



FINAL REPORT

BARBADOS TOURISM MASTER PLAN 2014–2023

REPORT V: SERVICES, INFRASTRUCTURE & PRODUCTS PART 2: Niche Markets



Environmental Planning Group Inc.
HLA Consultants

2014

BARBADOS TOURISM MASTER PLAN

2014 – 2023

REPORT V: SERVICES, INFRASTRUCTURE AND PRODUCTS

Part 2: Niche Markets

Ministry of Tourism and International Transport

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DISCLAIMER

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

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In the production of these documents, the work of local artists has been featured as an opportunity to showcase the visual arts in Barbados.

REPORT V: SERVICES, INFRASTRUCTURE AND PRODUCTS

PART 2: Niche Markets

TABLE OF CONTENTS

1.0 Transportation (see Report V, Part 1)	
2.0 The Accommodation Sector (see Report V, Part 1)	
3.0 Niche Markets	2
3.1 Assessment and Prioritization of Niche Markets	2
3.1.1 Introduction	2
3.1.2 Approach Undertaken	2
3.1.3 Prioritization of Niche Markets	3
3.1.4 Linkages and Relationships	8
3.2 Prioritized Niche Markets	8
3.2.1 Primary Niche Markets	10
3.2.1.1 Accessible Tourism	10
3.2.1.2 Silver Market Tourism	26
3.2.1.3 Culinary Tourism	38
3.2.1.4 Health and Wellness Tourism	60
3.2.1.5 Conference (MICE) Tourism	74
3.2.1.6 Sports Tourism	93
3.2.1.7 Diaspora	120
3.2.1.8 Domestic Tourism	132
3.2.2 Secondary Niche Markets	149
3.2.2.1 Agro-tourism	149
3.2.2.2 Creative and Performing Arts	161
3.2.2.3 Faith Tourism	199
3.2.2.4 Community Tourism	214
3.2.2.5 Medical Tourism	253
3.2.2.6 Education Tourism	261
3.2.2.7 Volunteer Tourism	276
3.2.2.8 Shopping Tourism	389
List of Acronyms	304
References	308

3.0 Niche Markets

3.1 Assessment and Prioritization of Niche Markets

3.1.1 Introduction

At the commencement of the Barbados Tourism Master Plan (TMP) project, the Ministry of Tourism and International Transport and the consulting team agreed on specific niche markets that would be researched, assessed, and prioritized for their potential and further development in Barbados. These niche markets include:

- Accessible tourism
- Agricultural tourism
- Community tourism
- Conference tourism
- Creative and Performing Arts
- Culinary tourism
- Diaspora
- Domestic tourism
- Education tourism
- Faith tourism
- Medical, Health & Wellness tourism (subsequently addressed as Medical tourism and Health & Wellness tourism)
- Shopping tourism
- Silver Market tourism
- Sports tourism
- Volunteer tourism

This section presents a summary overview of the approach undertaken, resulting prioritization of the considered niche markets, a summary of assessment with supporting rationale for niche market prioritization, and linkages / relationships that should be taken into account.

3.1.2 Approach Undertaken

The following approach was undertaken to assess and prioritize the niche markets considered:

- Research and reporting on each of the individual niche markets in terms of definitions, global trends, market activity within Barbados, needed improvements and recommended strategies / actions
- Consideration of linkages between individual niche markets as well as their relationships with other aspects of tourism experience delivery in Barbados
- Development of a rationale to assess and prioritize potential niche markets for Barbados
- Assessment and prioritization of potential niche markets for Barbados
- Preparation of summary profile charts for *Primary Priority* niche markets

3.1.3 Prioritization and Assessment of Niche Markets

Table 3.1 lists the niche market areas that were assessed according to priority determination either as *Primary* (those considered top priority), or *Secondary* niche markets (those not considered top priority at this time but may present potential at a later date; see also Table 3.2). Medical, Health & Wellness Tourism is separated into Medical Tourism and Health & Wellness Tourism given major differences in their potential for Barbados.

Table 3.1. Barbados niche markets by priority grouping.

Primary Niche Markets	Secondary Niche Markets
<ul style="list-style-type: none"> • Accessible Tourism • Conference Tourism • Culinary Tourism • Diaspora • Domestic Tourism • Health & Wellness Tourism • Silver Market Tourism • Sports Tourism 	<ul style="list-style-type: none"> • Agro-Tourism • Community Tourism • Creative and Performing Arts • Education Tourism • Faith Tourism • Medical Tourism • Shopping Tourism • Volunteer Tourism

While cultural / heritage and nature tourism subjects were both reviewed, they were not considered to be specific “niche” markets in the Barbados context, but will be described in Report VI, Section 1.0 on Cultural Heritage and Attractions. Cultural tourism may be considered as an umbrella that includes most tourism experiences and is subsumed in all niche areas, incorporating all aspects of the built and natural environment. Although Barbados has much to offer relative to natural sites, it does not have the range of unique experiences that competing nature tourism destinations can showcase.

The rationale developed for assessing and prioritising the niche markets considered encompasses the following significant perspectives:

- *Supply* – Available and planned supply in Barbados (including facilities, services, information, marketing, provider support, etc.) and the nature and extent of competition elsewhere
- *Demand* – General niche market trends and characteristics globally, as well as recent and anticipated demand in Barbados
- *Match* – Whether there is currently or there is the potential for a favorable to strong product-market match in Barbados
- *Benefit* – What the general nature and extent of potential benefits to Barbados are from each niche market

The summary findings of the priority assessment of niche markets are presented in Table 3.2.

Table 3.2. Priority assessment of niche markets considered for Barbados tourism. Primary and Secondary markets are colour coded. Cultural/Heritage Tourism and Nature Tourism are assessed but not rated.

Priority Assessment of Niche Markets		
Niche Market	Priority Assessment	Rationale (supply, demand, match, benefits)*
<i>Accessible Tourism</i>	Primary	<ul style="list-style-type: none"> ▪ Required facilities, services and information (e.g. accommodation, food and beverage) are not yet adequately provided in Barbados, although Fully Accessible Barbados (FAB) is aggressively making progress ▪ A large and fast growing niche market, especially in traditional origin markets (aging population); loyal repeat visitors and unofficial “ambassadors” when needs are well met ▪ Facilities, services and information also serve local population in need
<i>Agro-tourism</i>	Secondary	<ul style="list-style-type: none"> ▪ Barbados has a strong, accessible agricultural sector, an international reputation for rum and sugar, and a range of related attractions and events (e.g. AgroFest, markets) but market requirements are not always adequately met (e.g. service skills, facility standards, experiences, safety, cleanliness), are mechanisms to improve productivity and efficiency (e.g. cooperatives) ▪ A fast growing niche market (and large when the broader definition is assumed), especially in traditional origin markets, whose expectations can be met relatively easily in Barbados ▪ Strong potential for linkages, dispersal of economic benefits; helps sustain local agricultural production and food supply as well as lower food imports
<i>Community Tourism</i>	Secondary	<ul style="list-style-type: none"> ▪ Community involvement in tourism is generally lacking (e.g. awareness of benefits, opportunities for involvement, capacity building) although Oistins is noteworthy and agencies exist to provide support to SMEs, youth, etc. ▪ A fast growing niche market in traditional origin markets, with expectations for interaction and minimum standards to be met ▪ Strong potential for dispersal of economic and social benefits; fosters community pride, cross-cultural understanding and helps retain population in smaller and remote communities
<i>Conference Tourism</i>	Primary	<ul style="list-style-type: none"> ▪ Barbados has new and renovated (e.g. Lloyd Erskine Sandiford Centre) meeting facilities and strong stakeholder support to target this niche, but lodging is not always adequate (re: size, standard, proximity) and target marketing is not aggressive enough ▪ International business/MICE markets are not rebounding as quickly as leisure markets, but Barbados has a growing international business sector ▪ Can complement leisure markets to reduce seasonality patterns; provides exposure to Barbados for return leisure visits
<i>Creative and Performing Arts</i>	Secondary	<ul style="list-style-type: none"> ▪ Arts industry is growing in Barbados (with internationally-known talent) and it has a strong annual events calendar, but standards, venues and access/distribution need improvement and Government sponsorship has waned in recent years (e.g., for marketing and startup funding) ▪ Regional competition is very strong ▪ A fast growing and high spending niche market that has great interest in local arts and talent ▪ Fosters pride and preservation of cultural practices; those performing or recognized internationally become unofficial “ambassadors” for Barbados

Priority Assessment of Niche Markets		
Niche Market	Priority Assessment	Rationale (supply, demand, match, benefits)*
<i>Culinary Tourism</i>	Primary	<ul style="list-style-type: none"> ▪ Barbados has an abundant supply of good quality restaurants, noteworthy chefs and related events ▪ A major interest of the “new traveller” and a fast growing, often affluent niche market in itself (but still small), with great interest in local dishes and use of local ingredients ▪ Interest in local dishes benefits cultural exchange, international understanding and preservation of cultural heritage; greater use of local ingredients increases demand for local agricultural production and helps reduce foreign imports
<i>Cultural /Heritage Tourism</i>	<i>Not rated (but see Report VI)</i>	<ul style="list-style-type: none"> ▪ For Barbados, this is not seen as a niche market, but rather as an overarching focus of tourism ▪ Barbados has a rich cultural heritage but facilities (including maintenance), interpretation, packaging and marketing need improvement ▪ A major interest of the “new traveler” and a fast growing, high spending niche market in itself ▪ Protection/interpretation of heritage also fosters local pride and attracting this niche expands cross-cultural understanding
<i>Diaspora</i>	Primary	<ul style="list-style-type: none"> ▪ The Government of Barbados is committed to attracting this already “vested” (i.e. family ties, roots) yet still largely untapped niche market, but current marketing mechanisms and strategies do not effectively reach it (e.g., database needed) ▪ A large and growing market; dispersed geographically but with some key nodes to effectively target (e.g. in Canada, USA, and UK) ▪ Return visits and investment by the Diaspora in Barbados strengthens pride and ties, generates social and economic benefits; become unofficial “ambassadors” for Barbados
<i>Domestic Tourism</i>	Primary	<ul style="list-style-type: none"> ▪ Limited understanding and consideration of domestic market in Barbados historically by local tourism industry, but mindset is slowly changing due to recent poor performance and greater appreciation of both necessity and opportunity such that a moderate and increasing number of tourism facilities and services are now geared towards this niche market ▪ Niche is recognized as an important segment of the visitor market by international tourism bodies (e.g. WTTC) and most countries, with several of Barbados’ origin market countries (e.g. USA) aggressively and effectively targeting their domestic markets (e.g. staycations, weekend escapes) ▪ Barbados has a relatively large “captive” domestic market (i.e. already on-island), as compared to some other Caribbean islands with smaller populations ▪ Generates social and economic benefits (e.g. pride, reduces exports); can help improve seasonality patterns; in turn, more informed to become welcome ambassadors with Diaspora and tourists
<i>Education Tourism</i>	Secondary	<ul style="list-style-type: none"> ▪ Barbados is recognized globally for its high literacy rates and higher education, with UWI – Cave Hill serving the region ▪ Barbados is already attracting foreign students for English as a Second Language training and university exchange, but shorter educational experiences are lacking or not well marketed; opportunity to “piggyback” on BTA’s current marketing initiatives ▪ Major interest of the “new traveler”, a fast growing and high spending niche market in itself (although very diverse, e.g. LOS), with great potential from the emerging origin markets in Latin America ▪ Fosters cross-cultural understanding; become Barbados “ambassadors”

Priority Assessment of Niche Markets		
Niche Market	Priority Assessment	Rationale (supply, demand, match, benefits)*
<i>Faith Tourism</i>	Secondary	<ul style="list-style-type: none"> ▪ Religion has long been an important foundation in Barbados (places of worship, faith-related events, strong beliefs and daily practices of local population) ▪ Historic places of worship are attractions in themselves, including of international significance (e.g. Nidhe Israel Synagogue, oldest in the Western Hemisphere); there is a strong year-round calendar of faith-based events, including parish reunions; tours already exist but more packaging and marketing is needed ▪ There is demonstrated growth in this niche market (especially group travel) internationally; Barbados has also seen a recent increase in this niche from the region, with additional potential from the domestic market and Diaspora ▪ Generates local pride and cross-cultural understanding; strengthens linkages; helps preserve historic places of worship and traditional practices
<i>Medical, Health & Wellness Tourism</i>	Medical Tourism – Secondary	<ul style="list-style-type: none"> ▪ Given differences in the product-market match in Barbados for Medical tourism vs. Health & Wellness tourism, this niche is being considered as 2 distinct niche markets for Barbados <p>Medical Tourism:</p> <ul style="list-style-type: none"> ▪ Only a small number of existing and planned medical facilities and services meet international medical standards (practitioners, accreditation), with notable specializations (e.g. dentistry, fertility); there is room for improvement (e.g. recuperative hotel facilities) and it takes time to achieve recognition in this field ▪ A fast growing and lucrative niche market internationally, with a small number of visitors already coming to Barbados for this primary purpose (e.g. fertility treatments) ▪ However, Barbados is not yet recognized as well as other medical tourism destinations (e.g. Costa Rica, Mexico, India, Colombia, Cuba) ▪ Facilities and services also benefit local population in need and improve global reputation of Barbados
	Health & Wellness Tourism – Primary	<p>Health & Wellness Tourism:</p> <ul style="list-style-type: none"> ▪ Barbados has long been a destination for health & wellness, associated largely with its “sea, sand and sun” and its range of spa treatment offerings, and more recently through its alternative medicine, healthy food and meditation offerings; however there is a need to meet international certification standards (e.g. finalize and adopt standards now being developed through UWI) in order to become part of a new Caribbean-wide thrust and to compete effectively with other such destinations ▪ A major interest of the “new traveller” and a fast growing, high spending niche market in itself ▪ Facilities and services also benefit local population in need
<i>Nature Tourism</i>	<i>Not rated (but see Report VI)</i>	<ul style="list-style-type: none"> ▪ Barbados offers sea and land-based natural attributes, with interesting fauna and features (e.g. sea turtles, gullies, caves), although few pristine natural areas remain ▪ Barbados currently attracts and serves tourists largely for “sun, sand and sea”, but less so for its land-based nature and could do more ▪ A fast growing niche market internationally for some time, with high expectations for resource quality and experience offered – but this is not yet well delivered in Barbados and natural resources are challenged by development ▪ Meeting standards and expectations of nature tourism helps protect Barbados’ natural resources, for environmental and social benefit
<i>Shopping Tourism</i>	Secondary	<ul style="list-style-type: none"> ▪ Barbados has a wide array of retail venues + goods (e.g. duty free, local arts and crafts) for sale, more so than in many smaller competing destinations, but prices are perceived as high

Priority Assessment of Niche Markets		
Niche Market	Priority Assessment	Rationale (supply, demand, match, benefits)*
		<ul style="list-style-type: none"> ▪ Shopping is a primary activity of all tourism segments; it is also a significant niche market in itself internationally (e.g. Latin Americans to Miami) but one that is typically shrewd re: price and value ▪ Through shopping in Barbados, international visitors bring in much needed foreign exchange and domestic travelers improve local spending multipliers
<i>Silver Tourism</i>	Primary	<ul style="list-style-type: none"> ▪ Barbados has a long history of serving older visitors from traditional origin markets (e.g. adequate accommodation and medical facilities) but it needs to improve facilities and services for the disabled, maintain and improve standards and safety, and offer more organized excursions to retain and grow this already significant repeat market in Barbados ▪ A major segment of the international travel market and a fast growing niche market in itself (aging population in traditional origin markets due to longer lifespan, healthier, declining birth rate) ▪ Ability to stay longer, improve seasonality and provide repeat visitation
<i>Sports Tourism</i>	Primary	<ul style="list-style-type: none"> ▪ Barbados has a strong sporting events schedule, legendary sports figures and an established reputation for sports tourism, but needs facility upgrades ▪ Barbados already has a significant sports tourism market (professional, amateur, youth), with great opportunity to further expand its range and reach ▪ International sporting events and figures foster national pride; sporting facilities and programmes can also serve and benefit locals; this niche can help improve seasonality
<i>Volunteer Tourism</i>	Secondary	<ul style="list-style-type: none"> ▪ A few volunteer management organizations and volunteer tourism opportunities now exist in Barbados (e.g. Sea Turtle Conservation Project); additional ones could be formed and offered (e.g. faith-based) to meet existing needs ▪ A major interest of the “new traveler” and a fast growing niche market in itself; while they pay to volunteer, intensive management is required to coordinate and involve them and to provide continued programme delivery ▪ Typically intended to generate environmental or social benefits, depending on volunteer focus, but care is needed to ensure positive impacts result from good intentions; potential to become unofficial “ambassadors” for Barbados
<p>* Rationale for the priority assessment of each niche market considered is from the perspective of:</p> <ul style="list-style-type: none"> – <i>Supply</i> – Available and planned supply in Barbados, including provider support, and competition – <i>Demand</i> – Recent and anticipated demand in Barbados, general niche market trends globally – <i>Match</i> – Favorable product-market match in Barbados, and – <i>Benefit</i> – Nature and extent of potential benefits to Barbados from niche markets 		

3.1.4 Linkages and Relationships

Another important consideration to take into account when assessing and prioritizing the niche markets is the extent and nature of inter-specific linkages and their relationships with other aspects of tourism experience delivery in Barbados. This is significant because by attempting to maximize such synergies, efforts to cater to and attract related niche markets through product and service delivery that meet their common needs and expectations can prove more efficient and effective. Furthermore, attracting niche markets with similar needs and expectations can result in improved compatibility and reduced conflict and alienation among visitors to Barbados. The strategies being developed for the TMP also take these relationships and linkages into account.

The relationships and linkages perceived between niche markets as they relate to general tourism activity in Barbados are illustrated in Figure 3.1.

3.2 Prioritized Niche Markets

The niche markets that were reviewed and prioritized are presented separately by priority status (i.e. primary or secondary) in Sections 3.2.1 and 3.2.2. The White Paper recommends the development of strategies to facilitate the competitive offer of targeted niche markets in the various sub-groups (Strategic Solutions Inc., 2012). Each niche market section presented herein includes strategies that are being proposed per subject area.

Where relevant, pertinent linkages between niche market areas and complementary sectors are noted and cross-referenced. These primary relationships upon which the growth of niche market segments are based help to strengthen the quality and diversification of the overall tourism product. Supporting infrastructure such as quality accommodation suitable for servicing relevant niches, set within an environment featuring authentic Barbadian elements (i.e. built, cultural, and natural heritage) will help to set the island's tourism product apart from its competitors.

EXPERIENCE DELIVERY: NICHE MARKET DEVELOPMENT AND LINKAGES

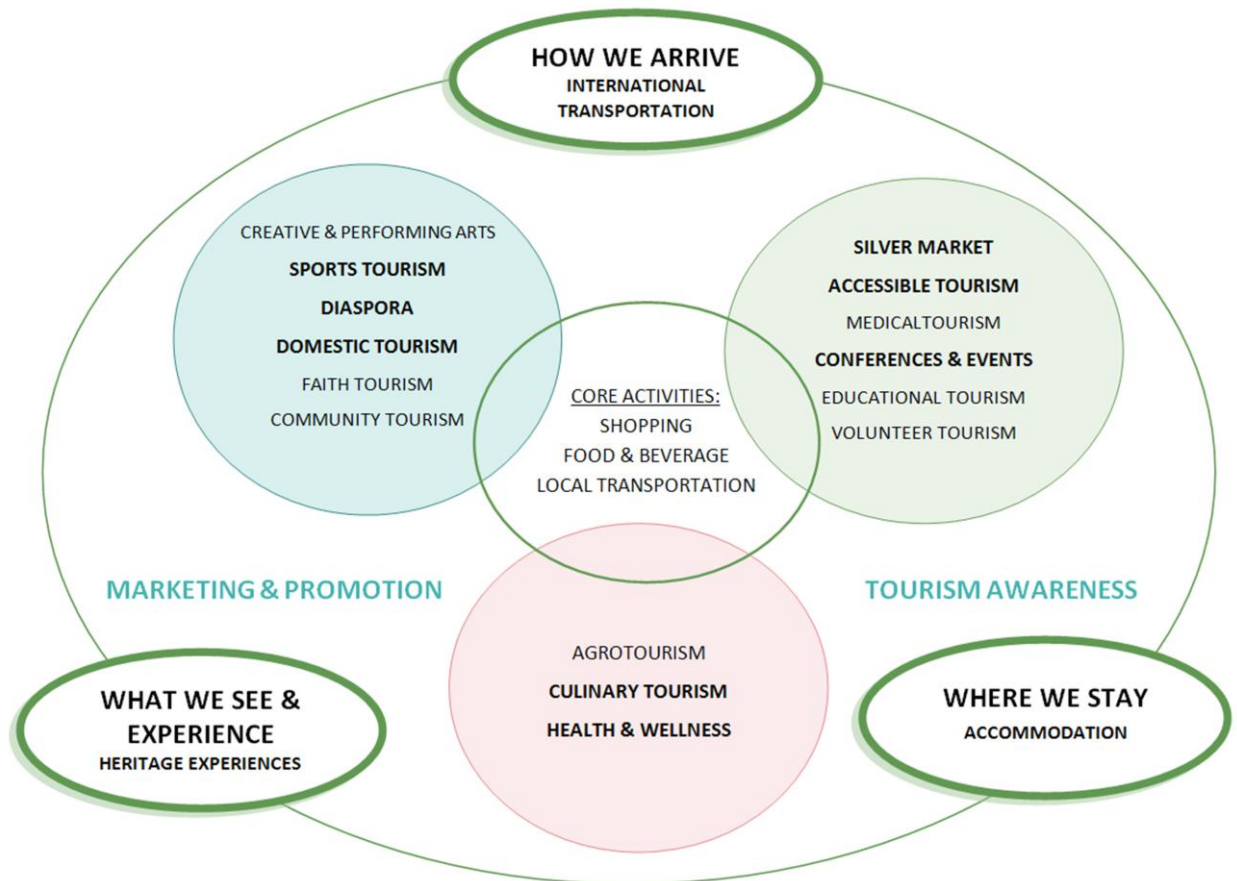


Figure 3.1. Key components of experience delivery that influence niche market development and promotion. Niche markets are grouped according to primary linkages and presented in coloured circles, with primary priority niches highlighted in bold.

3.2.1 Primary Niche Markets

The primary niche markets proposed for Barbados include:

- Accessible Tourism
- Conference Tourism
- Culinary Tourism
- Diaspora
- Domestic Tourism
- Health & Wellness Tourism
- Silver Tourism
- Sports Tourism

These niche markets are examined separately in Sections 3.2.1.1 through 3.2.1.8, and include proposed strategies specific to those markets. Given the unique nature of the Diaspora and Domestic Tourism markets, i.e. they are not true 'international' visitor markets for Barbados, their market potential has been assessed differently and summary profiles have not been prepared for them as has been done for all other primary niche markets. Refer to Sections 3.2.1.7 and 3.2.1.8 for relevant and readily available information on these two distinct primary niche markets for Barbados.

3.2.1.1 Accessible Tourism

Overview

The growing market of accessible tourism often referred to as "inclusive to all" is described in various ways around the globe. For example, it is known as Inclusive or Accessible Tourism in Australia, Access Tourism in New Zealand, and Barrier Free Tourism in the UK. Succinctly put, accessible tourism creates an environment where people of all ages and abilities feel welcome as customers and guests (Travability, 2012).

It is generally accepted that disability can occur at any age or stage in life, whether the circumstances are temporary or permanent. However, it usually has a relationship to aging. The global tourism industry has been faced with the challenge of facilitating access for all to its products and infrastructure. In keeping with the UN *Convention on the Rights of People with Disabilities*, all citizens should have the right to participate in the arts, leisure, sports and travel (Darcy and Dickson, 2009). This is not limited only to individuals in wheelchairs, but also to those travelers who may desire to access tourism facilities with ease of movement (Tourism New South Wales, 2005).

According to Darcy and Dickson (2009), tourism is a right of citizenship; therefore tourism institutions should be inclusive for seniors and people with disabilities. They stated that the application of legislation is one important aspect, but also critical is a change of perspective whereby tourism developers / entrepreneurs need to understand the market potential and apply universal design principles to their developments. To provide accessible destination experiences requires an understanding that the experience itself is multifaceted based on a

person's access considerations whether they have mobility, vision, hearing, and cognitive challenges.

Research on non-domestic travel suggests that about 7% of international travellers have some form of disability (Darcy, 2009). Assessment of the economic contribution of travelling tourists with disabilities was recently compiled in the UK where it was found that overnight trips made by individuals with a health condition or impairment contributed almost £1bn to the English domestic visitor economy in the first 6 months of 2009, totaling 5.7 million domestic trips. This highlighted the importance of considering people with access needs who accounted for 12% of all overnight domestic trips in England (European Network for Accessible Tourism, 2009). In the USA, adults with disabilities or reduced mobility currently spend an average of \$13.6 billion a year on travel (Rains, 2012).

Aside from individuals with disabilities, the 'baby boomer' generation is likely to retire with some level of reduced mobility. Unlike previous generations, this group is pursuing more adventurous vacation experiences in their senior years. As a result, accessible tourism has become an established niche area. It is predicted that by 2015, this group will control 60% of net US wealth and 40% of spending (Court et. al., 2007). The challenge then is to create accessible cruise ships, accessible cruise terminals, accessible ground transportation and accessible tourist destinations.

Table 3.3 presents a summary profile chart for Accessible Tourism.

Situation Analysis

Barbados has enjoyed repeat visits from a mature market sector, largely from the UK and North America, which continues to be a huge potential target market (see Section 3.2.1.2). There has been an increasing demand for fully accessible services and facilities in recent years. The White Paper states that special emphasis must therefore be placed on the creation of more accessible facilities, products, and services to accommodate these rapidly expanding markets in the areas of sidewalks, ramps, handrails, Braille signage, and menus (Strategic Solutions Inc., 2012, p. 116).

The Government of Barbados became a signatory to the UN Convention on the Rights of Persons with Disabilities in July 2007. Following a resolution submitted to the Government by the Barbados Council for the Disabled (BCD) and the wider community of persons with disabilities, the Government ratified this Convention on February 27, 2013 to become a States Party. This establishes the basis for enacting legislation that, *inter alia*, requires all new accommodation developments to incorporate infrastructure that enables full access by the physically challenged. The legislation would also address the retrofitting of existing accommodation infrastructure to international standards required for access by people with disabilities (pers. comm., R. Tudor, April 21, 2013). In order to facilitate positive growth in this niche, policies such as the UN Convention on the Rights of Persons with Disabilities will need to be taken even further (refer Action 12.1-3; see also Report III, Section 7.2).

Table 3.3. Summary profile chart for Accessible Tourism.

