li>• Three main segments have been identified:Free Spirits demand exciting experiences they cannot find at home, Cultural Explorers enjoy going off the beaten path and Authentic Experiencers who also enjoy learning about history and culture.</li> <li>• In Germany, new laws enable employees to take up to six weeks leave in a year, if required, for health/wellbeing reasons.*</li> </ul>
<b>Trip Characteristics</b>	<ul style="list-style-type: none"> <li>• Popular summer destinations for leisure trips include Spain, Turkey and Greece.</li> <li>• Over the past decade, German arrivals to long-haul destinations expanded 50%.</li> <li>• Long-haul trips take place mostly between April-June and September-November.</li> <li>• Average spending per trip increased to €684 (US\$ 885) in 2011.</li> <li>• 65% of travellers start planning their vacation at least six months in advance.</li> <li>• While some parts of an itinerary may be pre-booked, most German visitors like to make arrangements as they travel through.</li> <li>• The main 5 destinations for the German Market are Other Destinations, Austria, Italy, Spain and France.</li> </ul>

	Description
<b>Leisure</b>	<ul style="list-style-type: none"> <li>• Outgoing leisure was the main purpose of expenditure for outbound tourists in 2010.</li> <li>• The highest share of outbound leisure trips is undertaken by couples (26%), followed by families (20%), groups (16%) and singles (11%).</li> </ul>
<b>Business</b>	<ul style="list-style-type: none"> <li>• Business departures outperformed leisure departures in 2011 with growth of over 2%.</li> <li>• MICE trips accounted for 26% of all business departures and increased by 3% in 2011.</li> <li>• The growth of MICE departures however slowed from 7% in 2010, with this strong growth linked to recovery in the economy.</li> </ul>

Sources: 2012 Outbound Travel Euromonitor Report, Germany Market Profile, Canadian Tourism Commission, February 2013; Arizona German Market Profile \* One caribbean organisation: Health and Wellness niche market



# France Market Snapshot

In 2011 the French took 26 million trips abroad (+2% over 2010). The number of outbound trips increased by 2% for the second year in a row after strong declines both in 2008 and 2009. Average spending remained relatively stable in 2011 after a year of growth in 2010, as the French remained cautious in their travel and spending decisions in a context of economic instability. **International departures are expected to increase by a CAGR of 1% over the 2011-2016 period, to reach 27 million departures in 2016 and outgoing tourist expenditure is forecast to decline slightly at a constant value CAGR of -0.1% .**

	Description
Behavior Characteristics	<ul style="list-style-type: none"> <li>In 2011, French tourists remained budget minded.</li> <li>French tourists took shorter breaks and many opted to travel off season to save money.</li> <li>French long haul travellers are defined by a number of needs including: sun, relaxation and nature; the need to get off the beaten track; and the need for indulgence.</li> <li>Within the long haul market, six distinct segments were revealed: Self Challengers (10%), Independent Self Development (15%), Activity Seekers (26%), Family Focus (14%), Comfort and Learning (11%), Safe and Unwind (17%) and Indulgence (7%).</li> </ul>
Trip Characteristics	<ul style="list-style-type: none"> <li>Popular outbound destinations Spain and Italy represent 27% of total outbound trips.</li> <li>Among long-haul destinations, Bali, Thailand and Vietnam were particularly popular and attracted a rising number of tourists in 2011.</li> <li>French tourists increasingly booked flights and/or hotels at the last minute on the web so as to benefit from special offers and discounted packages.</li> <li>Cruises have been increasingly popular amongst the French.</li> <li>Internet remained the first source of information for planning trips outside of France. Travel agencies' internet sites are the most widely used (by 50% of internet users) vs 40% for operators' private sites.</li> <li>The main 5 destinations for the French Market are Other Destinations, Spain, Italy, UK and Belgium.</li> </ul>

	Description
Leisure	<ul style="list-style-type: none"> <li>Leisure departures still accounted for the largest majority of trips (87%).</li> <li>Leisure segment showed moderate growth as more French decided to spend their holidays in France in 2011 after the drop in 2010.</li> <li>Families represented the highest share of leisure departures market (48%) accounting for almost half of total leisure departures.</li> <li>Couples represented the third highest share (17%) of leisure departures after Others (25%).</li> </ul>
Business	<ul style="list-style-type: none"> <li>Business was the fastest growth segment in 2011 (+4%).</li> <li>Business departures' weight has been increased gradually since 2006 and represented 13% of total outbound trips in 2011.</li> <li>Corporate travel has been damaged by the crises; as a result, the corporate travel landscape has gone through a major realignment.</li> <li>MICE accounted for 23% of total business trips in 2011, a proportion that has remained stable in the past years.</li> </ul>

Sources: 2012 Outbound Travel Euromonitor Report; Tourism Queensland, The French Traveller A segmentation of the French Market (2011)

# Priority target segments for St Lucia

## Priority Segments



### Couples

- ✓ Sharing new experiences together
- ✓ Using nature to reconnect
- ✓ Activities in nature



### Creative Class

- ✓ Search for authentic cultural experiences
- ✓ Participate in culture
- ✓ High edutainment motivation



### Wedding/Honeymooners and Romance

- ✓ Spending time together
- ✓ Romance
- ✓ Unforgettable experiences
- ✓ Luxury



### Feel alive: Sport and adventure enthusiasts

- ✓ Sports and Sensations
- ✓ Adventures
- ✓ Going out / feeling free / partying



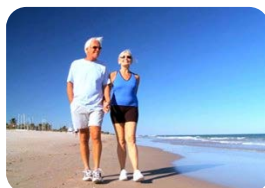
### Nature lovers

- ✓ Contact with flora and fauna
- ✓ Discovering new places
- ✓ Activities in nature



### Luxury

- ✓ Indulgent
- ✓ "Me" time
- ✓ High expenditure
- ✓ Honeymooners
- ✓ Couples



### Active Seniors

- ✓ Taking care of yourself
- ✓ Health
- ✓ Peacefulness
- ✓ Safety



### Wellbeing

- ✓ Health and beauty
- ✓ Relaxing moments
- ✓ Sublime landscapes
- ✓ Feeling part of an infinite cycle
- ✓ Honeymooners



### Trendsetters

- ✓ New and unique experiences
- ✓ Couples
- ✓ Undiscovered places
- ✓ Following celebrities favourite' spots



### Regional travellers

- ✓ Travelling to close islands
- ✓ Relaxing moments
- ✓ Travelling all year
- ✓ Spending time together
- ✓ Getting to know different cultures and places

Target segments should focus in priority Couples, Wedding and Honeymooners, Nature Lovers, Regional Travellers, Seniors and Wellbeing

# Secondary target segments for St Lucia

## Secondary Segments

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### Family

- ✓ Spending time together
- ✓ Relaxing moments
- ✓ Activities in nature
- ✓ Getting on together
- ✓ Education while having fun
- ✓ Entertainment



### Executive meetings and conferences

- ✓ Adapted infrastructures
- ✓ Different and original offer
- ✓ Preferential treatment
- ✓ Driven by MICE experts



### Locals

- ✓ Education while having fun
- ✓ Entertainment
- ✓ Activities in nature
- ✓ Learning about their own history and natural assets

Lifestyle segments and new segments should also be looked into in order to diversify traditional target clients

Introduction

Saint Lucia's Comparative Advantage

**Strategy**

- Vision, objectives and goals
- Infrastructure and Destination
- Tourism Product Development
- Marketing, commercial and branding
- **Human Resources & Quality**
- Governance, Investment & Funding

Action Plan

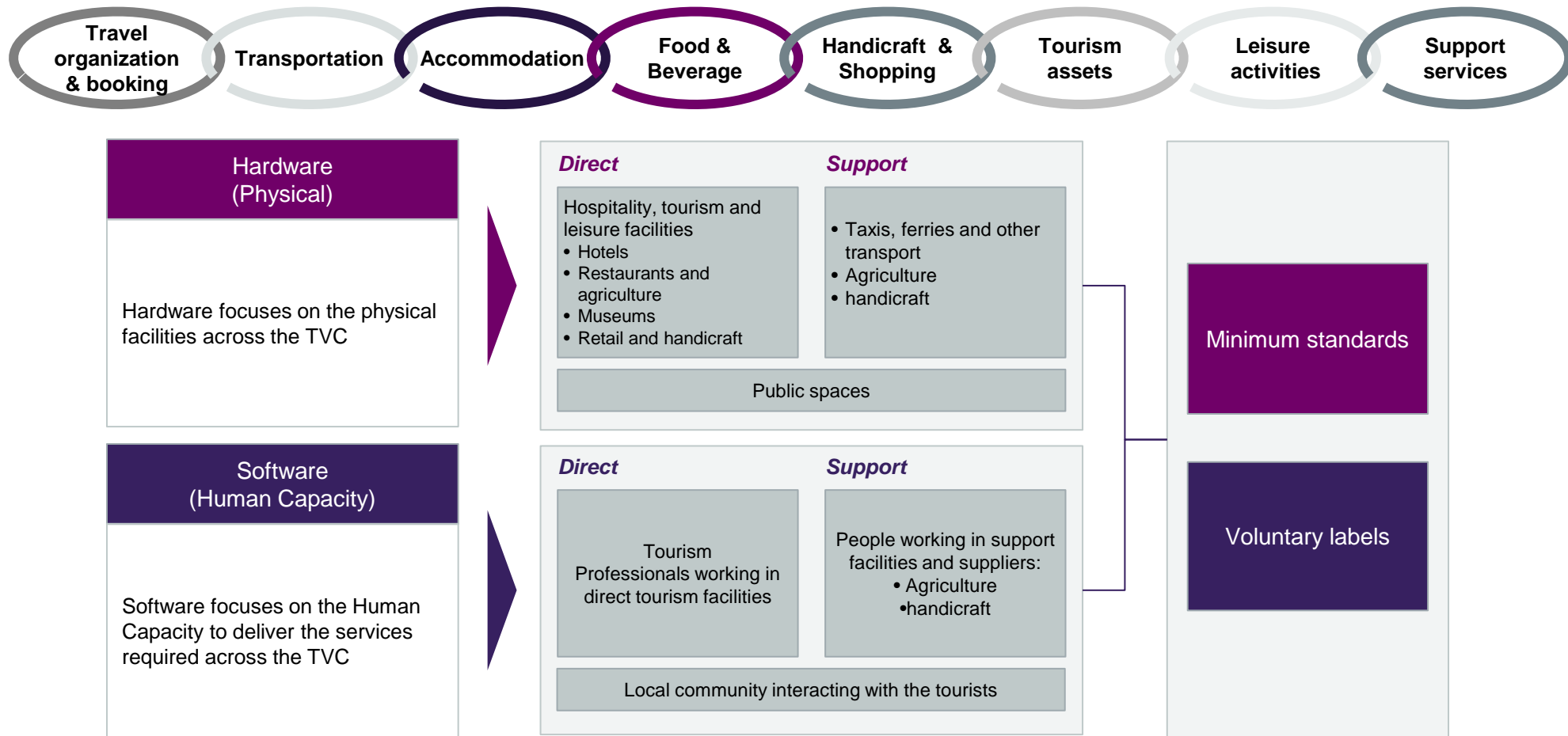
Priority Projects

Benchmarks

## Objective: To develop HR Capacity and quality throughout the Tourism Value Chain

HR Capacity and Quality Strategy	
<b>Total Quality Management (TQM)</b>	<ul style="list-style-type: none"> <li>• TQM across the Tourism Value Chain</li> <li>• Mandatory labels and minimum standards which meet international best practices</li> <li>• Voluntary labels which provide quality assurance and contribute to branding</li> </ul>
<b>Training needs assessment</b>	<ul style="list-style-type: none"> <li>• Transversal needs include training needs which are shared across different types of players in the tourism sector. It includes general behavioural training of how to interact with tourists (e.g. how to engage the interest of the tourists in a comfortable and non-intrusive manner).</li> <li>• Specific training tailored to provide value to tourists and to provide an overall service experience. Specific needs include the different components of the Tourism Value Chain (taxis, accommodation, F&amp;B, handicraft )</li> </ul>
<b>handicraft and agricultural</b>	<ul style="list-style-type: none"> <li>• Understand what tourists are looking for and how to market and brand their authentic products</li> <li>• Understand what the hotels and hospitality sector needs and how to create link with agriculture and handicraft</li> <li>• Solutions to overcome cash flow barriers</li> <li>• Build on the current successful example (e.g. Sugar Beach Hotel, Jade Mountain) and re-launch previously successful projects (e.g. Belle Vue Farmers Cooperative project)</li> </ul>
<b>Entrepreneurial support</b>	<ul style="list-style-type: none"> <li>• Business Incubators: A business incubator is a service centre specialized in the support to potential entrepreneurs in the process of setting up a company.</li> <li>• Financial support: Support to entrepreneurs of how to obtain funding for their projects.</li> <li>• Quality standards: Entrepreneurs should be made aware of the minimum compulsory standards in the business sector.</li> </ul>
<b>Public awareness</b>	<ul style="list-style-type: none"> <li>• Create awareness among the local communities and stakeholders of the positive impacts of tourism and the potential employment opportunities. Stakeholders (local community, agricultural sector, hospitality, infrastructure) need to understand their role in tourism and know how they fit into the TVC (only 52% in St Lucia vs. 73% in Barbados) i.e. What can I do?</li> <li>• The awareness strategy should instill pride in the sector. It should also focus on the role that the general public plays in developing the overall tourism experience of St Lucia.</li> <li>• Stimulate interest and participation in the tourism sector by showing specific projects the potential role of the stakeholders.</li> </ul>

# A Total Quality Management (TQM) approach is to be developed in order to guarantee quality in the physical (hardware) and human (software) experiences in St Lucia



A focus on the Hardware (physical) and Software (human capacity) quality improvements and guarantees throughout the Tourism Value Chain is critical in improving St Lucia's tourism experience and in building its competitiveness

## Mandatory and Voluntary Labels should be used as a tool to ensure minimum standards and differentiating features in St Lucia

### Mandatory Quality Labels

- A sound regulatory framework is necessary to set minimum standards, avoid unfair competition and protect the consumer regarding the international standards of tourism performance. These are represented as “Mandatory labels”.
- Mandatory labels should be used to provide a minimum standards guarantee. These mandatory recognition systems should meet international standards specifically in terms of accommodation and food & beverage.
- It should review the minimum standard and identify where the standard adheres to international standards and where the standard should be lifted. If standards should be lifted, these should be clearly defined.
- Current amenities should adhere to the new standards and new amenities should meet these standards as the minimum requirements to enter the tourism sector.

### Voluntary Quality Labels

- Voluntary labels should be used as a strategic differentiation tools. The strategy is to use these voluntary labels to provide further guarantees to the tourist and to further support the identity authentic St Lucia.
- Boutique St Lucia accommodation labels: The strategy is to support the identity of authentic local accommodation like B&B's.
- Destination labels: The strategy is to use these labels to reinforce the positioning of facilities and services. For example “Cultural buffs”, “Nature Lovers” etc.
- Environmental labels: These labels should be used to support the environmental strategy.

Quality labels are an important tool to provide a level of security to tourists with regards to the level of quality and tourism experience that they should experience.



Introduction

Saint Lucia's Comparative Advantage

**Strategy**

- Vision, objectives and goals
- Infrastructure and Destination
- Tourism Product Development
- Marketing, commercial and branding
- Human Resources & Quality
- **Governance, Investment & Funding**

Action Plan

Priority Projects

Benchmarks

## Objective: To develop a clear investment vision and strategy for focused investment promotion and fund allocation

Investment and Funding Strategy	
<b>Tourism investment vision</b>	<ul style="list-style-type: none"> <li>• Need a holistic vision for investment, specifically for tourism investment, that ensures that everybody across different sectors and ministries understands and accepts the investment targets. e.g. Need to link the Vision Plan with the work of Invest St Lucia.</li> <li>• Everyone who is selling St Lucia needs to sell the same product through one message and with one voice.</li> <li>• Need a champion to lead and drive the tourism investment target strategy.</li> </ul>
<b>Tourism investment strategy</b>	<ul style="list-style-type: none"> <li>• St Lucia needs to identify exactly what it wants to sell, what it wants to project, what the destination offers and how it is competitive</li> <li>• Invest St Lucia needs a clear target for tourism investment projects (geographic hubs, product hubs) and target investors.</li> </ul>
<b>Alignment across ministries</b>	<ul style="list-style-type: none"> <li>• Different ministries (e.g. Ministry of Commerce, Business Development, Investment and Consumer Affairs) need to understand the role of Invest St Lucia and how they can benefit from the work of St Lucia, as well as how they can work together and not duplicate work.                             <ul style="list-style-type: none"> <li>• Policy framework and clarification of regulations/laws needs to be done by the Ministry of Commerce in order to facilitate the investment process.</li> <li>• The role of Invest St Lucia and the Ministry of Commerce, Business Development, Investment and Consumer Affairs needs to be clearly defined so that it is understood internally and externally to investors</li> </ul> </li> </ul>
<b>Sustainable funding model</b>	<ul style="list-style-type: none"> <li>• Need to develop a sustainable funding model and not be dependent only on public funding.</li> <li>• Need to auto-generate funds</li> </ul>
<b>Public-private partnerships (PPP)</b>	<ul style="list-style-type: none"> <li>• Needs models for public-private funding which is linked to prioritised projects. Allocation of funds to key flagship projects. Prioritization of development and investment hubs e.g.:                             <ul style="list-style-type: none"> <li>• Awareness</li> <li>• Agriculture/tourism synergies</li> <li>• Hospitality upgrades</li> <li>• Tourism signage</li> </ul> </li> </ul>

## Objective: To develop a tourism strategy and vision which is adopted across ministries, across the TVC and the public/private sectors

Governance Strategy	
<b>Leadership</b>	<ul style="list-style-type: none"> <li>• Need a leader to champion the tourism agenda across ministries and across the private and public sector.</li> <li>• The champion should lead the tourism strategy, pushing and campaigning for the tourism agenda and assuming the role of bringing different stakeholders together.</li> </ul>
<b>Institutional framework</b>	<ul style="list-style-type: none"> <li>• Inter-ministerial collaboration structure which supports tourism development. Need buy in across different ministries and buy in across the public and private sector.</li> <li>• Identify synergies and opportunities for other sectors of the industry to benefit from tourism development (eg. agriculture)</li> <li>• Clear institutional framework for collaboration across existing entities (e.g. Invest St Lucia and Commerce) and define roles. Improve inter-ministerial and inter-departmental coordination and collaboration.</li> </ul>
<b>Public-private partnerships (PPP)</b>	<ul style="list-style-type: none"> <li>• Create a mechanism for better communication and relations between key stakeholders from public and private sector.</li> <li>• Develop a new approach to PPP and define rules for collaboration in order to ensure that approved projects are implemented.</li> </ul>
<b>Policy</b>	<ul style="list-style-type: none"> <li>• Review policy to ensure PPP and support tourism development and investment.</li> <li>• Create a program to incentivise upgrading of existing hotel supply</li> </ul>

Introduction

Saint Lucia's Comparative Advantage

Strategy

**Action Plan**

Priority Projects

Benchmarks

## 6 Macros programmes with corresponding Action Plans provide the framework of Action Plan

	Actions	Macro programmes	Action Plan
1	Infrastructure capacity support & projects development	Infrastructure programme	<ol style="list-style-type: none"> <li>1. Development of national connectivity: (Airport and roads upgrade)</li> <li>2. Establish a priority list to develop tourism projects (waterfront, boutique hotels, resorts)</li> <li>3. Tourism Signage</li> <li>4. On-island communication : Internet &amp; WIFI</li> <li>5. Development Framework</li> <li>6. Resources and Waster Management</li> <li>7. Upgrade of existing hotels</li> <li>8. Safety and Security</li> </ol>
2	New product development	Product Development programme	<ol style="list-style-type: none"> <li>1. Product Development Committee</li> <li>2. Core product: Sun &amp; Beach Tourism</li> <li>3. Core product: Wellness Tourism</li> <li>4. Core product: Nature &amp; Eco Tourism</li> <li>5. Core product: Wedding &amp; Honeymoon Tourism</li> <li>6. Core product: Luxury Tourism</li> <li>7. Complementary Product:Cultural Tourism</li> <li>8. Comp. Product: Nautical Tourism</li> <li>9. Comp. Product: Sport Tourism</li> <li>10. Core. Product: Cruise Tourism</li> <li>11. Comp. Product: Events, Retail &amp; Gastronomy</li> <li>12. Comp. Product: Community and Village Tourism (part of Eco-Nature)</li> <li>13. Comp. Product: MICE</li> </ol>
3	New destination marketing & branding strategy	Marketing, branding and positioning Programme	<ol style="list-style-type: none"> <li>1. Marketing Plan</li> <li>2. Sales and operational marketing plan</li> <li>3. Upgrade brand and positioning</li> <li>4. Island wide branding 100% St Lucia</li> <li>5. Events calendar</li> <li>6. International &amp; local offices</li> <li>7. Market Intelligence</li> <li>8. Connectivity development programme</li> </ol>
4	Quality and HR capacity development	Quality & Human Resources programme	<ol style="list-style-type: none"> <li>1. Training and capacity building programme</li> <li>2. Mandatory standards &amp; licensing</li> <li>3. Voluntary Certification</li> <li>4. Handicraft and Agriculture special programme</li> <li>5. National Pride Campaign</li> <li>6. Entrepreneurial support programme</li> </ol>
5	Attract and support investors & funding	Investment & Funding Facilitation programme	<ol style="list-style-type: none"> <li>1. Tourism investment vision and strategy</li> <li>2. Institutional Framework for investment</li> <li>3. Priority projects</li> <li>4. Funding mechanism</li> <li>5. Harmonization of standards procedures and policies</li> </ol>
6	Create sustainable governance structure	Governance programme	<ol style="list-style-type: none"> <li>1. Institutional Framework and organization of the Tourism Governance Structure</li> <li>2. Public- and Private- sector collaboration</li> <li>3. Internal governmental campaign to promote tourism benefits</li> <li>4. Information and statistics</li> </ol>