ACCESSIBLE TOURISM	
<p>Definition: Accessible Tourism enables visitors with access requirements (e.g., mobility, vision, hearing) to travel independently and with equity and dignity through the provision of universally designed tourism products, services and environments. Such tourists include those with permanent or temporary disabilities, travelling with children in prams, seniors and the obese. (Darcy and Dickson, 2009).</p> <p>Also Known As / Strong Linkages:</p> <ul style="list-style-type: none"> • Access tourism, Disability tourism, Handicapped tourism, Inclusive tourism, Universal tourism • Strong linkages with Medical/Health/Wellness tourism and Senior/Silver tourism 	<p>Barbados' Product-Market Match: Very Good <i>Potential</i></p> <p>Priority by Term: <u>Short Medium Long</u> Low Medium High</p> <p>Potential Benefits to Barbados:</p> <ul style="list-style-type: none"> • Facilities, services and information also serve local population in need and spur provision of other local-serving ones • Positive image for the country <p>Note: See also assessment of Silver tourism, given strong niche market overlap.</p>
GLOBAL MARKET SIZE AND KEY TRENDS	GENERAL MARKET PROFILE
<p>Global Market Size + Recent Growth:</p> <ul style="list-style-type: none"> • International: <ul style="list-style-type: none"> – 1+ billion disabled people globally (2 billion directly affected, including families, or one-third of population) (2011, WHO) – 600 million elderly • Rapid increase in senior population in developed countries • Europeans – Between 2005 + 2010, travel by Europeans aged 55+ increased by 17% and accounted for 27% of all overseas trips • UK – 2.7 million United Kingdom residents with disabilities travel annually. Foreign travel by seniors has risen 28% since 2005 • USA – Seniors comprise 47% of the annual US travel market • Lower level of travel and greater tendency for domestic travel than general population • Growing recognition that the tourism industry needs to adopt universal design principles as a foundation to achieving greater social sustainability, yet there is a lack of common standards + regulations • Gradual progress in removal of barriers is being observed • Over last 5 years, more rapid increase in dissemination of information for market and providers <p>Main Origin Markets:</p> <ul style="list-style-type: none"> • US – 50-80 million persons (21% of population) are disabled, with 70% able to travel • UK – 10-11 million persons (27%) disabled and 20 million required accessibility in 2005 • Europe – 45-50 million persons disabled, with 70% able to travel, and 81 million seniors <p>Main Destinations:</p> <ul style="list-style-type: none"> • Most often domestic-based • Western Europe – Portugal, Spain, UK (2013 target strategy of VisitEngland), Germany, France • North America – US, Canada, Mexico • Asia/Pacific – Australia, Singapore, China, India <p>Potential for Growth:</p> <ul style="list-style-type: none"> • Number of disabled people set to rise due to aging and increasing life expectancy of developed countries (STCRC) • Number of elderly 60+ expected to double between 2000 and 2025 (STCRC) • Germany – 60+ population to increase by 4 million between 2000 to 2020, becoming 29% of population • Boomers (future seniors) and senior market to dominate future tourism 	<p>Demographics:</p> <ul style="list-style-type: none"> • Disabled – All ages, levels of education and income; both sexes • Diverse sub-markets relate to nature of disability (e.g. mobility, visual, auditory, speech, intellectual, cognitive/learning, hidden such as allergies or diabetes) and affected needs • Although healthier, more active and longer living than previous generations, strong relationship between disability and aging • Seniors traveling with their children's families/grandchildren <p>Travel Planning + Patterns:</p> <ul style="list-style-type: none"> • Info/booking tools – Rely on word-of-mouth of other disabled travelers, specialist travel agent/brochures and Internet searches. Embrace technology for researching accessibility provisions • Seasonality – Flexible, with preference for low season when lower pricing and less crowds • Older seniors often stay longer and travel more often • Tend to spend more per day than able-bodied • Become loyal repeat travelers and word-of-mouth "ambassadors" when needs well met • Bring companions (families, caregivers), with a typical multiplier effect of 0.5-2 <p>Profile Changes Observed + Anticipated:</p> <ul style="list-style-type: none"> • None identified <p>Activities + Experiences Sought:</p> <ul style="list-style-type: none"> • Stronger emphasis on R&R and improving health as compared with able-bodied travelers • A change from their regular routine • Visiting friends and relatives • Attending a sporting event • Sightseeing <p>Expectations + Preferences:</p> <ul style="list-style-type: none"> • Entire tourism supply chain must accommodate special needs • Credible information assembled and made available to permit an informed decision to visit the destination
RELEVANT OFFERINGS IN BARBADOS	RELEVANT MARKET IN BARBADOS
<p>Major Selling Points and Recent Trends:</p> <ul style="list-style-type: none"> • Good quality accommodations, medical facilities + services • Fully Accessible Barbados (FAB) accreditation programme and website in place • Inclusive Tourism Symposium held in Barbados in December 2012 <p>"Must See/Do" Activities, Attractions and Experiences:</p>	<p>Market Size to Barbados (est.):</p> <ul style="list-style-type: none"> • Total by type: <ul style="list-style-type: none"> – Inbound: Number and % disabled Not Available. 217,158 (38% of total inbound arrivals in 2011) were 50+ – Cruise: Disabled/Senior passenger data N/A – Domestic: 28,000 disabled (Joey Harper)

(LOS required for these – 7 days)

- Browne's Beach "Floating Chairs" Aquatic Day Programme – Very good condition
- FAB (Fully Accessible Barbados) attractions – Harrison's Cave, Kensington Oval, George Washington House
- FAB - Fully Accessible Hotels – Good Condition
- FAB – Fully Accessible Shopping – Sheraton Mall
- FAB – Fully Accessible Transport – Grantley Adams International Airport, Ministry of Transport: 5 vehicles with wheel-chair facilities for people with disabilities (only 1 currently operational)
- Special Olympics National Games – 400 athletes

**Additional Activities, Attractions and Experiences:
(Additional LOS required for these– 7 days)**

- Fully Accessible Barbados (FAB) Awards

Extent of Available Offerings:

- Lodging – Few fully accessible facilities available; only 4 FAB accredited hotels in 2012
- F+B – Few fully accessible options; only 5 FAB accredited restaurants in 2012 (The Beach House, Just Grillin, Chefette, Brown Sugar)
- Services – Barbados Council for Disabled: Braille translation, Rehab Therapy, Library. Emergency and general medical facilities available
- Other – Only 1 beach facility, 2 attractions, 1 sporting facility, 1 shopping centre accredited by FAB. Lacking tours for disabled

Condition of Available Offerings:

- Lodging – Requires upgrading in general; Moderate at some accessible hotels
- Services – Accessibility for senior person with disabilities inadequate; medical services good

Improvements Needed To Better Serve This Niche:

- A holistic approach that covers transport, accommodation and attractions overall increased stakeholder participation in FAB programme by public and private facilities/venues for the range of accessibility types (mobility, vision, hearing)
- Continuous pathways
- Accessible public transport (low floor buses)
- Accessible destination experiences, including organized activities specifically for the accessible/silver market (e.g. live entertainment, educational programmes, art and shopping excursions)
- Accessibility of washrooms at venues
- Availability of disability aids at the destination (car rental, facilities, taxi services, care givers, equipment and supplies)
- More state of the art medical facilities on the west and south coasts
- Host Special Olympics Regional Games

Main Accessible Tourism Origin Markets to Barbados:

- Europe – UK; UK visitors constitute the highest number of arrivals to Barbados each year since 2007
- Emerging – USA and Canada; Americans constituted the 2nd largest number of visitors to Barbados annually 2008-2011

Main Competing Destinations for Barbados:

- In the Caribbean – St. Thomas
- Elsewhere – China, India, New Zealand, Mexico, Singapore

Market Profile to Barbados:

- Demographics – 217,158 visitors were aged 50+ in 2011, or 38% of total arrivals that year
- Travel planning – Not Available
- Travel patterns – Not Available
- Expectations – A high standard of sporting facilities and good accommodation

Recent Market Trends in Barbados:

- Over 33% of all stay-over visitors from 2007 to 2011 were aged 50+, and their totals increased steadily over this period
- Increase in villa sales to seniors

Potential for Growth:

- A fast growing niche market, especially in traditional origin markets due largely to aging population and travel patterns of aging baby boomers;
- Barbados has a long history of serving older (often repeat) visitors from traditional origin markets (e.g., adequate accommodations and medical facilities), providing what is already a significant market upon which to build
- Required facilities, services and information (e.g. accommodation, F+B) not yet adequately provided, although Fully Accessible Barbados (FAB) making progress
- **Not currently, but potential for a very good product-market match in Barbados** – Must address need for accessible facilities, services and information in order to attract and satisfy this market and to compete with international trends. Improvements should be made anyway to meet needs of local population.

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Barbados has also benefited from the initiatives of the BCD, a non-governmental association that acts as the umbrella for 18 organizations representing persons with disabilities. One of its key objectives is to promote programmes for the education, training, employment, and welfare of the disabled.

With regard to two of Barbados' main source markets, it is estimated that there are over 22 million individuals in the US and 10 million in the UK with disabilities, a growing tourist market worldwide (Fully Accessible Barbados, 2011). Importantly, persons with disabilities travel with family members, friends and caregivers in their entourage, whether to seek medical care, vacation, or attend conferences. Since tourism is the driver of the local economy, it is apparent that improvements in accessibility to buildings, conference venues, outdoor areas, and other facilities must now be rated as high priority given that 10% of the world's population is disabled, persons with disabilities are interested in travel, and many of them do so with companions (Rhodda, 2008; World Health Organization, 2013). This market could therefore be lucrative for Barbados if the appropriate facilities are put in place to support them.

Established in 2005, Fully Accessible Barbados (FAB), an initiative of the BCD, is a programme designed to promote the required changes in the enabling environment to facilitate individuals with disabilities being able to enjoy full access to all facilities. The FAB programme is based on international standards for accessibility. Properties are currently being assessed to determine the level of accessibility to a range of disabled persons (pers. comm., R. Tudor, April 21, 2013).

The White Paper indicates that standards governing the FAB accreditation scheme are broken down into the following main categories: independent wheelchair user, wheelchair assisted, mobility challenged, blind and visually impaired, and deaf and hearing impaired. The White Paper also states that "*while there has been some progress in making hotels and other tourism facilities accessible, significant work is needed to make Barbados a destination that caters to all types of disabilities*" (Strategic Solutions Inc., 2012, p. 210).

Universal design, which emerged from earlier barrier-free concepts and the broader accessibility movement, is now regarded as being important for all persons regardless of age or disability. As life expectancy rises and modern medicine increases the survival rate of those with significant injuries, illnesses, and birth defects, there is a growing interest in universal design (Wikipedia, 2013). With approximately 10% of the world's population being disabled, or 650 million individuals worldwide including 14,000 local residents, Barbados is faced with the urgent requirement to upgrade its establishments with infrastructural elements including ramps, sidewalks, handrails, parking areas, and specially equipped bathrooms.

New hotel accommodation will require smart solutions. These would include a lowered hotel reception desk for wheelchair users, a guest computer in the lobby at a comfortable height for both a wheelchair and an ordinary chair, seating areas in hotel lobbies, and electrical switches positioned at a height accessible to all users (see also Section 2.8 in Part 1).

FAB compliant plaques have been awarded to several hotels and commercial establishments in Barbados that have met the criteria for eligibility (see Table 3.4).

Table 3.4. Fully Accessible Barbados certification awardees.

Hotels	Accra Beach, Amaryllis, Bougainvillea, Hilton Hotel, Courtyard Marriott, Rostrevor Hotel, Plum Tree Rockley, Colony Club
Places	George Washington House, Kensington Oval, Lanterns Mall, Sheraton Centre Mall, Bath Beach Facility, Grantley Adams International Airport, Trimart Rendezvous
Restaurants	Beach House, Chefette, Just Grillin' (west coast), Accra restaurants (2), Hilton restaurants (3), Courtyard Marriott restaurant
Pending	Bridgetown Cruise Terminals, Radisson Aquatica Resort, Coral Reef, Savannah, Sandpiper, LESC, Pirates Inn, Palm Garden Hotel, Europa, Kensington Court, Dover Beach Hotel, BL&P, Museum of Parliament, Diabetes Association Bldg., Boabab Towers, Waterfront Café, Barbados Concorde, Keystone Villa, Italia Coffee House
<i>Source:</i> Barbados Council for the Disabled, 2014.	

Incentives are provided under the Tourism Development Act (2002) to investors who plan to construct or refurbish a tourism project. Duty free concessions extend to such items as building materials, furniture and fittings subject to appropriate applications to government.

In order to promote awareness of the needs within this area, the BCD, in collaboration with the Ministry of Education and local schools, celebrates "Disability Awareness Day" in March each year to highlight the importance of the topic. In addition, the Rotary Club of Barbados' "Sea for All" programme at Browne's Beach provides 3 'floating chairs' for the physically challenged, illustrating an example of best practices (pers. comm., R. Tudor, April 21, 2013).

However, there continues to be limited beach access for the physically challenged and the elderly at the majority of beach sites. Barbados would stand to benefit from the establishment of accessible beach facilities in the major Tourism Zones along the west and south coasts. Upgrades would include washroom areas, paved access, and where feasible, ramped access to beaches built to the appropriate grade. These facilities would complement the availability of floating chairs for the disabled at selected locations (refer Action 2.1a-2).

Currently, 19 hotels and 8 apartments are listed by the Barbados Tourism Authority as having facilities for the disabled. This represents approximately 30% of existing hotels and 10% of existing apartments; it does not necessarily imply that comprehensive access by the disabled is possible at these establishments.

In order to heighten visitor satisfaction among persons and families requiring mobility aids, a higher standard of physical accommodation needs to be set for tourists requiring accessible

amenities. This includes a large number of senior citizens who tour the island. The lack of continuous sidewalks, ramps and pathway access, particularly in commercial areas and buildings, is prohibitive to accessible travel for both locals and tourists. In locations such as Broad Street, accessibility upgrades may require the interruption of vehicular or pedestrian traffic flows during phases of construction activity (refer Action 2.1a-1). However, the enhancement of accessible amenities will positively impact the overall visitor experience and product rating. Improvement of pedestrian infrastructure would also be advantageous to all users.

Currently, there is a comparatively small number of registered businesses and overall low stakeholder participation in the FAB programmes for the range of accessibility types (e.g. mobility, vision, hearing). This indicates a greater need for more service providers, especially in the accommodation sector, to be certified by FAB through upgraded infrastructure and active participation by business owners.

There are only a minimum number of transport and service providers facilitating on-island accessible travel. The cost of a new accessible vehicle as used by BCD is BDS\$115,000 duty-free. The breakdown of accessible vehicles currently available in Barbados is presented in Table 3.5.

Table 3.5. Number of accessible vehicles currently available in Barbados.

Organization	Accessible Vehicles	Description
Barbados Council for the Disabled	3	Vehicles that hold up to 4 wheelchairs or 13 seated
National Disability Unit	1	Van
Taxi Association	5	Private taxis with lifts
Ministry of Transport and Works	5	Vehicles (only 2 currently in working condition)

Source: Pers. comm., R. Tudor, Barbados Council for the Disabled, 2014.

Local standards will have to be improved to accommodate international requirements. Venues such as Grantley Adams International Airport, the Bridgetown Port, and the National Sports Stadium do not have fully accessible washrooms in accordance with international standards. An increased number of facilities made accessible would open Barbados' options and potential for catering to repeat visitors who are typically in more mature age groups (e.g. refer Action 2.1a-2).

With respect to opportunities for niche market expansion in accessible sports, the potential for introducing inclusive sailing activities in Barbados was examined and recommendations provided (Staley, 2011; refer also Action 2.1a-3). The report noted that limited local

experience in delivering inclusive training and development programmes or marketing and conducting major sailing events was a weakness in the ability to maximize this niche, coupled with low participation in sailing within the Barbadian population and the lack of an accessible marina.

Nevertheless, the option for the Bridgetown Careenage to be upgraded to fill this gap is viable, whereby the island can attract a broader range of international users who prefer the warm weather conditions of the island. Boats will need to be custom-made for the purpose (see Figure 3.2).



Figure 3.2. Universal Design Sailboats recommended for an Inclusive Participation Programme at the Careenage (Staley, 2011).

Recommendations of the report included key measures necessary for facilitating growth in this area, particularly with respect to the Careenage:

- Encourage the Barbados Sailing Association (International Sailing Association, ISAF, Member National Authority) to adopt an Inclusion and Access Policy that is shared with affiliated clubs and involve all stakeholders in the preparation of a programme for the development of inclusive sailing participation and events
- Commence activity with a participation programme focused on fun recreation
- Establish learn to sail and skill development programmes

Additionally, these activities would be supported by the development of inclusive racing opportunities in local yacht clubs. Recent refurbishments in the Careenage have improved overall standards for sailing and mooring of boats (see Figure 3.3). Also, ensuring that the proposed marina development at the Pierhead is fully accessible and has the capacity to host major sailing events and championships would enhance the promotion of Barbados as a major venue for sailing events. Governmental and non-governmental stakeholders include the Barbados Sailing Association, the Barbados Yacht Club, the Ministry of Tourism, the Barbados Tourism Association, the Paralympics Association of Barbados, and the Barbados Council for Disabled.



Figure 3.3. Refurbished inner basin of the Bridgetown Careenage is the proposed venue for the development of accessible sailing activities.

Strategic Outlook

Given that Barbados already draws a large proportion of its visitors from the silver market demographic (see also Section 3.2.1.2), and there is a highly lucrative market of disabled travellers globally, Accessible Tourism is being viewed as a potential priority niche market area for Barbados. However, the provision of accessible accommodation and infrastructure will need to become a standard practice in order for this niche market to develop its full potential. In addition, it will be important for all relevant stakeholders to support the ongoing FAB initiatives through the BCD via funding and implementation by both the private and public sectors. The required enactment of legislation relative to the UN Convention should help to drive the process forward (see Action 12.1-3).

The benefits to the local tourism industry in embracing strategies and actions for promoting Accessible Tourism are international recognition of FAB standards, increased revenues, and enhanced marketability in a globally competitive environment. Barbados should therefore embrace this sector as a high priority in planning for the next decade.

It is recommended that full accessibility should be provided on arrival at the airport and seaport.

The following Actions recommended to promote Accessible Tourism are in support of Strategic Imperative 2 on **'Enhance the Visitor Experience'** and corresponding Strategy

2.1 which states: “Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending”. One of these recommended Actions also relates to Strategic Imperative 12 on ‘Update and Enforce Policy and Legislation to Support the BVE’, and corresponding Strategy 12.1 which states: “Review local legislation to update existing and enact new laws to facilitate functioning of the BVE” (refer Report I, Sections 4.4 and 5.0).

12.1-3 Enact Legislation to Enable Accessible Infrastructure

2.1a-1 Make Bridgetown More Accessible for the Disabled

2.1a-2 Facilitate Beach Access for the Disabled

2.1a-3 Provide Opportunities for Accessible Sailing

Full descriptions of these Actions are presented below.

Actions Recommended to Promote Accessible Tourism

12.1-3 Enact Legislation to Enable Accessible Infrastructure

Description:

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

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

Currently, 19 hotels and 8 apartments are listed by the Barbados Tourism Authority as having facilities for the disabled, which represents approximately 30% of existing hotels and 10% of existing apartments; this does not necessarily imply that comprehensive access by the disabled is feasible at those establishments (pers. comm., R. Tudor, BCD, January, 2013).

Expected Outcomes:

- The standard of Barbados’ physical infrastructure would be raised to international standards with respect to facilitating both locals and visitors
- More visitors requiring accessible services and accommodation would be attracted to the island
- Employment opportunities would be increased

Guidelines for Implementation:

Establish a monitoring committee to oversee and guide the next steps in the process. The Ministry of Health, Ministry of Housing and Ministry of Education will meet the requirements of accessible housing, education and awareness. The Ministry of Public Works will promote requisite specifications for parking in public car parks.

Challenges With Implementation:

- Timing of decision by the Government of Barbados to enact legislation which will provide for the necessary enabling environment
- More funds are needed to create awareness through a major public relations campaign

Recommended Implementation Agency:

Government and specifically the Ministry of Public Works and Ministry of Tourism in association with the Barbados Council for the Disabled would be responsible for implementation of the Convention and subsequently report to the United Nations in 4 years. This will be the process to full inclusion for all in Barbados.

Priority/ Implementation Timeframe:

High/Short Term: This is viewed as an **enabling** priority action in the TMP Implementation Plan (refer Report I, Section 5.0)

The ratification and ensuing enactment of legislation to support visitors with disabilities will open up the market for this demographic which is currently significant.

Target Users:

- Visitors with disabilities
- Residents with disabilities

Who Benefits:

The beneficiaries will be visitors and residents with disabilities, the accommodation sector and businesses offering ancillary services for increased visitor arrivals, and government through increased revenues

Risks:

- A major risk is Government not expediting the enactment of legislation
- Without this approach to expedite the infrastructural conversion process in the accommodation sector, many more years of effort would be required to realize the same output, resulting in the loss of potential revenue from this untapped market

Estimated Costs:

- Costs to enacting legislation to be determined
- Costs associated for compliance with new standards by the accommodation sector to be determined

Source of Funds:

- Government of Barbados for legislation and enactment
- Ministry of Tourism to continue to expand and promote Fully Accessible Barbados
- Ministry of Social Care
- Hoteliers for infrastructural compliance
- Barbados Tourism Investment Inc. as a potential funding agent, as well as the Caribbean Investment Facility recently created by the European Union

Revenue Generation Potential:

Enhanced tourism revenues from increased visitor arrivals from this target market

Further Development Work Required:

- Costing
- Sourcing financing
- Sponsorship from the businesses community, hoteliers etc. to support Fully Accessible Barbados through the recent BDS\$7,000 'lighted bus stop' promotion

Other Considerations: Linkages to Silver Market Tourism, Medical Tourism

2.1a-1 Make Bridgetown More Accessible for the Disabled**Description:**

In the UNESCO World Heritage Historic Bridgetown area, this strategy is intended to address needs for upgrading Broad Street and its environs for all users resulting in improved amenities and a more pleasant visitor experience. The strategy would also promote greater access for all, including cruise passengers, through ongoing site assessment of existing public areas, sidewalks and entrances to commercial buildings within the city centre to enhance accessibility for users with disabilities. The redevelopment programme would extend from the General Post Office area to the Nelson statue. Some initiatives are in progress through the Ministry of Public Works.

Expected Outcomes:

- A higher standard of physical infrastructure would be established for visitors requiring accessible amenities in accordance with international standards
- Increased visitor satisfaction among persons and families requiring mobility aids. This includes a large number of senior citizens who tour the island
- Broad Street has an approximate length of 762 metres, and the strategy is intended to make the area more accessible to wheelchairs, the elderly, and others with physical challenges
- Enhanced safety for all users will be a priority

Guidelines for Implementation:

- Formal approvals from the Town & Country Development Planning Office and the Ministry of Public Works will be a standard pre-requisite to the process; however, if ongoing urban improvements operate under the jurisdiction of MPW, this issue would be expedited
- The inclusive design for all would include new or refurbished drop curb installations where applicable at major access points along Broad Street, including Cave Shepherd & Company Ltd which attracts significant pedestrian traffic
- Improved maintenance to all pedestrian crossings and ensure adequate lighting
- Commercial entrances to be graded for wheelchair access
- Addition of ramps and handrails where applicable

Challenges With Implementation:

- Vehicular or pedestrian traffic flows along Broad Street would of necessity be interrupted during periods of construction activity
- Retail operations would also be impacted in terms of access, dust and pollution
- Work would have to be scheduled to mitigate inconvenience to the public

Recommended Implementation Agency:

- The most appropriate entity to be responsible for coordination of the ongoing programme is the Ministry of Public Works in association with the Ministry of Tourism, Ministry of Health and the Barbados Chamber of Commerce
- Similar retrofit operations in the city centre have been successfully implemented in this manner
- Stakeholders' interests would be represented by the Barbados Chamber of Commerce

Priority / Implementation Timeframe:

High/Short Term: Given Government initiatives including the Bridgetown Urban Rehabilitation Programme, and the current Barbados Chamber of Commerce 'Revitalization of Bridgetown' Initiative (2010), implementation of programmes to enhance Historic Bridgetown for pedestrian use and importantly the physically challenged must be accorded a high priority in the short term.

Target Users:

- Commercial/retail shoppers
- Stay-over tourists & cruise ship visitors
- Local residents
- Taxi operators

Who Benefits:

The beneficiaries will be all residents of Barbados, businesses in all sectors, visitors and government through increased commercial activity

Risks:

- The major risk is poor coordination efforts and delay in government approvals processes
- Lack of adequate funding or support
- Lack of cooperation amongst stakeholders, retail operators

Estimated Costs:

- Initial estimates would be in the range of approximately BDS \$500,000
- Costing at approximately BDS\$85.00 per square metre for concrete sidewalk works
- Construction is envisaged in phases over a 6-12 month period

Source of Funds:

- Could be eligible for funds under various government agency programmes including Ministry of Public Works and Barbados Tourism Investment Inc. (BTII)
- There is potential for application to the Tourism Development Corporation (TDC)

Revenue Generation Potential:

Further analysis required but increased retail activity is anticipated

Further Development Work Required:

- Assessment through the Ministry of Public Works and Barbados Chamber of Commerce
- Technical specifications & construction drawings
- Coordination with Environmental Protection Department, Ministry of Health, Ministry of Tourism
- Confirm agency and stakeholder involvement including Barbados Council for Disabled
- Arrange financing package

Other Considerations: Linkages to Silver Market Tourism

2.1a-2 Facilitate Beach Access for the Disabled

Description:

Encourage beach access through the acquisition of ‘Mobi-chairs’ for the physically challenged (see Figure 3.4). At present, access for use of these wheelchairs can easily be facilitated at the Hilton and Enterprise beaches. The locations at Browne’s Beach and Rockley Beach require improvements to infrastructure. To date, Rotary Barbados has supported this initiative with a donation of 3 to 4 beach chairs that are stored at the premises of the National Disabilities Unit. The Barbados Council for the Disabled has informed that these are not readily available to the general public (pers. comm. Roseanna Tudor, BCD, January, 2013).



Figure 3.4. Mobi-Chair (Source: Assistive Technology Blog, 2013).

Public bathroom facilities under the jurisdiction of the NCC are fully accessible at both Bath Beach and Pebbles Beach, although access to the beach itself is problematic at these locations.

Expected Outcomes:

- Improvement of access at key local beaches to facilitate the disabled or the physically challenged
- Promotion of an improved standard of service in the tourism industry leading to increased visitor satisfaction with local offerings

Guidelines for Implementation:

The current needs suggest that there should be a minimum supply of twelve (12) beach wheelchairs or ‘Mobi-Chairs’. These chairs need to be deployed at an agreed location which is readily accessible to the relevant agencies

Challenges With Implementation:

- Assistance by trained personnel on the beaches, in addition to safety equipment will be necessary for all beach sites using the chairs. Lifeguards may need to be trained in the use of the equipment
- Safe storage of the chairs will be necessary

Recommended Implementation Agency:

The Barbados Council for the Disabled: a key stakeholder for implementation, and also a primary stakeholder in organizing accessible transport to and from sites

Priority / Implementation Timeframe:

Medium/ Short term: Greater access to such services will allow Barbados to demonstrate its commitment to service and quality in this niche market area

Target Users: Locals and visitors requiring accessible recreational opportunities on the coast
Who Benefits: <ul style="list-style-type: none"> • Visitors and locals • Persons with either disability of reduced mobility issues • Barbados as a nation will be aided by the availability of these services for both locals and visitors who are currently restricted in their activity options
Risks: <ul style="list-style-type: none"> • Unavailability of staff to assist users, and store and maintain equipment • Safe dedicated storage facility for chairs
Estimated Costs: Costs associated with acquisition of boats and implementation are BDS\$72,000 at \$6,000 per chair.
Source of Funds: <ul style="list-style-type: none"> • Sources of funds will include sponsors and service clubs • This activity may be eligible for support by the Tourism Development Corporation
Revenue Generation Potential: Nominal rental fees can be applied.
Further Development Work Required: <ul style="list-style-type: none"> • Sourcing of Mobi-Chairs • Collaboration with trained personnel in both swimming safety and accessibility • Planning of locations and preparing storage facilities for chairs • Promotion of beaches offering the service
Other Considerations: Linkages to Silver Market Tourism, Sports Tourism

2.1a-3 Provide Opportunities for Accessible Sailing

Description:

Sailing has been a popular activity in Barbados for all ages and there is an opportunity to develop water-based activities for accessible tourism that are at present very limited or non-existent. Promoting inclusive sailing events within the Careenage would add a new dimension to what is currently being offered in Barbados, and would help to promote the island as an accessible tourism destination.

Expected Outcomes:

- Expansion of the tourism product offering to visitors, locals and their families seeking opportunities to participate in accessible adventure sport
- Worldwide exposure through electronic media

Guidelines for Implementation:

- Purchase of required start-up equipment will include boats, i.e. access dinghy range, life-vests, transportation and maintenance of marine craft
- With respect to developing a prime central location, the Careenage basin is fully accessible

based on an assessment conducted by the Council for the Disabled. This agency should be approached for assistance in establishing the inaugural event for both competitive local and visiting teams

- The sporting opportunity, owing to its location, would also be accessible to cruise ship visitors

Challenges With Implementation:

- Maintenance of drainage and cleaning of the Careenage would be necessary to maintain a water-based environment that is clean and conducive to public activity
- Engaging supervisory staff and custom designed boats to organize the sailing experience

Recommended Implementation Agency:

In association with the Ministry of Tourism, the Barbados Council for the Disabled would be a key stakeholder for implementation along with the Barbados Sailing Association & the Barbados Sports Council

Priority / Implementation Timeframe:

Medium/ Short term: The absence of accessible activities in Barbados for the disabled community is a major concern

Target Users:

Locals and visitors seeking accessible recreational sporting opportunities

Who Benefits:

- Visitors and locals
- Persons with either disability or reduced mobility issues
- Barbados will also benefit from increased visitor satisfaction with expanded product offerings in a typically overlooked but critically important area

Risks:

- Unavailability of reliable staff and maintenance crews to provide weekly service to interested participants
- Safe dedicated storage facility for boats and equipment

Estimated Costs:

Costs associated with acquisition of boats and implementation are BDS\$300,000

Source of Funds:

- Sources of funds include sponsors, service clubs and direct revenues from operation of the boats.
- This activity may be eligible for support by the Tourism Development Corporation

Revenue Generation Potential:

Boating user fees will be applied

Further Development Work Required:

- Sourcing of adequate boating equipment
- Collaboration with knowledgeable personnel in both sailing and accessibility requirements
- Planning regarding locations for launching boats, preparation of sailing schedules
- Identifying stakeholders for marketing and promotion

Other Considerations: Linkages with Attractions, Sports Tourism, Silver Market Tourism

3.2.1.2 Silver Market Tourism

Overview

The Silver Market, also known as the Mature or Seniors Market, is defined as people over the age of 50 (Walker, 2009), or as seniors and aging 'Baby Boomers' born between 1946 and 1965 (Rhodda, 2008). According to the White Paper, travel data projects that seniors will be the predominant traveling demographic in the future (Strategic Solutions Inc., 2012, p. 116). Baby Boomers are currently the highest income earners when compared to other groups, generally have money to spend on travel, are internet savvy, and will demand appropriate services. In addition, they spend a greater percentage of their discretionary income on traveling than any other market segment, and have more time to travel (Walker, 2009). This segment can therefore help to increase visitor spend, occupancy rates (including off-season periods), and foster repeat visitation.

There is abundant research globally on the travel patterns of the silver market. In the USA, seniors comprise 47% of the leisure travel market, and are willing to travel in shoulder seasons if there is enough incentive provided. Research on this age group indicates that they are a largely untapped market, and it is growing at a phenomenal rate (see Figure 3.5 for USA profile). In the USA, the next generation of retirees are predicted to be the healthiest, longest lived, best educated, and most affluent in American history; by 2030, one in five Americans will be 65 years or older, creating a situation that will affect social institutions and public policy for the next 50 years (US Census Bureau – In: Bruhn, 2011).

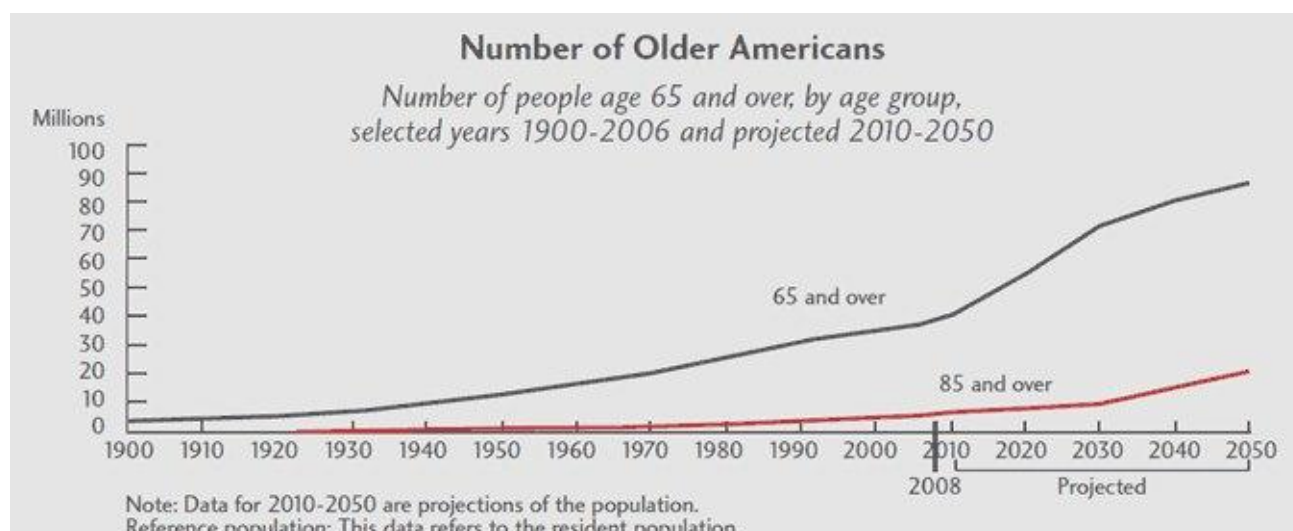


Figure 3.5. Aging profile compiled by the US Census Bureau (In: Bruhn, 2011).

In order to appeal to this market, tourism destinations need to understand the needs and desires of the older traveler and provide the services that appeal to them. Some traveling seniors have a high disposable income and like to visit specific destinations where they can meet people. They are not just looking for sun, sea and sand, but want to see and experience things unique to them (Turkel, 2006).

People aged 50 and over are more mobile and active than ever before. From 2005 to 2010, there was a 17% increase in travel by Europeans 55 years or over and they accounted for 27% of all trips taken abroad (i.e. 78 million holiday trips). Foreign travel by the silver market group from Britain has risen by 28% since 2005. Moreover, 25% of British people over 55 years of age plan to take a break of 3 months or longer, spending more than £4,000 each (Rhodda, 2012¹). Britain, Germany, France, and the Netherlands account for almost 60% of all travelers over the age of 55. Holidays at beach resorts are significantly the most popular choice among Europeans aged over 50 years, and are the most expanding sector, rising by 22% since 2005 (Rhodda, 2008).

A report on Australian Baby Boomers found that 5.5 million of them will eventually control almost \$1 trillion, and they plan to spend their money, with their priority being on travel, followed by family, home improvement, entertainment, and restaurants. About 31% expect to retire in the next 5 years at an average age of 64, and are seen to hold the key to the sustainability of the tourism industry globally (Rhodda, 2012²).

Market research conducted by the Cultural Traveler in the USA found that travelers who generate the greatest return on investment have the following profile (Henry, 2011):

- Baby Boomer/Seniors
- College Degree/Professional
- Annual Income of US\$75,000 or more
- Stays longer and spends more
- Looks for unique travel experiences
- Wants value (in time and dollars)
- Spends \$3,000+ on 4.2 trips per year
- The force behind Multi-Generational Travel
- Source information from the Web (as well as word of mouth)
- Part of 80%+ of Americans who book travel online

The research indicated that the seniors' demographic stayed longer and spent more money while traveling, which is consistent with findings from other parts of the world. Given the competition from other warm weather destinations both regionally and globally, Barbados is well-placed to capitalize on this lucrative market to help boost visitor arrivals, accommodation occupancy rates, and visitor spend.

Table 3.6 presents a summary profile chart for Silver Market Tourism.

Table 3.6. Summary profile chart for Silver Market Tourism.

SILVERMARKET TOURISM	
<p>Definition: For travel and tourism purposes and depending on the source, anyone over 55 or 65 years of age, with three age distinctions: young-old (aged 55-64, old (aged 65-74) and very old (aged 75+).</p> <p>Also Known As / Strong Linkages:</p> <ul style="list-style-type: none"> • Mature market, Senior market, Silver market, Silver Surfers • Baby Boomers are the young-old segment of this niche market • Strong linkages with Accessible tourism, Cruise tourism, Culinary tourism, Cultural heritage tourism, Medical/Health/Wellness tourism 	<p>Barbados' Product-Market Match: Very Good</p> <p>Priority by Term: Short Medium Long High High High</p> <p>Potential Benefits to Barbados:</p> <ul style="list-style-type: none"> • Help create off-season demand and lessen seasonality cycles • Satisfaction often results in loyal repeat visitation
GLOBAL MARKET SIZE AND KEY TRENDS	GENERAL MARKET PROFILE
<p>Global Market Size and Recent Growth:</p> <ul style="list-style-type: none"> • International – Spectacular increase in senior population in developed countries • Europeans –80 million of population were elderly (>65) in 2005. Between 2005 and 2010, travel by Europeans aged 55+ increased by 17% and accounted for 27% of all overseas trips • UK –10 million of population were elderly (>65) in 2005. Foreign travel by seniors has risen 28% since 2005 • USA –Seniors comprise 47% of the annual US travel market • Boomers – Large numbers and growing shares of population, especially in developed countries; 80% of all US leisure travel <p>Main Origin Markets:</p> <ul style="list-style-type: none"> • Europe – Germany, UK, Benelux, Italy, France, Scandinavia • North America – USA and Canada • Major tour operators include Elderhostel (USA) <p>Main Destinations:</p> <ul style="list-style-type: none"> • Boomers – Prolific world travelers <p>Potential for Growth:</p> <ul style="list-style-type: none"> • International – 60+ population will double between 2000 and 2025 • Germany – 60+ population to increase by 4 million between 2000 to 2020, becoming 29% of population • Boomers (White Paper, p. 128): <ul style="list-style-type: none"> – “The most lucrative market of the future” – Baby Boomer numbers and shares of population, wealth, discretionary income and travel spending will continue to grow – Boomers and senior market will dominate future tourism 	<p>Demographics:</p> <p>Silvers:</p> <ul style="list-style-type: none"> • Born before 1946, span all ethnic groups and both genders • Typically retired, with pensions, investments and benefits <p>Boomers:</p> <ul style="list-style-type: none"> • Born between 1946-64 • Highly educated • Hard working retirees with time and money to travel and travel a high priority • High asset wealth and available discretionary income • Now healthier, more active and longer living than previous generations <p>Travel Planning and Patterns:</p> <ul style="list-style-type: none"> • Seniors market highly lucrative – Spans 30-40 years of life as a consumer, and travel is favoured • Beach holidays outstrip any other type of vacation <p>Boomers:</p> <ul style="list-style-type: none"> • Info/booking tools – Embrace technology for researching + booking but wealthiest prefer service of luxury travel agents • Seasonality – Flexible, when lower pricing and less crowds • Older seniors often stay longer and travel more often • Spending – Total of \$500 M/year on vacations (ASTA); Drive luxury spending due to their volume and income; Spend a greater % of their income on travel • Experienced travelers <p>Profile Changes Observed and Anticipated:</p> <p>Boomers:</p> <ul style="list-style-type: none"> • Growing interest in multi-generational travel with family, milestone celebration vacations and grand travelers (grandparents with grandchildren) • More frequent use of health-related goods and services • Fastest growing user group of social networking sites <p>Activities and Experiences Sought:</p> <p>Silvers:</p> <ul style="list-style-type: none"> • Excellent beaches and consistent warm weather <p>Boomers and seniors:</p> <ul style="list-style-type: none"> • Unique, exclusive, once-in-a-lifetime, quality • Educational, spiritual and physical enrichment • Themed – Art and architecture, culture, history, hiking, golf, sailing, spas and wellness, performing arts, food and wine • Active and fun, experiential • Element of effort and accomplishment • Interactive – New cultures, foreign languages, exotic cuisines • Sustainable <p>Expectations and Preferences:</p> <ul style="list-style-type: none"> • Accommodation and services – Good quality and accessible • Access to adequate medical facilities and quality medical care • Clean environment and safe haven • Rank value and convenience above price • Boomers: More demanding, Personalized service

RELEVANT OFFERINGS IN BARBADOS	RELEVANT MARKET IN BARBADOS
<p>Major Selling Points and Recent Trends:</p> <ul style="list-style-type: none"> • Good quality accommodations, medical facilities and services • Excellent beaches and consistent warm weather • Clean and generally safe (though a growing concern) • Cruise liners to Barbados offer 55+ years passengers discounts <p>“Must See/Do” Activities, Attractions and Experiences: (LOS required for these – 7 day minimum)</p> <ul style="list-style-type: none"> • Heritage attractions, e.g. St. Nicolas Abbey – Excellent restoration + experience • Natural attractions, e.g. Farley Hill National Park, St. Andrew • Visit local pottery and handicrafts, e.g. Earthworks Pottery, St. Thomas – Excellent local crafts • Mount Gay Rum visitor centre– Good / educational • Barbados National Trust open houses – Excellent opportunity to view local homes of distinction <p>Additional Activities, Attractions and Experiences: (Additional LOS required for these– 7 days)</p> <ul style="list-style-type: none"> • Catamaran cruise and swim with sea turtles – West coast, excellent outing, with local food and music • Visit local food markets e.g. Brighton Farmer’s Market, St. Thomas – Good experience, local/country style • Spa treatment – Various locations or private masseuses • Sporting events such as polo at Holders, St. James, Lion Castle, St. Thomas or Apes Hill, St. James – Excellent quality • Tea at St. Nicolas Abbey, St. Peter or Sunbury Plantation, St. Philip – Experience old Barbados <p>Extent of Available Offerings:</p> <ul style="list-style-type: none"> • Lodging – 63 registered hotels, 74 apartments and 19 guesthouses – of these, 19 hotels and 8 apartments have some facility for disabled persons. Also 815 private villas for higher end visitors and/or extended stay-over. Numerous unregistered rooms/apartments in private homes – BTA trying to obtain data. • F+B – Total of 111 restaurants registered with BTA. Also small food outlets. Nightclubs and bars mostly concentrated on south + west coasts. About 1,000 rum shops scattered island-wide • Services – Lacking services specifically targeting the silver market, but most general services would appeal. Emergency and general medical facilities available • Other – Lacking organized entertainment, shopping excursions, educational programmes, live shows, etc. geared to mature market <p>Condition of Available Offerings:</p> <ul style="list-style-type: none"> • Lodging – Requires upgrading in general; most private villas are of a high quality. More brand name hotels required • F+B – Varied cuisine available, including high quality restaurants, and those that are Zagat rated • Services – Accessibility for senior person with disabilities inadequate; medical services good <p>Improvements Needed To Better Serve This Niche:</p> <ul style="list-style-type: none"> • More accessible facilities and services • Organized activities specifically for the silver market (e.g. live entertainment, educational programmes, art and shopping excursions) • More state of the art medical facilities on the west and south coasts • Accommodations, activities and attractions that meet the needs of multi-generations traveling together 	<p>Market Size to Barbados (est.):</p> <ul style="list-style-type: none"> • Total by type (2011): <ul style="list-style-type: none"> – Inbound: 217,158 (38% of total inbound arrivals) were 50+ – Cruise: Senior passenger data N/A – Domestic: 10% of total population are 65+ years <p>Main Silver Market Origin Markets to Barbados:</p> <ul style="list-style-type: none"> • Europe – UK; UK visitors constitute the highest number of arrivals to Barbados each year since 2007 • North America – USA and Canada; Americans constituted the 2nd largest number of visitors to Barbados annually 2008-2011 • Caribbean – CARICOM countries • Emerging – BRIC <p>Main Silver Market Competing Destinations for Barbados:</p> <ul style="list-style-type: none"> • In North America – Mexico • In the Caribbean – Dominican Republic, Jamaica <p>Market Profile to Barbados:</p> <ul style="list-style-type: none"> • Demographics – 217,158 visitors were aged 50+ in 2011, or 38% of total arrivals that year. In 2006, 52% of the stay-over arrivals were female. • Travel planning – From Jan. to June 2011, 53% surveyed felt Internet ‘very important’ as an info source for deciding to visit Barbados, followed by the Friends/Relatives category; 62% of visitors made their own travel arrangements vs. using a prepaid package over the same period • Travel patterns (2011) – LOS mostly 7-10 days; Peak months are February through April; 47% of visitor arrivals to Barbados are repeats <p>Recent Market Trends in Barbados:</p> <ul style="list-style-type: none"> • Over 33% of all stay-over visitors from 2007 to 2011 were aged 50+, and their totals increased steadily over this period • Increase in villa sales to seniors <p>Potential for Growth:</p> <ul style="list-style-type: none"> • Already a major segment of the international travel market and will remain a fast growing niche market in itself due largely to aging population in traditional origin markets and travel patterns of aging baby boomers • Barbados has a long history of serving older visitors from traditional origin markets (e.g., adequate accommodations and medical facilities), providing what is already a significant repeat and word-of-mouth market upon which to build • Very good product-market match in Barbados – But must address need for accessible, brand name and upgraded accommodation as well as more organized activities in order to retain + grow this market
<p>INFORMATION SOURCES</p>	
<ul style="list-style-type: none"> • Accessible Tourism, <i>Get Out of the Way! Seniors Are Coming</i> (2009, www.accessibletourism.org/resources/tourism_ethical_review-senior_travellers-june2009.pdf) • Amadeus and Oxford Economics, <i>The Travel Gold Rush 2020</i> (2010, pdf available for download from www.amadeus.com) • Barbados Ministry of Tourism, <i>Statistical Digest</i> (2006) • Barbados Tourism Authority data on hotels and restaurants (2011 and 2012) • BTA Quality Assurance Dept., <i>Accommodation & Restaurant Information</i> (2011) • BTA Quality Assurance Dept., data on Length of Stay, Purpose of Visit, & Visitor Age (2006-2011) • Caribbean Tourism Organization for the Ministry of Tourism, Barbados, <i>Barbados Stayover Visitor Survey</i> (January to June 2011) • Caribbean Tourism Organization, <i>Individual Country Statistics</i> (2010, http://www.onecaribbean.org/statistics/countrystats/) • Craigwell, R. & D. Worrell for CBB Research Dept., Barbados, <i>The Competitiveness of Select Caribbean Tourism Markets</i> (2008, 	

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- Turkel, Stanley, *Turning Gray Into Gold* (2006, http://www.hotel-online.com/News/PR2006_3rd/Jul06_MatureMarket.html)

Current Status of Silver Market Visitors in Barbados

Seniors make up a large part of the stay-over market share in Barbados. Visitor age data provided by the BTA (2012³) from 2007 to 2011 indicates that over 33% of all stay-over visitors each year were aged 50 years or over, and in 2011, this demographic represented 38% of the total arrivals (see Table 3.7). Moreover, the percentage of total stay-over arrivals that were aged 50+ consistently increased over these 5 years, including the recessionary period starting from 2008. Seniors are expected to have more disposable income to spend on travel than younger individuals, which may be why recessionary periods would affect them less.

Seniors also prefer longer stays in Barbados. Analysis of length of stay data in Barbados in 2003 (which ranges from 1 day to 182 days; see Government of Barbados, 2004) indicates that 30.5% of all visitors who stayed for 8 to 14 days, the category that drew the most visitors that year, were aged over 50. For visits greater than 2 weeks, over 31,000 visitors, or 5.9% of the total number of visitors, are aged 50 or over. In the same year, 36.4% of all visitors who stayed for 15 to 21 days were aged 50 or over, as were 40.8% in the 22 to 28 day category, and 41.6% in the 29 to 182 day category.

During 2006, length of stay categories were revised (see Government of Barbados 2007) such that the 8 to 14 day category was amalgamated with the 15 to 21 day category. For stay-over durations between 8 and 21 days, 31.5% of the total visitors were from the 50+ demographic in 2003, which closely compares to the 2006 calculation of 30.3%; comparable analysis in the 8 to 14 day category could not be made between these 2 years. In the 22 to 28 day category, 37.7% of total visitors in 2006 were aged over 50, as were 30.1% in the 29 to 182 day category. On average utilizing 2003 and 2006 data, over a third, or 35.8% of total stay-over visitors who stayed for up to 6 months were aged 50 or over. These longer stays can include off-season periods and lessen seasonality cycles in the tourism sector.

Table 3.7. Tourist stay-over arrival data by major markets for the senior traveler demographic from 2007 to 2011.

TOURIST ARRIVALS 50 YEARS AND OVER BY MAJOR MARKETS											
Year	Canada	Germany	Other CARICOM	Other Europe	T&T	UK	USA	Other	Total	Total Arrivals	% Silver
2007	24,612	2,298	13,646	5,278	8,587	78,169	52,753	10,058	195,401	576,034	33.9
2008	26,339	2,283	15,042	5,624	8,129	79,282	52,298	6,749	195,746	569,399	34.3
2009	28,614	2,790	14,360	5,375	8,037	75,946	49,809	5,929	190,860	519,888	36.7
2010	32,162	2,803	13,695	5,895	8,492	73,919	53,297	7,045	197,308	533,713	37.0
2011	33,256	3,295	14,799	6,784	10,744	83,048	57,888	7,344	217,158	572,066	38.0

Source: BTA Visitor Age Data (2012³).

Regarding the Baby Boomer demographic (i.e. ages 46 through 65), data provided by the BTA (2012³) indicates that more stay-over visitors aged 46 to 55 arrived in Barbados than in any other age bracket between 2008 and 2011. However for the 2 years prior to the recession, (i.e. 2006 and 2007), most visitors were aged 36 to 45. The average percentage share of arrivals between 2006 and 2011 was 19.9% for the 46 to 55 age group, 15.3% for the 56-65 age group, and 8.5% for visitors over the age of 66.

No age specific data on cruise passengers to Barbados was available at the time of report writing, but cruise industry demographics for USA passengers indicate that the average age of American cruise travelers is around 50, i.e. the senior demographic, for cruises taken between 1998 and 2011. The age of cruise travelers in the UK market averages between 53 and 56 over the past 10 years and remains higher than the average in the North American market and some other European markets (Wild, 2013).

Strategic Outlook

Given the lucrative state of the silver market globally, and the increasing trend for visitors in this age bracket to choose Barbados as a holiday destination, the focus on this market as a high priority niche is recommended.

It will be necessary to establish strategic linkages with other associated niches, and provide essential infrastructure, services, and attractions that support this age group in larger numbers. Organized entertainment, shopping excursions, trips to local shows with guide services, and theme based educational programmes are all recommended as appealing to the mature market (refer Actions 2.1b-1 and 2.1b-2).

The silver market has the potential to continue to grow in Barbados, especially if appropriate services and attractions are provided for that market segment. The development of

accessible infrastructure is becoming more of a necessity due to the aging of the world population, as disability increases with age. In the registered accommodation sector, 19 hotels and 8 apartments have some form of facility for the disabled, but these are minimum (e.g. ramps, elevators). These facilities are required more comprehensively across the sector to make Barbados more accessible to people with disabilities, including seniors. Medical facilities are adequate, especially the private walk-in clinics in Holetown and Belleville that cater to visitors on a 24-hour basis.

Aging visitors will require products and services that are readily accessible to them (Rhodda, 2008; in White Paper prepared by Strategic Solutions Inc., 2012, p. 116; see also Section 3.2.1.1 on Accessible Tourism). The design of tourism infrastructure should therefore take into account the characteristics of these mature visitors, such as hearing loss, diminished vision, lessened colour perception, poor memory, and weakened upper body strength. Hotel facilities for seniors can be designed or retrofitted to offset these difficulties, including the following infrastructural improvements recommended by Turkel (2006; see also Section 2.0):

In Guest Rooms:

- Better lighting at writing table, at bedside, in closet, at TV set, at room entry
- Master electrical switch at bedside to control all room lights
- TV and radio operation instructions that are easy to read, clear in direction, simple to operate and well lit
- Clear instructions on how to use the telephone
- Provide an alarm clock that is easy to programme and read
- Lamp switches at the base of the lamp where they can be easily seen and reached
- Make sure that all descriptive printed materials are well written, clearly printed, and large enough to read easily

In Bathrooms:

- Apply good non-skid material to both the bathtub floor and the bathroom floor
- Install well-placed and secure hand holds and grab bars in bathtub/shower area
- Make sure the adjustable shower head is easy to adjust
- Eliminate hot water surges and provide scald-proof hot water
- Provide good lighting over the mirror
- Install night lights which won't disturb sleeping but will provide safe night trips to bathroom
- Install a magnifying mirror on an accordion bracket
- Provide a UL-approved hair dryer with a wall-hung bracket
- Supply better-quality, more absorbent towels
- Make sure all shower curtains are long enough to reach well below the bathtub top
- Provide bathroom amenities (shampoo, lotion, etc.) in containers which are easy to identify (with large print) and which have raised surfaces on the cap for easy turning when hands are wet
- Provide some bathrooms for handicapped and wheelchair access

In Corridors and Elevators:

- Make certain that corridors are well illuminated
- Provide easy to read, well-designed directional signs
- Elevators should have clear, well lit floor buttons with "Door Open" buttons easily located
- Elevator door bumpers should retract readily when touched

- Elevator signs describing restaurant facilities should be colourful, simple in design with clear directions
- Exit signs should be installed close to the floor to avoid being hidden by rising smoke

Security and Safety Considerations:

- Voice activated fire emergency alert systems
- Smoke detectors
- Sprinklers
- Medical service availability with provision for emergency illness
- Valet parking
- Well-lit parking areas with shuttle services
- Uniformed security guards on duty at critical times

Many of these improvements are relatively simple to institute and not that costly. Their implementation would also support the White Paper recommendation which states that there should be special emphasis placed on the creation of more accessible facilities, products and services to accommodate aging and disabled visitors, e.g. the provision of sidewalks, ramps, handrails, Braille signage, and menus (Strategic Solutions Inc., 2012, p. 116).

In addition to accessible tourism, there are links to other niche markets that will be critical to develop in order to grow the silver market segment in Barbados. For example, health and wellness tourism is another niche area that has significant potential (see Section 3.2.1.4). Health was found to be the number one priority for silver market consumers in most travel markets (Walker, 2009). Barbados has a number of attributes that promotes health and wellness for all. The health-giving properties of the sea, consistently warm temperatures, fresh ocean breezes, the availability of fresh, local foods, including those that are organic, and good food eating regimes (e.g. Slow Food Barbados) all provide the necessary elements that promote a healthy lifestyle. A strong linkage with culinary tourism is therefore also feasible for this market demographic, which is a lucrative target market for culinary retreats (see Action 2.1c-3 in Section 3.2.1.3).

Maintaining high standards of safety and security across the island will also be key in continuing to attract this market segment. Since seniors have more time to travel, ensuring that they have a secure environment in which to relax and enjoy their time away from home is critical to draw more of these visitors on a consistent basis and for longer periods.

Additionally, the provision of appropriate and affordable accommodation for longer stays (i.e. self-catering units that are affordable for extended visits) will help to attract silver market visitors who travel to warmer climates for months at a time (refer Action 2.1b-2 in Report V, Part 1, Section 2.9). This could also help to stimulate off-season demand and lessen seasonality cycles.

The following Actions recommended to promote Silver Market Tourism are in support of Strategic Imperative 2 on **'Enhance the Visitor Experience'** and corresponding Strategy 2.1 which states: *"Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending"*.

2.1b-1 Develop a Silver Market Activities Package**2.1b-2 Promote Visitor Accommodation to Support Longer Stayovers**(see Section 2.9)**2.1b-3 Develop Art Tours for Seniors**

Full descriptions of the Actions are presented below. Action 2.1b-2 is described in Report V, Part 1, Section 2.9.

Actions Recommended to Promote Silver Market Tourism

2.1b-1 Develop a Silver Market Activities Package

Description:

To develop an activities package in Barbados that would appeal to visitors aged 50+. Accommodation establishments would adopt this programme and offer it to their senior visitors. This “Enjoy Barbados” package would be designed specifically for this target visitor and would include:

- Trips to local live performances, such as appropriate musical and sporting events
- Organized game activities, such as bridge, canasta, and mah-jongg
- Excursions for shopping at a variety of retail outlets
- Trips to local seminars focused on cultural & historical themes
- Keep fit activities for seniors such as yoga, aqua-fitness, tennis, and golf
- Guided heritage and nature tours in safe, easy to access sites
- Volunteer activities in local education and art to benefit children or adults (see Action 2.1o-2 in Section 3.2.2.7)

Expected Outcomes:

- Providing the 50+ market with activities that appeal to them, which would encourage them to choose Barbados as a destination, especially for extended stays
- Increasing visitor numbers in the 50+ bracket
- Increasing visitor spend

Guidelines for Implementation:

Develop an ‘Enjoy Barbados’ package for seniors that specifically appeal to silver market visitors through the following initiatives:

- Organize a series of events that fall under different categories of activities for seniors, e.g. shopping excursions, concerts/theatre events, heritage/nature tours, fitness regimes, etc.
- Ensure that the programme material is widely distributed to all BHTA and Intimate Hotels of Barbados members (promotional material to be produced in hard copy, and information to be placed on websites including BHTA, BTA, and Ministry of Tourism)
- Enlist relevant businesses and venues to participate in the programme
- Consult with BARP for their input and assistance

<p>Challenges With Implementation:</p> <ul style="list-style-type: none"> • Ensuring comprehensive distribution to accommodation establishments • Developing an effective marketing programme with adequate distribution via electronic media
<p>Recommended Implementation Agency: BHTA(in association with BTA and BARP)</p>
<p>Priority / Implementation Timeframe: High/Short Term: This is viewed as an enabling priority action in the TMP Implementation Plan (refer Report I, Section 5.0)</p>
<p>Target Users: Mature (50+) tourists</p>
<p>Who Benefits:</p> <ul style="list-style-type: none"> • Local industries and activity providers in all areas identified, including accommodation establishments • Locals who benefit from senior visitors who provide volunteer work
<p>Risks:</p> <ul style="list-style-type: none"> • Acquiring adequate funds to properly develop the programme • Developing an appropriate programme that would appeal to seniors • Reliance on accommodation establishments to consistently offer their senior visitors the package
<p>Estimated Costs:</p> <ul style="list-style-type: none"> • Brochure production estimated at BDS\$50,000 • Marketing programme estimated at BDS\$50,000 per annum
<p>Source of Funds: Tourism Development Corporation or the Small Business sector</p>
<p>Revenue Generation Potential:</p> <ul style="list-style-type: none"> • Revenues to associated local industries, including the hotel sector • Increased tourism revenues through more visitors in the 50+ segment
<p>Further Development Work Required:</p> <ul style="list-style-type: none"> • Costing • Source of financing • Identifying an appropriate event planner
<p>Other Considerations: Linkages with Volunteer Tourism, Cultural Heritage and Attractions, Health & Wellness Tourism, Creative and Performing Arts, Culinary Tourism</p>

2.1b-3 Develop Art Tours for Seniors

Description:

To offer senior travelers coordinated Art tours/retreats in Barbados focused on the creation of visual arts in a chosen medium, including painting, sculpture, pottery, etc. The retreat would include guided visits to local art galleries, opportunities to meet with local artists and artisans, learning about the history of art in Barbados, and art sessions. These art tours would be specifically designed to cater to the mature tourist, including foreign art students / practitioners wishing a fine arts sabbatical in Barbados.

Expected Outcomes:

- Providing the 50+ market with a themed holiday in Barbados
- Promoting the fine arts industry in Barbados and links between local and overseas artists

Guidelines for Implementation:

Developing a well-coordinated art retreat that targets the 50+ market segment via an association between the Barbados Arts Council and the BTA. The BTA could assist in promoting creative art holidays and the Barbados Arts Council could coordinate linkages between local artists and visitors, as well as identifying locations where visitors can apply their artistic skills. The Barbados Arts Council could hire a local retreat organizer to act as a liaison / coordinator between the visitor and the Council.

Challenges With Implementation:

- Would require coordination and cooperation of local artists, artisans and fine art establishments
- Success of the strategy would be heavily reliant on effective marketing of the retreat
- Identifying appropriate accommodation options for those visitors wishing a long art retreat of 1 month or more.
- Linking with overseas art groups / establishments that would be interested in offering the retreat

Recommended Implementation Agency:

Barbados Arts Council

Priority / Implementation Timeframe:

High/Short Term: The silver market is a lucrative market, and developing activities relative to attracting more of this market segment should be prioritized. This strategy would offer seniors interested in fine arts something appealing and would help to draw them to Barbados while stimulating interest in the local arts.

Target Users:

- Mature (50+) tourist market interested in fine arts
- Locals

Who Benefits:

- The local arts industry and associated businesses
- Local artists / artisans providing art sessions, tours, seminars, etc.

Risks:

- Acquiring funds to develop the programme
- Reliability of available artists / artisans to participate
- Finding affordable accommodation for the mature tourist, especially those wishing extended stays (beyond 3-4 weeks) for long retreats

Estimated Costs:

- An adequate marketing budget to advertise the retreat in foreign target markets, including appropriate art magazines, foreign art instruction schools, etc. Initial annual budget may be around BDS\$100,000
- Remuneration of local artists for their time and expertise – this is estimated at BDS\$5,000 per artist, but will be dependent on the level of interaction required between local artist and visiting artist
- Remuneration of the local retreat organizer to be determined

Source of Funds:

Tourism Development Corporation

Revenue Generation Potential:

- Revenues to local artists and associated industries
- Would boost overall tourism revenues through increases in mature market stay-overs

Further Development Work Required:

- Costing
- Source of financing
- Coordination of retreat elements both overseas and locally

Other Considerations: Linkages with Creative and Performing Arts, Cultural Heritage and Attractions

3.2.1.3. Culinary Tourism

Overview

There is abundant information on culinary tourism and its growing popularity worldwide. Culinary Tourism became prominent just over a decade ago when the International Culinary Tourism Association, now called the World Food Travel Association, developed a policy paper in 2001 that highlighted a growing interest in food tourism driven by local businesses (Karimi, 2010). The heightened interest in food is reflected in the recent growth of food media, food movements, and events featuring local and regional cuisine in many destinations (World Food Travel Association, 2012). Television shows and an increased interest in educational travel have also added to the growing interest. For many travelers, learning to replicate a destination's culinary specialties can be a more fulfilling travel experience than visiting renowned museums and top tourist sites (Hunter, 2006).