# The following international benchmarks and best practices have been consulted for the Action Plan:

<p><b>Infrastructure Destination programme</b></p>	<ul style="list-style-type: none"> <li>• Tourism Signage, New Zealand</li> <li>• Harbour, St Thomas, USVI</li> <li>• Waterfront Development, Port Louis, Mauritius</li> <li>• Waterfront, Victoria &amp; Albert Waterfront, South Africa</li> <li>• Marina, La Balise Marina, Mauritius</li> <li>• Sustainability (Domenica, BVI, Brazil, Barbados, Bermuda, Bahamas, US, Denmark, Mexico)</li> <li>• Smart cities, La Graciosa, Spain</li> </ul>	<p><b>Marketing &amp; Branding programme</b></p>	<ul style="list-style-type: none"> <li>• Branding and Positioning, New Zealand</li> <li>• Branding and Positioning, Costa Rica</li> <li>• Branding Sustainability (Dominica, Brazil, Barbados, Bermuda, BVI, Denmark, Mexico)</li> </ul>
<p><b>Product Development programme and Best Practices for 6 high priority projects</b></p>	<ul style="list-style-type: none"> <li>• Gastronomic Experiences, Mauritius</li> <li>• Nature Tourism, Jamaica</li> <li>• Nature Tourism, Birk Park, Indonesia</li> <li>• Nature Tourism, Georgia Sea Turtle Center, USA</li> <li>• Nature Tourism, Rainforest Discovery Centre, Panama</li> <li>• Agriculture, Heritage Corridor: Blue Mountain, Jamaica</li> <li>• Agriculture, L´Aventure du Sucre, Mauritius</li> <li>• Agriculture, Circle Farm Tour, Canada</li> <li>• Sports, Mauritius</li> <li>• Sports Academy, IMG Sports Academy, United States</li> <li>• Nautical Tourism, Monaco and France</li> <li>• Sports Tourism, Geovillage Sports Resort, Italy</li> <li>• Spa and Wellness, Mauritius</li> <li>• Spa and Wellness, Six Senses</li> <li>• Thalassotherapie, Tunisia</li> <li>• Eco- Hotel Spa, Yves Rocher, France</li> <li>• Eco- Hotel, Domaine des Ormes, France</li> <li>• Leisure and Entertainment, Jamaica and Mauritius</li> <li>• Sun and Beach Tourism, Nikki Beach Clubs</li> <li>• Retail and Handicraft, Canada</li> <li>• Craft Village, Umnini Craft Village, South Africa</li> <li>• Community Tourism, Dominica</li> </ul>	<p><b>Human Resource &amp; Quality programme</b></p>	<ul style="list-style-type: none"> <li>• Training Programme, France and Mexico</li> <li>• Awareness, Jamaica</li> <li>• Awareness, Mauritius</li> <li>• Awareness, Spain</li> <li>• Awareness, South Africa</li> <li>• International Labels for Accommodation</li> <li>• International Quality Labels</li> <li>• Tourism Schools, Cambodia</li> <li>• Tourism Schools, Indonesia</li> </ul>
		<p><b>Governance, Investment &amp; Funding programme</b></p>	<ul style="list-style-type: none"> <li>• Governnace, Jamaica</li> <li>• Investment strategy, Mauritius</li> <li>• Investment strategy, Mexico</li> <li>• Funding model, Jamaica</li> <li>• Funding model, Barbados</li> <li>• Fundng model, Canada</li> </ul>

# Project implementation leadership

	Macro programme	Leading Stakeholders	Strategic Partners
1	Infrastructure programme	<ul style="list-style-type: none"> <li>✓ Ministry of Infrastructure, Port Services and Transport</li> <li>✓ Ministry of Tourism, Heritage and the Creative Industries</li> <li>✓ Saint Lucia Air and Sea Ports Authority (SLASPA)</li> <li>✓ Ministry of Finance, Economic Affairs, Planning &amp; Social Security</li> </ul>	<ul style="list-style-type: none"> <li>✓ Invest St Lucia</li> <li>✓ Saint Lucia Hotel and Tourism Association</li> <li>✓ Saint Lucia Tourism Board</li> <li>✓ Saint Lucia Bureau of Standards</li> <li>✓ St. Lucia Chamber of St. Lucia National Trust</li> <li>✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs</li> <li>✓ Ministry of Education, Human Resource Development and Labour</li> <li>✓ Ministry of External Affairs, International Trade and Civil Aviation</li> <li>✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology</li> <li>✓ Ministry of Legal Affairs, Home Affairs and National Security</li> </ul>
2	Product Development programme	<ul style="list-style-type: none"> <li>✓ Ministry of Tourism, Heritage and the Creative Industries</li> <li>✓ Saint Lucia Hotel and Tourism Association</li> <li>✓ Saint Lucia Tourism Board</li> </ul>	<ul style="list-style-type: none"> <li>✓ Invest St Lucia</li> <li>✓ Saint Lucia Bureau of Standards</li> <li>✓ Saint Lucia Air and Sea Ports Authority (SLASPA)</li> <li>✓ St. Lucia Chamber of Commerce, Industry and Agriculture</li> <li>✓ St. Lucia National Trust</li> <li>✓ Ministry of Finance, Economic Affairs, Planning &amp; Social Security</li> <li>✓ Ministry of Infrastructure, Port Services and Transport</li> <li>✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs</li> <li>✓ Ministry of Education, Human Resource Development and Labour</li> <li>✓ Ministry of External Affairs, International Trade and Civil Aviation</li> <li>✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology</li> <li>✓ Ministry of Legal Affairs, Home Affairs and National Security</li> </ul>



## Project implementation leadership

	Macro programme	Leading Stakeholders	Strategic Partners
3	<b>Marketing, branding and positioning Programme</b>	<ul style="list-style-type: none"> <li>✓ Ministry of Tourism, Heritage and the Creative Industries</li> <li>✓ Saint Lucia Tourism Board</li> <li>✓ Saint Lucia Hotel and Tourism Association</li> </ul>	<ul style="list-style-type: none"> <li>✓ Invest St Lucia</li> <li>✓ Saint Lucia Bureau of Standards</li> <li>✓ Saint Lucia Air and Sea Ports Authority (SLASPA)</li> <li>✓ St. Lucia Chamber of Commerce, Industry and Agriculture</li> <li>✓ St. Lucia National Trust</li> <li>✓ Ministry of Finance, Economic Affairs, Planning &amp; Social Security</li> <li>✓ Ministry of Infrastructure, Port Services and Transport</li> <li>✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs</li> <li>✓ Ministry of Education, Human Resource Development and Labour</li> <li>✓ Ministry of External Affairs, International Trade and Civil Aviation</li> <li>✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology</li> <li>✓ Ministry of Legal Affairs, Home Affairs and National Security</li> </ul>
4	<b>Quality &amp; Human Resources programme</b>	<ul style="list-style-type: none"> <li>✓ Ministry of Tourism, Heritage and the Creative Industries</li> <li>✓ Saint Lucia Tourism Board</li> <li>✓ Saint Lucia Bureau of Standards</li> <li>✓ Saint Lucia Hotel and Tourism Association</li> </ul>	<ul style="list-style-type: none"> <li>✓ Sir Arthur Lewis Community College</li> <li>✓ Monroe College</li> <li>✓ Invest St Lucia</li> <li>✓ Saint Lucia Air and Sea Ports Authority (SLASPA)</li> <li>✓ St. Lucia Chamber of Commerce, Industry and Agriculture</li> <li>✓ Taxi Association</li> <li>✓ National Workers Union</li> <li>✓ St. Lucia National Trust</li> <li>✓ Tourism Working Groups</li> <li>✓ Ministry of Finance, Economic Affairs, Planning &amp; Social Security</li> <li>✓ Ministry of Infrastructure, Port Services and Transport</li> <li>✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs</li> <li>✓ Ministry of Education, Human Resource Development and Labour</li> <li>✓ Ministry of External Affairs, International Trade and Civil Aviation</li> <li>✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology</li> <li>✓ Ministry of Legal Affairs, Home Affairs and National Security</li> </ul>

## Project implementation leadership

	Macro programme	Leading Stakeholders	Strategic Partners
5	<b>Investment &amp; Funding Facilitation programme</b>	<ul style="list-style-type: none"> <li>✓ Invest St Lucia</li> <li>✓ Ministry of Tourism, Heritage and the Creative Industries</li> <li>✓ Ministry of Finance, Economic Affairs, Planning &amp; Social Security</li> </ul>	<ul style="list-style-type: none"> <li>✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs</li> <li>✓ Saint Lucia Air and Sea Ports Authority (SLASPA)</li> <li>✓ St. Lucia Chamber of Commerce, Industry and Agriculture</li> <li>✓ Saint Lucia Hotel and Tourism Association</li> <li>✓ Saint Lucia Tourism Board</li> <li>✓ Ministry of Infrastructure, Port Services and Transport</li> <li>✓ Ministry of Education, Human Resource Development and Labour</li> <li>✓ Ministry of External Affairs, International Trade and Civil Aviation</li> <li>✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology</li> <li>✓ Ministry of Legal Affairs, Home Affairs and National Security</li> </ul>
6	<b>Governance programme</b>	<ul style="list-style-type: none"> <li>• Ministry of Tourism, Heritage and the Creative Industries</li> </ul>	<ul style="list-style-type: none"> <li>✓ Invest St Lucia</li> <li>✓ Saint Lucia Hotel and Tourism Association</li> <li>✓ Saint Lucia Tourism Board</li> <li>✓ Saint Lucia Bureau of Standards</li> <li>✓ Saint Lucia Air and Sea Ports Authority (SLASPA)</li> <li>✓ St. Lucia Chamber of Commerce, Industry and Agriculture</li> <li>✓ Taxi Association</li> <li>✓ National Workers Union</li> <li>✓ St. Lucia National Trust</li> <li>✓ Tourism Working Groups</li> <li>✓ Ministry of Finance, Economic Affairs, Planning &amp; Social Security</li> <li>✓ Ministry of Infrastructure, Port Services and Transport</li> <li>✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs</li> <li>✓ Ministry of Education, Human Resource Development and Labour</li> <li>✓ Ministry of External Affairs, International Trade and Civil Aviation</li> <li>✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology</li> <li>✓ Ministry of Legal Affairs, Home Affairs and National Security</li> </ul>

## 6 key actions from the Programmes have been selected which should be implemented as soon as possible

	Actions	Programme
1	Create iconic projects such as the Waterfront in Castries and Boutique hotels with international brands	<b>Infrastructure</b>
2	Develop and focus on Wellness, Nature and Luxury product development to position and differentiate the destination	<b>Tourism Product Development</b>
3	Create St Lucia brand promoting 100% St Lucia associate with international operators brand for hotel, attractions, retail,...	<b>Marketing, Branding and Positioning</b>
4	Focus on the training and capacity building (tourism, wellness, hospitality) to offer the best services in line with the positioning of the destination	<b>Quality &amp; Human Resources</b>
5	Create a section for tourism within the IPA to have the perfect knowledge on the tourism specificity in order to attract the adequate investors and operators	<b>Investment &amp; Funding</b>
6	Define a leader to guide the development of tourism in St Lucia and create synergies between the different partners and the public and the private sector	<b>Governance</b>

These actions will help to sustain the development and positioning of tourism in St Lucia in a sustainable way

## The Action Plan details the following for each of the 8 priority programmes for implementation in St Lucia

- Overview of the programme
- Objectives of the programme
- Leading Stakeholders
- Identification of main priority actions and definition of sub-projects
- Estimation of time frame for implementation
- Estimation of scale of investment

**NOTE THAT THE TIME FRAME AND SCALE OF INVESTMENT ARE PROVIDED IN ORDER TO GIVE AN INDICATION OF POTENTIAL TIME NEEDED AND AN ORDER OF MAGNITUDE FOR INVESTMENT RESPECTIVELY.**

	Estimated Implementation Timeframe
Short Term (S/T)	<ul style="list-style-type: none"> <li>• Relatively short implementation time.</li> <li>• Less than 12 months</li> <li>• May have potential as a “Quick Win”</li> </ul>
Medium Term (M/T)	<ul style="list-style-type: none"> <li>• Medium implementation time</li> <li>• 12 – 24 months</li> </ul>
Long term (L/T)	<ul style="list-style-type: none"> <li>• Relatively long implementation time</li> <li>• More than 24 months</li> </ul>

	Estimated Scale of Investment
Low	<ul style="list-style-type: none"> <li>• Relatively low investment requirement</li> <li>• Less than US\$ 500.000</li> </ul>
Medium	<ul style="list-style-type: none"> <li>• Relatively moderate investment requirement</li> <li>• US\$ 500.000 – US\$ 1 million</li> </ul>
High	<ul style="list-style-type: none"> <li>• Relatively high investment requirement</li> <li>• More than US\$ 1 million</li> </ul>

## Macro Programme: Infrastructure and Projects

*An infrastructure & projects programme is necessary to develop a sustainable tourism industry in St Lucia and to welcome more tourists into the country*

1

### Infrastructure Programme

#### Overview of the programme

The infrastructure plan aims to ensure the sustainability of St Lucia's resources and supports the increased tourism demand and development of tourism destinations.

The following projects are regarded as basic infrastructure needed to support sustainable tourism development.

A holistic approach to design and infrastructure upgrade is required in order to manage environmental impact and mitigate risks

#### Objectives of the programme

- To support the increased tourism demand for resources on the islands, due to the increase in tourism arrivals
- To improve the transportation infrastructure, airport facilities, quality of services and safety of facilities to positively impact the tourist experience
- To create incentives and improve sustainable practices throughout the public and private sectors to foster quality, respect and awareness of St Lucia's natural and cultural heritage.
- To raise awareness and improve public education and participation in the conservation and protection of St Lucia's resources

#### Leading Stakeholders

- ✓ Ministry of Infrastructure, Port Services and Transport
- ✓ Ministry of Tourism, Heritage and the Creative Industries
- ✓ Saint Lucia Air and Sea Ports Authority (SLASPA)
- ✓ Ministry of Finance, Economic Affairs, Planning & Social Security

#### Strategic Partners

- ✓ Invest St Lucia
- ✓ Saint Lucia Hotel and Tourism Association
- ✓ Saint Lucia Tourism Board
- ✓ Saint Lucia Bureau of Standards
- ✓ St. Lucia Chamber of St. Lucia National Trust

#### Strategic Partners

- ✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs
- ✓ Ministry of Education, Human Resource Development and Labour
- ✓ Ministry of External Affairs, International Trade and Civil Aviation
- ✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology
- ✓ Ministry of Legal Affairs, Home Affairs and National Security

## Macro Programme: Infrastructure and Projects

### Priority Actions and Sub-projects

Infrastructure & projects programme	Sub-projects	Implementation time			Scale of investment		
		ST	MT	LT	Low	Medium	High
<b>Action 1</b>	<b>Development of national connectivity:</b> (Airport and roads upgrade) <ol style="list-style-type: none"> <li>1. National land connectivity infrastructure development</li> <li>2. Water connectivity development</li> <li>3. Air infrastructure improvement</li> <li>4. Cruise infrastructure improvement</li> <li>5. Marina and boat facilities</li> </ol>		✓	✓			✓
<b>Action 2</b>	<b>Establish a priority list to develop tourism projects (waterfront, boutique hotels, resorts)</b> <ol style="list-style-type: none"> <li>1. Development of the Waterfront in Castries</li> <li>2. Development of high quality accommodation of international standards (4*) (resort, boutique hotels)</li> <li>3. Development of wellness boutique hotels (spa, springs,..)</li> <li>4. Sport and MICE facilities</li> <li>5. Development of Welcome Centres</li> </ol>	✓	✓	✓		✓	✓
<b>Action 3</b>	<b>Tourism Signage</b> <ol style="list-style-type: none"> <li>1. Tourism signage programme</li> </ol>	✓			✓		
<b>Action 4</b>	<b>On-island communication : Internet &amp; WIFI</b> <ol style="list-style-type: none"> <li>1. Create a free WIFI network on the main tourist hubs</li> <li>2. Develop internet connectivity and WIFI connections across island</li> </ol>	✓	✓			✓	✓

## Macro Programme: Infrastructure and Projects

### Priority Actions and Sub-projects

Infrastructure & projects programme		Sub-projects	Implementation time			Scale of investment		
			Short	Medium	Long	Low	Medium	High
<b>Action 5</b>	<b>Development Framework</b>	<ol style="list-style-type: none"> <li>1. Adoption of Vision Plan as the development framework for tourism development</li> <li>2. Adopt a Sustainable Land Use Plan</li> <li>3. Protection and preservation programmes for natural and cultural heritage</li> </ol>	✓	✓		✓	✓	
<b>Action 6</b>	<b>Resources and Waster Management</b>	<ol style="list-style-type: none"> <li>1. Resources and waste management plan</li> <li>2. Definition of a solid waste management plan</li> <li>3. Definition of a non-renewable energy management plan</li> <li>4. Recycling and awareness campaign</li> </ol>			✓		✓	
<b>Action 7</b>	<b>Upgrade of existing hotels</b>	<ol style="list-style-type: none"> <li>1. Impulse upgrading of existing hotels by creating incentives and/or review lease policy, particularly for the 4* quality offer</li> </ol>		✓	✓		✓	
<b>Action 8</b>	<b>Safety and Security</b>	<ol style="list-style-type: none"> <li>1. Street and ambient lighting</li> <li>2. Increase visible police presence in tourist areas</li> <li>3. Develop national emergency network (including helicopters)</li> </ol>	✓	✓	✓	✓	✓	✓

Note that while investment in infrastructure requires high investment and relatively long implementation time, the development of human capacity (skills development for boating, awareness and training) which support the infrastructures requires relatively low investment and may be started in the short term. The development of human capacity to support the infrastructure programme is a high priority and should be implemented in the short term.



## Macro Programme: **New Product Development**

*Developing new tourism products will leverage the current tourism offer, stimulate demand, stimulate spending and attract new markets*

2

### Product Development Programme

#### Overview of the programme

With the limited competitiveness of St Lucia in terms of new products, product differentiators which will allow the destination to compete in the tourism sector at regional and international levels is essential.