Culinary tourism includes any tourism experience in which one learns about, appreciates, and consumes food and drink that reflects the local, regional, or national cuisine, heritage, culture, tradition or culinary techniques. It is seen as a subset of cultural tourism, as it tells the story of the heritage, the people, and the landscape of a geographic area. It reflects 'place', enriches experiences, and can be a valuable tool to boost economic, social, and community development (Government of Ontario, 2011; see also Report VI, Section 1.0).

All tourists have to eat, thus providing an opportunity for travel destinations to feature their local produce, tastes, and flavours in ways that add value to a visitor's holiday experience. Destinations can also showcase their culinary delights to visitors through packaged culinary tours, food trails, and cooking classes. Barbados has the potential to offer visitors a unique culinary experience, given its interesting local foods, excellent restaurants, top chefs, and varied cuisine. In fact, its national dish of flying fish and cou-cou was rated 3rd on a list of gastronomic delights prepared by National Geographic in 2011. Whether a visit to Barbados involves an opportunity to learn new cooking techniques or attend food, wine, and rum tastings, a "culinary adventure can be a welcome change from the standard travel itinerary" (Karimi, 2010).

*"Virtually any tourism experience is enriched by food and drink."
(Culinary Tourism Strategy, Government of Ontario, 2011).*

With increasing awareness of the economic, environmental, and health related benefits of consuming local produce, there is an increased desire to sample local dishes, foods, and drink in travel destinations. This has led to the emergence of local food festivals, as well as increased interest in local markets (Acorn, 2008).

According to ITB Berlin (2012), international travel experts predict over the medium term that consumers will seek new and more authentic experiences, i.e. holiday destinations and experiences which allow more interaction with local communities. This would include experiencing local foods within these communities.

Demographic analysis indicates that gastronomic consumers tend to be couples with above-average income, are usually professionals, and are aged 30 to 50. This correlates closely to

the results found from an analysis of cultural tourists. The World Food Travel Association states that, on average, food travelers spend around US\$1,200 per trip, with 36% of their travel budget going towards food-related activities. Those who are considered as deliberate food travelers tend to spend a significantly higher amount of their overall travel budget (i.e. around 50%) on food-related activities (Acorn, 2008).

Table 3.8 presents a summary profile chart for Culinary Tourism.

Table 3.8. Summary profile chart for Culinary Tourism.

CULINARY TOURISM	
<p>Definition: Trips made to destinations where the local food + beverages are the main motivating factors for travel. (CTO)</p> <p>Also Known As / Strong Linkages:</p> <ul style="list-style-type: none"> • Epicurean tourism • Gastronomic tourism • Strong linkages with Agricultural tourism, Cultural heritage tourism, Diaspora, Educational tourism, Medical/Health/Wellness tourism and Silver tourism 	<p>Barbados' Product-Market Match: Excellent</p> <p>Priority by Term: <u>Short Medium Long</u> High High High</p> <p>Potential Benefits to Barbados:</p> <ul style="list-style-type: none"> • Cultural exchange and international understanding • Demand for local agricultural production (for consumption in Barbados and for export) • Preservation of cultural heritage (agricultural practices)
GLOBAL MARKET SIZE AND KEY TRENDS	GENERAL MARKET PROFILE
<p>Global Market Size (CTO):</p> <ul style="list-style-type: none"> • More significant in domestic tourism of origin markets • International: 1 million travelers/year • In the UK – Food tourism is worth nearly \$8 billion/year • USA – 27million Americans (17% of its leisure travelers) made culinary activities part of their travels in 2004-07; 16 million (10%) participated only in food-related activities while traveling <p>Main Origin Markets (CTO):</p> <ul style="list-style-type: none"> • Europe – Germany, UK, Benelux, Italy, France, Scandinavia • North America – USA • Major tour operators include Global Gourmet Tours (UK) <p>Main Destinations (CTO):</p> <ul style="list-style-type: none"> • Europe – Spain, France, Italy • Asia – Japan, India, Thailand <p>Recent Trends:</p> <ul style="list-style-type: none"> • Explosive growth globally over past 15 years as part of growing trends of authenticity and high-quality experiences, growing wealth, multi-culturalism, popularity of Food Network media • Growing popularity of ethnic cuisines in industrial countries • Food and drink festivals more prevalent <p>Potential for Growth (CTO):</p> <ul style="list-style-type: none"> • Strong growth over next 5 years (60% of US leisure travelers expressed interest in the ICTA survey), but from a small base so volumes will remain small • Appeals to a broad range of travelers, especially combined with other activities 	<p>Demographics (CTO):</p> <ul style="list-style-type: none"> • Span all ethnic groups, age groups and both genders • Span various income levels, but often couples with above average income • Professionals aged 30-50 • Well educated • Similar to cultural tourists <p>Travel Planning + Patterns(CTO):</p> <ul style="list-style-type: none"> • Budget – US\$1200/trip (2008); spend 35-50% of travel budget on food-related activities • Motivated by unusual experiences, with wine and culinary experiences a driver of destination choice <p>Activities and Experiences Sought (CTO):</p> <ul style="list-style-type: none"> • Some focus visit primarily on experiencing and learning local cuisine, others as one aspect of an overall experience that connects them with local culture and nature • Culinary tours to sample local dishes, food and drink • Dining experiences in restaurants • Attending food and drink festivals and events • Short term cooking classes and schools • Visits to fish and produce markets • Gourmet food shopping • Wine and alcohol tastings, tours and driving tours • Also shop, visit parks and museums • Choose destination to experience local culture and cuisine <p>Expectations and Preferences:</p> <ul style="list-style-type: none"> • Accommodations – Good to high standard • F+B – Local, fresh, good quality, authentic, diverse range (gourmet experience seekers to “street food” seekers)
RELEVANT OFFERINGS IN BARBADOS	RELEVANT MARKET IN BARBADOS
<p>Major Selling Points and Recent Trends:</p> <ul style="list-style-type: none"> • Barbados is a top culinary capital of the Caribbean offering a complete culinary experience from haute cuisine to simple local fare • World class restaurants+ talented, award-winning local chefs • High profile food festivals • Epicurean foods more available • Most fine dining restaurants per square mile than any other Caribbean destination • National dish of Flying Fish and CouCou is rated 3rd on world list 	<p>Market Size to Barbados (est.):</p> <ul style="list-style-type: none"> • Total – 572,066 people/year visit Barbados and all have to eat • Total by type (2011): <ul style="list-style-type: none"> – Inbound: 572.066 – Cruise: 619,054 arrivals but not all exited the port and only some of those dine off-board – Domestic: Not Available <p>Main Culinary Origin Markets to Barbados:</p> <ul style="list-style-type: none"> • Europe – UK, Germany • North America – USA

of gastronomic delights by the National Geographic

**“Must See/Do” Activities, Attractions and Experiences:
(LOS required for these – 7 day minimum)**

- Seaside dining – High to medium quality, some Zagat rated (e.g. The Cliff, Paynes Bay)
- Restaurants offering authentic Bajan cuisine – Good quality (e.g. The Village Bar, Lemon Arbor)
- Plantation style dining – Good quality (e.g. Sunbury Plantation)
- Local food and street vendors – Oistins, Moontown, Lemon Arbour
- Local dishes – Flying fish, cou-cou, conkies, sea egg, jug jug, black belly sheep, pepperpot, rice and peas, okra, crab, pone
- Food festivals – BHTA’s Taste of Barbados, BTA’s Barbados Food & Wine and Rum Festival (November, annually, excellent quality gourmet and epicurean foods, has generated increased arrivals and enhanced the Barbados Brand)
- Rum – Tastings + tours (e.g. Mount Gay Rum Visitor Centre – good experience and educational)

**Additional Activities, Attractions and Experiences:
(Additional LOS required for these– 7 days)**

- Catamaran cruise with dining (West Coast) – Excellent
- St. Nicolas Abbey (includes sugar production tour) – Good quality
- Visit to a local food market such as Brighton Farmer’s Market, St. Thomas – good rural experience, fresh produce and garden café
- Visiting local rum shops to experience local watering holes – many are colourful chattel house structures – mostly average quality
- Oistins Fish Fry, Oistins, Christ Church – good quality, fresh fish daily, associated with a major fish market

Extent of Available Offerings:

- **Lodging** – 29 restaurants within 63 registered hotels; most apartments and guesthouses have kitchenettes for food preparation by visitors
- **F+B** – 111 restaurants registered with BTA, including some that are Zagat rated; local food markets; supermarkets offer local and imported foodstuffs; gourmet shops (3 on west coast); nightclubs and bars offer specialty cocktails, many featuring local rum and other spirits including local beer. Limited use of local food, especially in fine dining; limited offerings of traditional Barbadian fare an old issue but some improvement recently
- **Services** – Variety of cuisine offered; chefs available for private dining experiences; 39 catering services on island
- **Other** – Food vendors in stalls or roadside vehicles, and ‘Mum and Pop’ shops for Bajan cuisine, including 1,000 est. local rum shops

Condition of Available Offerings:

- **Lodging** – Accommodation plant is generally tired
- **F+B** – Varied cuisine; over 45% of respondents to the CTO/BTA exit surveys rated restaurants as ‘Good’ to ‘Excellent’;
- **Services** – Food catering and hospitality services generally good
- **Other** – Generally good quality food stalls and rum shops, but varies island-wide

Improvements Needed To Better Serve This Niche:

- Develop more diverse + broad based culinary offering involving a wider cross-section of community
- Develop foodie trails to enhance interest in patronizing local establishments
- Develop experiential activities (cooking classes with local chefs, competitions, demonstrations, culinary retreats) and rum tastings
- Showcase local talent + full spectrum of offerings on BTA website + in international promotions

Main Culinary Competing Destinations for Barbados:

- In Caribbean – Jamaica, Bahamas, Puerto Rico
- In North America – USA, Mexico

Market Profile to Barbados:

- **Demographics** (2008-11) – Most arrivals 46-55; Over 40% 46+
- **Travel planning** – Tour operators and internet primarily; Attracted by current food festivals and award winning chefs from Barbados
- **Travel patterns** (2011) – LOS mostly 7-10 days; Peak months are February through April; 47% of visitor arrivals to Barbados are repeats (i.e. more likely to venture out)
- **Activities** – Dining out; attending festivals focused on food

Recent Market Trends in Barbados:

- More patronizing of local eating spots around the island to sample indigenous fare in authentic community settings, but largely through word of mouth

Potential for Growth:

- Strong recent and anticipated global niche market growth
- Food service industry is a major aspect of tourism (i.e. all visitors have to eat)
- Abundant supply of good quality restaurants, noteworthy chefs + culinary events
- Already a small but established niche market in Barbados
- **Excellent product-market match in Barbados**

INFORMATION SOURCES

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- Caribbean Cuisine Consortium (CCC) website (www.caribbeanfoodemporium.co.uk)
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- Caribbean Tourism Organization for the Ministry of Tourism, Barbados, *Barbados Stay-over Visitor Survey* (January to March 2011 and April to June 2011)

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Local Culinary Scene

Aside from accommodation expenditure that accounts for the largest share of visitor spend per trip, the average daily expenditure on meals and drinks by stay-over visitors to Barbados in 2011 was US\$24.02, or 15.7% of the total (data from CTO, 2011). Visitors have a choice of 111 restaurants that are listed with the BTA, 29 of which are located within hotels (BTA, 2011). Many restaurants are located on the beach, providing an outdoor dining experience with added drama and ambiance. The cuisine offered in Barbados is diverse, featuring both local and international foods. Local dishes reflect culinary traditions from Africa, Europe and the Caribbean, and the blend is unique, fresh, and flavourful.

According to the White Paper (Strategic Solutions Inc., 2012, p. 140):

“Barbados is an excellent candidate to be the foremost culinary destination in the region...What makes Barbados perfectly poised to dominate regionally in this particular niche is the fact that the island offers a complete culinary experience, from the higher-end haute cuisine...to the mid-range experience, to the community-type offering. Culinary tourism is therefore one of the areas where Barbados has a distinct competitive advantage over other destinations in the Caribbean”.

A wide variety of foods are available in Barbados, although there can be brief shortages of certain fresh produce depending on the season. Farmers’ markets provide visitors with the opportunity to interact with local producers and vendors, and to purchase local foods on display (see Figure 3.6). There are 8 fish markets that provide daily fresh fish (see Figure 3.7) and 10 fresh produce markets offering fruits and vegetables across the island. Supermarkets import a wide variety of foodstuffs that add to the availability of local supplies. There are also specialty food outlets such as gourmet shops and posh take-out eateries offering both local and international foods. A variety of small food outlets, including ‘mum and pop’ eateries serve local foods and delicacies, and there are food vendors that sell out of their homes or roadside vans.

There is a missing link between local cuisine and what is served in hotels; more local cuisine needs to be served as in other destinations (per. comm., S. Johnson, Ministry of Culture and Sports, Government of Barbados, January 2013). The White Paper also emphasized that *“one of the biggest priorities for Government is to initiate a greater infusion of local food on hotel and restaurant menus...tourists are more likely to be exposed to Italian cuisine than local cuisine on many menus around the island”* (Strategic Solutions Inc., 2012, p. 142). Having a vibrant Farm to Table programme in Barbados that features local meats and

produce would help to bridge this gap. In this regard, the efforts of the BHTA, who have worked to link local farmers with providing foods for hotel restaurants, and the Slow Food Barbados movement, should be encouraged.



Figure 3.6. Vendors selling their produce at Cheapside Market in Bridgetown.



Figure 3.7. Fresh fish at Berinda Cox Fish Market, Oistins, Christ Church.

Presently, there are 19 farmers growing produce without the application of pesticides; although there are currently no local standards or controls that would certify this produce as organic, the attempt is being made by these farmers to provide a healthier option to consumers (see Figure 3.8). There are also food production operations that are hydroponic, i.e. growing food plants in water without soil (see Figure 3.9). These operations complement the traditional forms of food production in Barbados and help to provide local produce for consumers in Barbados. Through the local Slow Food movement recently certified in Barbados, a Farm to Table programme was launched in 2012 linking these local farmers

with hotels and restaurants (Business Barbados, 2012; see Figure 3.10). In this way, chefs can choose clean and fair food grown from local sustainable and environmentally friendly sources. This initiative is in keeping with Barbados' sustainable development goals and objectives for a greener economy (see also Report II, Section 2.2 on Green Economy).



Figure 3.8. An active crop farm in Bawden, St. Andrew; no pesticides are applied to the crops, which are rotated regularly to maximize nutrient production.



Figure 3.9. Hydroponic vegetable crops under cover at Redland Farm in St. John.

Slow Food Barbados has also developed an outreach programme in local schools. A “Closing the Food Loop Programme” has been launched at the Alleyne School in St. Andrew involving the production of an organic school garden; the school’s canteen purchases the produce that is being grown in the garden. Thus students can be fed healthy meals while gaining knowledge on the importance of healthy eating based on good nutrition through the consumption of fresh, local foods. Empowering the younger generation in this way will help to guide future leaders of the tourism industry and a greener Barbados.



Figure 3.10. The menu from the first Farm to Table event in Barbados sponsored by Slow Food Barbados, 2012. Note references to the local growers/ suppliers associated with each dish on the menu.

Importantly, the White Paper noted that the promotion of local foods would also have spin-off benefits for the economic and community development of Barbados (Strategic Solutions Inc., 2012, p. 143).

Barbados is the birthplace of rum, which originated on the island in 1703 as a byproduct of the sugar industry. There is a range of nightclubs and bars that offer specialty cocktails, many featuring a variety of Barbados rum. There are approximately 1,000 rum shops on the island (Laurie, 2001), although that number is diminishing as a result of the recent global recession. Rum shops provide a unique, local experience to visitors and offer an aspect of traditional Bajan village life. Sugar plantations that once dotted the landscape offer a glimpse into the Barbados of yesteryear. Many of them are now privately owned, and a few

offer a place in which to dine (e.g. Sunbury House and Fisher Pond Plantation). The chattel house is another unique Barbadian icon that can offer a unique experience to visitors. There are restaurants in refined chattel houses that provide added ambiance to the dining experience. Showcasing more of these unique venues would add to a visitor's culinary experience.

Barbados hosts a number of food festivals, including the Food & Wine and Rum Festival held each November since 2010, which allows participants to mingle with culinary masters and wine experts from around the world while sampling fine foods. There are also expositions that are staged annually, such as the Food Expo and BMEX. In addition, the Agrofest event showcases local agricultural produce and epicurean cuisine, such as the Dinner Under the Stars event which is prepared by Barbadian chefs who use only local meats and produce to create high quality epicurean dishes (see Figure 3.11). The 2013 Dinner event, which was sponsored by the Ministry of Tourism, Ministry of Environment, and IICA, promoted the Barbados Black Belly Lamb, which was featured in three of its five courses. This type of premier local food event should be staged more frequently and widely promoted throughout the accommodation sector to encourage visitor attendance and promote the development of Barbadian cuisine in the global culinary arena. The 2013 Dinner event was well attended by 70 patrons, mainly local Barbadians.



Figure 3.11. Epicurean dishes served at the “Dinner Under the Stars” event at Agrofest in Queen’s Park, Barbados, February 22, 2013.

The BTA is embarking on a Trails Programme that will include a Rum Runners Trail that features rum shops and local eateries, and a Romance Trail that features choice restaurants. These trails can be developed further through planned themes with associated guidebooks and maps.

The private sector is also actively supporting the development of culinary tourism in Barbados. The BHTA created the Culinary Alliance of Barbados in 2005 to help develop the

culinary tourism potential in Barbados. The programme is dedicated to promoting local food and beverage production skills while elevating standards in order to position Barbados as a world-class culinary destination (pers. comm., Michelle Smith-Mayers, Assistant Executive VP, BHTA, February 8, 2012). The Culinary Alliance was developed to “build vibrant and enduring relationships between people who are professionally engaged in providing food, beverage and hospitality in Barbados” (BHTA, 2012¹). The BHTA described the following aims of the Alliance, which are to:

- Foster opportunities for learning and networking among BHTA members
- Offer training and scholarship opportunities for BHTA members
- Generate and support public awareness of sustainable, artisanal local products and the quality culinary services offer by BHTA members
- Harness, enrich and highlight our wealth of local food resources
- Create and nurture a food and beverage niche market to enhance the marketability and branding of our tourism product

Prior to 2010, the BHTA also sponsored a Taste of Barbados festival that featured local chefs preparing dishes with local foods. This annual event was very successful, but has not been held since 2009 (pers. comm., Michelle Smith-Mayers, Assistant Executive VP, BHTA, February 8, 2012). It spanned a period of nine days in early October and was meant to give both locals and visitors the chance “to experience Barbados’ culinary cornucopia, the best of local produce, and local chef wizardry” (Repeating Islands, 2009). As a complement to the annual Food & Wine and Rum Festival, the Taste of Barbados event should be revived and could be aligned with Agrofest’s Dinner Under the Stars. Given that visitors generally seek out and savour local food creations, efforts to provide more opportunities for them to sample these delights would enhance the culinary tourism product (see Figure 3.12).

Efforts made by the public and private sectors to promote sustainable production and consumption of local foods is in keeping with the development of a greener economy for Barbados. In this regard, the Ministries of Tourism and Agriculture held a workshop on March 18 - 19, 2013 on “Mainstreaming Sustainable Consumption and Production in the Restaurant Sub-sector” which brought together stakeholders in the local food industry to discuss issues relative to the status of the local food supply and the potential to become more food secure and provide a better quality of life for all. Key priorities to promote this initiative were discussed, including the training of local farmers, developing sustainability production plans, implementing product specific plans by public-private sector partnerships, promoting sustainable production and consumption to farmers, developing a financing plan for farmers, developing a centralized distribution system for local produce, creating a quality control system, and setting up a traceability system.



Figure 3.12. Epicurean dish prepared by Barbadian executive chef, Peter Edey, with the use of local foods.

Strategic Outlook

Barbados has the potential to develop as a vibrant culinary destination in the Caribbean. Promoting local chefs, foods and products would provide a culinary brand and experience that is uniquely Bajan.

As part of a holiday experience, visitors tend to patronize local eating spots to sample indigenous foods in authentic settings. Barbados needs to capitalize on this and boost its marketing drive of unique local cuisine so that more visitors are aware of what the island has to offer in the culinary arena. The White Paper (Strategic Solutions Inc., 2012, p. 141) emphasized that *local* cuisine should be showcased on the BTA's website and in all international promotions. In addition, initiatives undertaken relative to the development of food trails and culinary retreats will require appropriate marketing drives. Whether food enthusiasts seek the higher end epicurean cuisine or wish to partake in more community-based experiences, providing the visitor with the full range of options will help to consolidate Barbados' position as the preferred Caribbean culinary destination.

The enhancement of culinary tourism in Barbados can be promoted by a greater focus on the use of local foods and the creation of menus that include rustic, authentic local cuisine offered through the island's restaurants and hotels. Menus can be embellished with relevant information so that an entire culinary experience is created - from taste, sight, and aroma of individual dishes to facts on food type, source, nutritional value, and historical context where appropriate.

Barbados has the potential to diversify its tourism product through its culinary offerings. Programmes that can help to achieve this include:

- Facilitating agro-tourism linkages, including a consistent Farm to Table programme that links local farmers with hotels and restaurants
- Creating programmes that promote sustainable food production, ensuring consistent high quality local foods being provided to hotels and restaurants
- Stimulating the development of Barbadian cuisine by providing educational programmes that train local chefs to the executive level and to help to enhance their skills and service standards in the industry (refer Action 2.1c-2), promoting the use of local foods and products, and staging festivals and competitions showcasing Caribbean foods (refer Action 2.1c-5)
- Improving standards in the industry to reflect world class norms in food service and preparation
- Promoting programmes and products relative to Barbadian cuisine on a global scale through effective marketing drives, including the targeting of food media outlets (refer Action 2.1c-6)
- Showcasing Barbadian cuisine in the media, including television shows that are locally produced
- Developing an electronic application that visitors can access on their mobile devices that provides quick and accurate information on where to dine in Barbados, linked to associated international applications (refer Action 2.1c-4)
- Developing a series of themed food trails that provides interesting and informative food based activities (refer Action 2.1c-1), building on the trail programme that is being initiated by the BTA
- Developing a culinary retreat travel package to help draw food enthusiasts interested in learning more about the history and art of Barbadian cuisine (refer Action 2.1c-3)
- Creating a tourism component to the Cheapside Market which operates from dawn to dusk and features local produce and sampling of the best Barbadian cuisine, accompanied by cooking demonstrations, and visual and performing arts

The following Actions recommended to promote Culinary Tourism are in support of Strategic Imperative 2 on '**Enhance the Visitor Experience**' and corresponding Strategy 2.1 which states: "*Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending*".

2.1c-1 Develop Culinary Trails

2.1c-2 Develop a Caribbean Culinary Institute

2.1c-3 Promote Bajan Culinary Retreats

2.1c-4 Create a 'Bajan Spoon' Electronic Application

2.1c-5 Organize an Annual Caribbean Food Festival

2.1c-6 Promote Bajan Food Facts

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Culinary Tourism

2.1c-1 Develop Culinary Trails

Description:

An important part of any visitor experience would include the sampling of a destination's local foods and flavours. Barbados has a rich culinary history with unique local foods that should be showcased proudly.

This strategy aims to develop Barbados as a top food destination. Given the island's excellence in cuisine, chefs, and fresh food offerings prepared in unique and various ways, a "Savour Barbados" programme would feature Bajan Culinary Trails for visitors to experience the gastronomic local delights of the island. From fresh local seafood and meats to fresh ground provisions, herbs, and vegetables, incorporating choice aromatic spices and local condiments, all contributing to the local cuisine that is sought after on the local and international stage, there is much to offer the visitor seeking a gastronomic experience in Barbados. A guidebook and map outlining the various food trails would be developed showing participating restaurants, local cuisine cooking classes with participating chefs, locations of fresh food markets and food outlets, as well as a timeline on the local food festivals. The guides can be requested on island or downloaded online.

Note that the BHTA is currently developing a similar concept, along with a "Farm to Table" programme that would be a major component of the initiative; but they require funding assistance to execute. Support of their initiative is recommended to help boost the culinary tourism potential of Barbados.

There is also a "Farm to Table" programme being implemented by the Slow Food Barbados organization involving restaurants serviced by fresh produce from organic farmers and food producers. The dining events have been staged since November 2012, and are expected to increase in regularity. These types of events should become a part of any proposed Bajan Culinary Trail programme, giving visitors an opportunity to experience "Farm to Table" dining in Barbados.

Expected Outcomes:

- The development of culinary trails in Barbados that would showcase the variety of excellent local dishes, restaurants, rum shops and eateries, as well as opportunities to participate in local cuisine cooking classes and learn about the history of Bajan cuisine
- Trails would include food and beverage establishments as well as fresh produce markets and food shops, with the opportunity to sample various types of cuisine along the way
- A user-friendly trail guide that pinpoints the available dining spots and outlines the history and development of Bajan cuisine

Guidelines for Implementation:

- Development a system of food trails in association with restaurant owners and chefs, with a specific focus on local foods and authentic culinary experiences
- The preparation of a culinary trail guide (printed and electronic) by a local author / publisher, inclusive of maps, topics of interest relative to the Bajan dining experience, and the history of Bajan cuisine

- The guide can also include local recipes for popular dishes, and highlight establishments that offer authentic Bajan cuisine cooking classes
- Advertise the trail programme in food magazines and travel websites

Challenges With Implementation:

- Would require a variety of restaurants and chefs to participate in the programme
- Identifying the location of cooking classes
- Development of a variety of trails to add interest
- Developing an effective marketing tool that would attract visitors to this option
- Development of a user-friendly and interesting guidebook and map to help guide the visitor on the food trails
- The need for a reliable supply of fresh local meats and produce to support the programme
- Developing a 'Farm to Table' system would significantly add to the success of the programme
- The need for reliable and authentic local organic food outlets/restaurants for those seeking healthier eating options

Recommended Implementation Agency:

Barbados Hotel and Tourism Association (in collaboration with the BTA)

Priority / Implementation Timeframe:

High/Short Term: This is viewed as an **enabling** priority action in the TMP Implementation Plan (refer Report I, Section 5.0)

Target Users:

- All tourists
- Locals
- Tourists specifically seeking epicurean experiences (foodies)

Who Benefits:

The restaurant industry and businesses tied to the food industry; local chefs providing cooking classes; local farmers. Also increased government revenues through a boost in this niche market.

Risks:

- Acquiring the funds to develop the programme
- Reliability of consistent local, fresh foods
- Extent of organic food options – needs to be better developed on a wider scale

Estimated Costs:

- Specific costs roughly estimated at BDS\$50 per guidebook, which should also be made available online via the implementing agencies' website
- An annual marketing budget estimated at BDS\$150,000 which would include advertising in food magazines and on local websites

Source Of Funds:

Could be eligible for funds under various government and agency programmes such as Barbados Tourism Authority and Tourism Development Corporation

Revenue Generation Potential:

- Revenues to the restaurants and associated industries
- Revenues to local farmers and food outlets
- Revenues to local chefs providing cooking classes

Further Development Work Required:

- Design of guidebook and map
- Identification of a variety of trails
- Costing
- Source of financing
- Identifying an implementation agency
- Marketing of the programme so visitors are aware it exists

Other Considerations: Linkages with Cultural Heritage and Attractions, Agro-tourism

2.1c-2 Develop a Caribbean Culinary Institute

Description:

The BHTA has identified the need for strengthening the training of local Chefs. Graduates of the Barbados Community College Hospitality Institute and other locals aspiring to become professional Chefs must go abroad to seek those qualifications as there is no local institution that provides these programmes to international standards. If funding resources are limited, only a few candidates will be able to enroll in overseas programmes, unless they are self-supporting. The development of a Caribbean Culinary Institute based in Barbados and affiliated with a recognized international culinary school would help to boost the chef training capability locally (and regionally) to a high standard, and in turn the local culinary arts industry.

Expected Outcomes:

- The development of a culinary institution that aims to train locals as fully qualified Chefs
- Affiliation with a recognized international organization
- Increasing the standard of excellence for Barbadians in the field of culinary arts
- Providing the local hospitality industry with highly qualified professionals through excellence in education and training
- Enhancing the competitive capabilities of the tourism industry through appropriate technology, research, and internationalization efforts
- Increasing the number of Barbadian chefs and providing the culinary industry with a consistent output of locally trained chefs
- Supporting the development and widespread use of local and Caribbean cuisine on a wider scale
- Strengthening the culinary industry through training and development of local human resources

Guidelines for Implementation:

- Identifying an existing building that can be retrofitted to suit the requirements of the Caribbean Culinary Institute, or developing a new property on lands that may be leased from an organization such as the BIDC
- Constructing or retrofitting a modern training facility for chef certification to advanced levels. To include a culinary arena where competitions can be held as part of the training process, open to visitors interested in viewing the competitions. These competitions can be televised

to increase the awareness of Caribbean cuisine, and in particular local Barbadian cuisine, on a broad scale

- Linking with an international culinary institute that would help to establish an appropriate training syllabus

Challenges With Implementation:

- Would require a funding source to cover the start up costs of infrastructure and equipment
- Identifying the teaching staff, using local qualified chefs, and supplementing with foreign chefs until enough locals are trained to take over
- Identifying a recognized culinary affiliate that would develop the culinary programme to an international standard of excellence

Recommended Implementation Agency:

University of the West Indies (in association with the BHTA)

Priority / Implementation Timeframe:

High/Short Term: This is viewed as an **enabling** priority action in the TMP Implementation Plan (refer Report I, Section 5.0): Planning phase by end of 2015 and development completion by 2019
This initiative would help to develop local chefs to high levels and enhance the island's competitive edge in culinary tourism

Target Users:

- Locals interested in chef training programmes
- Overseas students, including those from the Caribbean region
- Visitors wishing to take culinary classes featuring local cuisine
- Exchange students from international culinary institutes

Who Benefits:

- Local restaurants, including those in the accommodation sector
- Individuals wishing to further their education in the culinary arts
- Visitors seeking training in local cuisine

Risks:

- Acquiring the development funds
- Identifying qualified local staff to teach the courses
- Finding a suitable location to develop the institute

Estimated Costs:

- Infrastructure and equipment costs estimated at BDS\$1,500,000
- Staff salaries to be determined
- Leasing land from BIDC to develop a new building (if that is required) would help to keep the initial development costs down

Source of Funds:

- Could be eligible for funds through entities such as the Tourism Development Corporation
- Also through private sector funding via a beneficiary

Revenue Generation Potential:

- Revenues through increased programmes showcasing local and Caribbean cuisine for culinary tourism initiatives
- Locals would not have to seek government grants to participate in overseas training
- Revenues from student enrollment
- Revenue potential from educational tourism

Further Development Work Required:

- Costing
- Design and location of the facility
- Source of financing
- Identifying an appropriate implementation agency
- Identifying an appropriate affiliate institution

Other Considerations: Linkages with Educational Tourism; the BCC Hospitality Institute and the Tourism and Hospitality Management Programme at UWI Cave Hill

2.1c-3 Promote Bajan Culinary Retreats**Description:**

To develop and promote “Bajan Culinary Retreat” travel packages that would be comprised of well coordinated trips to Barbados to learn about the history of the local cuisine, visit the local food and farmer’s markets, partake in cooking classes to learn how to prepare local delicacies, and sample a variety of local restaurants to experience the epicurean delights of Barbados.

Note that the BTA is currently promoting this concept, as part of the Barbados Food & Wine and Rum Festival. It is recommended that this concept be extended beyond the Festival period and have travel packages of this type offered throughout the year.

Expected Outcomes:

- Offering a culinary tour package to diversify the Barbados tourism product
- Increasing visitor stay-overs, specifically targeting foodies and individuals interested in culinary arts
- Increasing interest in local cuisine through its history and evolution
- Exposing visitors to local produce and the unique ways in which it can be used in a variety of dishes
- Opportunity for visitors to learn about local cuisine while enjoying the sights, culture, and flavours of Barbados
- Visits to produce farms and markets to learn about the fresh local foods available

Guidelines for Implementation:

A tour package will be developed that focuses specifically on local cuisine in Barbados, enabling the visitor to partake in cooking classes and learn about the local food industry. The package will be marketed online via the BTA and BHTA websites and other relevant websites, as well as to tour operators. Advertisements in food magazines can also be placed to help market the culinary tour options being offered.

The Hospitality Institute at the PomMarine Hotel could be one of the venues for the cooking classes, and perhaps one of the options for hotel accommodation.

Challenges With Implementation:

- The programme would require coordination between sponsoring hotels, restaurants, and teaching chefs
- An effective marketing campaign would be required to promote the retreat, including advertising in epicurean magazines
- Need for a tour coordinator to develop and manage the tour packages being offered

Recommended Implementation Agencies:

Barbados Tourism Authority (in collaboration with the BHTA)

Priority / Implementation Timeframe:

High/Short - Medium Term: Given the island's high culinary standards and the popularity of international culinary adventures, this initiative would provide those interested specifically in a Caribbean culinary experience to focus on something both educational and rewarding. It would also provide Barbados with additional diversity in its tourism product.

Target Users:

- Foodies
- Chefs
- Culinary travelers
- All markets

Who Benefits:

Beneficiaries will be the restaurant industry and businesses/individuals tied to the food industry, including local farmers, participating chefs, and accommodation establishments

Risks:

- Not being able to establish an effective marketing campaign to market the package
- Not being able to achieve proper coordination and cooperation amongst the stakeholders providing the varying aspects of the package
- The lack of access to consistent fresh, local foods as well as organic produce, if required

Estimated Costs:

- The highest costs would be primarily in marketing the product, i.e. advertising costs which could require a budget of minimum BDS\$50,000 per year
- Cost of chefs providing cooking classes estimated at BDS\$500 per class
- Cost of a tour coordinator to be determined

Source of Funds:

Barbados Tourism Authority

Revenue Generation Potential:

Revenues to the restaurants, hotels, and associated industries and personnel

Further Development Work Required:

- Design and costing of the travel package
- Identifying participating hotels and restaurants that would be a good fit for the package
- Identifying local food markets to be included in the package
- Identifying local chefs to provide cooking classes
- Identifying a tour coordinator

- Source of financing
- Marketing of travel package in both the travel and food media

Other Considerations: Linkages with Cultural Heritage and Attractions, Agro-tourism

2.1c-4 Create a 'Bajan Spoon' Electronic Application

Description:

To develop an electronic application and mobile website known as 'Bajan Spoon' that would promote quick visitor access to information on the range of restaurants available in Barbados, as well as the schedule of food festival events. Organized by cuisine type, this programme would enable users to search, source, and even complete an online reservation at a restaurant of their choice.

Expected Outcomes:

- More efficient information access to restaurants and eateries in Barbados
- Creation of a user friendly guide compatible with all browsers and also for mobile use
- Showcasing Barbados' excellent variety of cuisine via online access

Guidelines for Implementation:

To develop an electronic application and website for mobile and desktop devices by a web designer/programmer and to update these online applications over time. Restaurant owners to link in to the programme to showcase their businesses. Visitors to the island can plan their dining outings and make reservations with their own mobile devices while on island, or even before they arrive.

Challenges With Implementation:

- Local restaurants would have to run updated websites with online booking capability
- Minimum requirement would be a listing of the establishment, with location, cuisine description, and phone contact so that bookings can at least be made via telephone

Recommended Implementation Agency:

In the absence of a local association of restaurant owners, an entity such as the Barbados Tourism Authority is suggested

Priority / Implementation Timeframe:

High/Short Term: This type of application would allow visitors to quickly access information without having to rely on accommodation personnel, other local representatives, or printed directories for assistance. Where to eat, what is offered, as well as where to access the range of cuisine is a major component of a tourism destination. Thus high priority and quick implementation is recommended.

Target Users:

- All tourists
- Locals
- All markets

Who Benefits:

Beneficiaries will be the users of the application, and ultimately the restaurant industry and businesses tied to the food industry

Risks:

- The major risk is acquiring the funds to develop the electronic medium
- For ultimate success, full participation by all restaurants is ideal but not guaranteed
- Ongoing updating of the electronic site is required

Estimated Costs:

- Approximately BDS\$30,000 for initial application development
- Estimated BDS\$10,000 per annum to update and maintain the application

Source of Funds:

Tourism Development Corporation or BTA

Revenue Generation Potential:

Revenues to restaurants and associated industries

Further Development Work Required:

- Design
- Costing
- Identifying an appropriate web developer
- Source of financing
- Marketing of application or website so visitors are aware that it exists

Other Considerations: Linkages with existing international eatery applications is recommended

2.1c-5 Organise an Annual Caribbean Food Festival

Description:

A number of annual events in Barbados showcase the culinary industry, including Agro-Fest, BMEX, Food Expo, and the Food & Wine and Rum Festival. While this is beneficial for the local culinary industry, there is room for an event that would specifically showcase Caribbean cuisine in an entertaining and competitive way. An annual Caribbean Food Festival would feature the preparation of cuisine exclusively by local and regional chefs utilizing Caribbean foods, with cook-off competitions, mystery baskets, and other interesting events staged at different venues during the festival. It would run for a period of 2 weeks, allowing visitors and locals to sample authentic Caribbean cuisine in different parts of Barbados.

Local and regional foods prepared in rustic, yet elegant ways would increase the interest in Caribbean cuisine and help to reinforce the Caribbean as a unique culinary region, with the spotlight on Barbados. It would also help to showcase and promote local and regional culinary talent. The competitions could be aired on television to increase viewership and interest in Barbados as a unique culinary destination. This event would draw visitors regionally and internationally, and also be of interest to locals. Visitors would be able to sample local foods that are prepared in original ways, exposing many of them to flavours and tastes that they may never

have experienced. Inclusion of a 'Farm to Table' component in this festival would add to the experience through the use of fresh, local foods, including those that are organically grown, while helping to support local farmers and linking them with venues that would feature their produce. Scheduling the Caribbean Food Festival during the summer season would help to increase visitor stay-overs during that period. The month of May would be a good target date as it is outside of the Crop Over season and would not overlap with other events noted above.

Expected Outcomes:

- The development of an annual event that features Caribbean cuisine as a culinary art form
- Bringing together professional chefs from across the Caribbean to compete for culinary awards
- Drawing regional and international visitors to experience Caribbean using foods grown locally, including organic produce
- Increased exposure of Caribbean cuisine via media, including television
- Increased exposure of Caribbean chefs, including those in Barbados
- Increased exposure of Barbados as a focal point for Caribbean cuisine
- Increased visitor stay-overs during the summer season to help boost occupancy rates

Guidelines for Implementation:

- Develop and market a Caribbean Food Festival for 2 weeks during the month of May
- Develop a programme of cooking competitions between participating chefs from different Caribbean countries for monetary awards
- Involve local restaurants and hotels to help boost their business during the festival period
- Televise selected competitions to increase viewership and interest in Caribbean cuisine

Challenges With Implementation:

- Would require the participation of local restaurants and hotels
- Developing an effective marketing campaign for the Festival would be critical to help draw interest regionally and internationally
- Attracting ample sponsorship for the annual event, which could be sourced through a public/private sector partnership scheme

Recommended Implementation Agency:

Along with their support of a Farm to Table programme for Barbados, this initiative could be implemented by the BHTA; synergies between the two programmes could be fostered.

Priority / Implementation Timeframe:

Medium/Medium Term: This initiative would help to develop interest in Caribbean cuisine, using Barbados as the focal point, and promote individuals and companies that support it.

Target Users:

- Local patrons, as well as regional and international visitors
- Caribbean chefs, including those in Barbados
- Local hoteliers and restaurant owners participating in the event

Who Benefits:

- Participating local restaurants and hoteliers
- Local farmers and the agricultural industry in Barbados
- Visitors and locals seeking to experience Caribbean cuisine
- Government of Barbados through increased visitor arrivals and visitor spend

Risks:

- Acquiring adequate sponsorship for the event
- Securing participation from local restaurants and hotels
- Attracting local and regional chefs to participate

Estimated Costs:

- Cost of bringing in regional chefs, including room and board, estimated at BDS\$10,000 per chef for 2 weeks
- Initial estimates for the cost of marketing the programme annually are BDS\$150,000
- Cost of food purchases for each competition – to be determined by individual menus

Source of Funds:

Public / private sector sponsorship through a partnership that may include the following organizations:

- Barbados Manufacturing Association
- Barbados Chamber of Commerce
- Barbados Small Business Association
- BIDC

Revenue Generation Potential:

- Revenues through visitor attendance fees per venue / competition
- Revenues through increased visitor occupancy and visitor spend
- Revenues for local farmers and local food suppliers
- Advertising revenues during television broadcasts

Further Development Work Required:

- Costing
- Identifying participating restaurants and hotels
- Source of financing

Other Considerations: Linkages with Agro-tourism and 'Farm to Table' programmes; can be tied in with the annual Agro-Fest initiative; links to Actions 2.1c-1 and 2.1c-2; linkages with Diaspora and Health & Wellness Tourism

2.1c-6 Promote Bajan Food Facts**Description:**

"The only way to reach the world effectively with anything is through your culture; culture that persons could get only if they come to your country, or if it is prepared by your people. Food, for me, is that true culture, and if we want to reach the world, we have to reach it with food and music. So, our Tuk band and our culinary delights are two of the strongest things we can use to [help] Barbadians to reach the world..." (local Executive Chef, Peter Edey in: Pilé, 2012).

The representation of Bajan cuisine has long been championed by local chefs at workshops, festival demonstrations, culinary schools, television cooking shows (e.g. Cooking the Bajan Way, Caribbean Cuisine and Dueling Chefs), competitions, and exhibitions in an effort to emphasize Bajan food and its cultural roots, particularly given international culinary influences (Overman,

2011). The interactive workshop entitled 'Bajan Cultural Immersion - Cooking the Bajan Way' presented at the Barbados Network Consultation 2012 - 2nd Diaspora Conference, aimed to reconnect the Diaspora with their culinary roots, a need which local Executive Chef, Peter Edey insists is becoming urgent (Pilé, 2012).

Bajan food is partly rooted in slavery and African traditions. For example, slaves were allowed to use only the left over, undesirable cuts of pork which were used to create the local dish Pudding and Soupe. Improving the knowledge of visitors and locals regarding local produce and meats, such as black belly lamb, and traditional dishes such as cou-cou and flying fish, and Pepperpot, can give locals and visitors a richer understanding of the island and its culinary origins. In addition, some value added products can be better marketed through clearer labeling and information on products regarding the origin and use of select, unfamiliar ingredients such as tamarinds, guavas, and golden apples (pers. comm., Keeley Holder, Agricultural Consultant, 2012).

A 2006 presentation of local cuisine by Chef Edey on an international syndicated network (i.e. NBC in the USA) was heralded as a valuable promotion of local uniqueness (Moore, 2006). The expansion of such promotions is therefore to be encouraged through a range of modes that facilitate visitor interaction with Bajan recipes, foods preparation options, and ingredients, along with the benefits of utilizing fresh local produce.

Expected Outcomes:

- Ensuring the culinary culture of the island remains vibrant
- Increasing awareness of Bajan foods and dishes
- Transfer of Bajan culinary traditions to second and third generation Bajans, preserving the island's culinary culture
- Transfer of knowledge about Bajan food traditions to locals and visitors

Guidelines for Implementation:

- Plan promotional material through print, television, and web media in collaboration with local chefs, nutritionists and culinary experts to highlight local cuisine and food options
- Restaurants to highlight and describe local foods and dishes on their menus
- Enhanced food labelling that includes information on local ingredients and their historical significance
- Add information to the proposed TIPS programme (refer Action 2.1h-4)

Challenges With Implementation:

- Production of information relative to Bajan foods
- Buy in from stakeholders to include the information on their products and services

Recommended Implementation Agency:

BADMC (in association with the BHTA and BTA)

Priority / Implementation Timeframe:

High/Short term

Target Users:

- All tourists and locals
- Persons having a culinary interest

Who Benefits:

Visitors and locals are expected to benefit through education and experience

Risks:

Cooperation from stakeholders to partake in the programme

Estimated Costs:

- Printing and media costs
- Product labeling costs

Source of Funds: <ul style="list-style-type: none"> • BTA • Private sector sponsors and advertisers • Restaurant owners
Revenue Generation Potential: Indirect revenues via food and product sales
Further Development Work Required: Developing marketing strategies and selecting media types for promotions
Other Considerations: Linkages with Marketing, Tourism Awareness, Cultural Heritage and Attractions

3.2.1.4. Health & Wellness Tourism

Overview

The history of health and wellness tourism dates back to its first recorded case when Greek pilgrims traveled from the Mediterranean to Epidauria in the Saronic Gulf area of Greece. These were the ancient Greeks and Egyptians who went to hot springs and baths to improve their health (Ben-Natan et. al., 2009). There were also the 18th and 19th century Europeans and Americans who flocked to health spas and sanitariums even in remote places in the hope that they would receive treatment for diseases such as tuberculosis, gout, bronchitis or liver diseases. For centuries, India has been renowned for providing the science of Ayurvedic healing to visiting patients from around the world.

Turkey has become a leader in health tourism due to marketing its geothermal resources also known as thermal springs. In some cases, published studies indicate water therapy to be as strong or stronger than other well recognized medical interventions (Kargulle, 2010). The lesson to be learned for Barbados surrounds our crystal sparkling waters that can be specifically marketed for health treatments, e.g. the tidal pools on the east coast.

Barbados has long been considered the ideal destination for vacation and leisure travel due to its salubrious climate, beaches, heritage and culture. A well-documented event is the 1751 visit of George and Lawrence Washington, the latter being ill with tuberculosis and seeking a health-giving climate for his recuperative needs. Since that period, the opportunity for health and wellness tourism has increased globally, giving rise to the need for specialized facilities and services. Broadly defined, the health and wellness tourism industry includes products and services made accessible to people travelling from their place of residence for health reasons (World Bank, 2005 -In: Caribbean Export Development Agency, 2008).

The global health and wellness industry has been estimated as a US\$40 billion international market. For the purpose of this report, a distinction has been made between medical tourism and health & wellness tourism, since there are persons who travel to a particular destination for medical services such as cancer treatment or specific procedures such as coronary bypass. Others travel for general health reasons such as rest and relaxation (Tarlow 2012). Medical tourism is presented in Section 3.2.2.5.

Table 3.9 presents a summary profile chart for Health & Wellness Tourism.

Table 3.9. Summary profile chart for Health & Wellness Tourism.

HEALTH & WELLNESS TOURISM	
<p>Definition: Trips taken by tourists with the principal purpose to improve their health +/or wellbeing. Typically this includes 1 or more of the following: physical fitness programmes, spa visits, medical treatment, health farms, beauty treatment + many different complementary health + alternative therapies derived from different cultures. (CTO) In the broader sense, this niche covers a continuum from general wellness consumers through to those seeking medical attention. However, given Barbados' market readiness, Health + Wellness tourism should be treated as distinct from the Medical tourism niche which may be defined more as "people traveling from one country to another for medical treatment based upon perceived personal value" (Jonathan Edelheit, CEO Medical Tourism Association, 2011).</p> <p>Also Known As / Strong Linkages:</p> <ul style="list-style-type: none"> • Health tourism • Spa tourism • Strong linkages with Accessible tourism, Culinary tourism, Diaspora, Medical tourism, Silver tourism 	<p>Barbados' Product-Market Match: Very Good to Excellent</p> <p>Priority by Term: <u>Short Medium Long</u> High High High</p> <p>Potential Benefits to Barbados:</p> <ul style="list-style-type: none"> • Health and wellness facilities + services also serve the local population • Higher than average niche market spending at destination benefits local economy <p>Important Note:</p> <ul style="list-style-type: none"> • This niche was originally part of a broader Medical, Health & Wellness tourism niche under consideration for Barbados. But Barbados is still far from developing a competitive advantage with full services in medical tourism (it first needs to meet international requirements and best practices). By contrast, Barbados is ready to market itself to the Health & Wellness tourism niche market. For these reasons, we have treated them as separate niche markets, with Health & Wellness tourism as a High Priority niche market for Barbados now.
GLOBAL MARKET SIZE AND KEY TRENDS	GENERAL MARKET PROFILE
<p>Global Market Size and Recent Growth:</p> <ul style="list-style-type: none"> • Various estimates on size and growth rates by source follow • International: <ul style="list-style-type: none"> - Health, Wellness and Spa tourism estimated at 5 million trips/year (as main purpose of trip), with participation in this sector during trips for other purposes considerably greater (CTO) - Significant growth in Health & Wellness tourism but less than phenomenal growth of closely associated Medical tourism niche • UK – Overseas spa/holistic tourism market worth \$50 million(CTO) • Europe – Health holidays account for 15% of the total European international holiday market (trips with some element of health tourism included but not the main purpose of visit)(CTO) • Global health and wellness <i>industry</i> is a US\$40 billion market, growing at 30% per annum, according to a Commonwealth Secretariat study, which also estimated the Caribbean's potential for generating export earnings from this sector at US\$175 million (CEDA) • Overseas medical tourism market worth \$120 million(CTO) <p>Recent Trends:</p> <ul style="list-style-type: none"> • General health and wellness trend currently occurring globally • Aging populations in key source markets with desire/effort to stay young and rejuvenate • Germany - New laws enable employees to take up to 6 weeks leave in a year, if required, for health/wellbeing reasons • Alternative and complementary practitioners now in demand by Baby Boomers and others who are seeking the best medical care outside of the medical mainstream (CHT) • Growing number of tourists combining holidays with health care + healthy activities • Rise in outdoor holidays (soft + hard adventure activities) due to greater awareness of health issues <p>Main Origin Markets:</p> <ul style="list-style-type: none"> • Europe – Germany, UK, Benelux, Italy, France, Scandinavia • North America – USA • Emerging – Asia • Note: One of the earliest forms of tourism, known to go back as far as the Ancient Greeks + Egyptians <p>Main Destinations (CTO):</p> <ul style="list-style-type: none"> • Europe – Austria, Hungary • USA – Arizona, California, Florida, Hawaii • Asia – India, Japan, Singapore, Thailand • Latin America – Costa Rica, Mexico, Panama • Other – South Africa, Dubai 	<p>Demographics (CTO):</p> <ul style="list-style-type: none"> • Well-educated, affluent Boomers to remain primary market, especially women and middle-aged empty nesters • Also stressed professional couples and singles • Increasing appeal to Gen Y (aged 20-24) <p>Travel Planning + Patterns:</p> <ul style="list-style-type: none"> • Selection – Branding has a large effect; hotels with a trusted brand name for quality are likely to benefit from increased confidence in spa facilities by consumers. Accreditations, such as the Condé Nast Traveler Gold Standard, are also influential • LOS – Longer for older markets (have more time and some treatments sought may take longer) (CTO) <p>Profile Changes Observed and Anticipated:</p> <ul style="list-style-type: none"> • General population globally is now healthier, more active and longer living than previous generations, making more frequent use of health-related goods and services • New appeal to a younger market (aged 20-24) <p>Activities and Experiences Sought(CTO):</p> <ul style="list-style-type: none"> • Spa treatments: <ul style="list-style-type: none"> - Visits to day spas and stays at destination spas ("spa-cation") where the health and wellness properties of the location are ideal for access to fitness programmes, resort amenities (and medical services) - Physical fitness and weight reduction programmes - Beauty treatments and cosmetic beautification • Non-acute health care: <ul style="list-style-type: none"> - Naturopathic, herbal and homeopathic treatments - Stress management - Massage therapy, Osteopathy and Yoga - Acupressure and acupuncture • Alternative therapies derived from different cultures • Educational, spiritual and physical enrichment – Programmes, workshops, counseling • Note: Medical tourism focuses more on conventional medical and dental treatments (more affordable than home) <p>Expectations and Preferences(CTO):</p> <ul style="list-style-type: none"> • Depends on which segment of the niche spectrum: <ul style="list-style-type: none"> - General wellness – High-quality facilities, healthy menus, gym facilities, opportunities to walk - Middle – Traditional spa facilities, facial, healing and other treatments - Medical end – Health care facilities and practitioners for surgery, treatment • Packages that include excellent health and wellness facilities and services, often at affordable prices, combined with a

<p>Potential for Growth:</p> <ul style="list-style-type: none"> • Major interest of the “new traveler”, fast-growing niche market also • Substantial growth expected to continue for many years, due largely to aging population of origin markets and changing attitudes towards physical fitness and general wellbeing, especially among 50-65 year old Boomers seeking less costly medical attention in developing countries (CTO) 	<p>refreshing vacation in a scenic locale</p> <ul style="list-style-type: none"> • Accommodation – High-end, luxury, trusted/accredited brands; destination spas, health farms • F+B – Healthy menu
<p>RELEVANT OFFERINGS IN BARBADOS</p>	<p>RELEVANT MARKET IN BARBADOS</p>
<p>Major Selling Points and Recent Trends:</p> <ul style="list-style-type: none"> • Since the 18th-19th centuries, Barbados has had a reputation for the finest climate and the healthiest island of the British West Indies • Health and wellness has long been a key component of the available tourism product in Barbados, associated largely with its “sun, sand and surf” (excellent beaches and consistent warm weather), its range of spa treatment offerings, and more recently through its alternative medicine, healthy food and meditation offerings • Basic foundation in place – Climate, natural beauty, diverse activities, good quality accommodation, infrastructure, workforce, healthcare systems and medical facilities + services, technology • Well-documented 6-week visit by George Washington and brother Lawrence in 1751 to help Lawrence recover from tuberculosis • Major initiatives taken and underway to target this high priority market for the Caribbean and Barbados: <ul style="list-style-type: none"> – Barbados’ Tourism Development Act – Incentives for qualifying health and wellness service companies, such as waivers of capital expenditure and 150% interest exemption from import duty, VAT and environmental levy for furniture, fixtures and equipment and construction materials – “Exporting Services to Canada Seminar: Caribbean Health & Wellness Tourism Strategy Meeting” (March 2008) at Accra Beach Hotel, attended by representatives of CARIFORUM states and sponsored by the Caribbean Export Development Agency (CEDA) and Trade Facilitation Office Canada (TFO Canada) – Barbados’ National Health and Wellness Stakeholders Conference (March 2010) and follow-up Strategic Advisory Panel’s “A Midweek Escape” seminar (March 2011) – Barbados Ministry of Tourism-sponsored baseline study (2013) of standards and quality of services offered by existing practitioners – Current aim of CEDA and the Caribbean Spa and Wellness Assn. (C-SWA) for the Caribbean to become a leading spa and wellness destination by 2015, supported by a new website and 3-year development plan (with market research, marketing and promotion, standards development) launched in October 2012 – Research and development work now underway at UWI to formulate a 2013 Draft Industry Standard for Spa and Wellness to establish requirements for Health and Wellness goods and services delivery in the region – Also, recent and planned investment in longer-term medical tourism sector by Barbados government, Invest Barbados, American World Clinics and Cave Shepherd & Company Ltd. <p>“Must See/Do” Activities, Attractions and Experiences: (LOS required for these – 5 day minimum)</p> <ul style="list-style-type: none"> • Therapeutic treatments – Incorporating any of the wide range of complementary medicine and services noted below • Spa treatment – Various locations or private masseuses • Fitness programmes and coaching • Nature retreats • Relaxation + meditation • Healthy food alternatives <p>Additional Activities, Attractions and Experiences:</p> <ul style="list-style-type: none"> • Walk the seaside boardwalk at Rockley • Caribbean Wellness Day – 2nd Saturday in September, annually. In Barbados since 2009, it includes a dawn walk-athon, cookery demonstrations, games and a dance-off (BAMP) • A range of general wellness activities to complete a “spa-cation” – kayaking, hiking, biking, scuba diving, yoga, golf, sailing (C-SWA) <p>Extent of Available Offerings:</p> <ul style="list-style-type: none"> • Numerous <u>complementary health centres</u> providing services and 	<p>Market Size of Health and Wellness Tourism Niche Market to Barbados (est.):</p> <ul style="list-style-type: none"> • Total by type: <ul style="list-style-type: none"> – Inbound – Not available – Cruise –Not available, but day spa visits possible –Domestic –Not available <p>Main Health & Wellness Tourism Origin Markets to Barbados:</p> <ul style="list-style-type: none"> • Europe – UK; UK visitors constitute the highest number of arrivals to Barbados each year since 2007 • North America – USA and Canada; Americans constituted the 2nd largest number of visitors to Barbados annually 2008-2011 • Other Caribbean countries and South America (especially for Medical Tourism) <p>Main Health & Wellness Tourism Niche Market Competing Destinations for Barbados:</p> <ul style="list-style-type: none"> • In North America – Mexico • In the Caribbean – Dominican Republic, Jamaica, St. Lucia. Unique spa offerings: four-hand massage, baneotherapy (hot springs, mud & other thermal treatments), thalassotherapy (sea water), banana leaf body treatment & wrap + other exotic treatments utilizing indigenous botanicals + oils (CHT) <p>Market Profile of Health & Wellness Tourism Niche Market to Barbados:</p> <p>Not available</p> <p>Recent Health & Wellness Tourism Niche Market Trends in Barbados:</p> <ul style="list-style-type: none"> • Not available <p>Potential for Growth:</p> <ul style="list-style-type: none"> • Long a significant segment of the international travel market and that to Barbados, and now growing globally in close parallel with medical tourism as a result of a new thrust for healthy living • Synergy from Caribbean-wide effort to target this niche market • A wide range of available treatments and health and wellness experiences in Barbados in both resorts and independent facilities, with many near ready for international accreditation and target marketing • Very good to Excellent product-market match in Barbados – But must address need for accredited facilities, brand name and upgraded accommodation in order to retain and grow this market

remedies in general health counseling; acupuncture and acupressure; allergy testing; homeopathy, naturopathy, herbal food/medicine, food supplements and nutritional therapy; chiropractic care, laser treatment and sports rehabilitation; osteopathy; biofeedback therapy, detoxification programmes, clinical microscopy; sleep and stress management; ozone therapy

- Several world-class resort-based and independent spas providing therapeutic massage, body treatment, waxing; saunas, exercise equipment, spas and resorts
- 25+ places offering fitness and wellness programmes ([C-SWA](#))
- Medical facilities and services – Several public and private medical health care centres, including Barbados Fertility Centre (the only facility in Barbados with international JCI accreditation, also offers medical travel packages) and Barbados Smile Makers (offering international medical and dental services)

Condition of Available Offerings:

- Health and wellness facilities and services – Standards and accreditation overseen by Barbados Assn. of Medical Practitioners (BAMP), The Paramedical Council, The Caribbean Spa and Wellness Association (Barbados Chapter), Ministry of Health
- Medical facilities and services – A good health care system with well-developed core services for the local population. Competitive rates for quality medical services and well trained practitioners
- Lodging –Requires upgrading in general; most private villas are of a high quality. More brand name hotels required
- F+B – Varied cuisine available, including high quality restaurants, and those that are Zagat rated
- Support services – Range of tourism services, reliable communications and good transport infrastructure. However, necessary support services for medical procedures are inadequate
- No smoking allowed in public places ([Ministry of Health](#))

Improvements Needed To Better Serve This Niche:

- Meet international certification standards (e.g., finalize and adopt standards now being developed through UWI) in order to become part of a new Caribbean-wide thrust and to compete effectively with other such destinations
- Target marketing through effective channels ([CEDA](#))

For Medical tourism:

- More medical facilities must adopt international standards + attain accreditation with Joint Commissions International (JCI)
- More state of the art medical facilities on the west and south coasts
- Development of custom-designed recuperative hotel facilities and medical support services in accordance with international standards to meet special needs of the medical tourism traveler
- More accessible facilities and services

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Situation Analysis

The White Paper (Strategic Solutions Inc., 2012, p. 147) states that:

“Barbados is perfectly poised to capitalize on this health and wellness trend currently sweeping the globe. From as far back as the 18th and 19th centuries, the island has earned a reputation for having the finest climate and being the healthiest island of the British West Indies...the early Barbadian tourism industry, started as a form of Health and Wellness tourism...Barbados is thus a natural fit to go full circle and once again explore the development of this health tourism niche in the 21st century”.