#### Objectives of the programme

- Develop new core and complementary products
- Diversify tourism products in order to increase competition with other Caribbean and worldwide destinations
- Attract new market segments with new core and complementary products
- Increase visitor expenditure by diversifying the tourism offer
- Improve the value of the offer by developing the tourism products that the market is seeking

#### Leading Stakeholders

- ✓ Ministry of Tourism, Heritage and the Creative Industries
- ✓ Saint Lucia Hotel and Tourism Association
- ✓ Saint Lucia Tourism Board

#### Strategic Partners

- ✓ Invest St Lucia
- ✓ Saint Lucia Bureau of Standards
- ✓ Saint Lucia Air and Sea Ports Authority (SLASPA)
- ✓ St. Lucia Chamber of Commerce, Industry and Agriculture
- ✓ St. Lucia National Trust

#### Strategic Partners

- ✓ Ministry of Finance, Economic Affairs, Planning & Social Security
- ✓ Ministry of Infrastructure, Port Services and Transport
- ✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs
- ✓ Ministry of Education, Human Resource Development and Labour
- ✓ Ministry of External Affairs, International Trade and Civil Aviation
- ✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology
- ✓ Ministry of Legal Affairs, Home Affairs and National Security

## Macro Programme: **New Product Development**

### *Priority Actions and Sub-projects*

New Product Development		Sub-projects	Implementation time			Scale of investment		
			Short	Medium	Long	Low	Medium	High
<b>Action 1</b>	<b>Product Development Committee</b>	1. Creation of the product development committee	✓			✓		
<b>Action 2</b>	<b>Core product: Sun &amp; Beach Tourism</b>	1. Development and improvement of existing of sun & beach infrastructures such as hotels and beach facilities (beach club, day resorts,...) 2. Protection of assets 3. Improvement of safety	✓	✓	✓	✓	✓	✓
<b>Action 3</b>	<b>Core product: Wellness Tourism</b>	1. Development of infrastructures (iconic spa) 2. Attraction of wellness/ spa international brands 3. Marketing actions		✓	✓		✓	✓
<b>Action 4</b>	<b>Core product: Nature &amp; Eco Tourism</b>	1. Development and improvement of Eco-Tourism Infrastructure 2. Protection of assets 3. Improvement of safety 4. Marketing actions	✓	✓			✓	✓
<b>Action 5</b>	<b>Core product: Wedding &amp; Honeymoon Tourism</b>	1. Improvement of wedding and honeymoon facilities and services 2. Marketing actions to complement existing positioning 3. Synergies with Wellness, Luxury	✓			✓		
<b>Action 6</b>	<b>Core product: Luxury Tourism</b>	1. Development of new infrastructures (boutique hotels, charming accommodation, residential tourism,...) 2. Development of marinas for large yachts as well as mooring zones		✓	✓		✓	✓

The development of tourism products is essential in order for the destination to become competitive, position itself at an international level and to differentiate the offer

## Macro Programme: New Product Development

New Product Development		Sub-projects	Implementation time			Scale of investment		
			Short	Medium	Long	Low	Medium	High
<b>Action 7</b>	<b>Complementary Product: Cultural Tourism</b>	<ol style="list-style-type: none"> <li>1. Development and improvement of Cultural Tourism Infrastructure</li> <li>2. Human resources development</li> <li>3. Marketing actions</li> <li>4. Promote , protect and market 100% St Lucia handicraft, design and artworks</li> </ol>	✓	✓		✓	✓	
<b>Action 8</b>	<b>Complementary Product: Nautical Tourism</b>	<ol style="list-style-type: none"> <li>1. Development and improvement of Nautical Tourism Infrastructure</li> <li>2. Protection of assets</li> <li>3. Improvement of safety</li> <li>4. Capacity enhancement (development of marinas and training for services)</li> <li>5. Marketing actions</li> </ol>	✓	✓	✓	✓	✓	✓
<b>Action 9</b>	<b>Complementary Product: Sport Tourism</b>	<ol style="list-style-type: none"> <li>1. Development and improvement of Sport Tourism infrastructure</li> <li>2. Marketing actions</li> <li>3. Events programme linked with sport</li> </ol>	✓	✓	✓	✓	✓	✓
<b>Action 10</b>	<b>Core Product: Cruise Tourism</b>	<ol style="list-style-type: none"> <li>1. Development and improvement of Cruise Tourism infrastructures and accessibility</li> </ol>		✓	✓			✓
<b>Action 11</b>	<b>Complementary Product: Events, Retail &amp; Gastronomy</b>	<ol style="list-style-type: none"> <li>1. Development of waterfront, villages, craft markets including retail, gastronomy, food, music events</li> </ol>	✓	✓	✓	✓	✓	✓
<b>Action 12</b>	<b>Complementary Product: Community and Village Tourism as part of Nature &amp; Eco-Tourism product</b>	<ol style="list-style-type: none"> <li>1. Development and improvement of Community Tourism Infrastructure</li> <li>2. Planning of the product development</li> <li>3. Develop human resources and capacities</li> <li>4. Sustainability project</li> </ol>	✓	✓		✓	✓	
<b>Action 13</b>	<b>Complementary Product: MICE</b>	<ol style="list-style-type: none"> <li>1. Development and improvement of MICE infrastructure</li> <li>2. Organisation of executive meetings and events</li> <li>3. Marketing actions</li> </ol>	✓	✓	✓	✓	✓	✓

## Macro Programme: Marketing, Branding and Positioning

*The marketing, branding and positioning programme is one of the major action to be undertaken in order to upgrade the brand, create products and market key markets and segments*

3

Marketing,  
branding and  
positioning  
Programme

### Overview of the programme

The marketing, branding and positioning defines the main projects required to develop and implement strong marketing actions

The programme aims to promote and develop the image of St Lucia as a world class to key target markets with improved and new products. The marketing effort aims to align product development with target markets in order to stimulate demand, reducing seasonality and increase spending.

### Objectives of the programme

- To strengthen the positioning of the destination and communicate the values of the brand
- To attract international brands for the development of services and facilities in line with the tourism products defined in the strategy
- To stimulate the demand by structuring a new product portfolio that will offer new experiences to visitors
- To improve the tourism marketing network and to focus the commercialisation on the new products and on key markets
- To develop a market intelligence system which supports strategic decision-making
- To lead and support collaboration with airlines to sustain air arrivals growth

### Leading Stakeholders

- ✓ Ministry of Tourism, Heritage and the Creative Industries
- ✓ Saint Lucia Tourism Board
- ✓ Saint Lucia Hotel and Tourism Association

### Strategic Partners

- ✓ Invest St Lucia
- ✓ Saint Lucia Bureau of Standards
- ✓ Saint Lucia Air and Sea Ports Authority (SLASPA)
- ✓ St. Lucia Chamber of Commerce, Industry and Agriculture
- ✓ St. Lucia National Trust

### Strategic Partners

- ✓ Ministry of Finance, Economic Affairs, Planning & Social Security
- ✓ Ministry of Infrastructure, Port Services and Transport
- ✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs
- ✓ Ministry of Education, Human Resource Development and Labour
- ✓ Ministry of External Affairs, International Trade and Civil Aviation
- ✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology
- ✓ Ministry of Legal Affairs, Home Affairs and National Security

## Macro Programme: Marketing, Branding and Positioning Programme

### Priority Actions and Sub-projects

Marketing, Branding and Positioning Programme		Sub-projects	Implementation time			Scale of investment		
			Short	Medium	Long	Low	Medium	High
Action 1	Marketing Plan	<ol style="list-style-type: none"> <li>Review marketing plan and allocation of budget in line with target markets and product development</li> <li>Create special fund for small hotels</li> <li>Develop tourism ambassadors programme</li> </ol>	✓			✓	✓	
Action 2	Sales and operational marketing plan	<b>Promotion management</b> <ol style="list-style-type: none"> <li>Advertising, communicating and promotional tools</li> <li>Promotional events</li> <li>Travel trade awareness</li> <li>Public relations</li> <li>On island tourism awareness campaigns</li> </ol>	✓	✓		✓	✓	
		<b>Marketing online and new technologies</b> <ol style="list-style-type: none"> <li>Revise and update website, with focus on new products and target segments</li> <li>New technologies and tools development</li> </ol>	✓	✓			✓	
Action 3	Upgrade brand and positioning	<ol style="list-style-type: none"> <li>Brand review</li> <li>Brand management and brand manual</li> <li>Attract iconic international brands for priority projects (hotels, spa, retail, ..)</li> </ol>	✓	✓		✓	✓	
Action 4	Develop island wide branding 100% St Lucia	<ol style="list-style-type: none"> <li>Create a brand and sub-brands that will position and promote local 100% St Lucian handicraft and good</li> <li>Promote local 100% St Lucia products developed by the local communities</li> </ol>	✓			✓		

Some actions in this marketing programme could be quick wins, helping the tourism industry through, for example, special promotion of the destination in specific markets to obtain quick results

## Macro Programme: Marketing, Branding and Positioning Programme

### Priority Actions and Sub-projects

Marketing, Branding and Positioning Programme		Sub-projects	Implementation time			Scale of investment		
			Short	Medium	Long	Low	Medium	High
<b>Action 5</b>	<b>Events calendar</b>	<ol style="list-style-type: none"> <li>1. Review events calendar to ensure that events target key niches</li> <li>2. Review timing of events to reduce seasonality</li> </ol>	✓	✓		✓	✓	✓
<b>Action 6</b>	<b>International &amp; local representation offices</b>	<ol style="list-style-type: none"> <li>1. Review international representation offices</li> <li>2. Develop visitor/ discovery centres on the island in strategic locations</li> </ol>	✓	✓			✓	
<b>Action 7</b>	<b>Market Intelligence</b>	<ol style="list-style-type: none"> <li>1. Review data collection, monitoring and control of tourism statistics</li> <li>2. Improve data collection at airports and cruise terminals</li> <li>3. Develop yacht data collection programme</li> <li>4. Improve data collection at attractions and information centres</li> </ol>	✓	✓	✓		✓	✓
<b>Action 8</b>	<b>Connectivity development programme</b>	<ol style="list-style-type: none"> <li>1. Development of a PPP Committee to negotiate with airline industry and attract more flight s to the destination</li> </ol>		✓	✓		✓	✓

\* ST: Short Term, MT: Medium Term, LT: Long Term

## Macro Programme: **Quality and Human Resources Programme**

*The Quality & HR programme develops capacity to ensure international standards in the delivery of service, as well as building awareness*

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### Quality and Human Resources Programme

#### Overview of the programme

The Quality & HR programme aims to create value in the tourism sector through quality levels throughout the Tourism Value Chain and, thereby, create value for visitors and the people of St Lucia

An improvement of quality and human resources capacity is essential to support St Lucia in building competitiveness.

#### Objectives of the programme

- To develop international standards and build competitiveness
- To differentiate the destination through voluntary labelling and reinforce the destination 's quality
- To involve the community in the tourism industry and the quality management process
- To create international training and tourism school that can be a reference in the Caribbean

#### Leading Stakeholders

- ✓ Ministry of Tourism, Heritage and the Creative Industries
- ✓ Saint Lucia Tourism Board
- ✓ Saint Lucia Bureau of Standards
- ✓ Saint Lucia Hotel and Tourism Association

#### Strategic Partners

- ✓ Monroe College
- ✓ Sir Arthur Lewis Community College
- ✓ Invest St Lucia
- ✓ Saint Lucia Air and Sea Ports Authority (SLASPA)
- ✓ St. Lucia Chamber of Commerce, Industry and Agriculture
- ✓ Taxi Association
- ✓ National Workers Union
- ✓ St. Lucia National Trust
- ✓ Tourism Working Groups

#### Strategic Partners

- ✓ Ministry of Finance, Economic Affairs, Planning & Social Security
- ✓ Ministry of Infrastructure, Port Services and Transport
- ✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs
- ✓ Ministry of Education, Human Resource Development and Labour
- ✓ Ministry of External Affairs, International Trade and Civil Aviation
- ✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology
- ✓ Ministry of Legal Affairs, Home Affairs and National Security



## Macro Programme: Quality and Human Resources Programme

### Priority Actions and Sub-projects

Quality and Human Resources Programme		Sub-projects	Implementation time			Scale of investment		
			ST	MT	LT	Low	Medium	High
<b>Action 1</b>	<b>Training and capacity building programme</b>	<ol style="list-style-type: none"> <li>1. Training needs assessment: transversal, behavioural, specific to each TVC component (hotels, restaurants, handicraft, agriculture etc.)</li> <li>2. Create more accurate training programme for hospitality and tourism across the TVC</li> <li>3. Create specific handicraft and agricultural special programme</li> <li>4. Develop ongoing training modules for tourism professionals</li> </ol>	✓	✓			✓	
<b>Action 2</b>	<b>Mandatory standards &amp; licensing</b>	<ol style="list-style-type: none"> <li>1. Create a tourism operator licensing procedure</li> <li>2. Create a tour guide licensing procedure</li> <li>3. Review licensing of hotels and other establishments and benchmark against international procedures and controls</li> </ol>	✓	✓	✓	✓		
<b>Action 3</b>	<b>Voluntary Certification</b>	<ol style="list-style-type: none"> <li>1. Develop voluntary certification across island.</li> <li>2. Define membership of voluntary labels for accommodation, restaurants, green certificates.</li> </ol>	✓	✓		✓		
<b>Action 4</b>	<b>handicraft and Agriculture special programme</b>	<ol style="list-style-type: none"> <li>1. Training programme specifically for handicraft and agriculture producers.</li> <li>2. Develop a special fund for handicraft in the tourism sector.</li> <li>3. Roll out island wide agricultural tourism project.</li> </ol>	✓	✓		✓	✓	
<b>Action 5</b>	<b>National Pride Campaign</b>	<ol style="list-style-type: none"> <li>1. General awareness programme to communicate the tourism strategy and objectives for the island</li> <li>2. Community involvement projects (in relation with developing Community Tourism)</li> <li>3. Youth and schools in order to explain the benefits of tourism sector and the role of every St Lucian.</li> </ol>	✓	✓			✓	
<b>Action 6</b>	<b>Entrepreneurial support programme</b>	<ol style="list-style-type: none"> <li>1. Create a tourism business incubator for local entrepreneurs.</li> <li>2. Create training programs for entrepreneurs (quality and marketing)</li> </ol>	✓	✓		✓		

\* ST: Short Term, MT: Medium Term, LT: Long Term

## Macro Programme: Investment & Funding Programme

*The attraction of Direct Foreign Investment should be a priority in the government agenda in order to develop new iconic tourism projects*

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### Investment & Funding Programme

#### Overview of the programme

The investment & funding programme aims to identify priority investments for tourism development in St Lucia, and aims to create a framework which allows for the seamless delivery of prioritised projects from the perspective of investors and/or operator.

#### Objectives of the programme

- To identify high priority investment projects, to increase their visibility and attract investors and operators
- **To create a common vision and strategy for investment in St Lucia.** The vision and strategy should define what type of investments St Lucia is targeting and how it plans to achieve this.
- **To identify a clear framework for target project profiles and target investor and operator profiles.** The framework should define the nature of tourism facilities projects which are priorities for St Lucia as a destination.
- **To define roles and responsibilities of those whom deal with promoting St Lucia and/or the channelling of investments.** To ensure that the investment strategy is rolled out without duplication of roles and responsibilities.
- To create funding mechanism which **support priority projects** and encourage **new funding solutions.**
- **To ensure that the investment process is seamless from the point of view of investors.**
- **To ensure that Invest St Lucia has a specialist team dedicated to tourism development.**

#### Leading Stakeholders

- ✓ Invest St Lucia
- ✓ Ministry of Tourism, Heritage and the Creative Industries
- ✓ Ministry of Finance, Economic Affairs, Planning & Social Security

#### Strategic Partners

- ✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs
- ✓ Saint Lucia Air and Sea Ports Authority (SLASPA)
- ✓ St. Lucia Chamber of Commerce, Industry and Agriculture
- ✓ Saint Lucia Hotel and Tourism Association
- ✓ Saint Lucia Tourism Board

#### Strategic Partners

- ✓ Ministry of Infrastructure, Port Services and Transport
- ✓ Ministry of Education, Human Resource Development and Labour
- ✓ Ministry of External Affairs, International Trade and Civil Aviation
- ✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology
- ✓ Ministry of Legal Affairs, Home Affairs and National Security

## Macro Programme: Investment & Funding Programme

### Priority Actions and Sub-projects

Investment & Funding Programme		Sub-projects	Implementation time			Scale of investment		
			ST	MT	LT	Low	Medium	High
<b>Action 1</b>	<b>Tourism investment vision and strategy</b>	<ol style="list-style-type: none"> <li>1. Tourism development vision within overall investment vision for St Lucia.</li> <li>2. Definition of priority project profiles.</li> <li>3. Definition of investment attraction strategy for tourism and within overall strategy.</li> </ol>	✓			✓		
<b>Action 2</b>	<b>Institutional Framework for investment</b>	<ol style="list-style-type: none"> <li>1. Definition of roles and responsibilities of Ministry of Commerce, Business Development, Investment and Consumer Affairs and of Invest St Lucia.</li> <li>2. Tourism specialist within Invest St Lucia team.</li> </ol>	✓			✓		
<b>Action 3</b>	<b>Priority projects</b>	<ol style="list-style-type: none"> <li>1. Definition of development goals (geographic hubs, tourism hubs, product hubs).</li> <li>2. Definition of priority projects (S/T, M/T and L/T)</li> <li>3. Definition of partners for priority projects.</li> <li>4. Definition of funding requirements for priority projects.</li> <li>5. Definition of target investor and operator profiles.</li> <li>6. Offering Memorandums.</li> </ol>	✓	✓		✓		
<b>Action41</b>	<b>Funding mechanism</b>	<ol style="list-style-type: none"> <li>1. Evaluate alternative funding sources for tourism development.</li> <li>2. Develop special funds for priority projects (e.g. Tourism Enhancement Funds)</li> </ol>		✓			✓	✓
<b>Action 5</b>	<b>Harmonization of standards procedures and policies</b>	<ol style="list-style-type: none"> <li>1. Evaluation of ease of project implementation from the perspective of the investor (external audit).</li> <li>2. Improvement of the investment process to attract international investors and hotel brands</li> <li>3. Revision of incentives and concessions</li> </ol>	✓	✓		✓		

## Macro Programme: **Governance Programme**

*Sustainable governance is necessary to develop and strengthen the institutional framework of tourism, providing tools for an effective and efficient leadership to meet the challenges posed by a sustainable tourism model*

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### Governance Programme

#### Overview of the programme

The governance programme aims to strengthen the institutional framework for tourism development. It provides the tools for leadership and support in order to meet the challenges of the tourism growth strategy for St Lucia. The proposed programme sets out to create partnerships and collaboration across the Tourism Value Chain, across ministries and between the public- and private-sector, thereby, creating a stronger support environment for tourism. It also encourages a market-driven approach to product development approach.

#### Objectives of the programme

- **To increase competitiveness of the tourism sector**, through an integrated structure that combines strategic leadership and operational instruments
- **To increase collaboration between ministries and the private sector.** Create a coherent long-term vision for the development of the tourism industry.
- **To facilitate public-private collaboration**
- **To encourage collaboration across ministries** which have a role in the Tourism Value Chain (e.g. Agriculture, commerce)
- **To reinforce the regulation of tourism activity** and increase foreign currency revenues obtained from tourism activity

#### Leading Stakeholders

- ✓ Ministry of Tourism, Heritage and the Creative Industries

#### Strategic Partners

- ✓ Invest St Lucia
- ✓ Saint Lucia Hotel and Tourism Association
- ✓ Saint Lucia Tourism Board
- ✓ Saint Lucia Bureau of Standards
- ✓ Saint Lucia Air and Sea Ports Authority (SLASPA)
- ✓ St. Lucia Chamber of Commerce, Industry and Agriculture
- ✓ Taxi Association
- ✓ National Workers Union
- ✓ St. Lucia National Trust
- ✓ Tourism Working Groups

#### Strategic Partners

- ✓ Ministry of Finance, Economic Affairs, Planning & Social Security
- ✓ Ministry of Infrastructure, Port Services and Transport
- ✓ Ministry of Commerce, Business Development, Investment and Consumer Affairs
- ✓ Ministry of Education, Human Resource Development and Labour
- ✓ Ministry of External Affairs, International Trade and Civil Aviation
- ✓ Ministry of Public Service, Sustainable Development, Energy, Science and Technology
- ✓ Ministry of Legal Affairs, Home Affairs and National Security

## Macro Programme: Governance Programme

### Priority Actions and Sub-projects

Governance Programme	Sub-projects	Implementation time			Scale of investment		
		ST	MT	LT	Low	Medium	High
<b>Action 1</b>	<b>Institutional Framework and organization of the Tourism Governance Structure</b>	✓			✓		
<b>Action 2</b>	<b>Public- and Private-sector collaboration</b>	✓	✓			✓	
<b>Action 3</b>	<b>Internal governmental campaign to promote tourism benefits</b>	✓			✓		
<b>Action 4</b>	<b>Information and statistics</b>	✓	✓		✓		

\* ST: Short Term, MT: Medium Term, LT: Long Term

Introduction

Saint Lucia's Comparative Advantage

Strategy

Action Plan

**Priority Projects**

Benchmarks

# The National Vision Plan defines 24 projects across the four regions of St Lucia from which T&L has selected high priority projects



## 1 Dauphin & Dennery Region

1. Promote development of boutique hotel , eco lodge, spa retreat and avoid ‘All inclusive’ resorts (Grande Anse, Font d’Or , Anse Povert, Riverfront Development, Dennery village)
2. Enhance actual Golf Courses instead of new developments
3. **Development of Eco-parks supported by low density village development**
4. **Camping , lodging and educational centers (Grande Anse)**
5. **Creation of residential mixed-use with low impact, low density but high income**

## 2 Praslin, Micoud, Vieux Fort, Laborie, Choiseul Region

1. Resort development
2. Welcome center to promote nature tours, attractions and excursions
3. Hotel development on Troumassee Estate
4. Convention hotel/ resort and Marina(Vieux fort )
5. Cultural and performing arts center (Vieux Fort)
6. Resort and Beach Club development ( Anse de Sable)
7. Boutique hotel development at Rudy John Beach Park
8. Rivière Dorée National Park

## 3 Soufrière and Anse La Raye Region

1. **Creation of berths for cruise and of small marina in La Soufrière**
2. Possible Boutique hotels development in the village La Soufrière, Anse la Raye and Canaries

## 4 Castries and Gros Islet Region

1. Resort development in Marigot Bay Village
2. **Creation of a waterfront in Castries and Gros Islet**
3. Create an artistic community on Rat (Jacquot ) island
4. **Create a Health spa using sulfur springs**
5. Create a maritime museum
6. Create a national amphitheater in Bexon
7. Create a beach club , spa and residences with day slips in Mt Pinard
8. Mixed use boutique hotel & residential next to the marina village development in Rodney Bay
9. Creation of a dive park and Resort in Esperance Harbour



## 7 High priority projects have been selected for St Lucia (some of which are included in the St Lucia Vision Plan) which need to be developed in order to attract a critical mass of tourists

Project	Type of project	Proposed location	Description
1	Castries Waterfront	Castries	<ul style="list-style-type: none"> <li>Develop an integrated project including retail, F&amp;B, Discovery Center, walking paths, conference center, business hotel, craft market</li> </ul>
2	Spa & Thermal Springs Resort	Soufrière	<ul style="list-style-type: none"> <li>Develop an integrated resort with a luxury boutique hotel and a spa created around the Sulphur thermal springs that can be a differentiator in the whole Caribbean as a Thermal destination</li> </ul>
3	Econature-Park	Dennerly	<ul style="list-style-type: none"> <li>Eco- Park integrated in nature including eco-lodge, agri tourism, mixed use development with low density, an adventure park with trails, interpretation center to create awareness about nature (fauna/ flora) and local culture</li> </ul>
4	International Tourism Training School for the Caribbean	Vieux Fort	<ul style="list-style-type: none"> <li>Create an International Training School for the Caribbean for hotel industry including special programmes for culture and handcraft, wellness and sport.</li> </ul>
5	High Performance Sport Center	Vieux Fort	<ul style="list-style-type: none"> <li>Create a sport center for professional clubs which are looking for alternative options in winter. It can also be the reference center for the Caribbean athletes. Accommodation and a village with retail, F&amp;B and entertainment should also be developed.</li> </ul>
6	Marina Developments and Upgrades	Castries , Marigot Bay, Soufriere, Vieux Fort, Rodney Bay	<ul style="list-style-type: none"> <li>Promote the development and upgrade of marinas on the island linked with residential products, retail and F&amp;B facilities</li> </ul>
7	Internet and WIFI Connectivity	Island wide	<ul style="list-style-type: none"> <li>Develop fast and reliable communication infrastructure and technologic services to ensure connectivity across the island for leisure and business visitors.</li> </ul>

## The priority projects require between 3 – 10 years for implementation, smart and strategic phasing is essential to capture quick wins and build momentum

Project	Type of project	Proposed location	Implementation time		
			Short Term Less than 5 years	Medium Term 3 – 5 years	Long Term 5 – 10 years
1	Castries Waterfront	Castries	✓	✓	✓
2	Spa & Thermal Springs Resort	Soufrière		✓	
3	Econature-Park	Dennerly		✓	
4	International Tourism Training School for the Caribbean	Vieux Fort	✓		
5	High Performance Sport Center	Vieux Fort		✓	
6	Marina Developments and Upgrades	Castries , Marigot Bay, Soufriere, Vieux Fort, Rodney Bay		✓	✓
7	Internet and WIFI Connectivity	Island wide	✓		

# Project 1: Castries Waterfront

*Location: Castries*

## Introduction

- St Lucia needs to offer a lively place to shop, eat, walk, discover, enjoy and share the ambience of the water. St Lucia needs to upgrade the centre of Castries in order to create a destination which tourists and locals can enjoy. The waterfront should showcase the best of St Lucia and should be a leisure and entertainment hub.
- The Castries Waterfront needs to be a welcoming place (cruise, air and yacht arrivals), a place which provides information of what St Lucia is about and what it has to offer, and finally, it needs to be a meeting and gathering place for all.
- Note that the Capital City of Castries, **Vision Plan Direction** (IDEA, September 2007) defines potential areas of influence and impact associated with the redevelopment of Castries. The **National Vision Plan** (IDEA, October 2008) defines the Castries District Development Plan and specifically defines the Harbour District redevelopment plan.

## Product Description & Components

The Waterfront should integrate modern facilities with local architecture to represent 100% St Lucia. It should include the following components:

- **Welcome Centre/Interpretation Centre:** Information point which showcases the leisure and entertainment offer of St Lucia, provides information and booking services.
- **Retail:** Craft market which showcases local handcraft and 100% St Lucian products; Luxury/ Duty free brands, art / gallery shops, bookstore, supermarket, quality clothing and souvenirs.
- **Transportation:** water taxis, taxis
- **Restaurants:** Restaurants and bars for tasting local St Lucian cuisine and beverages, local fast food, local/ Caribbean restaurants, coffee shops, international brands.
- **Pedestrian walking path along the waterfront, benches**
- **Streetscaping:** architecture, lighting, gardens
- **Marina** for mega yachts and smaller private yachts, **marine vessel services**
- **Accommodation** mainly for business travellers **and day use facilities for yachts** (showers,..)
- **Business facilities** such as conference center, meeting rooms

## Tourism Products

Sun & Beach	Wellness	Nature	Luxury	Wedding & Honeymoon	Cruise	Nautical	Sport	Community	Culture & Heritage	Business MICE	Events, retail Gastronomy
✓			✓	✓	✓	✓		✓	✓	✓	✓

Tourism Segments						
Active Seniors	Couples	Nature Lovers	Wellness	Business / MICE	Creative class	
✓	✓			✓	✓	
Feel Alive	Trend setters	Family	Regional travelers	Locals	Honey mooners	Luxury
	✓	✓	✓	✓	✓	✓
Operator						
<ul style="list-style-type: none"> <li>• Need to attract operators for the retail, restaurants and accommodation components</li> </ul>						
Synergies with Caribbean Region						
<ul style="list-style-type: none"> <li>• Create a network of waterfronts in the Caribbean that can create a product for nautical tourism clients and offers facilities for a day visitors</li> </ul>						

## References-Benchmarks

- Victoria & Alfred Waterfront, Cape Town, South Africa
- Caudan Waterfront, Port Louis, Mauritius

# Project 2: Spa & Thermal Springs Resort

*Location: La Soufrière*

## Introduction

- St Lucia's natural mineral springs is a competitive advantage and opportunity to develop unique wellness facilities (spa, thermal springs).
- These facilities will also position St Lucia as a destination for wellness in the Caribbean and differentiate its offer from other islands by providing unique treatments with mineral water

## Product description & Components

The resort should be integrated in a natural environment and possibly close to a local village. The thermal springs can also be used by locals, as well as cruise passengers. The resort should include the following components:

- **Accommodation and resort services**
  - Boutique hotel of approximately 80-100 rooms
  - Positioning should be Medium-High
  - 2-3 restaurants using local products and promoting the SLOW LIFE concept (Sustainable, Local, Organic, Wellness, Learning, Inspiring, Fun, Experiences.)
- **Spa & Thermal spring component** operated by an international brand
  - Treatments with mineral water (swimming pools, massage, mud, breathing exercise,..) which have medical and health benefits.
  - Cosmetic spa (facial treatments, body treatments, etc..) with local products (fruits, essential oils)
- **Retail components** promoting local handcraft and products (100% St Lucia) and promoting involvement of the local community, as well as international spa brands
- **Thermal centre for locals and cruise passenger day visitors**

## Tourism Products

Sun & Beach	Wellness	Nature	Luxury	Wedding & Honeymoon	Cruise	Nautical	Sport	Community	Culture & Heritage	Business MICE	Events, retail Gastronomy
✓	✓	✓	✓	✓	✓			✓	✓		✓

Tourism Segments						
Active Seniors	Couples	Nature Lovers	Wellness	Business / MICE	Creative class	
✓	✓	✓	✓			
Feel Alive	Trend setters	Family	Regional travelers	Locals	Honey mooners	Luxury
	✓		✓	✓	✓	✓

## Operator

- An operator specialized in thermal springs and in special treatment with mineral water
- An international operator for the spa
- An international brand for the resort that operate hotel & spa like Accor, Banyan Tree, One & Only, Yves Rocher etc..

## Synergies with Caribbean Region

- This project can be the reference in the Caribbean for Wellness Tourism

## References-Benchmarks

- 4\* La Grée des Landes, Eco-spa resort, France
- The Residence Tunis, Spa & Thalassotherapy, Tunisia
- Six Senses, Eco hotel & spa, Thailand

# Project 3: Eco-nature Park

*Location: Dennery*

## Introduction

- St Lucia has unique nature which should be enhanced through tourism development in order to integrate, protect and bring value to the local community, and then develop and link village tourism with nature and eco/agro tourism.
- This project should showcase that sustainable development is about promoting the health and wellbeing of the environment, economy and people.

## Product description & Components

The eco-nature park should be integrated in a natural environment and close to the local village. The development should be low density and low foot print. It should follow Green Globe/ Leed certification for sustainability. This eco-nature park should include the following components:

- **Accommodation and resort services** operated by an international brand
  - Eco-hotel/ Eco lodge
  - Tented camps, alternative lodging such as tree houses
- **Real estate component**
  - Creation of high end residential mixed-use with low impact, low density
- **Activities components**
  - Interpretation center (birds, nature, flora, fauna)
  - Spa center using organic and nature products (linked with the Spa & Thermal Springs Resort detailed in this document)
  - Adventure park with tree canopy, museum in the trees, etc..(complementary to the zipline)
  - Trails for hiking and bicycles
  - Agritourism farm with plantations (pineapple, mangos, sugar) and animals
  - Village tourism with craft and local market
  - Retail and F&B components for both tourists and locals to buy and eat 100% St Lucia

Tourism Segments						
Active Seniors	Couples	Nature Lovers	Wellness	Business / MICE	Creative class	
✓	✓	✓	✓			
Feel Alive	Trend setters	Family	Regional travelers	Locals	Honey mooners	Luxury
✓		✓	✓	✓	✓	✓
Operator						
<ul style="list-style-type: none"> <li>• Attract operators for the accommodation and also operators for nature adventure components</li> </ul>						
Synergies with Caribbean Region						
<ul style="list-style-type: none"> <li>• Be a best case example for the Caribbean as an integrated sustainable project integrating local population and its village activities</li> </ul>						

## References-Benchmarks

- Panama Rainforest Discovery Centre, Panama
- Rainforest Adventures Mystic Mountain, Jamaica
- Bali Bird Park, Bali, Indonesia
- Casela Nature and Leisure Park, Mauritius

## Tourism Products

Sun & Beach	Wellness	Nature	Luxury	Wedding & Honeymoon	Cruise	Nautical	Sport	Community	Culture & Heritage	Business MICE	Events, retail Gastronomy
	✓	✓	✓	✓				✓	✓		

# Project 4: International Tourism Training School for the Caribbean

*Location: Vieux Fort*

## Introduction

- St Lucia needs an international standard training facility for hospitality which will create the capacity needed on island, as well as across the Eastern Caribbean.
- This is particularly important if St Lucia wishes to position itself as a real luxury destination, which provides international service levels and real value for their clients.
- Specific training programmes which address niche needs, such as marina and yacht training services, should also be provided.

## Product Description & Components

The training school should welcome students from St Lucia and other Caribbean island as a priority. It should contain the following components:

- **Hospitality training programmes**
- **General tourism training programmes**
- **Local awareness programmes**
- **Campus** with accommodation for students
- **Niche focus – Wellness:**
  - Work with the Bodyholiday in St Lucia to develop a Caribbean wide training school for Wellness tourism. This will complement the wellness product and provide a training focus, specific for St Lucia which establishes it as the wellness training school of the Caribbean.
- **Niche focus – Sport:**
  - Link the training programme with the High Performance Sport Centre (proposed in this document)
- **Niche focus – Nautical and Marine services**
  - Develop specific training for a marine school requirements.
  - Create partnerships with Antigua to leverage their training school.
- **Niche focus – Culture & Heritage**
  - ‘Create Local’ training in order to develop local products for tourists and to help promote local entrepreneurs

Tourism Segments						
Active Seniors	Couples	Nature Lovers	Wellness	Business / MICE	Creative class	
N/A	N/A	N/A	N/A	N/A	N/A	N/A
Feel Alive	Trend setters	Family	Regional travelers	Locals	Honey mooners	Luxury
N/A	N/A	N/A	N/A	N/A	N/A	N/A

## Operator

- Work in collaboration with international brands and international tourism training schools to build a specific program for the Caribbean hospitality sector

## Synergies with Caribbean Region

- Create an International Tourism Training School for the Caribbean to develop synergies and economies of scale

## References-Benchmarks

- Sekolah Tinggi Pariwisata Bali Tourism Institute, Bali
- Ecole Paul Dubrule, Cambodia

## Tourism Products (Training for products)

Sun & Beach	Wellness	Nature	Luxury	Wedding & Honeymoon	Cruise	Nautical	Sport	Community	Culture & Heritage	Business MICE	Events, retail Gastronomy
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

# Project 5: High Performance Sport Center

*Location: Vieux Fort*

## Introduction

- St Lucia has the potential to develop a High Performance Sport Center as an alternative place for professionals to train during their winter.
- It can also attract summer schools for a period of 1 - 2 weeks with a program organised around sports and nature targeting regional and US/ Canada and UK markets as a priority.

## Product description & Components

This centre should be developed close to an existing village and should have hotel accommodation and sports facilities, with hotel services such as restaurant, rooms, laundry, etc. It should be able to attract sports club, groups and individuals.

This centre should include the following components:

- **Accommodation** for athletes and summer schools
- **F&B facilities**
- **Meeting rooms**
- **Changing rooms**
- **Wellness facilities**
- **Sport centre with high level equipment for training** with athletics track, swimming pool, football field. Existing facilities should be leveraged, upgraded if necessary and incorporated into the high quality facilities offer.
- **A professional team dedicated to sports and hospitality sector**

Tourism Segments						
Active Seniors	Couples	Nature Lovers	Wellness	Business / MICE	Creative class	
Feel Alive	Trend setters	Family	Regional travelers	Locals	Honey mooners	Luxury
✓			✓	✓		

## Hospitality Operator

- Find a operator for sports centers

## Synergies with Caribbean Region

- This high performance sports center could be a reference in the Caribbean and could be the sports center that can help training e.g. Olympics or world champions in athletics

## References-Benchmarks

- Summer Sports Camps to train young sport professionals, IMG Sports Academy
- Geo village – sports & Convention Resort – Olbia Sardinia

## Tourism Products

Sun & Beach	Wellness	Nature	Luxury	Wedding & Honeymoon	Cruise	Nautical	Sport	Community	Culture & Heritage	Business MICE	Events, retail Gastronomy
	✓						✓			✓	



# Project 6: Marina Developments and Upgrades

*Location: Castries Waterfront, Marigot Bay, Soufriere and Vieux Fort, Rodney Bay*

## Introduction

- St Lucia need to enhance its marinas in order to establish an integrated system of marinas and yacht clubs offering full services. New marinas should be developed and existing marinas should be upgraded in order to attract yachts and enhance Nautical Tourism. This is also closely linked with Luxury Tourism and real estate. International events are a key part of this product.
- A new marina and yacht club should be developed as part of the Castries Waterfront development project\*.
- Smaller marinas should be developed and/or enhanced in Marigot Bay, Soufriere and Vieux Fort\*.
- The Rodney Bay Marina should be enhanced and expanded\*.

## Product Description & Components

The marina development should be a mixed use product and should include villas, hotel, apartments, a commercial centre with restaurants, shops, boutiques, apartments for the local market and a complex exclusive for the residents, consisting of high-end amenities, including a fine-dining restaurant, a gym, a spa and a Kids' Club. It should also include facilities and services for yachts. The marinas should include the following components:

- **Hotel accommodation – Boutique hotel**
- **Real estate – mixed used development** including townhouse or villas with private mooring
- **Beach Club facilities** with swimming pool, lounge bar, restaurant, beach
- **Retail** focused on the needs of the yachters (supermarket, clothing) as well as handcraft and high quality 100% St Lucia souvenirs
- **F&B facilities** such as coffee shop, restaurant
- For larger developments a larger retail & F&B facilities should be proposed
- **Days use facilities for yachters** spending 1 night in the island e.g. showers
- **Technical services** for yachts

## Tourism Products

Sun & Beach	Wellness	Nature	Luxury	Wedding & Honeymoon	Cruise	Nautical	Sport	Community	Culture & Heritage	Business MICE	Events, retail Gastronomy
✓			✓	✓	✓	✓				✓	✓

Tourism Segments						
Active Seniors	Couples	Nature Lovers	Wellness	Business / MICE	Creative class	
✓	✓					
Feel Alive	Trend setters	Family	Regional travelers	Locals	Honey mooners	Luxury
	✓	✓	✓	✓	✓	✓

## Hospitality Operator

- Choose operators for hotel, beach club, retail and marina

## Synergies with Caribbean Region

- Create a network of marinas in the Caribbean with same kind of services mainly for Nautical tourism

## References-Benchmarks

- La Balise Marina – Mauritius
- Yacht Haven Grande, St. Thomas

\* St Lucia National Vision Plan, IDEA, 2008

# Project 7: Internet and WIFI Connectivity

*Location: Island Wide*

## Introduction

- International trends show that consumers are connected while on holiday. Technology allows travellers to share details of unique and special holidays while in the destination with friends and family. Posting photos, videos and text updates has become part of the travel experience, through apps (on smart phones and i-pads) like Facebook, Twitter etc.
- Tourists also like to share their experiences (e.g. through TripAdvisor) and consult reviews before travelling. Tourists, therefore, play a key role in shaping the perception of the destination.
- St Lucia does not have the necessary communication infrastructure and technologic services to which visitors are accustomed (Wifi Access, speed internet connections etc). This is a basic requirement of visitors and detracts from the value of the tourism experience.
- The lack of connectivity severely limits the potential for developing the MICE market, which can not operate successfully without sufficient connectivity.

## Product Description & Components

The Internet and WIFI Connectivity project should include the following components:

- **Development of an interactive interface** between the island and the visitors (e.g: Travel Apps)
- **Enhance visitor connectivity** through a secure and fast Wifi network in the Island
- **Enable visitor to share** their sport experiences on time ( e.g: Sports Competitions)
- **Enable visit to share their Community Based project experiences** (e.g: Blogs)
- **Provide an interface** where tourist and locals can share tips
- **Improve the lack of online information** related to St Lucia as stated by visitors in VEMS.

## Tourism Products

Sun & Beach	Wellness	Nature	Luxury	Wedding & Honeymoon	Cruise	Nautical	Sport	Community	Culture & Heritage	Business MICE	Events, retail Gastronomy
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Tourism Segments					
Active Seniors	Couples	Nature Lovers	Wellness	Business / MICE	Creative class

✓	✓	✓	✓	✓	✓	
Feel Alive	Trend setters	Family	Regional travelers	Locals	Honey mooners	Luxury

✓	✓	✓	✓	✓	✓	✓
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## Operator

- An internet operator that provides a reliable internet network on island
- Application Developer that creates an effective interface platform to share content
- Company specialised on social media to track the development of Saint Lucia's online presence.

## Synergies with Caribbean Region

- This project can be a reference in the Caribbean for Visitor Connectivity.

## References-Benchmarks

- London Official City Guide App
- Amsterdam: I amsterdam mobile app
- New York: nycgo.com's mobile site

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**Benchmarks**

- **Infrastructure**
- Product Development
- Marketing & Branding
- Human Resource & Quality
- Governance, Investment & Funding

# Best Practices: Tourism Signage, New Zealand

New Zealand tourist signposting is used to clearly indicate tourist facilities and places of interest

Note: New Zealand tourist signposting has been selected as a visual and well conceived system that should be used as example for St Lucia



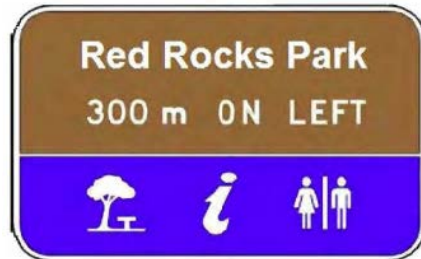
Winery or Vine



Historic Places Trust Property



Tourist Route



Note: The National Vision Plan (October 2008) highlights the importance of Signposting described in the NATIONAL SIGNAGE PROGRAM using this images as reference.



Source: NZ TRANSPORT AGENCY : Traffic Control Devices Manual, (2010)  
<http://www.nzta.govt.nz/resources/motsam/part-1/docs/motsam-1-section-09.pdf>

Source: St Lucia National Vision Plan (October 2008)



# Yacht Haven Grande St. Thomas is the premier marina facility for megayachts within the Caribbean and offers the ultimate experience in dining and shopping

## Yacht Haven Grande



### Key Learnings

- Yacht Haven Grande St. Thomas is the premier marina facility for megayachts
- **Voted the "Best Shopping" of 2008, 2009 and 2010 by the Virgin Island Daily News Readers Poll.**
- Top class dining and shopping experience
- Entertainment such as events and sports

### Description

#### Marina facilities and services:

- Offers world-class amenities including side-to-berthing for yachts up to 450 feet and 18ft-wide concrete docks and piers.
- Services include designed and appointed marina facilities dedicated for crew, owners, and guests including within walking distance, nearby nautical provisioning, catering, laundry, florist, and ships' chandlery.
- No cars or tour buses. No traffic jams or "hardsell" merchants.
- The marina offer state-of-the-art security, in order to enjoy shopping and spectacular nightlife.