Health tourism is distinct from Medical tourism in that it offers services in naturopathic medicine and the full range complementary healing modalities. Types of non-acute health care include herbal and medicinal treatments, stress management, weight loss, massage therapy, osteopathy, yoga, acupressure and acupuncture. Spas are categorized as destination spas where the health and wellness properties of the location are ideal for access to medical services, fitness programmes and resort amenities. Table 3.10 lists the established naturopathic health / complementary medicine centres in Barbados.

There are also numerous spas in Barbados that offer therapeutic massages and body treatments, including the following businesses:

- The Spa at Sandy Lane
- Soothing Touch Da Spa
- Chakra Spa
- Indulgence Spa
- Yin Yang Clinic and Beauty Spa
- Sugar Cane Spa
- Golden Touch Spa
- Serenity Spa
- Aqua Medical Spa
- Elements Spa
- Crystals Executive Salon & Spa
- Glo Spa & Salon Inc.

Table 3.10. Primary complementary health centres in Barbados.

Natural Health Centre	Services
Centre for Complementary Medicine	Naturopathy, Herbal products, vitamin supplements
360 Osteopathic Clinic	Osteopathic services
Natural Medical Centre	Chiropractic, EMI, sports rehabilitation, laser treatment, homeopathy
The MAAS Clinic	Osteopathy, nutritional therapy
The Wellness Centre	Biofeedback therapy, detoxification programmes, clinical microscopy
Integrated Natural Health Clinic	MRT, acupuncture, electronic homeopathy, herbal & nutritional therapies
Rastafari Health Trade Cultural Circle	Herbal Food products
Natural Health Clinic	General health counseling, homeopathic remedies, herbal medicines, allergy testing, food supplements
Meridian Natural Health Centre	Back pain, carpal tunnel, joint inflammation, arthritis, stress, insomnia
Bai Feng Huang TCM Clinic	Chinese herbal medicine, Chinese massage, Acupuncture

The health and wellness industry is a multi-billion dollar market worldwide. In March 2008, the Caribbean Export Development Agency (CEDA) and Trade Facilitation Office Canada hosted a seminar attended by representatives of CARIFORUM states at the Accra Beach Hotel entitled “Exporting services to Canada Seminar: Caribbean Health and Wellness Tourism Strategy Meeting”. This session laid the groundwork for regional collaboration in developing the sector and also explored measures for establishing linkages with the Diaspora (see also Section 3.2.1.7).

Whereas Barbados is some distance away from developing a competitive advantage with full services in the medical tourism field due to international requirements and best practices, ongoing local strategic initiatives, including (a) the National Health & Wellness Stakeholders Conference in March 2010 and (b) the follow-up Strategic Advisory Panel’s “A Midweek Escape” seminar in March 2011, have generally concluded that Barbados should be promoted as a health and wellness destination.

Strategic Outlook

In order to further develop the local health and wellness industry to meet the requirements of this growing regional and international niche market, it would be useful to develop a web portal and electronic directory for all health and wellness providers in Barbados (refer Action 2.1d-1).

It will also be important to review the outputs from the 2013 baseline study sponsored by the Ministry of Tourism and International Transport to determine the standards and quality of services offered by practitioners in the various complementary fields. Standards and accreditation are currently monitored by the following agencies in Barbados:

- Barbados Association of Medical Practitioners
- Paramedical Council
- Caribbean Spa and Wellness Association, Barbados Chapter
- Ministry of Health

The Caribbean Export Development Agency, in conjunction with the Caribbean Spa and Wellness Association (CSWA), noted at a news conference convened on January 28, 2013 that the current aim is for the Caribbean to become a leading spa and wellness destination by 2015. This is supported by the 3-year development plan launched in October 2012 with an emphasis on market research, marketing and promotion, and standards development. The plan is financed through the Caribbean Development Bank for approximately US\$800,000 (Andrews, 2013).

Barbados should consider the potential for creating custom-designed executive health services through corporate wellness programmes since lifestyle issues affect the health of employees, productivity and quality of life. There are opportunities for physicians, medical groups, hospitals and hotels to offer corporate health services to offshore groups (Hoeb 2010).

The significant advantage of the health and wellness sector is that it has the potential to become a year round business in Barbados. With therapeutic treatments incorporating complementary medicine and services, along with healthy food alternatives provided through local culinary tourism and the availability of natural products (refer Action 2.1d-4; see also Section 3.2.1.3), Barbados is adequately poised to focus its marketing efforts in wellness and healthy lifestyles. This would incorporate fitness and coaching, spa services, nature retreats, healthy eating, relaxation, and meditation (refer Action 2.1d-2).

As has been recognized in advertising campaigns for Barbados, George Washington's visit in 1751 in pursuit of his brother's recuperation in a healthy climate was a notable event. To take full advantage of this historic trip and enhance the daily attendance of patrons at George Washington House, the property can incorporate a health spa facility thereby adding to the product offering (Tourism Advisory Council, 2009). Access and parking are considered adequate at the current location (refer Action 2.1d-3).

Further research and developmental work in progress, at UWI, is the formulation of a 2013 Draft Industry Standard for Spa and Wellness, that is being prepared for the purpose of establishing the requirements for the provision of goods and services within the Health and Wellness sectors for regional tourism industry stakeholders (pers. comm., M. Clarke,

Barbados Coalition of Services Industries Inc., 2013). Barbados stands to benefit from this next step, as it will address standards and best practices in the industry.

With regard to incentives, it should be noted that the Tourism Development Act (2002) accords qualifying health and wellness tourism service companies relevant incentives such as waivers of capital expenditure and 150% of interest, exemption from import duty, value added tax and environmental levy for furnishings and equipment and construction materials.

The following Actions recommended to promote Health & Wellness Tourism are in support of Strategic Imperative 2 on ‘**Enhance the Visitor Experience**’ and corresponding Strategy 2.1 which states: “*Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending*”.

2.1d-1 Develop Capacity in Health and Wellness Tourism

2.1d-2 Develop a Health Retreat on the East Coast

2.1d-3 George Washington House Health Spa

2.1d-4 Create an Indigenous Medicinal Interpretive Centre

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Health & Wellness Tourism

2.1d-1 Develop Capacity in Health & Wellness Tourism

DESCRIPTION:

The Health & Wellness sector in Barbados is considered to be one of high priority to be further developed as a tourism niche. Currently, Barbados has a diverse number of health and wellness practitioners and associated services, but there is no comprehensive compilation of certified registrants for reference.

To enhance competitiveness in the global market and facilitate users in sourcing the full range of health and wellness products, providers and services in Barbados, there is a need to regularize the local industry by creating a web portal featuring an online professional directory. This will require research to gather data and statistics for the compilation of an updated electronic directory for public access. The long-term objective would be to ultimately meet international standards and best practices for all those contributing to the sector.

Expected Outcomes:

- More efficient information access to health and wellness providers and services in Barbados
- Creation of a user friendly guide compatible with all browsers and also for mobile use
- Showcasing Barbados’ health and wellness industry online in one consolidated portal

Guidelines for Implementation:

A special unit needs to be put in place in the Ministry of Tourism staffed with a technical research/website person. It is recommended that a platform be set up to receive submission of information online with detailed credentials and accreditation from each practitioner. The private business sector would submit this data to the responsible unit for evaluation. The website should be designed to make provision for users to describe their experiences. An objective would be to research and document all services and products available in this niche by category with the necessary online links that promote this niche.

Challenges with Implementation:

Ministry of Health and other relevant agencies would need to issue certification for health professionals prior to being listed.

Recommended Implementation Agency:

The Paramedical Professional Council, under the aegis of the Ministry of Health, is the appropriate entity to spearhead this initiative.

Other key stakeholders would include the Ministry of Tourism and the Barbados Coalition of Service Industries.

Priority / Implementation Timeframe:

High/Short Term: This is viewed as an **enabling** priority action in the TMP Implementation Plan (refer Report I, Section 5.0)

Target Users:

- Medical tourists
- Residents
- All stay-over tourists, cruise visitors
- All health enthusiasts
- Nutritionists
- Professional athletes

Who Benefits:

- Residents and expatriates
- Patients undergoing recuperation from medical procedures
- Persons interested in health and wellness in general
- Health and wellness practitioners

Risks:

- The major risk is proceeding with the project planning and design, then not being able to obtain adequate funding or support for implementation
- Ongoing updating of the electronic site is required
- Not being able to obtain timely completion process amongst the stakeholders for launch of the website

Estimated Costs:

Funding required for the proposed web design and database management services is estimated at BDS\$25,000. Web development should include dynamic HTML 5, tablet and mobile device compatible and cross browser compatible. Database development: content management system to include sessions and securities along with data entry.

Source of Funds:

- MTI
- TDC
- Could be eligible for funds under other Government and agency programmes

Revenue Generation Potential:

The portal can also be a revenue generator for health and wellness practitioners and associated industries through a premium higher generating channel. The practitioner can pay for a greater presence with video clips and galleries, i.e. through a yearly subscription. Website can be branded to create web videos, e.g. 'Best Spas in Barbados', with advertising sponsors

Further Development Work Required:

- Updated information on baseline Health & Wellness study by MTI
- Concept Design
- Costing
- Identifying appropriate web developer
- Source of financing
- Marketing of application or website so users are aware that it exists

Other Considerations: Linkages with existing international health and wellness groups, Barbados Coalition of Service Industries, Culinary Tourism

2.1d-2 Develop a Health Retreat on the East Coast**Description:**

With the exception of the longstanding success of the Barbados National Trust weekend Hikes and associated activities to promote health such as day spas, Barbados does not currently have a dedicated indoor/outdoor wellness centre providing health services to the public. There is a need to develop a Health Retreat Centre with wellness activities and exercise programmes for all interested parties in a location such as the East Coast's Scotland District.

The Retreat, with beach access, would incorporate the option of day visits or weekend stay-over packages. Registered health practitioners would be retained to provide 'spa' treatments. Hiking and exercise trails, with varying degrees of difficulty, would be planned through the east coast terrain. Interpretive signage would be located throughout the area with respect to cultural heritage. Sections of the trail would meet Fully Accessible Barbados standards for the physically challenged with support and input from the Barbados Council for the Disabled. Interpretive materials would be provided for all visitors. An educational programme would also be developed for school children.

Expected Outcomes:

The development of a comprehensive visitor centre in a bio-park setting that offers activities and exercise programmes in a peaceful setting conducive to natural healing and the promotion of healthy lifestyles and overall wellbeing.

Guidelines for Implementation:

Develop a new facility or renovate an existing one on the East Coast that provides a unique setting in a natural environment that would appeal to the health-conscious individual. Use of the latest green technologies to operate the facility, along with the provision of healthy cuisine, fitness regimes, and interpretive exercise trails that all focus on health and wellness. All activities would

focus on healthy lifestyles through the provision of full spa services with fitness classes, including yoga, Pilates, tai chi, and qigong, meditation sessions, and other complementary practices.

Challenges With Implementation:

- Free access to the trail route by private landowners in the Scotland District will need to be obtained if it is to be used on a regular basis
- Access to the area will need to be controlled by security measures
- Ministry of Health and other relevant agencies would need to issue certification for health treatments
- Obtaining the necessary permits could be time consuming with the existing approval processes through government agencies

Recommended Implementation Agency:

This model would be suitable to be developed as a private sector initiative guided by the CSWA; support from the business sector and NGO's should also be encouraged

Priority / Implementation Timeframe:

High/Medium Term: In addition to Sandy Crest Medical Clinic, the Nation Publishing Group of Companies and various public sector/NGO groups offering periodic healthy living sessions, there is no significant product in this category and should therefore be regarded as high priority

Target Users:

- All stay-over tourists
- All cruise ship visitors
- All health enthusiasts
- Residents
- Medical tourists
- Nutritionists

Who Benefits:

- All residents of Barbados
- Patients undergoing recuperation from medical procedures
- Persons interested in health and wellness in general
- Nutritionists
- Businesses in all sectors

Risks:

- The major risk is proceeding with the project planning and design, then not being able to obtain adequate funding or support for implementation
- Not being able to obtain timely permits from government agencies and ministries
- Development restrictions on the East Coast may necessitate the acquisition of an existing building as an alternative to a 'new build'
- Not being able to obtain free access to selected site for development

Estimated Costs:

- Excluding land acquisition, an approximate cost estimate for planning and development is BDS\$675,000 including supply of 20' x 20' tents, for a new building; BDS\$400,000 for the renovation of an existing building
- Programming, signage, education materials, initial staffing arrangements could be an additional BDS\$150,000

Source Of Funds:

- Private sector
- Could be eligible for funds under various government and agency programmes
- Could be eligible for funding from Tourism Development Corporation

Revenue Generation Potential:

- Services would have an appropriate fee charge
- Would also be part of an island tour or attractions package

Further Development Work Required:

- Site assessment
- Design and construction drawings
- Technical specifications
- Obtain approvals from Ministry of Health and TCDPO
- Ensure agency and stakeholder involvement including Ministry of Tourism and BCD
- Costing and sourcing the financing

Other Considerations: Linkages to Silver Market Tourism; Medical Tourism; Barbados Surfing Association activities

2.1d-3 George Washington House Health Spa

Description:

Develop a new strategic approach to George Washington House (GWH) based on the historic visit to Barbados in pursuit of health and recuperation benefits of the island. This notion is supported by the Tourism Advisory Council (2009) report. Based on appropriate research, an outbuilding should be selected for retrofitting as a new spa health centre. Medical practices and also stakeholders in the UNESCO Garrison district should be linked to complement this proposed attraction. The facility would also be marketed in the context of heritage and cultural activities.

Expected Outcomes:

- Provision of a new attraction to strengthen the UNESCO World Heritage product
- Visitors and locals would be introduced to marketable, value added retail health products
- Priority consideration would be given to the use of renewable energy technologies in the venture

Guidelines for Implementation:

- The proposed project would require specialized skills and expertise in the spa industry
- Provide a retail shop and healthy cuisine dining facilities for visitors
- Create a state-of-the-art spa facility within the existing attraction

Challenges With Implementation:

- Access to the area at GWH will need to be controlled with security measures
- Obtaining the necessary permits for renovation could be time consuming given the existing approval processes through several government agencies
- Selecting the appropriate entrepreneur/entity to lease and operate the spa

Recommended Implementation Agency:

The BTII should be a lead agency in collaboration with the Barbados National Trust and the Garrison Consortium Inc.

Priority / Implementation Timeframe:

High priority/ Medium Term

Target Users:

- Stay-over visitors
- All residents
- Cruise passengers

Who Benefits:

The beneficiaries will include:

All persons undergoing recuperation from medical procedures, persons interested in health and wellness in general, nutritionists, research academics, all sectors of the tourism and hospitality industry, and residents of Barbados including primary and secondary school students

Risks:

- The major risk is proceeding with development planning and design, then not being able to obtain adequate funding or support for implementation
- Not being able to obtain timely permits from government agencies and ministries

Estimated Costs:

- An approximate budget estimate for spa design and development is BDS\$150,000
- Programming, signage, advertising materials, initial staffing arrangements could be an additional BDS\$50,000

Source of Funds:

- No clear source of funds at this time
- Could be eligible for funds under various government and agency programmes including BTII
- Could be eligible for additional funding from the Tourism Development Corporation

Revenue Generation Potential:

- Would have an entrance fee
- Would also be incorporated into an island tour or attractions package as part of George Washington House and the Garrison area

Further Development Work Required:

- Site assessment
- Design & technical specifications
- Costing
- Approvals from TCPO, Ministry of Health
- Ensure full agency and stakeholder involvement including Ministry of Tourism and Barbados Council for the Disabled
- Sourcing of financing

Other Considerations: Linkages with Silver Market Tourism, Cultural Heritage and Attractions, Cruise Tourism, and Culinary Tourism

2.1d-4 Create an Indigenous Medicinal Interpretive Centre**Description:**

Develop an interpretive centre with specimens indigenous to the Caribbean that promote healthy diets and enhance awareness of Caribbean natural products. Natural beverages, health and home care products made from local extracts, and organic cosmetics such as soaps and creams would be included in the displays. A medicinal garden would be featured that incorporates outdoor interpretive exhibits and green technologies to educate visitors.

Expected Outcomes:

- Provision of an attraction to showcase key types of local and regional flora and their practical uses and applications
- Visitors would be introduced to local, marketable, value added products
- Provision of a unique type of attraction to Barbados with a focus on healthy lifestyles

Guidelines for Implementation:

- The proposed garden would require a growing area of approximately 1 to 2 acres located on relatively flat or gently sloping terrain. The growing areas would require automatic irrigation and a regular physical maintenance programme to promote successful rearing of plant species. Programmes that support organic growing regimens are to be promoted and featured at this centre.
- The Interpretive Centre is to be developed preferably in an existing structure, like an old plantation building; it will be necessary to develop a plan for the Centre that includes a laboratory and display area for local medicinal herbs. This would provide an educational opportunity for visitors, with a focus on healing through herbal remedies
- Provision of a retail shop and refreshment facility offering healthy local and regional products
- Develop a rainwater harvesting system in association with automatic irrigation systems powered by photovoltaic solar panels
- Design a curriculum-relevant educational programme for school children and provide interpretative materials and exhibits to facilitate school tours
- Install interpretive exhibits/displays of local and regional herbs and medicinal plants

Challenges With Implementation:

- Supply of local species in adequate quantities will require coordination between relevant agencies/stakeholders to ensure adequate diversity of materials
- Access to the area will need to be controlled with security measures
- Permaculture may have to be considered to naturally mitigate against pests

Recommended Implementation Agency:

- This model should be developed as a private sector initiative
- The Barbados Community College should be considered as a key stakeholder to provide guidance in the development of this project based on current academic research underway at the institution.

Priority / Implementation Timeframe:

High/Medium Term: This facility would provide an added attraction to Barbados that would complement the health & wellness niche.

Target Users:

- Stay-over and cruise ship visitors
- Locals
- All Markets

Who Benefits:

All persons undergoing recuperation from medical procedures, persons interested in health and wellness, nutritionists, botanists, research academics, all sectors of the tourism and hospitality industry and residents of Barbados including primary and secondary school students

Risks:

- The major risk is proceeding with development planning and design, then not being able to obtain adequate funding or support for implementation
- Not being able to obtain timely permits from government agencies and ministries
- Not being able to obtain requisite exhibit materials

Estimated Costs:

- Excluding land acquisition, an approximate budget estimate for design and development is BDS\$500,000
- Programming, signage, education materials, initial staffing arrangements could be an additional BDS\$150,000

Source Of Funds:

- Private sector investors
- Could be eligible for funds under various government and agency programmes
- Could be eligible for additional funding from Tourism Development Corporation

Revenue Generation Potential:

- Product sales
- Revenues for island tour or attractions packages

Further Development Work Required:

- Site assessment
- Design & construction drawings
- Technical specifications
- Costing
- Obtain approvals from TCPO, Ministry of Health
- Ensure agency and stakeholder involvement including Ministry of Tourism and Barbados Council for Disabled
- Sourcing financing

Other Considerations: Linkages with Cultural Heritage and Attractions, Culinary Tourism, Cruise Tourism, Educational Tourism, Medical Tourism

3.2.1.5 Conference (MICE) Tourism

Overview

One of the fastest growing, and potentially one of the most lucrative segments of the global tourism and travel market is the segment catering to business travel related to Meetings, Incentives, Conferences & Conventions, and Events & Exhibitions, i.e. the MICE market (OEG, 2011). In summarizing the return on investment of business travel, the Oxford Economics Group (OEG, 2011, p. 1) suggests:

“The results of these analyses are compelling, showing a clear relationship between business travel and corporate performance, as well as economic growth. Business travel not only helps the bottom line; it also grows economies, raises incomes, and creates jobs”.

In developing its visitor economy, Barbados cannot afford to focus on the traditional leisure travel market, without seeking to capitalize on this global trend for business travel tourism.

The Caribbean is seen as a desired tropical destination for both leisure and business travel. It has ‘aspirational pull’ since many people look forward to visiting this region for the sun, sea and sand and the warmth of the people during both vacation and business travel.

As a reasonably accessible destination, with good transportation and technological infrastructure, Barbados has several advantages over other Caribbean countries to attract the MICE market. However, while the marketing initiatives and offerings through the official websites have profiled meeting facilities, this aspect of tourism has not been spotlighted or strategically targeted as a critical niche market. The marketing of Barbados as a tourist

destination has traditionally focused on the leisure tourism market. The question is whether leaders of tourism organizations, as well as many of the key players in the industry, including hoteliers, fully recognize how lucrative the MICE market is internationally, and potentially for Barbados. Developing and maximizing the potential of the MICE niche market will require policy support, significant infrastructural development, and changes in marketing strategies.

In discussing the MICE market, it is first important to define its terms. The United Nations World Tourism Organization (UNWTO in PwC, 2011, Appendix A) defines a Meeting as follows:

- A gathering of 10 or more participants for a minimum of 4 hours in a contracted venue
- Meetings include conventions, conferences, congresses, trade shows and exhibitions, incentive events, corporate/business meetings, and other meetings
- Meetings exclude social activities, permanently established formal educational activities, purely recreational activities, political campaign rallies, or gatherings for consumers promotional activities

The MICE market targets the business community, providing fora for interaction, education, rewards and other benefits. In 2009, the global research firm, Oxford Economics, was one of the first to establish a clear link between business travel and business growth, indicating that for every dollar invested in business travel, businesses experienced an average of \$12.50 in increased revenue and \$3.80 in new profits. Ongoing research by the OEG on behalf of the WTTC in 2011 further examined the ROI of business travel from both a business and economic perspective. This study concluded that:

“...business travel, as a catalyst of global trade, plays a significant role in driving faster GDP growth via productivity improvements, improving standards of living and creating jobs” (OEG, 2011, p. 26).

The broader implications of business travel were assessed in a comprehensive study on the Economic Significance of Meetings in the USA. The study was undertaken on behalf of the Conventions Industry Council (CIC) and other institutions. While focused on the USA, the study has significant implications for the global travel market. The study “estimated spending associated with US meetings at over \$263 billion of which 75% was on corporate business meetings, conventions, congress and conferences....43% of the total was derived from *direct* spending for travel, accommodation and related meeting costs.... On the other hand, 57% was calculated as *indirect* spending attributable to the suppliers of the meetings’ industry, (including promotions and management) and *induced* spending by the employees of the meetings industry and its suppliers (PWC, 2011, p. 7).

The rigorous methodology of the studies cited above demonstrated a clear link between meetings and GDP, and the myriad benefits, including increased employment, to be derived by large and small countries and companies who are able to tap into this global trend of increasing business travel.

Table 3.11 presents a summary profile chart for Conference Tourism.

Table 3.11. Summary profile chart for Conference Tourism.

CONFERENCE TOURISM (MICE)	
<p>Definition: Travel for Meetings, Incentives, Conferences/ Conventions and Events/Exhibitions (MICE). The MICE market targets the business community, providing fora for interaction, education, rewards and other benefits. It often includes leisure activities undertaken independently or in organized tours by participants and accompanying family-members.</p> <p>The United Nations World Tourism Organization (UNWTO) defines a Meeting as: A gathering of 10 or more participants for a minimum of 4 hours in a contracted venue. Meetings include conventions, conferences, congresses, trade shows and exhibitions, incentive events, corporate/business meetings, and other meetings. Meetings exclude social activities, permanently established formal educational activities, purely recreational activities, political campaign rallies, or gatherings for consumers' promotional activities (PwC).</p> <p>Also Known As / Strong Linkages:</p> <ul style="list-style-type: none"> • Also known as MICE market or Meetings Industry • Includes Meetings, Incentives, Conferences/Conventions and Events/Exhibitions • Strong linkages with Business Travel 	<p>Barbados' Product-Market Match: Very Good to Excellent</p> <p>Priority by Term: <u>Short</u> <u>Medium</u> <u>Long</u> Medium High High</p> <p>Potential Benefits to Barbados:</p> <ul style="list-style-type: none"> • High return on investment, contribution to GDP • Faster GDP growth through improved productivity, living standards and job creation • Direct, indirect and induced employment • Economic development • Global trade • Improved seasonality patterns of visitation overall • Potential repeat visitation of MICE market, including return as leisure tourists
GLOBAL MARKET SIZE AND KEY TRENDS	GENERAL MARKET PROFILE
<p>Global Market Size and Trends:</p> <ul style="list-style-type: none"> • The fastest growing and potentially one of the most lucrative segments of the global tourism and travel market (Oxford Economics, 2011) • USA – Spending related to US meetings in 2011 estimated at \$263+ billion: 75% on corporate business meetings, conventions, congresses and conferences; 43% direct spending; 57% indirect and induces spending by suppliers + employees (PwC, 2011) <p>Main Origin Markets:</p> <ul style="list-style-type: none"> • USA • UK/Europe • Emerging economies – e.g. Brazil <p>Main Destinations:</p> <ul style="list-style-type: none"> • USA – includes strong domestic market, major trade shows • Caribbean – tropical, aspirational pull, especially Jamaica, the Bahamas+ emerging St. Lucia • Europe – major trade shows <p>Recent Trends:</p> <ul style="list-style-type: none"> • Demonstrated high return on investment of business travel from business + economic perspectives (Oxford Economics) • Clear link between business travel and business growth in terms of increased revenue and profit (Oxford Economics, 2009) • Business travel shown to drive faster GDP growth through improved productivity, living standards + job creation (Oxford Economics, 2011) • Resurgence of company meetings linked to corporate team building initiatives • Greater demand for completely customized meeting packages, healthy culinary, secure environments, greater focus on team building, greater use of IT (e.g., streaming media, web conferencing) – all responding to specific needs <p>Potential for Growth:</p> <ul style="list-style-type: none"> • Slow but steady growth forecast as companies plan meetings that were deferred during global economic crisis • Demand for 'customized meeting packages' creating opportunities for meeting planners + destination management companies 	<p>Demographics:</p> <ul style="list-style-type: none"> • Working age • Company managers and employees (sometimes accompanied by family/friends) • Event organizers <p>Travel Planning and Patterns:</p> <ul style="list-style-type: none"> • Event arrangements typically planned well in advance • Travel often in groups at negotiated discount rates <p>Activities and Experiences Sought:</p> <ul style="list-style-type: none"> • Meetings, conferences/ conventions and events/exhibitions are primary purpose of travel (incentive travel is reward- and leisure-oriented) • Interesting and easily accessible sea- and land-based tours and attractions • Leisure pursuits: <ul style="list-style-type: none"> –Arts, nightlife and entertainment –Shopping and dining –Sightseeing –Sporting events and recreation <p>Expectations and Preferences:</p> <ul style="list-style-type: none"> • More demanding of quality accommodation, transportation, amenities and service than leisure market • Strong preference for accommodations available at the meeting/conference location to simplify logistics, minimize costs • Prompt, efficient and comfortable transfers and transportation for delegates and family members/friends to/from airport, meeting venues and attractions, with vehicles of high standard and professional drivers/staff <ul style="list-style-type: none"> –Differing interests, standards and requirements of diverse origin markets – USA: generally more interested in up-market, sophisticated activities – UK/Europe: generally more willing to sample local activities and entertainment – Emerging markets (e.g., Brazil, China): expect to have their norms catered to - requiring better understanding of their language and culture.