#### Internal Marina Products:

- Arrival Experience
- Overall customer experience
- Crew Amenities
- Marina Internet Services
- Boat Yard Operations
- Showers



### Marina Experience

#### Shopping and F&B:

- Open seven days a week, the Galleria at Yacht Haven Grande is St. Thomas' only upscale shopping destination, featuring top brands and charming local shops. Eat Drink, Dine and Shop! Is their slogan.
- The shopping experience is wide from women's fashion, high end jewellery fashion high-end brands (Bulgari), men's wear (Salvatore Ferragamo), leather goods and accessories (Louis Vuitton, Gucci) children's wear to pet fashion and accessories all in 80,000 square feet of retail space.

#### Sports and activities:

- The marina has swimming, tennis and volleyball court and gives access to Golf and even activities such as Yoga and Zumba™ class in a stunning backdrop of yachts.
- Marina experience includes beauty services such as Spa and Hair dressers
- Events: local farmer's market, performing arts, yoga and more.



# The Port Louis, Mauritius Waterfront is an iconic development which took place through a public-private partnership initiative

## Le Caudant Waterfront



### Background

The project was initiated by the government with the following aims:

- To regenerate a run-down city centre site.
- To provide social and infrastructural improvements, including the construction of two underpasses linking the town centre to the Waterfront beneath the main North/South highway.
- To develop an esplanade for leisure purposes and to provide an open area in the city centre.
- To reinforce the sea defenses through the provision of new quay walls.
- To provide commercial and leisure facilities for the benefit of local Mauritians and foreign tourists.

### Public Private Partnership

The first phase of the Port Louis Waterfront Development cost about Rs425 million (US\$14 million). Financing for the development came from both from the **public and private sectors**.

### Development Phases

There are three stages to the Waterfront Development project in Port Louis:

- The first stage of Phase I was developed by a private-sector company which had also built Le Caudan Waterfront.
- The second stage of Phase I was built by the State Property Development Company (SPDC), a public limited company set up by government. The project was financed by public funds, but the commercial elements of the project are run by private-sector operators.
- The third element of the Waterfront was designated as Phase 2 of the Port Louis Waterfront Development project and the aim is to attract full private sector funding if possible, although the project will be managed by the SPDC.



**Victoria & Alfred Waterfont** is a fully-integrated entertainment offer in Cape Town which offers indoor and outdoor facilities and entertainment incorporating local and regional culture in the offer

### Victoria & Alfred Waterfront

#### Key learnings

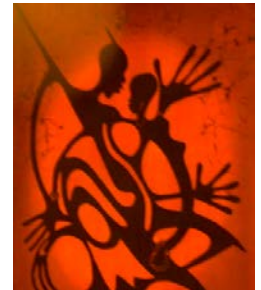
22 million visitors annually and commercially it has been one of South Africa's biggest real estate success stories. The Waterfront is a fully-integrated entertainment offer in Cape Town

which offers indoor and outdoor facilities and entertainment based on:

- African flair, authenticity (working harbour), mixed offer, integration of local culture.
- Incorporation of local and regional culture in the offer.
- Modern chic, vibrant ,multicultural, centre of energy & diversity.
- The total land size of the waterfront is 123 Ha which includes 88 Ha of land and 35 Ha of water.

#### Development Phases

- The opening year of the Waterfront was 1988 and the total investment was \$3.5 billion.
- The project included three phases and an extension of F&B and Retail in 2007-2008.



Source: Victoria & Alfred Waterfront Website <http://www.waterfront.co.za/Pages/home.aspx>

#### Description of Components

The main components of the waterfront are:

- **F&B:** Fine and casual dining and a mix of local and international cuisine.
- **Retail:** Mix of craftshop, trading barrows, luxury brands and retail outlets.
- **Streetmosphere:** Traditional dancers and bands
- **Arts & Culture:** Waterfront heritage route, Nelson Mandela Museum and Robben Island Museum
- **Kids Club:** Children Playing Areas and Leisure Park (BMW pavilion and showroom)
- **Edutainment:** The two oceans Aquarium with shark diving, South African Maritime and Breakwater prison



# La Balise Marina it is an ideal example on how to combine a marina development integrated into a mixed use projects and facilities for tourists and locals

### La Balise Marina- Mauritius

- La Balise Marina is a development fully integrated in the environment, comprising of luxury residential units and leisure facilities. Foreign clients are eligible for a resident permit in the country

#### Description:

- Property development worth an estimated total value of about 150 million US\$, on 12.8 hectares.
- Consists of 113 luxury residences - 17 of approx. 450 m<sup>2</sup> Villas and 96 Duplexes ranging between 175 and 200 m<sup>2</sup> - endowed with a waterfront and built on freehold land.
- All residences overlook canals, quays of the marina or the estuary and have easy and direct access to water channels and docks, with their own mooring.
- The development includes a commercial centre with restaurants, shops, boutiques, apartments for the local market
- It also includes a complex exclusive for the residents, consisting of high-end amenities, including a fine-dining restaurant, a gym, a spa and a Kids' Club.
- 2 basins has been created for vessels from 9 to 16m
- Total berth capacity are 74 vessels



# Many destinations worldwide have already realized the importance and the benefits of implementing sustainable practices in the tourism industry

### Eco – lodging - Dominica

Dominica has built their tourism brand on eco-luxury and nature. Lodging facilities integrate seamlessly within the natural environments. Eco-lodging and nature-based tourism offerings with luxury and unique traits of the island are packaged to provide a once in a lifetime experience that can only be found on the island. **They cultural expression is strings and they have focused on creating a “sense of place” rather than branding themselves as a typical Caribbean destination.** Focusing on **locally made products, cuisines and spa packages, they manage to create a rustic nature-based experience seem tropical and elegant**

### Energy Efficiency and sustainable operation - BVI

BVI has recently made a push to incentivize hotels and resorts through a **pilot program to assist hotels to achieve energy efficiency and sustainable operations**

### Transportation & Recycling - Brazil

Curitiba, Brazil offers a **trash-for-transit system which encourages their residents to recycle in exchange for public transportation fare** – thus increasing a more structured and efficient transportation system while diverting 2/3 of their waste from the landfill through recycling practices. This encourages residents to utilize mass transit, lowering the carbon emissions and requiring the public transit system to be more efficient and effective for the residents due to its high percentage of use.

### Transportation - Barbados

Within the competitive set **Barbados provides streamlined land connectivity with visible options and easy navigation throughout the island**

Renewable Energy: Although very small in size and scale, Over Yonder Cay, located in the Exumas of Bahamas provides for a completely “renewable experience” with the entire island powered by solar and wind energy. Considerations for portions of the island or resort properties to provide this option can be undertaken.

### Transportation - Bermuda

To encourage carbon emission reduction the island of Bermuda allows only one car per household and limits the size of vehicles which can be licensed to drive on the roads of the island. The island also has an extensive public transportation system along with ferry services and distinct taxi fleets

### Transportation – San Francisco

San Francisco, although located in the US, provides a **60-fleet electric vehicle taxi service**, reducing carbon emissions and limiting noise pollution

### Building- United States and Denmark

Green roof policies are being seen throughout the US and in other countries. Denmark, encouraging green space and responsible building design to reduce heat island effect through building construction – lowering cooling costs and decreasing system sizes while creating a green space for either rooftop gardens (ideal for restaurants) or simply to reduce building cooling loads

### Food Safety & Agriculture - Mexico

Playa del Carmen have made increased efforts to support local suppliers and encourage sustainable agriculture and the purchase of antibiotic free meats. On-site greenhouses and local farms are undergoing rainforest alliance compliance to ensure sustainable practices and delivery of organic ingredients.

### Transportation & Recycling - Bermuda

Rainwater Harvesting: Bermuda has in place strict building codes which require all residential buildings to reserve 80% of roof space to harvest rainwater into mandatory underground tank systems. Thus lessening the strain on commercial resources for residential supply and encouraging conservation.

# The regional government of the Canary Islands, through the Instituto Tecnológico de Canarias (ITC) and private sector wants the island to become a reference in Sustainability.

### Background

- La Graciosa with a dimension of 29 km<sup>2</sup> is the only inhabited island with 660 inhabitants in the Chinijo Archipelago.
- The Archipelago forms part of the largest marine reserve in Europe and a area of breathtaking natural beauty.
- Endesa and the Canary Islands Technological Institute (ITC), which is part of the Department of Employment, Industry and Trade of the Regional Government of the Canary Islands, have signed a collaboration agreement to develop a smart grid in La Graciosa, in order to achieve greater energy efficiency and the highest use of the renewable energy sources on this island off the coast of Lanzarote, thus making it a sustainable island.

### Public- Private Partnership and Citizen Collaboration

- The regional government of the Canary Islands, through the Instituto Tecnológico de Canarias (ITC), wants the island to become a reference in Sustainability.
- Endesa participates in the island self-sufficient energy initiative.
- The implementation of this project will require local cooperation since the roofs of their homes will have to have solar panels and require small turbines installation in their properties to produce wind energy.

### Objectives

- The objective is to develop a clean energy supply solution in order to make the island self-sustainable in terms of energy by means of :
  - A smart micro grid in equipment
  - Energy storage
  - Active and passive demand management
  - Wind and solar prediction system
  - Smart meters
  - Electric vehicle recharge systems, etc.
- The objective is to help islands achieve the EC's 20-20-20 target (20% renewable energies, 20% improvement in energy efficiency and 20% reduction in greenhouse gases by 2020).
- The proposal shall be included in promoting activities for developing renewable energies as part of the European Pact of the Islands initiative.

### Other Projects

- Endesa is a private company which has already developed Smart Cities such as Malaga and Barcelona. Based on IDC *Smart Cities Index Ranking* Top 5 Smart Cities in Spain are Malaga, Barcelona, Santander, Madrid and Donostia.



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- Marketing & Branding
- Human Resource & Quality
- Governance, Investment & Funding



### Mauritius has created unique gastronomic experiences through local products and gastronomic initiatives which indulge the senses with authentic Mauritian flavour

#### Table d´ Hôtes

- Table d´hôte literally means “host’s table” and is referred to as a table shared by guests, where a meal is served at a specific time.
- **Eating at a Mauritian home (or table d´hôte), means experiencing the legendary hospitality of the Mauritian people and enjoy a traditional home-style cooking meal around a communal table**
- **Table d´hôte provides an authentic Mauritian cuisine experience combined listening to Mauritians lifestyle stories.**
- “Hosts’ tables” are found in “chambre d’hotels”, essentially bed and breakfasts and family-run guesthouses.

#### Product Bases experiences: Route du Thé

- **The Route du Thé, or the tea road, is a chance to discover how Mauritian specialities such as tea, rum, vanilla and essential oils are produced.**
- The experience build around this product includes visiting Tea factories (e.g. Bois Cheri Tea factory), visiting French heritage sites

#### Recognised International Chefs

- Mauritius is home of **Michellin Stared chefs**.
- Some French chefs have ventured to open their concept restaurants such as Alain Ducasse's restaurant Spoon des Iles.
- Mauritius is characterised by a mixed gastronomic offer. **Vineet Bhatia the first Indian chef to be awarded a Michelin star opened in Mauritius a waterside restaurant .**
- The island's hottest table is **Beau-Rivage managed by Anne-Sophie Pic, the first Frenchwoman to earn three Michelin stars.**

#### Festival Culinaire Bernard Loiseau

- The idea is for the Michelin-starred European chefs to combine their style of cooking with the emerging style of the island chefs.
- They are associated in pairs to share their expertise, experience and knowledge.



### Jamaica and Mauritius have built successful attractions which combine nature and fun for travelers who are seeking adventure and experiences in nature

#### Nature Tourism and Attractions Jamaica

##### Rainforest Adventures at Mystic Mountain

- Rainforest Adventures is an environmentally friendly attraction, located in the heart of Ocho Rios. It offers a unique array of adventure tours for all ages through the exploration of forest's rich ecosystem.

##### There are 3 main attractions:

- **Sky Explorer:** state-of-the-art chairlift that sends guests soaring above the treetops up 700 feet to the top of Mystic Mountain.
- **Bobsled Jamaica:** The park's signature attraction, features a 1000m long gravity-drive through the rainforest on custom designed, high-tech sleds. Combines tropical landscapes and coastal features on sleds.
- **Zip-line:** Secure Zip Line attraction whisks travelers through the rainforest canopy.



#### Nature Tourism and Attractions Mauritius

##### Casela Nature and Leisure Park

- Combines hiking, climbing and adventure in the mountains of the hinterland of the Casela Park.
- Has been awarded Trip Advisor's *Certificate of Excellence*.

##### Main nature-adventure attractions :

- Wooden ladder which crosses an approximately 60 meters high gorge and a Nepalese bridge
- Zipline which ends up directly in the pool of the waterfall
- **Barbecue premises on a wooden platform in the trees**

##### Other attractions are:

- Quads
- Segways
- African Reserve



# Bali Bird Park offers visitors direct contact with birds and recreates natural habitats, it receives 200-500 tourists per day

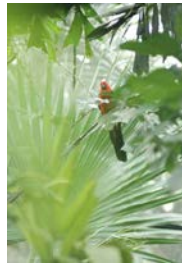
### Bird Park, Bali

#### Description

- Park with almost 1,000 birds of 250 different species that are displayed in their natural habitats, both in large walk-through aviaries and free range throughout the park.
- The surface of the park is 2 hectares and 200-250 tourists visit the park/per day and up to 400/ 500 during the holiday weekend.

#### Main Activities:

- Visit to the different regions of the park that recreate the natural habitats of the birds.
- Giant walk-through aviaries that replicate the natural eco-system of the Bali Jungle and Papuan Rainforest.
- Interactive feeding times: scheduled feeding times allow visitors to join the bird keepers.
- Flight bird show: eagles, owls, macaws and other birds soar through the sky.
- Guyu-Guyu Corner: hands-on experience with birds perching on visitors' shoulders and arms.
- Meet the bird star: encounter the cheeky entertainers of the park.
- Visit to the bird nursery: observe the growth progress of birds.



#### Services

- Special arrangements for family gatherings, companies, student groups, etc.
- The park sponsors special events to increase the awareness of the threats facing wildlife.
- Bali Starling Restaurant (150 seats): semi-open restaurant that merges into a garden of tropical greenery.
- Rain Forest Café (30 seats)
- Gift shop and traditional pavilions around the park with hand-painted crafts from local artisans

#### Price and Commercialization

- Adult: \$ 23.50 (+10% general tax).
- Child (2 to 12 years of age): \$ 11.75 (+10% general tax).
- Infant (under 2 years of age): free.
- Free guide provided for parties of 20 or more/ Flight bird show: free.

#### Other information

- Parking area for tour buses
- Timetable from 9:00 am to 5:30 pm



BALI BIRD PARK



### Georgia Sea Turtle Center enables visitors to see turtle conservation and rehabilitation. The center facilitates engagement of young visitors through programmes and online resources.

#### The Georgia Sea Turtle Center, Jekyll Island, Georgia

##### Description

- The aim of the Centre is to increase awareness of habitat and wildlife conservation challenges and take care of ill and injured sea turtles.
- The center has interactive online resources to engage young visitors (online games, videos).
- The center organises educative school field trip programmes and summer camps to guarantee regular visits of locals to the centre.

##### Main Activities

- Interactive Exhibit Gallery on sea turtle conservation, rehabilitation and their journey from egg to adulthood.
- Rehabilitation Pavilion: a number of sea turtle patients can be seen.
- Special events, such as “patient of the year” and “turtle crawl triathlon”.
- Online activities: information of patients several online games, puzzles and coloring books.

##### Education programmes:

- Daily programme: patient feeding, meet the patients, education programme and talking treatments.
- Field trip programmes: guided tour through the life of a sea turtle.
- Summer programmes: Sea Turtle Camp, Turtle Walks and Nest Walks
- Outreach programmes: the centre comes to you
- Scout programmes
- Birthday parties for children ages 5-12
- Marine Debris initiative
- Invite the GSTC mascot, Scute, to your event.

##### Price and Commercialization:

- Admission: \$7 for adults, \$5 for children
- Daily programmes: free/ Special children’s programmes on Saturdays: free
- School field trip programmes: \$6 per student
- Group tours: from \$8 to \$15 for children, and from \$10 to \$20 for adults
- Outreach programmes: from \$125 per programme plus travel fees

##### Other information

- The Center is accessible by boat, boat stops at the Jekyll Harbor Marina.
- Timetable from March – November: 9am to 5pm (Mondays closed before 10am and after 2pm) and December – February: 9 am to 5 pm (Mondays closed).



# The Rainforest Discovery Centre combines education and nature appreciation within an open structure of 140 m<sup>2</sup>

## Panama Rainforest Discovery Centre

### Description

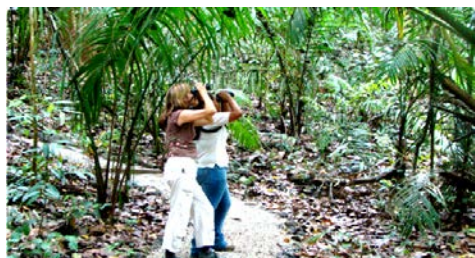
- The concept is based on the ecotourism and environmental education centre to enjoy nature while walking on trails and discovering a great variety of birds.
- The center has a direct transportation service with a shuttle service from Panama City each day to overcome accessibility issues.
- The visitor center is an open structure of 140 m<sup>2</sup>.

### Main Activities:

- Hiking trails: 1.2 km circuit of trails through the forest.
- Canopy Observation Tower: bird watching from a 40-meter observation tower 200 meters from the visitor centre along a gravel path and a wooden walkway
- Sunset from the treetops
- Study and practice birdwatching

### Services

- Rental of binoculars
- Guides in the visitor centre and at the tower
- Small shop in the visitor centre
- School programme: environmental education programme



### Price and Commercialization:

- Prices depend on entry time:
- 6am – 10am: \$30 for foreign adults, \$4 for foreign children, \$10 for resident adults, \$2 for resident children
- 10am – close: \$20 for foreign adults, \$2 for foreign children, \$5 for resident adults, \$1 for resident children
- Night walks: \$35
- Cost of the tour guide: \$25 per group
- Environmental education programme for school groups of 12 to 18 years free

### Other information:

- New direct shuttle service from Panama City each day (\$60 round trip for a 3 hours visit).
- Timetable from 6 am to 4 pm



# Buff Bay has become a successful tourist destination through the development of agriculture related activities, agricultural attractions and Jamaican products

### Jamaica Agro Tourism Product: The Heritage Corridor of the Blue Mountain

#### Project Background:

- The establishment of a tourist destination in the Buff Bay Valley was developed out of a project implemented by the Inter-American Institute for Cooperation on Agriculture (IICA) through funding from the European Union-Government of Jamaica Rural Diversification Programme.

#### Objectives:

- The Rural Diversification Programme aims to **create income and employment opportunities by promoting new economic agricultural and non-agricultural activities for farmers, farm and port workers and their communities.**
- The Rural Diversification Programme wants to generate income earning opportunities for residents in the target communities **through the development of tourist attractions** in the Valley and establishing marketing linkages **between the farmers and the hotel sector.**

#### Enhancement of Communities:

- **Constructing and enhancing facilities for the attractions for agro-demonstration facilities**
- **Tourism signage**
- **Training of community members** to improve their capacity to manage the activities.
- **Evaluating and training selected groups of cottage agro-processors and craft-makers** to improve the standards of their products so that high quality souvenirs are available to visitors.

#### Attractions:

The attraction of the Heritage Corridor is based on “**Taste and buy**” concept which is a popular Jamaican concept that **once you taste it, you haffi (have to) buy it.**

- Small coffee and banana farmers
- Nyam Jam Rest Stop
- Honey Bar
- Herb Gallery





**L'Aventure du Sucre is an edutainment complex built around an old sugar mill. The visitor has a complete experience based on sugar which includes visiting the museum, gift shop, restaurant, auditorium and events.**

### L'Aventure du Sucre, Mauritius

#### Description

- Tour of the old sugar mill transformed into a modern museum with sugar and rum tastings at the end.
- L'Aventure du Sucre is a whole complex around an old sugar mill including a museum, gift shop, restaurant, auditorium and events.
- The center has a educative and entertainment visit for children to answer all the questions along the visit.
- There is a locally made souvenir area with craftsmen making products associated with cane and sugar.

#### Main Activities

- Various pavilions amongst the equipment used for sugar production:
  - History of Mauritius and sugar
  - Manufacturing progress
  - The Cane Stand
  - Panorama videos and films on the walls
- For children: the 2 mascots will guide them along the visit with questions and answers to be found under envelopes.
- Online resources:
  - History of the sugar.
  - Quiz to help to organize the visit.
- Events: Sugar Cane Festival.
- Temporary exhibitions.

#### Services

- The Village-Boutik: gifts and souvenirs made by craftsman associated with cane and sugar.
- Auditorium for corporate events for up to 100 persons.
- Restaurant Le Fangourin: Mauritian cuisine in the garden of Beau Plan. It also organizes parties and weddings.

#### Price and Comercialization:

- Foreigners: \$11.70 adults, \$5.85 children and students.
- Residents: \$5.00 adults, \$2.50 children, students and seniors.
- Special fees for schools, associations and companies on demand.



**Circle Farm Tour** is a self-guided tour that direct visitors to a variety of specialty farm-gate vendors. Circle Farm Tour initiative enables visitors and locals to appreciate and learn about local agriculture

### Circle Farm Tour, Kent

#### Description

- Road map that directs visitors to a variety of specialty farm-gate vendors, open air markets, eateries, heritage sites, fairs, and other special events.
- The initiative targets locals and foreigners learn about agriculture and the area's farming heritage.

#### Services

- For each of the 5 communities there is a list of special events and accommodation options along the route.
- Guided tours available in some venues.

#### Other information

- Self Guided Tours
- Visitors can travel with their own cars
- Emphasize in virtual tools that put the sites together

#### Main Activities

- Abbotsford: a farm-fresh, honey-sweet experience. Castle Fun Park for kids.
- Agassiz-Harrison Mills: artisan cheese and hand crafted pottery in the making.
- Sandpiper Golf Course: to play golf, eat and stay.
- Chilliwack: learn how bees communicate, visit an organic grain and flour mill and race the kids through the corn maze.
- Langley: wine, roses and equestrian ballet.
- Maple Ridge-Pitt Meadows: shop at the farmers' market, learn about the world of bees, get lost in a corn maze or go wine tasting.
- Online activities: videos, articles, testimonials and a selection of farm fresh recipes.





# Mauritius has developed a strong sports tourism offer which ranges from adventure sports to sport events

## Mauritius Sports

### Water Sports

- Mauritius offer of sports provides something for travelers seeking active holidays such as kitesurf, events, and underwater activities.

### Land Sports

- Cycling: There are several dedicated bike trails in areas such as the Maccabée Forest and Chamarel down at Black River Gorges, and La Nicolière in the north.
- Golf: Signature golf courses such as Ernie Els, Bernard Langer sprawls and David Leadbetter are one of the main golf claims.
- Trekking : There are several trekking options such as Black River Gorges, Bel Ombre and Valriche.

### Adventure Sports

- Sky Diving
- Les Cerfs Volant (Kiting)
- Parasailing
- Rock Climbing

### Other Sports:

- Karting
- Hunting
- Horse Riding

### Events

- Mauritius hosts a 62- and 31-mile 'sportive' event every October.
- Rogers Indian Ocean Golf Challenge 2012
- Kiteival – Kite Surf Festival
- Le Malibu Classic - Championnat de Kitesurf & Windsurf
- KSP World Championship - Kite Surfing Tour



**IMG Sports Academy is a professional sports school which trains future sports professionals.**

### IMG Sports Academy, Florida

#### Description:

- IMG Sport Academy is a professional sport school which organises summer sport camps to train future sport professional (girls and boys)
- IMG Sports Academy proposes 2 camp types which correspond to: a professional training and a basic sports training.

#### Camps:

- Core camps offer sport instruction and physical and mental conditioning
- Total athlete camps offer the same as the core camps plus additional modules concerning nutrition, speed and movement, reaction time training, etc.

#### Sport activities:

- |              |            |               |
|--------------|------------|---------------|
| • Lacrosse   | • Tennis   | • Soccer      |
| • Football   | • Baseball | • Performance |
| • Basketball | • Golf     | • Adult camps |

#### Schedule information:

- |                            |                              |
|----------------------------|------------------------------|
| • Year-Round Weekly Camps  | • 5-Week Summer Camps        |
| • Accelerated Weekly Camps | • Holiday/Spring Break Camps |
| • 3-Week Summer Camps      |                              |



Source: <http://www.imgacademies.com/sports-camps/>



## Best Practices: Nautical Tourism, Monaco and France

The Monaco Yacht Show is the world's top luxury yachting event which attracts visitors from around the world. La Route du Rhum is successful transatlantic sailing event with high media coverage

	Monaco Yacht Show	La Route du Rhum
<b>Linked products</b>	<ul style="list-style-type: none"> <li>Nautical Tourism</li> </ul>	<ul style="list-style-type: none"> <li>Nautical Tourism</li> <li>Sports Tourism</li> </ul>
<b>Topics</b>	<ul style="list-style-type: none"> <li>Yachting</li> <li>Luxury</li> </ul>	<ul style="list-style-type: none"> <li>Sailing</li> </ul>
<b>Strengths of the site/ event</b>	<ul style="list-style-type: none"> <li>The world's top luxury yachting event</li> <li>High-end target: super and mega yacht owners and potential buyers</li> <li>Visitors from all around the world</li> <li>Visitors and organisers purchase a variety of upscale services and products at the show and during their stay</li> <li>Advertisement of luxury brands related to yachting or not</li> </ul>	<ul style="list-style-type: none"> <li>Extensive media coverage</li> <li>A significant part of the cost is covered by sponsors, each contributing between \$625 and \$62,500</li> <li>Strategic alliance with Express</li> </ul>



Source: [www.routedurhum.com](http://www.routedurhum.com); [www.monacoyachtshow.com](http://www.monacoyachtshow.com)

### Geovillage is a good example of how to link the hospitality sector with sports by providing facilities for sport professionals to train during a certain period of time

#### Geovillage Sports and Convention Resort, Sardinia

The **Geovillage Sport Wellness & Convention** Resort is a 4 star hotel with 254 rooms, sports & convention facilities.

The market segment is mainly sports club - soccer, tennis, swimming professionals team that are coming to train all year round and also sports school in summer time.

The convention center is mainly used by the MICE segment (meetings, incentives, conventions) all year round, but also for weddings and banquets

#### Description:

- **254 rooms** are equipped with air conditioning, satellite TV, direct dial telephone line, high speed internet, personal bar, electronic safe box, laundry service, and room service
- Three on-site restaurants.
- **Convention Centre** with 13 large meeting for meetings, conferences, and banquets.
- Main facilities consist of **modern sport centers**:
  - Soccer Area,
  - Swimming Centre (50m, 25m indoor and outdoor swimming pool)
  - Tennis Centre – 10 tennis courts
  - Fitness Centre
  - a multi-purpose 2,500 square meters structure able to house sports and musical events, conventions, exhibitions
  - Spa treatments, including a Sports Medicine Area





The Spa and Wellness offer in Mauritius is intrinsically connected to the island value proposition; it offers a comprehensive and competitive preventative treatments

### Spa and Wellness Destination

- The island's mix of cultures has inspired an eclectic blend of therapies, such as Asian Ayurvedic massages, ocean-inspired treatments, and age-old African and Creole remedies made from local herbs and flowers.
- Wellness is intrinsically connected to the island value proposition:
  - Most hotels and resorts welcome non-guests to their spas
  - Wide offer of independent health and beauty centres
  - Hotels with dedicated outside treatment areas (e.g gardens or private gazebos on the beach)

### Signature Wellness and Spa treatments

- The island's Spa experience includes high –end beauty treatments to support the luxury component of the island such as Clarins, Givenchy, Guerlain, La Prairie and Shiseido.

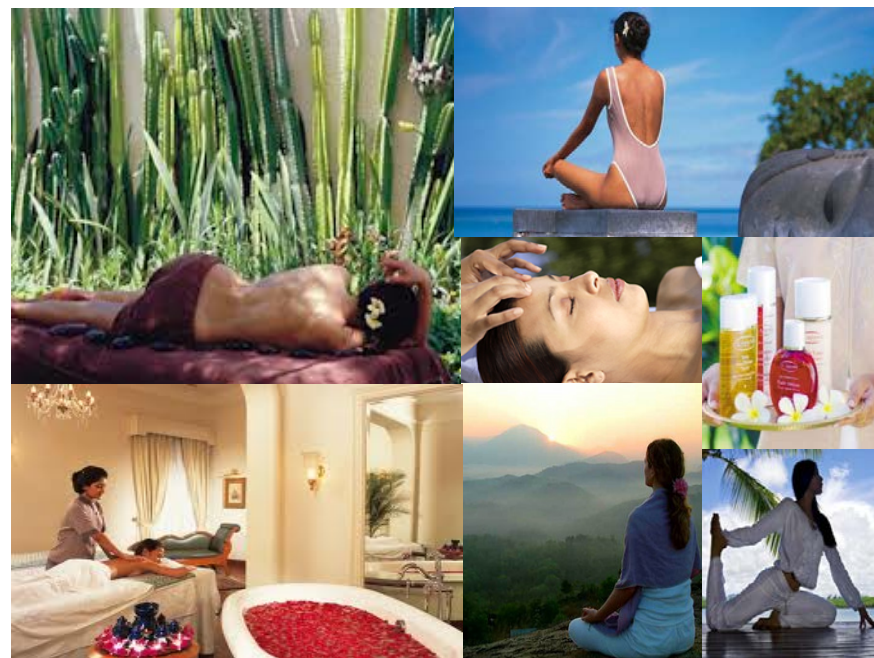
### Holistic treatments and Retreats

Mauritius Spa and Wellness offer includes personalised programmes such as :

- Stimulating and purifying therapies
- Yoga
- Meditation
- Dosha-specific Ayurvedic diet

### Wellness Products and therapists

- Mauritius has diversified its wellness product offer with products such as:
  - Balneotherapy
  - Algotherapy
- Spa and Wellness workforce is highly trained. Mauritius has wellness training institutions such as Mauritius Institute of Training and Development and Cibtac International Spa & Wellness Training Mauritius .



## Best Practices: Spa and Wellness, Six Senses

**Six Senses Spa resorts are leaders in providing sustainable tourism options for consumers, suppliers and partners based on their core philosophy of SLOWLIFE**

Components	Description
<b>History</b>	<ul style="list-style-type: none"> <li>• Six Senses is a resort and spa management and development company, established in 1995.</li> </ul>
<b>Concept</b>	<ul style="list-style-type: none"> <li>• A resort and spa management and development company with properties in 5 countries, including: the Maldives, Thailand, Vietnam, Oman, and Jordan. It manages resorts under the brand names Soneva, Six Senses and Evason; plus Six Senses Spas and Six Senses Sanctuary. They produce harmony combining the attitude of the employees, the smells, the sounds, the textures and the pleasing sights.</li> </ul>
<b>Values</b>	<ul style="list-style-type: none"> <li>• Its core philosophy is SLOWLIFE: Sustainable – Local – Organic – Wellness -Learning – Inspiring – Fun – Experiences.</li> <li>• The values communicated in the SLOW LIFE commitment, positions Six Senses as leader in providing sustainable tourism options for consumers, suppliers and partners.               <ul style="list-style-type: none"> <li>• Use of building materials and finishes from sustainable and local sources wherever it is possible.</li> <li>• Quality and origin of the food that is offered.</li> <li>• Innovative edutainment experiences.</li> </ul> </li> <li>• Along these lines, the SLOW LIFE Symposium aims to accelerate progress towards sustainable business practices in the tourism industry, with a particular focus on supporting small island states.</li> </ul>
<b>Clientele</b>	<ul style="list-style-type: none"> <li>• Evason properties are especially suitable for families.</li> </ul>
<b>Management</b>	<ul style="list-style-type: none"> <li>• Six Senses BVI has ownership stakes in some resorts and manages some other resorts, as well as retail and spas.</li> </ul>
<b>Investment and running costs</b>	<ul style="list-style-type: none"> <li>• For example, Six Senses Ahungalla (scheduled opening in 2012) has required a \$ 40 million investment. It will offer 20 one-bedroom villa suites, 14 two-bedroom beach front residential villas and 15 island villas. The resort expects to charge \$ 450 per room.</li> </ul>
<b>Upcoming developments</b>	<ul style="list-style-type: none"> <li>• Soneva Nisi is scheduled for completion in 2014-15.</li> <li>• Further Six Senses developments are planned in Thailand, Vietnam at Phu Quoc, Brazil and Turkey.</li> <li>• Evason development is currently being planned for several locations.</li> </ul>



**EVASON**



### The Residence Tunis hotel is located on the seafront in Gammarth and specialized in talassotherapy treatments

Components	Description		
<b>Hotel</b>	<ul style="list-style-type: none"> <li>The Residence Tunis is a 5 * hotel</li> <li>Part of the "Leading hotels of the World"</li> <li>The hotel is located on the seafront in Gammarth, near the ancient city of Carthage and the colonial city of Sidi Bou</li> <li>Only 20 minutes from the downtown Tunis, it is the perfect base from where to explore the UNESCO heritage sites of the medina of Tunis, Carthage and Sidi Bou Saïd</li> </ul>		
<b>Rooms</b>	<ul style="list-style-type: none"> <li>72 Rooms with views to the garden (35m<sup>2</sup>)</li> <li>83 Rooms with views to the sea (35m<sup>2</sup>)</li> <li>6 suites with views to the swimming pool (70m<sup>2</sup>)</li> <li>3 suites with views to the sea (70m<sup>2</sup>)</li> </ul>	<ul style="list-style-type: none"> <li>Air conditioning</li> <li>Satellite LCD TV</li> <li>DVD player</li> <li>Direct phone number</li> <li>Wi-Fi</li> </ul>	<ul style="list-style-type: none"> <li>Mini-bar and electronic safe</li> <li>Tea and coffee</li> <li>24 hrs. room service</li> <li>Laundry service</li> </ul>
<b>Services</b>	<ul style="list-style-type: none"> <li>Thalasso Spa</li> <li>Hot water pools</li> <li>Cold water pools</li> </ul>	<ul style="list-style-type: none"> <li>Tennis Courts</li> <li>Gym</li> </ul>	<ul style="list-style-type: none"> <li>Terrace</li> <li>Swimming Pool garden</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>Golf</li> <li>Water sports: sailing, waterski. (July and August)</li> <li>Horse riding</li> </ul>	<ul style="list-style-type: none"> <li>Quadbikes</li> <li>Bicycle</li> <li>Camel rides</li> </ul>	
<b>Thalasso-therapy</b>	<ul style="list-style-type: none"> <li>4,000 m<sup>2</sup> of facilities</li> <li>10 cabins for thalassotherapy treatments</li> </ul>	<ul style="list-style-type: none"> <li>Weightloss treatments</li> <li>Antistress treatments</li> </ul>	<ul style="list-style-type: none"> <li>Seaweed, oil wrap treatments</li> <li>Foot m,assage</li> <li>Draining massage</li> </ul>
<b>Spa</b>	<ul style="list-style-type: none"> <li>3 500 m<sup>2</sup> Inspired in the Roman baths</li> <li>30 cabins</li> <li>2 patios devoted to relaxation</li> <li>Hammam, and sauna</li> </ul>	<ul style="list-style-type: none"> <li>Seawater pools</li> <li>Darphin Products</li> <li>Toning massages</li> </ul>	
<b>Beauty</b>	<ul style="list-style-type: none"> <li>Eric Zemmour coiffeur</li> <li>Cellu 16 treatments</li> </ul>		
<b>Prices</b>	<ul style="list-style-type: none"> <li>Views to the patio (249 \$), vistas al mar (280 \$), Suite vistas a la piscina (500 \$), Suite vistas al mar (527 \$)</li> </ul>		
<b>Segments</b>	<ul style="list-style-type: none"> <li>Couples, families, corporate events</li> </ul>		





La Grée des Landes is a Yves Rocher Eco hotel with 29 rooms, events and spa & wellness facilities with a wide offer of activities

\*\*\*  
la grée des landes  
Éco-Hôtel Spa Yves Rocher

Components	Description	
<b>Hotel</b>	<ul style="list-style-type: none"> <li>• 29 rooms</li> <li>• Standard rooms: 13 m<sup>2</sup></li> <li>• Suite : 26 m<sup>2</sup></li> </ul>	
<b>Services</b>	<ul style="list-style-type: none"> <li>• Organic cuisine restaurant</li> <li>• Meeting rooms</li> </ul>	<ul style="list-style-type: none"> <li>• Natural filtration swimming pool</li> <li>• Spa</li> <li>• Sauna Hamman</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Hiking path, biking in an 10 hectares park</li> <li>• Visit to the town of Gacilly</li> </ul>	<ul style="list-style-type: none"> <li>• Classification of plants in an area of 44 hectares of organic fields</li> </ul>
<b>Spa</b>	<ul style="list-style-type: none"> <li>• 4 treatment rooms</li> <li>• Massages, facial and body treatments based on herbs</li> </ul>	
<b>Events</b>	<ul style="list-style-type: none"> <li>• Holding of seminars, team-building, training, for a maximum of 70 people</li> </ul>	
<b>Management</b>	<ul style="list-style-type: none"> <li>• Owner and management: Yves Rocher</li> </ul>	
<b>Tariffs</b>	<ul style="list-style-type: none"> <li>• Standard room: €120 per room per night including breakfast</li> <li>• Suite : €160 per room per night including breakfast</li> </ul>	
<b>Segments</b>	<ul style="list-style-type: none"> <li>• Couples, seminars</li> </ul>	





### Domaine des Ormes is an unique accommodation facility consisting of tree houses that have been built respecting the environment

#### Domaine des Ormes – Cabins in the Air

##### Description

- Since the installation of the cabins in 2004, the trees of Domaine des Ormes have continued to grow.
- The cabins are perched at 5, 10 and 15 metres off the ground on centenary beeches, giant sequoias and cedars.
- Cabins are of a rustic quality (there are no water or electricity facilities) although they are equipped with dry toilets. Each cabin has been originally designed around each tree, respecting its original form.
- There are 3 types of tree houses available: the Tyrolean huts, ladders or family treehouses.

##### Awards

- The treehouses received the “Innovation award” in 2008 (in the Grand Prix of Tourism Engineering) for being an original and unusual new form of accommodation, and for its environmental friendliness.

##### Development

- The cabins were constructed by Abane, and required an investment of €25,000
- The availability of a trademark licence for the "The Cabin in the Air" has resulted in the establishment of a new network, which currently consists of a dozen partner sites



Jamaica's entertainment offer connects its visitors to music and island's cultural living expressions; Mauritius has a wide offer of casinos and retail centres which are the main entertainment anchors.

### Leisure and Entertainment Jamaica

#### Museums and Attractions

- **Bob Marley Experience centre:** The centre carries an enormous collection of Marley t-shirts, music, gifts and souvenir items, considered the largest in the world.
- **Bob Marley Museum** is a museum built around Bob Marley legend

#### Nightlife and Music Events

- Jamaica is a lively destination with a large range of options for nightlife entertainment.
- **Ocho Rios Jazz Festival** is known as the best mainstream jazz festival not just in Jamaica but the entire Caribbean.
- **Reggae Sumfest** is the summer's hottest reggae festival is appropriately held each July in Jamaica's Montego Bay.
- **Jamaica Jazz and Blues Festival** attracts up to 30,000 people to Montego Bay each year for the annual Jamaica Jazz and Blues Festival

#### Retail

- Jamaica: Island Village (90,000 sq feet)
- Taj Mahal: Duty free
- Local Product stores: Blue Mountain Coffee

#### handicraft & Art Galleries

- Wassi Art Pottery Factory: is famous island-wide for its unique, colourful Caribbean pottery.
- Harmony Hall :features a fine collection of works from Jamaican artists and sculptors.
- The Crafts Market: Jamaican handicrafts, including paintings, sculptures, and inexpensive jewelry, can be found in the market's .