RELEVANT OFFERINGS IN BARBADOS	RELEVANT MARKET IN BARBADOS
<p>Major Selling Points + Recent Trends:</p> <ul style="list-style-type: none"> • ‘Aspirational pull’ of the Caribbean • Reasonable accessibility of Barbados • Good transportation and technological infrastructure of Barbados • MICE Product Club under the BTA/BHTA brings together key stakeholders to maximize synergies and develop joint approaches • Enhanced profile at recent WTTC conferences • However, continued focus on leisure tourist markets + little explicit focus on business travel/MICE <p>Extent of Available Offerings:</p> <ul style="list-style-type: none"> • <i>Barbados Conference Package</i>, produced by MICE Product Club, promotes Barbados’ capacity to host MICE market and highlights conference facilities, accommodation options and visitor attractions • 20 hotels/conference venues with a total maximum meeting capacity of 5,160 attendees • However, hotel rooms not always available, especially in high season as tour operators reserve blocks of rooms • Major conference facilities: Only 2 accommodate 400+ attendees: <ul style="list-style-type: none"> – Casa Grande – 1,000 total meeting capacity – Lloyd Erskine Sandiford Centre – Under renovation to accommodate 1,200 people but not supported by nearby accommodation • Hotels with medium to large conference rooms: 4 accommodate 250-400 attendees (Accra Beach Hotel – 280, Barbados Beach Club – 250, Hilton Barbados – 570, Sandy Lane Hotel – 350) <ul style="list-style-type: none"> –Hotels primarily for accommodating incentive groups (with small meeting rooms) • Destination management companies: <ul style="list-style-type: none"> – Barefoot Meetings and Incentives –Ciboney Caribbean –Goddards Destination Management Company – Island Magic Barbados – Journeys Thru Paradise – St. James Travel and Tours –Suntours Caribbean –Sunlinc Barbados – West Indian International Tours • Tour operators: Improved quality and expanded transport fleets but number of high quality vehicles remains inadequate to meet demands of growing MICE market and larger bus/coach operators often committed to cruise ships • Attractions: <ul style="list-style-type: none"> – Atlantis Submarines – Catamaran Cruises – Deep sea fishing – Harrison’s Cave – Horseback Riding – Scuba Diving and Snorkeling –Ziplining <p>Condition of Available Offerings:</p> <ul style="list-style-type: none"> • Generally perceived as “tired” by MICE market standards <p>Major conference facilities:</p> <ul style="list-style-type: none"> • Hotels with medium to large conference rooms (for 100 or more participants; not all are up to the MICE standard*): <ul style="list-style-type: none"> – Accra Beach Hotel and Spa – Amaryllis Beach Resort – Barbados Beach Club –Casa Grande* – Crane Resort –Divi Southwinds –Island Inn Hotel* – Hilton Hotel – Marriot Courtyard Hotel – Radisson Aquatica Resort Barbados – Sandy Lane Hotel – Savannah • Hotels primarily for accommodation of incentive groups (with small meeting rooms): <ul style="list-style-type: none"> –Coconut Court Hotel 	<p>Market Size to Barbados (est.):</p> <ul style="list-style-type: none"> • Total by type: <ul style="list-style-type: none"> – Inbound business travel: 37,000 – 40,000/year 2011-2012: 7% of total inbound – Inbound conference/convention/meeting: Close to 11,000/year in 2011 and 2012: 0.02% of total inbound (possibly underestimated) – Domestic: Not available <p>Main Conference/MICE Origin Markets to Barbados:</p> <ul style="list-style-type: none"> • North America • UK • Other Europe <p>Main Competing Destinations for Barbados:</p> <ul style="list-style-type: none"> • Other Caribbean destinations – especially Jamaica, the Bahamas, St. Lucia • Origin countries of MICE market <p>Market Profile to Barbados:</p> <ul style="list-style-type: none"> • Demographics – 10,686 representing 0.02% of visitor arrivals (2012) and increasing value of tourism product for Barbados • Travel planning – Not Available • Travel patterns – Approximately 25% from North America • Expectations – High quality accommodation and service <p>Recent Market Trends in Barbados:</p> <ul style="list-style-type: none"> • Barbados has generally attracted mid-income MICE groups, e.g. churches, sports groups • Limited but growing interest from high-end groups <p>Potential for Growth:</p> <ul style="list-style-type: none"> • Competitive advantages over other Caribbean destinations • Opportunities for meeting planners + destination management companies • Product-market match in Barbados – Conventions/conferences of under 1,000 delegates considered more sustainable for Barbados in terms of accommodation and activity needs

–Colony Club
 –Bougainvillea Beach Resort
 –Fairmont Royal Pavilion
 – Ocean Two Resort
 –Turtle Beach Hotel
 – The House
 [NB: Accra, Crane, Hilton and Sandy Lane have large conference rooms, but are also popular with Incentive groups]

- Destination management companies:
 - Barefoot Meetings and Incentives
 - Foster & Ince travel
 - Goddards Destination Management Company
 - Journeys Thru Paradise
 - St. James Travel and Tours
 - Suntours Caribbean
 - Sunlinc Barbados
 - West Indian International Tours

- Tour operators:
 - Bajan Tours Ltd.
 - Foster & Ince travel
 - Goddards Destination Management Company
 - Island Safari (Barbados) Ltd
 - St. James Travel and Tours
 - Suntours Caribbean
 - West Indian International Tours
 - Williams Tours

Improvements Needed To Better Serve This Niche:

- Self-recognition + market perception as a MICE destination
- Demonstration of potential of MICE to create direct employment + foster economic development
- Greater + more strategic policy support for MICE (e.g., incentives, financial investment, trade show participation)
- Additional resources + changes in *marketing* strategies to showcase Barbados' offerings + target MICE market (e.g. off-season, lower rates, host meeting planners)
- Improved *capacity building and coordination* through strengthening of the MICE Product Club and creation of a Convention Bureau as a "one stop shop" with full range of information + exposure (e.g., improved web presence, use of social media + attendance at key trade shows) + greater support to/resources for/collaboration within MICE Product Club to fulfill mandate + meet market needs
- Higher *level of service* to meet market expectations relative to amenities offered, places to visit, tours to take, interactions with locals
- Improved *plant + infrastructure*, including conference facilities, accommodation, meeting amenities, transportation to meet market expectations (existing supply now perceived as "tired"):
 - 750 room conference hotel in/near Bridgetown (per BHTA)
 - More administration + technical equipment/support available at venues, improved ease in securing duty-free concessions, remaining current in IT advances
 - Additional high quality vehicles + professional drivers/staff
- Improved *airlift capacity* to accommodate growing MICE market + large group bookings, including via charter flights

INFORMATION SOURCES

- Barbados Hotel and Tourism Association (BHTA), personal communications with Sue Springer, Executive Vice President (October 2012)
- Barbados Statistical Service, *Visitor Arrival Statistics* (2011 and 2012)
- Oxford Economics (OE), for the World Travel and Tourism Council (WTTC), *Business Travel: A Catalyst for Economic Performance* (April 15, 2011, 42 pp., www.wttc.org/site_media/uploads/downloads/WTTC_Business_Travel_2011.pdf)
- PriceWaterhouseCoopers (PwC), for the Conventions Industry Council (CIC) – *The Economic Significance of Meetings to the U.S. Economy* (2011, www.ahla.com/uploadedFiles/AHLA/information_center/CIC%20Final%20Report%20Executive%20Summary.pdf)
- Strategic Solutions, for the Barbados Ministry of Tourism, *White Paper on the Development of Tourism in Barbados*, 2012
- United Nations World Tourism Organization (UNWTO) – *MICE Outbound Tourism 2000* (2003, for purchase only)

Situation Analysis

As a segment of the Barbados visitor economy, activities supporting the MICE market create direct, indirect, and induced employment and foster economic development. The challenge is to quantify this benefit.

Barbados visitor arrival statistics differentiate between persons coming for pleasure, holiday or vacation, and those traveling for business, conferences, conventions or meetings (see Table 3.12). A total of 10,922 and 10,686 visitors travelled to Barbados for Conventions, Conferences or Meetings in 2011 and 2012 respectively. In each year, this represented a total of 2% of overall visitor arrivals (Barbados Statistical Service, 2011; Barbados Statistical Service, 2012).

Table 3.12: Barbados visitor arrival statistics by purpose of visit.

Stated Purpose of Visit	2011	% Total	2012	% Total	% CHG
Business	39,687	7%	36,985	7%	-6.8
Conference/Convention/Meeting	10,922	2%	10,686	2%	-2.2
Pleasure/Holiday/Vacation	324,639	57%	316,910	59%	-2.4
Total Arrivals	572,065		537,697		-6.0

At the same time, it is likely that many persons who would be considered as part of the MICE visitor group categorize themselves in the business or even pleasure / holiday / vacation categories. This lack of differentiation has led to an underestimation of the economic value of the MICE sector to the overall visitor mix and therefore to the economy as a whole.

While the White Paper included only a limited assessment of the MICE market, it stated that *“this segment will continue to be a major area of focus to the island”* and called for *“a more proactive approach to targeting this lucrative market”* (Strategic Solutions, 2012, p. 165).

The current market trends also speak to a resurgence of company meetings linked to corporate team building initiatives. These also highlight the demand for ‘customized meeting packages’ to respond to specific needs – expanding opportunities for meeting planners and destination management companies.

However, as outlined above, Barbados has traditionally focused on leisure tourist markets, and with little explicit focus on attracting business related travel. Consequently, up to recently, there has been little policy focus and limited marketing on this potentially valuable niche of business travel markets. More targeted marketing is required in a way that would appeal to the differing interests, standards and requirements of the business traveller from British / European, American markets, as well as from and from emerging economies like Brazil and China.

With respect to the latter, some investments have been made by the BTA to attract tour companies and visitors from these emerging economies. One of the lessons learned from such initiatives is the importance of undertaking research to better understand the specific

cultural orientation and needs of both leisure and business travellers from these markets that are non-traditional for Barbados (pers. comm., Anderson Daniel, President, MICE Product Club, July 2013).

Even for the traditional markets, the MICE market is not a homogenous group. The Incentives segment is a high-end one, rewarding top performers in business. The Meetings and Conference segments cater to both high-end clients and mid-budget range clients, such as sports, church or special interest groups. However, regardless of the segment of the MICE market, it is clear that their promoters have different requirements than the tour operators for the leisure market. These promoters and their business travel clients must therefore be approached and treated differently if opportunities and benefits from their travel to our shores are to be maximized.

Enhancing Capacity

The growing realization of the value of the MICE market stimulated the formation of a MICE Product Club under the BTA, and which has been coordinated by the BHTA since 2009. The Product Club sought to bring together key stakeholders in the MICE market to maximize the synergies between them and develop joint approaches for the benefit of all.

The stakeholders in the Barbados MICE market include:

- Major conference facilities
- Hotels with medium to large conference rooms
- Hotels primarily for accommodation of incentive groups (only small meeting rooms)
- Destination Management Companies (DMCs)
- Tour operators

With limited resources, the Barbados MICE Product Club has achieved noteworthy success. Through a collaborative effort, it was able to produce a *Barbados Conference Package* to promote Barbados' capacity for hosting MICE activities and to highlight conference facilities, accommodation options, and visitor attractions. The Product club was also able to facilitate higher levels of collaboration and participation that enhanced Barbados' profile at the WTTC conferences in 2011, 2012 and 2013. The MICE Product Club has recognized its own limitations and the need to increase its own capacity so it can better promote the potential in the MICE market to key stakeholders and suppliers (refer Action 2.1e-2).

Issues and Potential for Growth of the MICE Market

While there is excellent scope for Barbados to carve out its own "niche" and maximize benefits from the global MICE market, a number of key elements need to be strengthened: marketing, coordination, service quality, plant and infrastructure, and airlift.

Marketing

Most of the budget for marketing tourism (primarily through the BTA) currently focuses on promoting Barbados as a leisure tourism destination, although there have been some recent marketing initiatives focused on MICE. This suggests that while being recognized, the potential for growing the MICE market may not be fully appreciated by tourism leaders and decision makers in both the public and private sectors. It is also not clear whether representatives in Barbados consulates abroad are fully aware of what Barbados has to offer to MICE groups, and to what extent they are able to promote this aspect of tourism.

At another level, and as indicated earlier, informal discussions with some hoteliers suggest that many hoteliers are cautious, even fearful of pursuing the MICE market to the detriment of their traditional leisure tourist clientele and their linkages with and commitments to tour operators - particularly in the winter season. It could be advantageous for Barbados to attract MICE activities in the off-season (May to October) when there are lower occupancy levels. To achieve this and be competitive with other Caribbean destinations might also require willingness to negotiate lower rates for conferences during a lower occupancy period.

One of the first steps in developing the MICE market would be to build awareness of what Barbados has to offer to MICE promoters and organizers. In addition, it is also critical to ensure that policy and decision makers, as well as key stakeholders (including the marketing and operational managers in hotels, tour companies, etc.), better understand the value of the MICE market and the potential for developing this market niche in a way that would enable Barbados to be more competitive relative to other Caribbean countries (especially Jamaica, Bahamas, and emerging St. Lucia).

The MICE market is technology driven, and promotional materials need to be available and easily accessible online in a way that would attract MICE promoters. As outlined in the marketing section of the TMP, Barbados has only recently begun to tap the use of social media in its marketing to both the traditional and the MICE market (refer Report IV, Section 1.0).

In the same way that resources are allocated to hosting travel agents as part of a tourism marketing drive, resources are also needed to attract the promoters of MICE activities and to address their specific requirements, so that they can appreciate the value of what Barbados has to offer and are better able to promote Barbados with their respective clientele. Some initiatives have already been taken to reach out to and host events for meeting, incentive and event planners in the Canadian market (Hewetson, 2012).

However, even more strategic policy support is needed in the form of incentives and greater financial investment, as well as supporting participation in trade shows and MICE related conferences that would showcase Barbados' capacity as a MICE destination. The value of the Product Club's participation at the IMEX 2012 Trade Show showed a high return on investment. The BHTA reports that "*there was great interest in Barbados, especially for the incentive market and that the projected revenue gained by the bookings was over BDS\$6 million*" (BHTA, 2012², p. 25). Capturing a higher segment of the global MICE spending would significantly benefit the Barbados visitor economy (see also Report IV, Section 1.0).

Capacity Development and Coordination

One of the significant stumbling blocks to maximizing the MICE market for Barbados is the absence of a single place where external agencies or conference promoters and organizers who wish to come to Barbados can find relevant information. This points to the urgent need for a Convention Bureau – a “one stop shop” where meeting promoters and organizers can get full range of information on facilities (conference rooms, accommodation, places of interest and tours, etc.) that would appeal to their clients. A one-stop-shop would also significantly reduce the current bureaucracy that often makes it difficult to capitalize on emerging opportunities in the MICE market (refer Action 2.1e-1).

The MICE Product Club has been successful in bringing together key players (e.g. Destination Management Companies (DMCs), hotels, attractions and tour companies) to address common concerns in reaching the MICE market. As outlined above, the preparation of joint promotional packages in early 2011 was a major achievement. However, follow-up initiatives have been sporadic, and with limited resources have not been able to maintain the collaborative effort to implement some of the proposed strategies and processes required to target the MICE market in a systematic way (e.g. increasing website presence, better use of social media, improved attendance at key trade shows, etc.).

In addition, greater support is needed to maximize the opportunities for the MICE Product Club initiative. Neither the BHTA nor BTA have been able to provide the resources to enable the Product Club to carry out its mandate and consistently showcase the Barbados product competitively in international travel shows like the WTTC. At the same time, members of the Product Club have acknowledged that some companies appear to be complacent, and while awaiting government support, have not been proactive enough to ensure their own participation at critical trade shows featuring the MICE market.

Informal discussions also suggest that another factor inhibiting the development of the MICE market may be the reluctance of some DMCs and other service providers to share information on their operations and clients so that the BTA can assess the growth and scope of the MICE market. In this regard, the natural competition between some service providers makes it difficult to achieve a collaborative approach, particularly when responding to the requirements of very large groups (e.g. transportation, ancillary services). This points to an urgent need to build more effective strategic local partnerships that would ensure Barbados' ability to provide the necessary requirements for accommodation, transportation and other activities needed to service large groups. Achieving this will require sensitizing key stakeholders to the opportunities and benefits to be gained from actively pursuing the MICE market in a collaborative, systematic and consistent manner (refer Action 2.1e-2).

Service Quality

A major consideration in attracting the MICE market is the quality of service the country is able to provide. International experience suggest that visitors in the MICE market are generally more demanding of quality accommodation, transportation, amenities, and service since they are likely to approach it from a business rather than a more relaxed leisure tourist

perspective. Many also look forward to interesting and easily accessible sea and land based tours and attractions.

To respond to these demands, Barbados needs to increase its capacity to offer a higher level of service to the discerning business traveler relative to the amenities offered, the places they visit, the tours they take, and the people they interact with. The quality of service at all levels is a major consideration in attracting and retaining MICE market initiatives. Service providers will need to be able to recognize and respond to the different interests, standards, and requirements of the business visitor from not only the traditional British / European and American markets, but also from the emerging BRIC countries (especially China and Brazil). Expanding the MICE market will therefore require higher levels of language ability as well as multiple language provision in signage and basic tour guiding (see also Report III, Section 1.0).

Plant and Infrastructure

The quality of facilities and infrastructure of conference venues and related accommodation properties is one of the major limitations in the drive to develop the value potential for the MICE market to the Barbados economy. The availability and capacity of the primary hotels and conference venues is outlined in Table 3.13.

While ideally placed to attract some of the MICE international market, Barbados needs to address the following specific issues that hinder the development of this market niche. Currently, much of the Barbados plant, infrastructure and facilities are perceived as being “tired” and can create challenges in attracting the high-end MICE market (see also Section 2.3). Moreover, it should be noted that the facilities operate at different standards. Some can cater to the high-end Incentive market, while others are suitable for the mid-budget range clientele.

Conference Facilities

Concerns have been expressed about Barbados’ ability to attract and host large conferences. Table 13 outlines the numbers that conference rooms currently available in Barbados can accommodate. There are only 2 conference facilities which can accommodate numbers greater than 400. However, since most meetings in Barbados currently cater to fewer than 100 persons, the existing plant can therefore accommodate most requests for the small / medium sized meeting groups, but is missing out on attracting the larger groups. The ability to attract larger meeting groups on a consistent basis would help to increase visitor spend in Barbados.

Table 3.13. Meeting capacity per hotel / conference venue in Barbados, 2013 (*Source:* TMP consulting team).

Hotels / Conference Venue	Max. Meeting Capacity	Hotels / Conference Venue	Max. Meeting Capacity
Accra Beach Hotel	280	Island Inn	200
Amaryllis Beach Resort	200	Marriott Courtyard	180
Almond Bay	150	Ocean Two	40
Barbados Beach Club	250	PomMarine	80
Bougainvillea Beach Resort	70	Sandy Lane Hotel	350
Casa Grande	1,000	Savannah	200
Coconut Court	80	Southern Palms	60
Divi Southwinds	100	Turtle Beach Hotel	40
Fairmont Royal Pavilion	100	The Crane	180
Hilton Barbados	570	Lloyd Erskine Sandiford Centre (prov.)	1,200
Total			5,160

The global trend forecast for the MICE market shows for slow but steady growth as companies plan meetings that were deferred in 2011/2012. The trend shows a greater demand for the completely 'customized' package, healthy culinary, secure environments, greater focus on teambuilding and greater use of IT, as meetings are planned in the virtual world and some make use of webinars (Kelly 2013).

While incentive groups may be larger, they do not always require a large conference room. However, growing the MICE market would require extending the conferencing capacity. A renovated Lloyd Erskine Sandiford Centre (LESC) will offer conferencing facilities up to 1,200 persons. While meeting the requirements of local conferences, LESG lacks adjacent accommodation, which is disadvantageous as a conference site since participants have to be transported from hotels in peak traffic hours. This points to the need for the construction of a large-sized conference hotel with up to 750 rooms and conference facilities for 1,000+ persons.

Interviews with hoteliers and leaders from the BTA and BHTA suggest that Barbados should focus on conventions/conferences of approximately 1,000 persons rather than trying to compete with other destinations for the mega conferences.

Accommodation

MICE promoters and organizers generally prefer, where possible, to have participants accommodated at the location of the meeting or conference. The issue of accommodation is a major consideration for the largest conference facility at the LESC. While transportation can be organized from hotels, this requires additional logistical and cost considerations that must be factored in.

In this regard, the availability of beds is a major consideration for the MICE market. Hotel rooms are not always available especially in high season since tour operators generally reserve blocks of rooms that they may or may not utilize. Yet some hoteliers are understandably reluctant to commit their beds to a market that may vary from year to year. A mid-sized conference hotel with up to 750 rooms would enable Barbados to target this market in a consistent way. The BHTA is also of the view that the development of a large conference hotel in or near Bridgetown with a state of the art conference centre would significantly improve Barbados' capability as a MICE destination (pers. comm., Sue Springer, Executive Vice President, BHTA, October 24, 2012; see also Section 2.8; refer Action 2.1e-1).

Amenities

Conferences require administration and technical equipment (e.g. computers, printers, etc.) and other amenities, which could include special setup for some groups (e.g. branded props and specialized equipment). The arrangements for securing duty-free concessions for such equipment can be cumbersome. Even when companies have offered to donate equipment to local charities, they have found the process time-consuming.

Since the meeting trend is for companies to have greater integration of technology in meetings, including streaming media and web conferencing, this will require that more equipment is available at most venues. Barbados is well served by IT companies who are able to provide top of the line equipment and related IT services, although it will be important to stay current as technology advances.

A proposal is being discussed concerning the development of a major conference hotel facility at Needham's Point. This would be a welcome move since it would enhance the infrastructure available to the MICE market and increase the attractiveness of Barbados as a MICE destination. In pursuing such an initiative, experience from the international arena suggests that an effective marketing plan should be developed that parallels the infrastructural development process so as to ensure that the facility will be appropriately utilized from its inception.

Transportation

Efficient and comfortable transfers and transportation is one of the logistics essential for the smooth operation of the MICE market. Transportation is not only for the actual participants, but also for accompanying family members or friends. Groups require not only prompt

airport transfers, but also transportation to attractions, and this can be a significant source of visitor satisfaction or dissatisfaction.

To meet this need, many tour companies have improved the quality and expanded their fleet of vehicles. Yet the number of high quality vehicles is still not adequate to meet the demands of the growing MICE market. Larger bus/coach operators are often committed to contracts with cruise ships, and tour operators and may not be flexible enough to respond to the needs of the visitor.

In addition, feedback from some DMCs stress the importance of maintaining vehicles to high standards and ensuring that staff/ drivers dress appropriately and maintain customer friendly approaches that contribute to overall visitor satisfaction.

Airlift

The issue of airlift is a parallel major concern to that of conference facilities, and has broader implications for successful access to the MICE market. This issue is presented in Section 1.2.

The BTA has fully recognized the limitations of the airlift capacity to Barbados, considered a mid-range destination from North America. The MICE Product Club has noted that many groups experience difficulties in securing flights and seats, especially in the peak tourist season. This is particularly problematic since airlift out of some cities has been lost(e.g. Dallas).

Organizing charter flights is one option to increase airlift capacity. However, this requires passenger volume to fill flights in both directions and to justify flights once per week, or even twice per week in busy periods.

Summary of Challenges

The MICE Product Club is one of the strongest of the Product Clubs of the BHTA, and has taken several initiatives to stimulate greater interest in MICE market opportunities. However, one of the issues faced is that many tourism officials, decision makers in Government, and key tourism stakeholder agencies have generally focused on 'traditional' tourism. The potential of the MICE market is not fully understood, and therefore the level of support, promotions nor incentives has been provided to the destination management companies and the MICE Product Club to maximize the value of this niche market to Barbados.

The MICE Product Club has recognized that it must find more effective ways to demonstrate the value and potential of the MICE market and develop a strategic approach to maximize its potential. This would also include educating stakeholders to the specific interests and needs that meet the customized demands of MICE clients and which differ significantly from the requirements of traditional tour operators.

Visitors and promoters do not have a central place for information regarding many of the products and services in the tourism sector. In addition to creating such a location, there is also need for customized promotional material, both in hard and soft copy (refer Action 2.1e-

3). This would also facilitate the promotion of “specials” offered by different stakeholders (refer Action 2.1e-4).

As already outlined, the level of infrastructure for conferences and accommodation is inadequate to service both traditional demands and the needs of the MICE market, especially for the high-end Incentive market. In the medium to long term, the construction of a large conference hotel would increase the tourism plant and expand accommodation offerings to service the traditional market and the MICE market potential (refer Action 2.1e-1). In this regard, the BTII has extensive experience in developing investor packages and successfully attracting investment to Barbados.

The following Actions recommended to promote Conference (MICE) Tourism are in support of Strategic Imperative 2 on ‘**Enhance the Visitor Experience**’ and corresponding Strategy 2.1 which states: “*Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending*”.

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

2.1e-2 Further Develop the MICE Product Club

2.1e-3 Create Customized MICE Promotional Material

2.1e-4 Promote Communication and Coordination for MICE Markets

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Conference (MICE) Tourism

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

Description:

Preparation of a business plan targeted at potential investors for a large Conference Hotel.

While Barbados is an attractive destination for the MICE market, it does not have conference facilities with adjacent accommodation to host larger-sized conferences for 1,000+ persons. Currently, conferences of this size have to provide transportation to and from the existing large conference venue. The need has long been expressed for a medium-sized conference hotel that can respond to the request of this growing market segment.

Attracting potential investors to such a venture will require sound business plans and investor packages presented in a dynamic way.

Expected Outcomes:

- Business plans for a mid-sized (up to 750 room) hotel in Barbados which can service conferences of approximately 1,000+ persons
- State of the art presentations which can be customized to various types of investors, both locally and internationally

Guidelines for Implementation:

- Compile data and undertake an analysis of the opportunity costs for establishing a mid-sized (up to 750 room) hotel in Barbados which can service conferences for 1,000+ persons
- Develop business plans and financial projections for such a conference hotel facility and the direct and indirect economic benefits to the wider society
- Identify and develop collaborative linkages with local suppliers of goods and services
- Prepare an investment summary for presentation to potential investors
- Develop state-of-the-art presentations which can be customized to various types of investors, both locally and internationally

Challenges with Implementation:

Securing investors in the current economic climate

Recommended Implementation Agency:

Barbados Tourism Investment Inc. (BTII)

Priority / Implementation Timeframe:

High/Short Term: This is viewed as an **enabling** priority action in the TMP Implementation Plan (refer Report I, Section 5.0)

Target Users:

- BTII
- Potential investors

Who Benefits:

- Local and international investors
- Suppliers of goods and services

Risks:

- Investors are hesitant to consider investment in this challenging economic climate
- Airlift capacity is not improved

Estimated Costs:

BDS\$500,000 for investor package including concept design

Source of Funds:

BTII

Revenue Generation Potential:

A facility of this size will enable Barbados to target the mid-sized MICE market, and secure greater direct and indirect benefits.

Further Development Work Required:

Identification and selection of a firm to prepare the investor packages

Other Considerations: Linkages with Marketing, ICTs and New Media, Accommodation Sector

2.1e-2 Further Develop the MICE Product Club

Description:

Enhancing the capacity of Barbadian stakeholders to maximize the opportunities in, and benefits from, the MICE market.

While the MICE Product Club has successfully organized collaborative initiatives with its members to promote opportunities in the MICE market, activities have generally been ad hoc, and through their support from the BTA, has primarily focused on attendance at trade shows. This Product Club has now developed a more comprehensive strategic plan. Strengthening the MICE Product Club will enable it to achieve its goals and provide a more strategic, systematic and consistent approach to selected target markets, partner more effectively with key stakeholders while helping them to better appreciate the requirements of this market niche, and promote what Barbados has to offer to the MICE market.

Expected Outcomes:

- Increased capacity of the MICE Product Club to undertake initiatives to grow the MICE market in accordance with its strategic goals
- Key stakeholders (e.g. tour operators, Embassy personnel) will know what is required to increase benefits to Barbados of the MICE market
- Partner agencies and companies (e.g. hotels, tour operators etc.) will develop or improve strategies to attract and manage large groups

Guidelines for Implementation:

- Provide resources to strengthen the MICE Product Club to carry out its mandate, maximize its strengths, and address some of its limitations
- Organize a strategic session with the MICE Product Club, other Destination Management Companies (DMCs), or other tourism entities providing services in the MICE market to determine consistent and systematic approaches for promoting what Barbados has to offer to the MICE market
- Develop strategies to educate / inform key stakeholders so they gain a better appreciation of the MICE market and its potential for Barbados, including:
 - Marketing officers in Barbados' Embassies in key target markets
 - Marketing and Operations officers in Barbados hotels and tour operators
 - Relevant leaders and personnel who provide services to the MICE market (tour operators, etc.)
- Plan and implement training and related development activities for Marketing and Operations officers in Barbados hotels so they:
 - are better informed about the value of the MICE market, what is expected by different levels (from high-end to budget groups), and how they can benefit from the worldwide trend
 - develop (appropriate) promotional strategies to reach this niche market, including the use of the BHTA website (for members) and social media
 - develop skills and approaches in how to attract and maximize benefits from groups
- Create specific / appropriate incentives that are attractive to the MICE market
- Provide support to the members of the Product Club to attend international trade shows such as the IMEX

Challenges with Implementation:

- Tourism officials, decision makers and key stakeholders do not fully understand the opportunities for MICE tourism in Barbados
- Limited resources available to the MICE Product Club to undertake critical activities which would enable it to achieve its potential
- Other stakeholders (hotels, etc.) do not move in a timely way to take advantage of the opportunities and respond to the needs of the MICE market

Recommended Implementation Agency:

BHTA supporting the MICE Product Club

Priority / Implementation Timeframe:

High/Short Term: This is viewed as an **enabling** priority action in the TMP Implementation Plan (refer Report I, Section 5.0)

Target Users:

- MICE Product Club members
- Destination Management Companies and tour operators - local and international
- MICE promoters - local and international
- Marketing and Operations officers in hotels with conference / meeting facilities

Who Benefits:

- BHTA, BTA, MICE Product Club
- Destination Management Companies (DMCs) and tour operators - local and international

Risks:

- MICE Product Club members and other DMCs are not willing to collaborate in developing more strategic approaches
- Hotels are not interested in developing strategies to access MICE market opportunities

Estimated Costs:

BDS\$250,000

Source Of Funds:

BTA

Revenue Generation Potential:

Increasing tourism revenue through one of the fastest growing tourism niche markets

Further Development Work Required:

Identification of resource persons to assist the MICE Product Club in developing and implementing strategies that will improve the capacity of its members

Other Considerations: Linkages with Marketing, ICTs and New Media

2.1e-3 Create Customized MICE Promotional Material

Description:

Prepare attractive materials (including online materials) of interlinked products and services that can be converted to customized packages and utilized by the MICE market.

While Barbados has a variety of products and services to offer the MICE market, information about the range of options is not always available, nor presented in a cohesive and comprehensive manner. It is important to support and enable the MICE Product Club to develop and maintain up-to-date information on products and services offered by Product Club members and other suppliers, and which can be customized for MICE clients.

Expected Outcomes:

- A comprehensive inventory of the primary and support products and services which would be of interest to the MICE market (including accommodation, transportation, meeting facilities for small and large groups, culinary, entertainment, tours and companion activities)
- Create a database of suppliers' availability, primary interests, rates, key characteristics and selling points
- Flexible packages incorporating both products and services which can be customized to the needs of specific groups
- A mechanism for updating products and services, and incorporating "specials" offered by suppliers

Guidelines for Implementation:

- In collaboration with the MICE Product Club, prepare a comprehensive inventory of the primary and support products and services which would be of interest to the MICE market at different levels (accommodation, transportation, meeting facilities for small and large groups, culinary, entertainment, tours and companion activities, etc.)
- Determine with suppliers their availability, interests, rates, key characteristics and selling points
- Create flexible packages which can be customized to the needs of specific groups, recognizing the special requirements of different countries or target groups
- Arrange for printing of materials as required
- Develop a system for monitoring and updating the materials on a regular basis, and incorporate "specials" offered by suppliers

Challenges with Implementation:

- Lack of administrative capacity to collect and collate material and present in creative ways
- Lack of capacity to update materials on a regular basis so that they remain current

Recommended Implementation Agency:

BHTA through the MICE Product Club (in collaboration with the BTA)

Priority / Implementation Timeframe:

High / Short Term: Many materials are already available, but need to be coordinated more effectively

Target Users:

- Destination Management Companies servicing the MICE market – local and international
- MICE promoters – local and international
- Marketing and Operations Officers in hotels with conference /meeting facilities

Who Benefits:

- BTA, BHTA, MICE Product Club
- Destination Management Companies (DMCs) and tour operators - local and international
- Suppliers of goods and services for the MICE market
- Visitors

Risks:

- MICE Product Club members, DMCs and suppliers of goods and services are not willing to collaborate in developing flexible MICE packages
- The database on products and services is not updated regularly to reflect current activities and “specials”

Estimated Costs:

BDS\$200,000

Source of Funds:

Barbados Tourism Authority (BTA)

Revenue Generation Potential:

Increasing tourism revenue through one of the fastest growing tourism niche markets

Further Development Work Required:

Identification of resource persons to inventory and prepare flexible packages

Other Considerations: Linkages with Marketing, ICT and New Media**2.1e-4 Promote Communication and Coordination for MICE Markets****Description:**

There is no central point where destination management companies and visitors can go to easily locate information on Barbados.