### Leisure and Entertainment Mauritius

#### Museums and Attractions

- **Sugar Museum and Factory:** The tour of the old sugar mill, now transformed into a modern museum with rum and sugar tastings awaiting the visitor
- **Domaine les Pailles: Theme park and center of cultural and heritage.** The facilities available for visitor of the Domaine les Pailles include rides in horse-drawn carriages, a miniature railway, a working replica of a traditional ox-driven sugar mill, a rum distillery producing the estate's own brew, a spice garden, a quad-biking circuit and a children's playground.
- **Mauritius Casinos:** Le Grand Casino du Domaine, Le Casino de Maurice, Flic en Flac Casino and Le Caudan Waterfront Casino

#### Nightlife and Events

- Live Music: The symbol of island music culture, **Mauritian Séga is a style of music and also a dance form that originates from African people brought to Mauritius as slaves.**
- Nightlife happens in hotels, in the area of Grand Baie through beach parties
- The most important event is Ernest Wiehe Jazz Festival

#### Retail

- Central Market: selection of T-shirts, basketry, spices and souvenirs
- Sunset Boulevard Shopping Complex: chic retail complex

#### handicraft & Art Galleries

- **Galery Vaco: unique art works**
- **Grand Baie Bazaar: divers handicraft**
- **Le Craft Market: handicraft shopping area**

### Nikki Beach Clubs offer outstanding beach club experiences combining luxury with fresh dining, events and theatrical entertainment concepts

Components	Description
<b>History</b>	<ul style="list-style-type: none"> <li>In 1998, Nikki Beach was founded by Jack Penrod in Miami and set the standard for an outstanding beach club experience.</li> </ul>
<b>Concept</b>	<ul style="list-style-type: none"> <li>With 13-prestigious venues in 10 different countries, Nikki Beach Club is the market leader in the luxury beach club concept. It brings glamour, style and entertainment to a day or night at the beach. It also has a Hotel, Resort &amp; Spa division that has a current location in Koh Samui and is planning to open many more locations.</li> </ul>
<b>Values</b>	<ul style="list-style-type: none"> <li>Nikki Beach combines the elements of dining, fashion, art, music and entertainment into a beach club in the hottest addresses and trendsetting locales across the globe.</li> </ul>
<b>Beach Clubs</b>	<ul style="list-style-type: none"> <li>Miami Beach, USA</li> <li>St. Tropez, France</li> <li>St. Barth, French West Indies</li> <li>Marbella, Spain</li> <li>Cabo San Lucas, Mexico</li> <li>Marrakech, Morocco</li> <li>Koh Samui, Thailand</li> <li>Mallorca, Spain</li> </ul>
<b>Services</b>	<ul style="list-style-type: none"> <li>A pivotal piece of the concept is the Nikki Beach Club cuisine: fresh and flavourful sushi platters combined with grilled catch of the day, live pasta and stir fry stations.</li> <li>Special events with DJs, Sunday Pool Parties, etc.</li> <li>Events for Cannes International Film Festival and the Toronto Film Festival.</li> <li>Theatrical entertainment with signature Nikki Beach style.</li> <li>Yacht boating reservations to arrive by sea.</li> <li>Nikki Beach VIP programme.</li> <li>Nikki Beach Music: CD compilations.</li> <li>Online shop.</li> </ul>
<b>Clientele</b>	<ul style="list-style-type: none"> <li>Has attracted a client base of more than 3.5 millions of beautiful, trendy, famous and high net-worth individuals.</li> </ul>
<b>Management</b>	<ul style="list-style-type: none"> <li>Jack Penrod is the owner and founder of Nikki Beach.</li> </ul>
<b>Upcoming developments</b>	<ul style="list-style-type: none"> <li>Bali, among others.</li> </ul>



Source: [www.nikkibeach.com](http://www.nikkibeach.com)



# Canada supports local handicraft through the creation of a new and dynamic tourism product, the Economuseum



### Economuseum and the Community Adjustment Fund

- Economuseum is an initiative to support and contribute to the **vitality and sustainability of rural communities**.
- The initiative is funded by the Community Adjustment Fund (CAF).
- The Community Adjustment Fund delivered a total of \$ 48, 250 under the Government of Canada Economic Action Plan and its Community Fund for the establishment of the Community Adjustment Fund (CAF).
- The Community Adjustment Fund lead other initiatives to improve market access for products and other economic diversification activities.

### Economuseum concept

- It a **network of crafts businesses that combine the interpretation, production and sale of unique crafts, skills and products**.
- Provides visitors with **cultural tourism experiences**. In Knitting Economuseum, tourists will see **knitters demonstrating their craft in their own homes, where tourists will be able to interact directly**.
- **Visitor interpretation center, interpretative signage and product sales**.
- The Economuseum aims to be a profitable tourist product . There is a **strong work to support craftworks production and make it a profitable product to sell**.

### Artisan Network

- The artisans in the ÉCONOMUSÉE built a network.
- Every different kind of trade is represented in the ÉCONOMUSÉE network
- An expert is chosen to craft an experience into every item being sold.



The Pottery Économusée®

Artisans  
du SABLE

**Uminini Craft Village is a market which showcases artists working in a typical and authentic environment, where visitors can buy craft produced locally and contribute to the prosperity of the local communities**

### Umnini Craft Village

#### Description

- A decorated arts and crafts market where more than 20 crafters from the local community work in an open-fronted trading kiosk painted in primary coloured ethnic patterns.
- Among the items on display are pottery containers, traditional Zulu beadwork necklaces, bracelets and headbands, sculptures and baskets.
- All proceeds return to the respective communities.

#### Main Activities

- Buy craft produced by residents of the surrounding areas.
- Roadside traders in the vicinity sell avocados, bananas, paw-paws and fresh fish.

#### Services:

- The beach resorts of Amanzimtoti and Scottburgh are close to Umnini.





# Community Tourism in Dominica gives the opportunity to local communities to offer authentic experiences to visitors ranging from organic farms visits to lake visits

## Community Tourism Dominica

### Description

- Involving community groups, to offer package tours so that visitors can experience the unique aspects of the community.
- Community Tourism is based in authentic experiences through tours organised by Dominica communities in the most authentic areas of the country.

### Tourism Sector Development Program Background

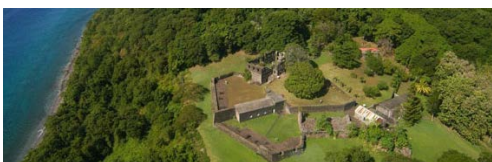
- Tourism Sector Development programme was funded under the European Special Framework of Assistance (SFA 2006).
- The SFA is a two year tourism programme implemented by the Ministry of Tourism and Legal Affairs (MT & LA). The main objective of the programme is to improve on the competitiveness of the tourism sector in Dominica.
- The programme seeks to build the necessary linkages between tourism and the agricultural and rural sectors and increase Dominica's presence in the market place through increased marketing and promotions. Technical assistance is also undertaken for the strengthening of the main tourism institutions.

### Activities

- 11 communities offer 3-day package tours. Some examples:
  - Bellevue Chopin: organic farms, production of pineapples and anthuriums, composting systems, etc.
  - Freshwater Adventure: lakes, rain forest, falls, etc.
  - Portsmouth: a trip up the river, Fort Shirley, Cabrits National Park, sea bath, the rain forest, etc.
- Each of the communities also offers a day tour.
- Events, such as Caribbean jazz concerts at Fort Shirley.

### Services

- Accommodation
- Restaurants
- Adventure activities





Introduction

Saint Lucia's Comparative Advantage

Strategy

Action Plan

Priority Projects

**Benchmarks**

- Infrastructure
- Product Development
- **Marketing & Branding**
- Human Resource & Quality
- Governance, Investment & Funding

### 100% Pure New Zealand showcases the uniquely New Zealand character and experiences



- Since its launch in 1999 the New Zealand 100% Pure tourism campaign has been portrayed worldwide as a **highly successful tourism branding campaign**.
- **100% Pure New Zealand** has reinforced the country's 'clean and green' positioning. It relates to nature and to culture, locally produced good etc.

#### Brand Symbol

- New Zealand's Brand symbol is the fern is a trade marked country-of-origin brand, used by tourism and trade operators to promote New Zealand internationally and within New Zealand.

#### Origins

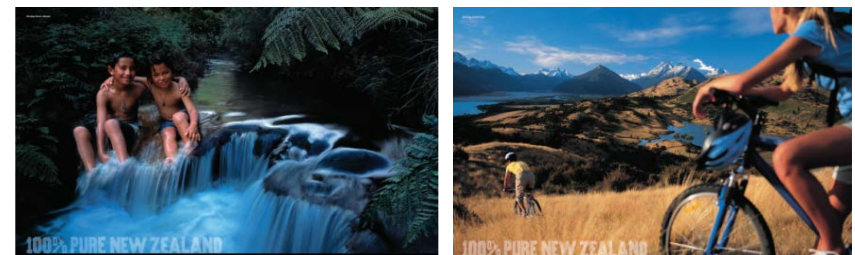
- The New Zealand Way Limited (TNZWL) was a joint venture, which was set up in 1995 by the New Zealand Tourism Board and Trade New Zealand to **restore the fragmented image of New Zealand in global markets**.
- In July 1999, **Tourism New Zealand launched the 100% Pure campaign in order to reposition New Zealand as a tourism destination**.
- TNZWL adopted six brand values: **environmental responsibility; achievement; cultural diversity; integrity; innovation; and quality**.

#### Communication Strategy

- Communication of a special combination of **activities, landscape, people and culture that create a uniquely New Zealand experience**.
- People actively considering New Zealand as their next holiday destination will understand the destination to be 100% Pure New Zealand.
- The communication campaign used "Landscape" as the brand essence and portrayed **New Zealand as a young, beautiful and clean country**.

#### Results Achieved

- The campaign was awarded by World Travel Awards as the **World's Leading Destination Marketing Campaign 2012**.
- The tagline of the campaign, "100% Pure" was copyrighted by Tourism New Zealand in its major markets.
- **One of the most successful international country-level promotional efforts of its time** and has led to its recognition as an extremely powerful travel destination brand.



Source: New Zealand Tourism Website <http://www.newzealand.com/>; World Travel Awards: <http://www.worldtravelawards.com/>; Facebook; Hall, M. "Tourism Destination Branding and its Affects on National Branding Strategies: Brand NewZealand, Clean and Green But is it Smart?"; NZ Tourism Website "Celebrating 10 years of 100% Pure new Zealand" Brochure

### “No Artificial Ingredients” campaign, a public-private partnership initiative has been extremely successful in terms of growth in international tourist arrivals



#### No Artificial Ingredients

Launch of the “**No Artificial Ingredients**” campaign which resulted in the **development of innovative new products, all aimed at reinforcing the image of Costa Rica as a ‘natural’ and environmentally friendly destination.** Among these are ‘canopy-viewing’ – treetop observation of flora and fauna – rafting, windsurfing and hot air ballooning.

#### The Challenge

- Dilemma between economic growth and environmental protection.
- Government of Costa Rica **through the help of public private partnership launched the initiative** of No Artificial Ingredients which proved an innovative way for **island’s growth on one side and environmental protection** of the island on the other.
- The initial promotional campaign, for 1996, had a budget of US\$3 million and similar annual budgets have been granted every year since.
- Combined funding from **public and private sectors**, the campaign was launched successfully and is still running.



#### Results Achieved

Based on INCAE’s assessment, the Congress identified key areas that needed strengthening in Costa Rica’s tourism product and recommended the creation of six national commissions to address the subject of: **marketing, ports and airports, tourist information, road infrastructure, motorway signage and public safety.**

This resulted in:

- Significant growth in international tourist arrivals in Costa Rica. The average annual growth over the four years from 1995 to 1999 was 13.6%.
- The campaign helped to establish Costa Rica as an important player on the global tourism scene by maintaining a **consistent image and message.** The campaign is still going strong and is contributing to tourism growth.
- There has been a **significant impact with respect to job creation, cost savings and improvement in the local standard of living**

“Many destinations in the Caribbean have already realized the importance and the benefits of implementing sustainable practices in the tourism industry

### Eco – lodging - Dominica

Dominica has built their tourism brand on eco-luxury and nature. Lodging facilities integrate seamlessly within the natural environments. Eco-lodging and nature-based tourism offerings with luxury and unique traits of the island are packaged to provide a once in a lifetime experience that can only be found on the island. **The cultural expression is focused on creating a “sense of place” rather than branding themselves as a typical Caribbean destination. Focusing on locally made products, cuisines and spa packages, they manage to create a rustic nature-based experience seem tropical and elegant**



### Transportation

- Curitiba, Brazil offers a **trash-for-transit system which encourages their residents to recycle in exchange for public transportation fare** – thus increasing a more structured and efficient transportation system while diverting 2/3 of their waste from the landfill through recycling practices. This encourages residents to utilize mass transit, lowering the carbon emissions and requiring the public transit system to be more efficient and effective for the residents due to its high percentage of use.
- Within the competitive set **Barbados provides streamlined land connectivity with visible options and easy navigation throughout the island**
- To encourage carbon emission reduction the island of **Bermuda** allows only one car per household and limits the size of vehicles which can be licensed to drive on the roads of the island. The island also utilizes an extensive ferry network
- **BVI** provides an extensive ferry network offer for tourists and residents.

### There is an increasing trend of eco- friendly awareness worldwide

#### Buildings

- Green roof policies are being seen throughout the US and in other countries. **Denmark, encouraging green space and responsible building design to reduce heat island effect through building construction** – lowering cooling costs and decreasing system sizes while creating a green space for either rooftop gardens (ideal for restaurants) or simply to reduce building cooling loads

#### Sustainable Operation

- BVI has recently made a push to incentivize hotels and resorts through a **pilot program to assist hotels to achieve energy efficiency and sustainable operations**
- **Cozumel** is working with STI to ensure the sustainability of the cruise operations.

#### Water Resources- Bermuda

Rainwater Harvesting: Bermuda has in **place strict building codes which require all residential buildings to reserve 80% of roof space** to harvest rainwater into mandatory underground tank systems. Thus lessening the strain on commercial resources for residential supply and encouraging conservation.



**SUSTAINABLE TRAVEL  
INTERNATIONAL™**  
*Leave the world a better place®*



**Travelife**  
*Sustainability in Tourism*

#### Energy Efficiency

- Renewable Energy: Although very small in size and scale, **Over Yonder Cay, located in the Exumas of Bahamas provides for a completely “renewable experience” with the entire island powered by solar and wind energy.** Considerations for portions of the island or resort properties to provide this option can be undertaken.

#### Food Safety & Agriculture

- Playa del Carmen have made increased efforts to **support local suppliers and encourage sustainable agriculture and the purchase of antibiotic free meats.** On-site greenhouses and local farms are undergoing rainforest alliance compliance to ensure sustainable practices and delivery of organic ingredients.





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- Product Development
- Marketing & Branding
- **Human Resource & Quality**
- Governance, Investment & Funding

# International best practices show that training programmes are essential to build confidence and pride in the tourism sector

### Quality Tourism Training

The Quality and Tourism Department in France uses Awareness campaigns to promote professionalization and actions to reinforce the social dimension.

The Quality Tourism Plan is a selection of quality initiatives implemented by network of tourism professionals, governmental institutions and private investors.

The Training Program consist of a series of controls and audits to provide best quality service in touristic destinations.

The aim of this campaigns is to reinforce the Touristic image of France, improve job qualification and wealth in the sector. **Quality became the priority of tourist stakeholders.** The training program was created for hotels, restaurants, cafés, brasseries, Tourism Offices and agency rentals.



Source: [www.qualite-tourisme.gov.fr](http://www.qualite-tourisme.gov.fr)

### Training and Recognition of Taxis

The Cancun Taxi Union has integrated training quality programs for tourism for their members. The certification is a prestigious award within the taxi community. The certification is obtained in the University of the Caribbean after attending to 100 hours course including Destination Knowledge, Maya Culture, Best Driving Practices and Environmental Awareness module..

The Training Program improves public transport services in order to contribute to the goals of positioning and promotion of the destination.

**The accreditation recognizes taxi drivers, who by their effort, their commitment and their superior knowledge, contribute to the experience of the tourist.**



Source: [www.sectur.gob.mx](http://www.sectur.gob.mx)  
Source: [www.acticonsultores.com](http://www.acticonsultores.com)

### 63 Tourism Awareness Clubs which are bodies of students of tertiary institutions which encourage greater awareness of tourism related issues

#### Jamaica: Tourism Awareness Unit

##### Tourism Awareness Unit

- The objective is to improve the level of awareness amongst Jamaicans on the value of the tourist industry and its impact on their quality of life.
- The TAC is a youth organization associated with a school and the Jamaica Tourist Board's Tourism Awareness Unit. Each group must be established with the approval of the school and the Tourism Awareness Unit.

##### Targets

- It targets all sectors of the society, including educational institutions, communities, private and public sectors, tourist industry, media and the general public

##### Tourism awareness activities:

- Activities include presentations, exhibits and lectures in the school and general communities.

#### Tourism Awareness Clubs: TAC

- The Tourism Action Club (TAC) consists of bodies of students in secondary and tertiary institutions who meet weekly to participate in activities that are designed to encourage a greater awareness of tourism related issues. The objectives are: Community Involvement; Education and Recreation

##### Administration

- All Tourism Action Clubs are affiliated to the Jamaica Tourist Board through the Tourism Awareness Unit and the Global Travel & Tourism Partnership (GTTP).
- Each member must contribute dues in the amount of two hundred and fifty dollars. (\$250) for a year. Two hundred dollars (\$200) are allocated to the National body and fifty dollars (\$50) are kept at the club level

##### International Coastal Clean up Day:

- Aim: enhancement of the tourism product and to stimulate a sense of pride and respect for the environment through voluntary cleaning of selected beaches around Jamaica.
- TEF provided funds to facilitate the Jamaica Environment Trust
- Conducted beach cleanups at 50 sites in Jamaica
- Increased environmental awareness on solid waste issues

##### National Best Community Competition

- Annual event aims to promote community involvement and, by extension, community-based tourism through the encouragement of community development committees to create sustainable development within their community.
- Funds are used to finance prizes for the competition
  - Most beautiful community
  - Best community spirit and self reliance
  - Best community facilities
  - Best youth development
  - Best heritage and cultural program
  - Best educational program

**JAMAICA**  
TOURIST BOARD



## Mauritius is the only island to have developed an holistic code of ethics for tourism actors

### Code of Ethics Mauritius

#### Code of Ethics for Tourism Industry

- In 1992, Mauritius Tourism Promotion Authority (MTPA) with Air Mauritius and other industry stakeholders led the initiative to develop a Code of ethics for Mauritians, tourists and for tourism professionals.
- The Code of Ethics for its Tourism Industry, constitutes a **moral building block for a sustainable development. Mauritius is the only island to have such a Code.**
- While having, specific chapters to deal with each of the three targets. There are 3 main ideas emphasized in Code of Ethics document which highlighted for each of the targets of the document (Mauritians, tourists and professionals of the tourism industry) which are built around:
  - **Respect**
  - **Pride of Mauritius traditions**
  - **Mutual richness to share**

#### Diffusion

- The document is available in the Mauritius Tourism Promotion Authority website.
- **The document into nine languages, including Kreol, Spanish, Italian, Russian, Hindi, Arabic and Mandarin.**
- In December 2011, a competition was in collaboration with Air Mauritius, one of the partners of this initiative. Participants were asked to answer questions about the code of ethics and the winner would obtain two tickets for a trip to a destination of choice.



#### Objectives

- **Build the destination USP around its multi skilled, trained, multi lingual, resilient workforce with strong sense of entrepreneurship.**
- Emphasize that tourism is **not just hotels and beaches**. It is also based on the **involvement of the population**, and the integration of more and more players in the **supply chain** to ensure sustainable development.





# “I’m a tourist, I’m a citizen” is a marketing campaign launched by the Barcelona city to increase tourism awareness among Barcelona residents

### Marketing Campaign “I’m a tourist, I’m a citizen”

- Improving the image of tourists among Barcelona residents, getting away from the stereotype of the tourist which has built up in recent years
- Showing a city that combines cultural tourism events, sun and sand, gastronomy, etc.
- Changing the concept of the tourist as an outsider, tourists can be anyone who acts like one, whoever experiences the city, its attractions, museums, restaurants, etc ... whether they stay in a hotel, live in an apartment in the centre or out in the suburbs... the city is for everyone who experiences it
- It is a living campaign using social media (twitter, facebook, flickr) so that the audience can help to expand the campaign, sharing their own particular vision of the city, explaining why “I’m a tourist”... whether they are temporary resident or permanent tourists of the city and its region





### The Proudly South African Program aim to promote locally produced products and emphasizes the importance of labels of origin

#### Background

- In 1998, under the leadership of the former President, Nelson Mandela, the Proudly South African Campaign was created with the of socio-economic necessity to create jobs.
- In 2011, through the National Economic Development and Labour Council (NEDLAC), the Proudly South African Campaign was launched and supported by Government, Organised Business (BUSA), Organised Labour and Organised Community.

#### Leadership

##### Institutions

- The Department of Trade and Industry leads the interaction between Proudly South African, the South African Bureau of Standards and South African National Accreditation System .
- The South African National Accreditation System task is to develop and implement a standard instrument to measure local content on products and services that would get preference during government procurement processes.

#### Proudly South African Campaign



##### Objectives

- To drive a national awareness campaign on the benefits of Buying Local
- To educate South Africans on the importance of “labels of origin” in order to promote fair and legal trade with other countries
- To work with enforcement agencies to prevent illegal imports and dumping of unsafe products
- To compile a database of locally produced products and services.

##### Buy Local Campaign

- The Proudly South African "buy local" campaign encourages the nation to buy local products and make use of local services to stimulate the local economy and help create jobs.
- The Proudly South African logo indicates that the company, product and/or the service provided is of good quality. This logo is an assurance of the key values of local content, high quality, fair labour practices and environmental standards.
- The campaign also promotes national pride, patriotism and social cohesion



# Voluntary labels for accommodation guarantee the quality levels and provide support for differentiation and branding of the establishment

## Leading Hotels of the World

The *Leading Hotels of the World* champion an exclusive collection of independent properties, including grand palaces and intimate city hideaways, luxury tent enclaves and expansive self-contained resorts. The hotels meet exacting standards of excellence in all areas affecting Guest comfort, convenience and well Being. The organization does not solicit new members; hotels must apply for inclusion and each member hotel is periodically re-inspected to ensure strict adherence to the company's quality standards



Source: [www.lhw.com](http://www.lhw.com)

## Mr & Mrs Smith

*Mr & Mrs Smith* is a club which provides a selection of hand picked stylish boutique hotels. It includes international hotels in destinations such as Vintage Properties, Boutique Bed & Breakfast and Private Island Hotels. A Smith Vintage property has the same boutique personality, stylish looks and nothing detracts from the sense of classic good taste. Vintage Properties have a special decoration and selected furniture including Chippendale chairs and candelabra. Vintage Properties are British country manors, romantic French châteaux or Georgian townhouse bed and breakfasts, traditionally turned out and faithful to the building's original feel.



Source: <http://www.mrandmrsmith.com/>

## Relais & Châteaux

*Relais & Châteaux* is an association of the world's finest hoteliers, chefs and restaurateurs that has set the standard for excellence in hospitality. Relais & Châteaux has redefined luxury hospitality by emphasising holistic. Experiences that transport its guests, taking them on a sensual journey and introducing them to a deeper, truer understanding of the Art of Living. The Grands Chefs Relais & Châteaux engage in the "haute couture" of fine dining, placing their creativity and their expertise in the service.



Source: [www.relaischateaux.com](http://www.relaischateaux.com)

## Quality Rose

The *Quality Rose* is the mark of England's official, nationwide quality assessment scheme and is an independent, reliable, impartial assessment of quality covering all accommodation typologies: Stylish boutique hotels, Bed & Breakfast and Self-catering cottages. Accommodation standard include cleanliness, ambience, hospitality, service and food.

The classification system follows as typical "Star classification including 4 star (Excellent standard throughout) and 5 star (Exceptional with a degree of luxury)



Source: [www.apco.org.uk](http://www.apco.org.uk)

### Labels can be used to brand individual establishments as well as the destination

#### “Calidad Turística”

The Q Brand is the most visible element of the Spanish Tourism Quality System and is related to all the touristic product and services in the sector. The “Q” brand uses elements which reinforce prestige, differentiation, reliability and rigor to all the tourism establishments certified by the brand. The quality is guaranteed by processes which includes standardisation (including ISO regulation in tourism sector), certification by awarding the Spanish Tourism Quality label and the Q Brand, promotion of the Q label and training of members. The advantages are based on the guarantee of quality of touristic products and services provided by certified establishments and security when selecting establishments. The advantages for companies are based on the improvement in the management and productivity provided by professional training, learn best practice, commercialization of product and the improvement of quality.



Source: [www.ict.e.es](http://www.ict.e.es)

#### Tourism Grading Council

The Tourism Grading Council of South Africa (TGCSA) is the only officially recognised organisation that authorises accommodation establishments to display Quality Stars. Operating as one of the business units of South African Tourism, the TGCSA ensures the standard of quality of accommodation and conference venues,



throughout South Africa. It establishes a recognizable and credible globally benchmarked system of quality assurance for accommodation and MESE (Meetings, Exhibitions and Special Events) experiences, which can be relied upon by visitors when making their choice of establishment.

TGCSA provides a rigorous framework and process for the quality assurance that is continuously sought after by businesses seeking to showcase their products in this vibrant industry which contributes to an increase in consumer confidence, thus ensuring the country's international competitiveness as a tourism destination of choice.

As a leading training provider in the hospitality and tourism industry with programmes varying from one to ten days.

Source: [www.tourismgrading.co.za](http://www.tourismgrading.co.za)

#### Green Globe Certification

Green Globe Certification is a worldwide sustainability system based on internationally-accepted criteria for sustainable operation and management of travel and tourism businesses. Green Globe is an affiliate member of the UNWTO, is partly owned by the World Travel and Tourism Council (WTTC), and a member of the Caribbean Alliance for Sustainable Tourism (CAST). The Certification focuses on the implementation of standards within and beyond the design and construction phases to impact sustainability for the life of a project, its operations and management.

The Green Globe Standards is a collection of 337 compliance indicators applied to 41 individual sustainability criteria which include sustainable management, social economic, cultural heritage and environmental criteria.



Source: <http://greenglobe.com/>

#### “Villes et Pays d'Art et d'Histoire”

The “Villes et Pays d'Art et d'Histoire” (Artistic and Historical Cities and regions) is a label which has been created by the French Ministry of Culture and Communication as part of policy to preserve and promote France's heritage. Historic towns and districts have been designated Villes et Pays d'Art et d'Histoire. These villages provide quality guarantee of the historic and cultural heritage experiences that tourists can have in these villages. The label is used as a way of developing tourism related to history and art, particularly Cultural Tourism experiences. The cities and villages rewarded with this label are developing initiatives to broaden the offer of touristic tours, exhibitions, and education services related to historic and cultural heritage.



Source: [www.vpah.culture.fr](http://www.vpah.culture.fr)

## Best Practices: Ecole Paul Dubrulle, Cambodia

### Ecole Paul Dubrulle provides professional and international training in hospitality and tourism. The school has partnerships with leading foundations, tourism and hospitality schools

#### Information on Ecole Paul Dubrulle

##### History & Location

Inaugurated in 2002 by the co-founder of Accor, Paul Dubrulle, the school aims to provide a professional and international training in hospitality and tourism.

The school is located 6 km from Siem Reap, the capital of the Siem Reap Province and the main touristic destination of Cambodia.

##### Management and operation of the school

- This school is a non governmental organization (NGO)
- The school funds its activities thanks to private donation, tuition fees and the incomes of the training hotel and restaurants as well as the Khmer cooking courses
- The foundation Accor provide the school with some financial help
- The school is training 200 students per year (50 cooking students, 20 students in tourism, 50 students in hospitality, 40 students in F&B and 40 student in Bakery)

##### Programmes

- Programmes are available for tourism, hospitality and F&B services
- The duration of the programme is one or two years according to the certificate wished by the student
- The student has the chance to receive an academic and practical training
- The school proposes also short courses for professionals who desire to enhance one of their abilities such as English, French, management skills, basic techniques of reception

##### Certification and association

- The institute created a large number of partnerships with professionals of hospitality and tourism , other schools of tourism and hospitality and foundations such as Accor, the foundation Paul Bocuse (France), le Lycée d'hôtellerie et de tourisme de Saint Quentin en Yvelines (France), The foundation Mérieux (France), the school Lenotre (France) and much more
- Partners provide internships for student and help the management of the school to update the programmes to fulfill the needs of the local and international tourism businesses

##### Training hotel and restaurant of the school

- The school provides one training hotel and two restaurants
- The hotel offers 4 guests rooms from \$20 to \$35 the night
- The café and the Jardins des Délices are the two training restaurants where the students can practice their specialization

##### Prices of the programmes

- Possibility for the student to be sponsored by a company
- \$600 per year per student

Sources: Ecole Pierre Dubrulle Website, <http://www.ecolepauldubrulle.org>

## Best Practices: Sekolah Tinggi Pariwisata Bali Tourism Institute, Indonesia

The Bali Tourism Institute is a training facility for hospitality and tourism professionals and a research facility for tourism development and sustainable tourism



### Information on Bali Tourism Institute

#### History & Location

The Bali Tourism Institute has been created in 1972 by the assistance of the United Nations Development programme (UNDP) and was upgraded as university 1993.  
It is located in a seaside touristic area of Nusa Dua.  
The institute is a training facility for hospitality and tourism professionals as well as a research facility for tourism development and sustainable tourism.

#### Management and operation of the school

- This tourism institute is managed and financed by the ministry of Tourism and Culture of The Republic Indonesia.
- The UNWTO, The ILO, The United nation ESCAP, UNDP support the institute
- Each year the school graduates 300 students

#### Programmes

- The institute proposes a bachelor in tourism management as well as several other degrees in
  - Tourism management
  - Hospitality business
  - F&B
- They have 3 departments (tourism, hospitality and travel)
  - Spa
  - Tour operator
  - MICE and events management

#### Certification and association

- The institute is member of the
  - International Hotel and Restaurant Association (IHRA)
  - Pacific Asia Travel Association (PATA)
- And has developed partnership with Bali Hotel Associations (BHA), Bali Tourism Board, Indonesia Tour Guide Association, Tourism Training Department Association (TTDA), Indonesia Hotel House Keeper, Bali Spa and Wellness Association (BSWA), Bali Culinary Professional (BCP), International Culinary Association (ICA)
- Persikaran Hotel and restaurant Indonesia (PHRI Indonesia)
- Indonesian Hotelier Association (IAPINDO I.H.A)

#### Training hotel and restaurant of the school

- The training hotel is the Langon Bali Spa resort located next to the institute.
- It offers to guests 10 rooms, 4 junior suites, 3 senior suites, a restaurant, a swimming pool and a spa
- The average rates of the rooms and suites: from \$60 to \$150

#### Prices of the programmes

- RP 6,000,000 (approximately \$700 per semester) all inclusive (books, uniform....)

Sources: Bali Tourism institute, <http://www.stpbali.ac.id>



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- **Governance, Investment & Funding**

### In 2008, JAMPRO was the recipient of the international accolade: “Best Trade Promotion Organization (TPO) from a Small Country”

#### Jampro – Jamaica Investment Promotion Agency



#### *Investment Institution and tasks*

Jamaica’s investment and export promotion agency operating under the direction of the Ministry of Industry, Investment and Commerce  
Mandate “ Stimulate, facilitate, and promote the development of trade and industry and export and investment activities in all sectors of the island’s economy”

JAMPRO has two focal points:

- Investment and trade promotions (with two local offices and an office in London serving Western Europe)
- Facilitating investment - guides investors through the necessary steps to making their projects possible, and also walks them through the approvals process and stays with them even after their investments are operational
- Jampro is committed to ensuring **sustainable development** arising from foreign direct investment into the country - both in terms of the environment and in the deepening of the absorptive capacity of the economy by encouraging growth in local direct investments

#### *Services*

- Provision of business information and advisory services
- Trade and investment incentives
- Export-related training
- Creation of business linkages
- Facilitation of business matchmaking
- Provision of funding sources and technical assistance
- Enterprise Rating and Upgrading
- Investment facilitation
- Business development initiatives

#### *Strategic Objectives*

- Facilitating enhanced national competitiveness
- The creation of an enabling business environment through research and advocacy
- The development of highly differentiated/high value niche exports, with focus on creativity and innovation
- **Attracting and facilitating investments resulting in high quality jobs and wealth creation**

#### *Investment Opportunities*

- **Jampro offers in its official website a section where investors can easily find tenders and investment opportunities – invitations to bid**

Clarity, simplicity and good organization of information is a key point in the Invest Mauritius website and is highly valued by investors looking for investment information

### Invest Mauritius – Mauritius Investment Promotion Agency



#### Investment Institution and tasks

- The Board of Investment (BOI) is the national Investment Promotion Agency of the Republic of Mauritius falling under the aegis of the Ministry of Finance and Economic Development
- BOI's range of services, provided free-of-charge, include inter alia:
  1. Counseling on investment opportunities in Mauritius;
  2. Providing sector-specific and tailor-made information for the setting up of a business in Mauritius;
  3. Organizing customized meetings and visits;
  4. Identifying joint-venture partners;
  5. Providing guidance on the choice of site locations and production facilities;
  6. Assisting with occupation permits, licenses and clearances.
  7. Facilitate inward investment

#### Team and responsibilities



#### Invest Mauritius Strategy

- Mauritius is pursuing a multi-pronged development strategy based on a liberal and open investment policy in order to achieve sustainable growth in a fast globalizing world economy. The key elements of the strategy are:
  1. Consolidation of traditional industries
  2. Diversification of the industrial base
  3. Development of emerging sectors
  4. Harnessing the services industries of the future

#### High quality of documentation for showing investment opportunities



**ProMexico offers a user friendly tool where investors can easily evaluate different locations in order to find the location that best meets business requirements**

### ProMexico – Mexico Investment Promotion Agency



#### Investment Institution and tasks

ProMexico promotes activities aimed at attracting FDI to support Federal Public Administration and the Federal States agencies in placing FDI in the country

#### General Incentives on foreign investment

Mexico does not offer specific incentives for the tourism sector. However, each state's government offers a specific bundle of the following incentives:

- Temporary exemption from states taxes and fees
- Income tax temporary exemption/ reduction for new firms
- Duty exemption from the Public Registry of Property and Commerce
- Exemption from payment for Land Use Licences and building permits
- Exemption for drinking water connection and drainage

- Reduced property transfer tax
- Income tax reduction for companies that create new jobs
- Reduction in the payment of licensing fees for construction
- Reduction in the payment of connection fees for water supply and sewerage

#### Services offered by ProMexico

Scheduling interviews with investors, coordination of appointments, logistics and organization of trips, confirmation of meetings, creation of an investor profile, monitoring of investor satisfaction

#### Site Selection tool

- ProMexico offers a tool offered for site selection.
  - Investors can easily evaluate different cities in Mexico for easily find the one that best meets its business requirements for its strategic location
  - Investors can filter considering macroeconomic and productivity indicators, statistics related to infrastructure, logistic access, labor force, quality of life and availability of basic services for 77 cities in Mexico

# Jamaica charges airlines and cruise fees to passengers which are paid directly to the Tourism Enhancement Fund to implement the recommendations of the National Tourism Master Plan



The **Tourism Enhancement Fund (TEF)** is an independent governmental body of the Ministry of Tourism.

### Airline and Cruise passenger fee

- A Tourism Enhancement Fee of US\$10.00 to be charged to incoming airline passengers and US\$2.00 to be charged to cruise passengers.
- The fee applies to foreign passengers, excluding transit passengers and domestic travelers.
- Fee exemptions are provided to infants (under 2), diplomatic staff, airline crew on duty, transit/transfer passengers (24 hours)

### Direct Funding for Tourism:

- Fees are placed into a dedicated fund to be used for the sole purpose of implementing the recommendations emanating from the National Tourism Master Plan.
- The TEF accrues US\$20 million a year through the collection of the incoming tourist fees

### Objectives:

- To promote growth and development in the tourism sector by encouraging a better management of environmental resources in the island, enhance the overall tourist experience in the Island, and promoting for sustainable development of the tourism sector by means of a geographic allocation of funds—supporting national projects and small properties.

Since its start date up to December 2010, the fund generated a total revenue of US\$ 90,7 million, approved 214 projects of which 152 already are completed

### Project criteria:

- Boost the country's economic prosperity
- Increase the competitiveness of tourism products
- Foster resort development
- Develop key sub-sectors such as, heritage and culture
- Protect the environment

### Classified into:

- Heritage Tourism – Built and Natural
- Resort Enhancement (development, restoration)
- Community Tourism
- Sports and Entertainment
- Environmental Management
- Culture

### Administration of the body:

- The TEF has a board of 13 members appointed by the Minister of Tourism including governmental officials (tourism and finance) and local tourism associations (e.g. attractions and hotels).
- The aim of these bodies is to ensure that the core objectives are carried out in accordance with the TEF Act. The Jamaica National Small Business Loan is a lending institution to which permanent residents of Jamaica have access to, in the realization of the objectives of the TEF Act.



# Barbados Hotel & Tourism Association develops marketing and product development projects thanks to the collection of voluntary guest fees



### Tourism Fund - Barbados Hotel & Tourism Association

The Tourism Fund is a voluntary contribution fund set up by - Barbados Hotel & Tourism Association in 2003

#### Voluntary Hotel guest fee:

- Contributions to the Fund are primarily made by hotel guests on a **voluntary basis** through an additional charge on their bill at check out.
- Nominal fee of between US\$0.25 – US\$2.00 per night.

#### Direct Funding for Barbados Hotel & Tourism Association:

- The fund is spent on both **marketing and product development projects such as: beautification of several areas in Barbados, beach rejuvenation, improving road signage, improvement of the official booking engine for Barbados.**

#### Administration of the Body:

- The Fund is managed through a separate Board of Trustees Barbados of the Hotel & Tourism Association
- The Barbados Tourism Authority and The Tourism Development Corporation give inputs.

#### Tourism Fund Projects examples:

- **West Coast Beach Restoration 2010 – 2011**
- **Road Signage project**
- **National Garbage Bin Project**
- **Barbados Culinary Team**

### Tourism Fund Project: Barbados Culinary Team

The Association has coordinated the efforts of managing the Barbados Culinary Team for competition purposes and uses the team for promotional events and festivals hosted to market Barbados

#### Promotion Activities supported by the Tourism Fund

- Barbados Culinary Team represents Barbados locally, regionally and internationally at several events, both promotional and entertainment such as:
  - Barbados Food & Wine and Rum Festival
  - Barbados Promotions in Europe and UK
  - Caribbean Cruise Association Conference
  - BTA overseas mall and in-store promotions

#### Product Development

- The Barbados Culinary Team offers training to chefs and bartenders.
- The Barbados Culinary Team has become an institution which trained some recognised culinary personalities such as John Hazzard – (Caribbean Chef of the Year 1995 & 2004), Mitchell Husbands – (Caribbean Chef of the Year 2011) and Jamaal Bowen - Mixologist, Caribbean Spokesperson for Angostura, (Caribbean Bartenders of the Year 2012).
- Development of the Culinary Alliance of Barbados, the Epicurean Product Club, Junior Duelling Challenge, Taste of Barbados Food Festival, the Barbados Food & Wine and Rum Festival and Caribbean Mixology Guild.

# Canada Tourism Clubs are a collaboration between the public sector and tourism industry



## Canada: Public Private Partnership

### Public Private Partnership:

- A major restructuring of Canada's national tourism administration (NTA) in early 1995 resulted in the replacement of the 100% government-funded Tourism Canada by the Canadian Tourism Commission (CTC) which is a partnership between the federal and provincial/territorial governments and the private sector.
- The CTC operates on the basis of public-private partnerships, with partner contributions to match federal funding so as to achieve a maximum return-on-investment for the taxpayer
- Canada's tourism industry is a dynamic affiliation of public and private sector organizations ranging from small- to medium-size enterprises (SMEs) to provincial marketing organizations (PMOs) to destination marketing organizations (DMOs).
- As a result of this partnership, total funding for tourism promotion and marketing rose 933% from 1995 to 1999. Of the total in 1999, 46% was the core budget provided by government and 54% partner funding.
- In 2008, partner contributions totalled \$95.8 million in 2008, for a 1.2:1.0 ratio of tourism industry monies to federal appropriations.

## 4 types of Public Private Partnerships

- **CTC-led marketing or sales campaigns:** \$12.4 million.
- **Marketing initiatives:** where a partner takes the lead in managing the campaign: \$29.6 million.
- **Parallel partnerships:** where the CTC runs parallel advertising with its partners: \$22.4 million in the form of parallel advertisements.
- **In-kind partner contributions:** \$31.3 million, with in-kind contributions including airfare and free television advertising.

In 2008, Public Private Partnership lead to a total investment in Tourism of \$178.7 million

- CTC Budget Allocation \$82.9 million (46%)
- Partnership Contributions \$95.8 million (54%)
- Total Investment \$178.7 million



Source: Public- World Tourism Organisation Business Council (WTOBC) *Private Sector Cooperation: Enhancing Tourism Competitiveness*, February (2013); Heritage Canada Website: <http://www.heritagecanada.org/>; Canada Tourism Commission: "Showcasing Canada on the world stage Corporate plan summary 2010 – 2014"

# CTC does not create tourism products; however, through a collaboration between the public sector and industry Canada increases the supply of competitive products



### The CTC's Product Clubs Programme

- Canadian Tourism Commission undertakes a call for proposals to the industry, inviting them to create their own partnership and to submit a five-year business plan, which addresses a specific area of tourism demand.
- Proposal accepted are included as one of the Product Clubs in the CTC's Product Club Programme.
- The initiative brings together many of the small industry players, which are not accustomed to forming strategic alliances.
- The proposal must have a five-year business plan including a strategy that includes partnership self-sufficiency after three years.
- The CTC becomes one of the partners of the industry-led plan and financial support is provided for the first three years
- The CTC also gives support on an ongoing basis in terms of access to research, cross-sector training and enhanced networking opportunities.

### Results

#### Public Private Partnership:

- The Canadian Tourism Commission's Product Club Program was created in 1996 to help small businesses and organizations offer tourists new experiences.
- Now 40 clubs exist across Canada, including the Ontario East Adventure Product Club, Aboriginal Waterways in Saskatchewan, and the Northern 2 Knowledge Product Club in the Yukon.
- All product club partnerships feel they have achieved results as a group that they would not have been able to achieve on their own.

### Examples of Products

#### Atlantic Lighthouse Product Club

- The Atlantic Lighthouse Product Club is one of the most successful heritage-related clubs.
- It was created to provide alternative uses for lighthouses - as restaurants, bed & breakfasts, shops, and museums, for example.

#### Economuseums Product Club

- The Economuseum is a project which enable to see artisans at work to discover heritage brought to life.
- Is a 'living museum' where people can discover the history of a craft or trade, meet the artisans, and find out first hand how they are adapting traditional know-how to modern needs.

#### Cuisines of Canada: Tastes of British Columbia Product Club

- \$200,000 start up cost
- Harness the effort to develop and promote culinary tourism.



Source: Public- World Tourism Organisation Business Council (WTOBC) *Private Sector Cooperation: Enhancing Tourism Competitiveness*, February (2013); Heritage Canada Website: <http://www.heritagecanada.org/>; Canada Tourism Commission: "Showcasing Canada on the world stage Corporate plan summary 2010 – 2014"; Don Monsour – British Columbia Cuisine and Tourism Society *The Power of Partnerships in Tourism Product Development : A Canadian Story* (2003)



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