Create a Convention and Visitors Bureau at the BTA where MICE Product Club members and other destination management companies, as well as visitors, have a clearinghouse and easy access to relevant information on Barbados.

Expected Outcomes:

- MICE Product Club Members, including Destination Management Companies, Tour Operators, Hotels, attractions and other parties interested in the MICE market in Barbados, have a central point to provide information on what is available in Barbados
- Visitors, promoters and international destination management companies have a central point for accessing relevant and current information on what Barbados has to offer to the MICE market

Guidelines for Implementation:

- Review with BTA the issues and challenges related to past attempts to create this coordinating mechanism
- Meet with MICE Product Club and other Destination Management Companies (DMCs) or tourism entities providing services in the MICE market to identify options for a feasible mechanism
- Provide resources to strengthen the MICE product Club to carry out its mandate
- Identify an approach that incorporates a low maintenance technology solution and can link to other ICT initiatives in the tourism sector

<p>Challenges With Implementation:</p> <ul style="list-style-type: none"> • Companies in the MICE Project Club are still hesitant to share information on upcoming activities • The MICE Project Club has limited resources and capacity
<p>Recommended Implementation Agency: Barbados Tourism Authority</p>
<p>Priority / Implementation Timeframe: High / Short Term</p>
<p>Target Users:</p> <ul style="list-style-type: none"> • MICE Product Club members • Destination Management Companies and tour operators – local and international • Visitors of all types
<p>Who Benefits:</p> <ul style="list-style-type: none"> • BTA • Visitors • MICE Product Club
<p>Risks:</p> <ul style="list-style-type: none"> • Product Club members and other DMCs are not willing to share their information • Product Club members and other DMCs are not willing to update their information on an ongoing basis
<p>Estimated Costs: \$100,000 for start up, staffing and materials for the first year (staffing from existing personnel)</p>
<p>Source Of Funds: Barbados Tourism Authority</p>
<p>Revenue Generation Potential: Has good potential to be monetized</p>
<p>Further Development Work Required: Identification of entities within the BTA who will take responsibility for establishing the mechanism</p>
<p>Other Considerations: Linkages to Marketing, ICTs and New Media</p>

3.2.1.6 Sports Tourism

Overview

Sports tourism is a multi-billion dollar business, one of the fastest growing areas of the \$4.5 trillion global travel and tourism industry. Economies of countries around the world are increasingly reliant on the visiting golfer or the travelling football, rugby, or cricket supporter. In some countries, sports can account for as much as 25% of all tourism receipts (Sports Business, 2006).

Annually, a large number of regional and international overseas competitors, fans and accompanying family members attend various sports and games in Barbados. The White Paper noted that *sports tourism plays a significant part in the global tourism industry*,

garnering approximately 10% to 14% of tourism business worldwide, and also calls for a diversification of the sports offerings in Barbados that are promoted nationally and internationally, such as road tennis (Strategic Solutions Inc., 2012, p. 144).

Barbados continues to host a number of regional and international sporting competitions. Recent events have included the 2010 WIBA Women's Boxing Championship that attracted over 80 participating countries to the island, the 2007 Cricket World Cup, Twenty-20 cricket in 2010, and the annual Tennis 'Pon de Rock' tournament.

Arrangements between local and international sporting organizations increase avenues available for expansion of the niche. For example, in 2011 the BTA and Chelsea Football Club, a renowned English sports team, signed a 3 year agreement that is expected to promote Barbados within the global arena and enhance our sporting profile. Three Chelsea coaches conducted a clinic in October 2012 for 32 junior footballers from 10 regional nations, including Barbados (Nation News, 2012).

Similarly, Rally Barbados has gained increasing attention in the media. The event was renamed Sol Rally Barbados and is one of the predominant international sporting brand names. The activity surrounding the Barbados rally has generated increases in visitor stay-overs during the typically low season in the month of May. The BTA, BHTA, and corporate sponsors support the Sol Rally Barbados event. In addition, international surfing is a major event attracting large crowds, and the Barbados Surfing Association's Independence Pro Competition held every November at the Soup Bowl in Bathsheba has been growing in visitor numbers (pers. comm., Barry Banfield, Director, Barry's Surf School, May 2013).

Over the past 25 years, Barbados has played host to a growing number of sports clubs such as cricket and field hockey. The Government of Barbados has resolved to develop its sporting facilities to meet the following goals:

- To further local sports development to enhance the performance of athletes in all arenas
- To strengthen the sports tourism niche, thereby helping to reduce the seasonality in the tourism sector and progress the inflow of revenues throughout the conventionally slow summer season

There are currently 62 sports associations and registered federations in Barbados contributing to the sports tourism sector (pers. comm., Stephen Rowe, Sports Development Officer, July 11, 2012). Key bodies include the Barbados Olympic Association, the National Sports Council, Kensington Oval Management Inc, and the Gymnasium. The Barbados Olympic Association strengthens disciplines and athletic merit, and this task is complemented by the National Sport Council's impetus to further local training and mass appeal of sports.

In 2013, the Government outlined the future direction for the sports industry in Barbados by indicating that it will restructure the National Sports Council (NSC) to allow for the implementation of a new National Sports Strategy that will focus on a Team Barbados concept. The NSC's five year Strategic Plan, which includes provision for transforming sports into a full-fledged industry, will also be implemented. A Sports Hall of Fame is also to

be established in honour of great Barbadian sportspersons (Belgrave, 2013). These initiatives are to be supported by a Sports Development Act currently under consideration (Preece, 2012).

In view of the potential contribution of the sports tourism niche to the overall success of the Barbadian tourism industry, the Ministry of Tourism commissioned a Sports Tourism Strategy for Barbados in 2012 under the auspices of the Commonwealth Secretariat (Preece, 2012). The 2012 Draft Strategy and Action Plan sought to identify and address weaknesses in the development of the niche through research, prioritization of resource application, infrastructural recommendations, capacity building, monitoring, and advancement of marketing potential in order to elevate Barbados' standing as a diverse and exceptional host destination.

The outputs of the Barbados Sports Tourism Strategy and Action Plan (Preece, 2012) were highlighted as key to future planning. Recommendations from this Strategy would help to inform and guide a national sports plan (pers. comm., Stephen Rowe, Sports Development Officer, July 11, 2012). A lack of funding was identified as a major obstacle in the promotion of individual sports and sports tourism as a whole. Funding initiatives through the Ministry of Tourism could potentially provide avenues for strengthening this niche.

Prioritization of sports disciplines was also recommended to help identify priority needs for financial support. Planning would need to be based on anecdotal evidence, since research confirming the level of attendance and support for individual sports is severely lacking. Preece (2012) proposed the formulation of an Inter-Agency Executive Group (IAEG) that would source adequate data to support a comprehensive plan. However, it was indicated by the majority of the sporting associations in attendance that the proposed IAEG entity be reconsidered in favour of a representative body which operates within a structure similar to the BHTA; it was proposed that the BHTA model would equip the body to lobby on behalf of the sports associations as a whole, allowing equal voice to each association. In this regard, it is suggested through the TMP that a new unified sporting association responsible for representing all member groups be created (refer Action 2.1f-1).

One of the primary roadblocks to future planning that was identified by Preece (2012) is the lack of a comprehensive information base with respect to attendance at sports events; this data gap compromises the ability of planners to anticipate visitor support and thus generate corporate sponsorship and attract media attention. The existence of adequate sports and quality events is therefore not enough to propel the industry beyond its current level.

Areas identified for further development, and as being beneficial to the advancement of professional sports groups, include school sports-based programmes; a variety of sports packages such as Masters Events, training camps, conferences / workshops, and school multi-sport tours; and seasonality / duration of events (Hackett, 2013). The linkage of sport events with activities such as festivals occurring within another niche requires cooperative effort and coordination between agencies.

Currently, a comprehensive sporting calendar with continuous feedback through various stakeholders and national associations is required. This will help to coordinate events and allow for better planning of sporting activities over the course of a year.

Table 3.13 presents a summary profile chart for Sports Tourism.

Table 3.13. Summary profile chart for Sports Tourism.

SPORTS TOURISM	
<p>Definition: According to the CTO, sports tourism refers to <i>international</i> trips specifically taken to <i>watch</i> (organized) sporting events, whether they be international team or individual participant events (CTO). However, sports tourism comes in many forms that are typically either organized or unorganized and can encompass those who travel to participate in or observe competitive sports, to participate in sports training programmes as well as those traveling primarily to pursue leisure sporting activities. This assessment focuses largely on organized sports tourism. Market information on cycling, diving, extreme sports, fishing, golf, sailing, trekking is available from the CTO.</p> <p>Also Known As / Strong Linkages:</p> <ul style="list-style-type: none"> • Recreational tourism (for individual, unorganized sports tourism) • Some sub-sectors have specific names (e.g. Adventure tourism, Golf tourism) • Strong linkages with Diaspora, Domestic Tourism and Educational Tourism 	<p>Barbados' Product-Market Match: Varies, Good to Excellent</p> <p>Priority by Term: <u>Short</u> <u>Medium</u> <u>Long</u> High High High</p> <p>Potential Benefits to Barbados:</p> <ul style="list-style-type: none"> • International and regional sporting events and figures foster national pride (and domestic events foster local pride) and cross-cultural awareness and understanding • Greater global exposure, awareness and recognition of Barbados • Infrastructure development • Sporting facilities and programmes can also serve and benefit locals • Increased tourism and reduced tourism seasonality cycles • Contributions from international teams and clubs (e.g. community coaching programmes) • Regularly-scheduled events (e.g. annual) always held in Barbados encourages repeat visitation • Opportunity to showcase Barbados' other tourism offerings, encourage return visit for leisure • Strengthens linkages between tourism and sports/recreation • Helps convey the importance of sport to Barbadians • Encourages a healthier lifestyle for visitors and Barbadians
GLOBAL MARKET SIZE AND KEY TRENDS	GENERAL MARKET PROFILE
<p>Global Market Size and Recent Trends (CTO):</p> <ul style="list-style-type: none"> • On average, 12 million international trips made each year for the main purpose of watching a sporting event, although it fluctuates depending on the events taking place in a given year • Over US\$600 billion spent worldwide by sports tourism, 10% - 14% of total tourism • One of the fastest growing niche markets in recent years • Barcelona, long a popular vacation destination, more than doubled its tourist arrivals in the 10 years following the 1992 Olympic Games. It has since become the 6th most attractive European city to locate a business, up from 11th place before hosting the Games • South Africa – The 400,000+ tourist arrivals for the 2010 FIFA World Cup brought a reappraisal of pre-tournament misconceptions held by locals + visitors • Hosting the 2010 ICC World Twenty20 did the same for the Caribbean • Traditional sun and sea vacations – the former main stay of the travel and tourism industry – are being replaced by sport-related vacations and a 'new tourist' interested in attending readily-accessible mega sporting events • Increased media coverage has raised the profile of many sports and made icons of sports stars • Sports events are more appealing to attend (comfortable venues, extended events) • More convenient and affordable air transport <p>Main Origin Markets(CTO):</p> <ul style="list-style-type: none"> • Europe – UK, Germany, Italy, Spain, Scandinavia • North America – USA • Asia Pacific – Australia • Africa – South Africa 	<p>Demographics:</p> <ul style="list-style-type: none"> • Professional athletes, their coaches, trainers and support team • Amateur athletes (including clubs), their families and friends • Youth (individuals, club and school teams) and their families <p>Varies by sport:</p> <ul style="list-style-type: none"> • Generally field hockey and soccer - Aged 18-34, middle socio-economic group • Golf, rugby and cricket – Slightly older, greater disposable income • Horse racing – No clear pattern • Athletic sports – Younger, lower spenders • Formula 1 Grand Prix circuit – Males in their 40s, average disposable income <p>Travel Planning and Patterns:</p> <ul style="list-style-type: none"> • Varies by sport, whether organized or unorganized, whether participant or spectator • Info/booking tools – Organized sports tourism often through sports associations and specialist travel agents • LOS / Seasonality – Year-round; function of event scheduling for organized sports, favorable weather, school holidays for youth • Spending – Full range, subject to type of sport, event and individual's involvement • Other – Amateur sports teams often accompanied by family members, with potential for return visits <p>Profile Changes Observed and Anticipated:</p> <ul style="list-style-type: none"> • None identified <p>Activities and Experiences Sought:</p> <ul style="list-style-type: none"> • Centered around organized or unorganized sports

<p>Main Destinations(CTO):</p> <ul style="list-style-type: none"> Varies depending on location of large events + on specific sport For annual tournaments of global interest: North America – US Europe – UK, France, Spain Asia Pacific – Australia <p>Potential for Growth(CTO):</p> <ul style="list-style-type: none"> Expected to grow by 6%/year 	<p>Organized sports:</p> <ul style="list-style-type: none"> Travel involving participating in or spectating at sports Professional sporting events Amateur sports competitions for teams and individuals School-related sports competitions for teams Training programmes and camps for professional, amateur and youth teams + individuals International sporting events such as World Cups (for soccer, rugby, cricket), the Olympics and Formula 1 Grand Prix) Regional events (e.g. the soccer European Champions League) <p>Unorganized sports:</p> <ul style="list-style-type: none"> Individual, independent (non-team) travel to participate in sports as a primary leisure activity (e.g. tennis, golf, cycling, boating, fishing, SCUBA, surfing, extreme sports) <p>Expectations and Preferences:</p> <ul style="list-style-type: none"> Accommodation, F+B – Type and standard vary by type (organized/not, group/individual), specific sport, participant age (e.g. youth often stay in dormitory rooms), etc. Group discounts Easy access (proximity/available transport) to sporting venues
<p>RELEVANT OFFERINGS IN BARBADOS</p>	<p>RELEVANT MARKET IN BARBADOS</p>
<p>Major Selling Points and Recent Trends:</p> <ul style="list-style-type: none"> Favourable year-round weather Hosts many world class events for golf, cricket, polo, sailing, football – tournaments and training camps for professional, amateur and youth sports (e.g. 2007 Cricket World Cup) Many world-class sporting icons are from Barbados and from several sports (e.g. Sir Garfield Sobers in cricket, track, etc.) National teams, regional team players (e.g. West Indies cricket team), athletes in the Olympics and Commonwealth Games Sports associations, federations, leagues, clubs for 20+ sports Barbadians are avid sports enthusiasts (participating and as spectators) Cricket is the premier sport on island, with modern 12,000-seat Kensington Oval and nearby Cricket Legends of Barbados Museum Indigenous Bajan sport of road tennis is entertaining to watch and try World class surfing conditions at the Soup Bowl in Bathsheba (rated by Kelly Slater, the world champion surfer, as one of the top three surfing destinations in the world) Yachting Recently launched Sporting Barbados website (2011) Sports Tourism Study and Strategy being developed for MOT <p>“Must See/Do” Activities, Attractions and Experiences:</p> <ul style="list-style-type: none"> LOS required for these – Not typically undertaken collectively, varies by sport and activity type Adventure sports – Aerial Trek (1 day), snorkelling, surfing lessons Sol Rally Barbados – 1 week, June (Caribbean’s largest annual international motor sport event) Tennis Pon de Rock – 2 days, December West Indies Test Matches – 5 days West Indies 20/20 – 4 days, variable Mount Gay Rum/Boatyard Regatta – 4 days, May Sandy Lane Barbados Gold Cup horse race – 1day, early March at the Garrison Savannah Training camps, all ages – 10 days (swim, soccer, football, cricket) <p>Additional Activities, Attractions and Experiences:</p> <ul style="list-style-type: none"> Barbados Legends Football Tournament – 2 days, May 26-27 Banks International Hockey Festival – 7days, August 20-26 Cricket Legends Museum – 1 day Caribbean International Challenge Trophy – Largest international youth soccer tournament in Caribbean Shell V-Power Super Special – Bushy Park racetrack National Stadia – Sir Garfield Sobers Complex, Kensington Oval Youth camps – e.g., Barbados Sports Camp, Brewster’s Trust Football Holiday Camp – Taught by ex-professional athletes <p>Extent of Available Offerings:</p> <ul style="list-style-type: none"> Over 60 forms of sport currently practiced, including traditional and 	<p>Market Size to Barbados (est.):</p> <ul style="list-style-type: none"> Barbados already attracts a significant, largely international, sports tourism market (professional, amateur, youth) that consists of players, coaches, support teams and spectators Total – 8,500/year sports-related tourists visit Barbados (2011) or 1.9% of stayover visitors as per BSS survey (2011-12) Sol Rally (June) attracts 20,000 spectators, almost 3,000 visitor nights, BDS\$2.5 million to local economy 2007 Cricket World Cup brought to the Caribbean an additional 100,000 visitors travelling specifically for the tournament <p>Main Sports Tourism Origin Markets to Barbados:</p> <ul style="list-style-type: none"> Caribbean (30% Regional) US UK and Europe Emerging Markets – South America, Canada (sports “fantasy camps”- Canadian Professional Football league) <p>Main Competing Destinations for Barbados:</p> <ul style="list-style-type: none"> Sports tourism overall – Jamaica (won 2012 World Travel Award for Caribbean’s Leading Sports Tourism Destination) Golf tourism – Jamaica Snorkelling – Cayman Islands (artificial reef) Hard adventure – Australia, New Zealand, USA, Canada, Europe, UK Soft adventure – US, Canada, Mexico <p>Market Profile to Barbados:</p> <ul style="list-style-type: none"> Demographics: <ul style="list-style-type: none"> Spectators to sporting events – Adults, range of incomes Sports camps and academies – 13+ years old Extreme sports – Males, 20-35 years old Soft adventure – 40+ years old, more wealthy, well-educated, male/female Travel planning: <ul style="list-style-type: none"> 3+ months planning time Bookings through broad ranging adventure travel specialists that include extreme sports in their programmes Sports publications circulated in school or specific sporting communities Regional visitors plan through family/friends Prepaid package (approx. 43%) Travel patterns: <ul style="list-style-type: none"> Travel with friends/relatives (approx. 57%) Average LOS – 3.4 nights (8,500/year sports-related tourists visiting Barbados in 2011 and generating 2,500 visitor nights) Average hotel guest undertook 2.3 taxi trips during their stay, visited 1.3 attractions in the destination, 1.5 restaurants outside of the hotel and 1.7 shopping trips (mostly facilitated by hotels and benefits businesses outside the hotel mainly) Expectations – A high standard of sporting facilities and good accommodation.

<p>non-traditional (e.g., rallying, surfing)</p> <ul style="list-style-type: none"> • Lodging – Poor availability in immediate vicinity of Kensington Oval, National Stadium, and Sir Garfield Sobers Gymnasium. Overall, ample availability except for a given price range during high-profile cricket matches drawing increased numbers of English visitors • F+B – Few venues offer concession services • Services – Airfare, hotel and car rental packages available for Sol Rally and select events e.g. major cricket and football events • Other – Equipment rental available for water sports, golf <p>Condition of Available Offerings:</p> <ul style="list-style-type: none"> • Overall Quality of Events – Good to Very Good • Overall Quality of Facilities – Poor to High • Sporting facilities – Do not always meet int'l standards or capacity needs; Poor condition of many due to age and lack of maintenance: <ul style="list-style-type: none"> – High quality polo and golf facilities – Unsatisfactory quality of cricket, football, hockey, tennis, swimming, horse racing facilities – Kensington Oval – Good quality but was down-sized as part of modernization for 2007 Cricket World Cup, now less appropriate for other uses (e.g., professional football matches) – Cricket club grounds not of comparable standard to those of competing destinations for English County team training, such as South Africa, Sri Lanka, Australia • Lodging – Average quality, require upgrading in general; most private villas of high quality • F+B – Of all standards and quality; temporary food stalls at events • Services – Good quality at many, but lacking at some <p>Improvements Needed To Better Serve This Niche:</p> <ul style="list-style-type: none"> • Sporting facilities: <ul style="list-style-type: none"> – Upgrade/maintain existing sports facilities (e.g. electronic scoreboards, playing surfaces, seating, showers and toilets, lockers, medical bay) – Build new facilities (e.g. new football field) – Facility maintenance programmes – More use of hotel tennis facilities (e.g. tennis group tournaments) • Event planning: <ul style="list-style-type: none"> – Better collaboration with island sporting entities and BTA – Produce more World Championship and off-season events – Increased frequency of beach sporting events and plan tourist participation with certificates – Plan ticket/accommodation packages for regional (T20) and international events • Marketing: <ul style="list-style-type: none"> – Target international sports teams/clubs and amateur sports teams/schools for training at local facilities – More permanent events (more efficient investment than one offs that must compete for) – Enhanced research and data collection at events – Detailed online guide to sporting facilities – Coordinated event calendar by September of preceding year – International magazine exposure (e.g. existing: Surfer Magazine, Eastern Surf Magazine and Transworld Surf) – Port of Entry Sports TV Display/ Marketing. Airport booth showing top surf spots – S. Coles BSA – Facilitation of scout invitations to see local players – Improved event marketing (e.g. Run Barbados) – Expanded corporate sponsorship (cricket) – More TV promotion of Barbados during internationally broadcast events (e.g. ESPN 20/20 – local promotion not maximized) – National sportsmen/teams travelling overseas should be featuring branded Barbadian gear 	<ul style="list-style-type: none"> – Golf and Polo – villas – Boating – marinas – Surfing - beach villa rentals on East Coast – Sports Meet - hotels (62%) and villas (18.5%) <p>Recent Market Trends in Barbados:</p> <ul style="list-style-type: none"> • Increase in arrivals, investment and employment for sporting events, but not typically sustained beyond events • Loss of international schools and clubs for hockey due to inadequate facilities • Growth in car racing (rallies) <p>Potential for Growth:</p> <ul style="list-style-type: none"> • Niche is already a notable share of the international travel market and fast growth expected to continue from both traditional and emerging origin markets • Barbados is fast becoming a significant destination for a variety of sports, with events and facilities, local enthusiasm, long history of sporting excellence and world class athletes • Opportunity exists to further expand range and reach of sports tourism market to Barbados (e.g. Gap year students market through sport, Caribbean T20 Cricket tournament) • Good to Excellent product-market match in Barbados – Generally a good fit for accommodations + sports facilities, although upgrades are required to both to maintain/grow market
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Status of Sports Facilities

Internationally, the quality of sports infrastructure is viewed as a key indicator of the future success of sporting events and activities. In Barbados, the degradation of key facilities has contributed significantly to the withdrawal of sports teams from the island and their relocation to other Caribbean destinations for training camps and events. Preece (2012) noted the establishment of maintenance plans for national facilities as a significant requirement.

The NSC operates 114 facilities, 14 of which have the full complement of amenities, e.g. pavilions, playing fields, and hard courts used by local and international teams for camps, training and competitions. These facilities require constant upgrading. A summary of the status of various sports facilities is presented by sport category as follows:

Cricket –As the island's national sport, Barbados can now boast a high quality cricket facility at Kensington Oval. It was refurbished in 2007 for the staging of the ICC Cricket World Cup and remains in prime condition for local and international matches. The facility has a permanent seating capacity of 15,000, and the venue has also been used for other major events, including music concerts (e.g. Rihanna's first concert in Barbados staged at Kensington Oval in August, 2011). However, the Oval is predominantly used as a cricket venue. During major cricket events, the Oval is filled with both locals and visitors attending to enjoy the action. The venue is a significant draw for tourists, and will continue to act as a major part of sports tourism initiatives involving international cricket.

Field Hockey -Increasing visitor numbers by visiting sports groups encouraged the Barbados Men's Hockey Association in 1980 to actively promote "Hockey Tourism" (Elcock, 2005). The Banks International Field Hockey Festival, first held in 1986, became internationally popular, highlighting Barbados as a desired field hockey destination. Up to 2005, it was estimated that approximately 100 teams had participated from Europe, 80 from the Caribbean and South America, and 40 from North America. The Barbados Men's and Women's Field Hockey Associations estimated a value of approximately BDD\$1million accrued each year in receipts from the visit of field hockey clubs through accommodation, meals, and transportation.

In 2012, the Astroturf at Wildey was found to be below standard, impacting the once vibrant hockey season. David Rouse, president of the Barbados Hockey Federation (BHF), indicated that *"our goal is to have the turf in place with modern facilities so that we can market an attractive sports tourism package that would encourage teams from all over the world to come and train or compete in Barbados. Ideally, we would like to have two pitches so that we can attract major international tournaments such as the World Cup qualifiers or Pan Am Games. International hockey is not played on grass so this is our only route if we are really serious about sports tourism"*. Key travel partners in the UK have discontinued marketing of the local facility as a result of its poor condition (King, 2012). It is anticipated that international teams will choose alternative neighbouring destinations (e.g. Trinidad) owing to the lack of high quality facilities in Barbados.

Currently, the Astroturf surface replacement will require financing of approximately \$3 million (Toppin, 2012). The 2012 Draft Strategy and Action Plan recommends that replacement of the hockey Astroturf be completed as one of the highest priorities for the Sports Tourism niche. The Pan American Hockey Federation has indicated support for turf replacement, however additional investment was to be sought from the Government of Barbados (Toppin, 2012). The BHF, which is conducting a comprehensive plan for a new facility, will lead the initiative in the future.

Football - The Barbados Football Association (BFA) was assisted by FIFA in developing the new playing facility at Wildey in 2011(see Figure 3.13). The installation of the artificial field is the first phase of the FIFA Goal project. The Astroturf field was noted to be comparable to those of international standard. Future plans include lighting that would allow for extended training and matches in addition to offices and adjunct facilities that will allow for attracting international groups.



Figure 3.13. The new football facility at the Sir Garfield Sobers Sports Complex, Wildey, features an Astroturf surface to international standards.

Motor Sports – Bushy Park, St. Philip has been the central location for car racing and karting in Barbados other than the use of the local road network. In 2013, redevelopment of Bushy Park has been approved through a lease arrangement with the Barbados Motoring Federation. Phase one of the works is estimated to be complete by the end of 2013, which will increase the length of the track from 1.6 km to approximately 2.5 km. In addition, new track facilities, pits and stands will be constructed. The complete redevelopment programme is estimated to cover a 5 to 7 year period.

Tennis – The National Tennis Centre located at the Sir Garfield Sobers Gymnasium in Wildey provides 4 illuminated, hard surface courts for tournaments. The Centre has hosted several local, regional and international tennis matches, including Tennis ‘Pon De Rock’ which has recently featured celebrity players such as Serena Williams and Caroline Wozniacki.

It is strongly recommended that this sport be further developed through full BTA support of the current private sector initiatives.

With its origins in Barbados in the early 1930’s, the sport of Road Tennis is considered a hybrid of lawn tennis and table tennis, with rules identical to the latter. The game is played all over the island including a popular venue, the Road Tennis Facility in Bush Hall. Its potential for future development has been noted within local sporting circles (barbados.org).

“We need to have a permanent home for road tennis in Barbados. It is imperative that if we are to go forward, that we need to find somewhere where road tennis players can call home” (P. Garner, in: King, 2013).

Stakeholders have indicated that revitalization of the Barbados Road Tennis Association (BRTA), which has been non-operational since 2008, will provide impetus to the

sport. National inter-parish road tennis championships and the Racquets of Fire series have been two of the major events promoting the sport. Promotional efforts have been undertaken by the BRTA featuring international tennis champion Andy Murray on CNN World Sport with a wide global audience.

After 80 years, it is recommended that the sport, considered as one that visitors should try, *needs to have adequately covered facilities* to protect against the elements during play.

Track and Field / Track Cycling – The Barbados National Stadium has completed its redevelopment through the replacement of the track. In addition to this, the 40 year old Randolph Fields Velodrome facility for track cycling is in urgent need of repair. The Barbados Cycling Union is proposing that a new 250-metre track be constructed to bring Barbados in line with standards of the sport (Yearwood, 2012). It was proposed that funding for the track could be offset through sports tourism ventures such as year round training camps for international cyclists. It was also proposed that accommodation surrounding an indoor track facility could host other national federations. An alternative recommendation was made for the redevelopment of the former Louis Lynch Secondary School as a dormitory for international training camps (Yearwood, 2012). The UWI Ryan Brathwaite Track is under construction and will add another venue for track and field sports.

Swimming - The Aquatic Centre features a 50 metre Olympic-sized swimming pool for training, and hosts international swimming events. The Centre serves both amateur and professional swimmers as a fitness, therapy, and recreational facility. International athletes from universities, colleges and national teams in Canada, U.K., Sweden, and USA utilize the centre for training during the months of December and January. Seating is provided for 800 in a covered stand, and the facility is generally considered in good condition.

Gymnasium Sports – The Sir Garfield Sobers Sports Complex is a multi-purpose gymnasium complex that provides a venue for large sporting and cultural events. This modern gymnasium can seat up to 5,000 patrons and accommodates many sports including basketball, volleyball, badminton, indoor soccer and boxing.

Other Sports - Other sports that are popular in Barbados include horse racing at the Garrison Savannah, Polo, and Golf, all of which are staged at privately operated facilities that are kept up to standard through their respective maintenance programmes. These types of sports are popular as visitor attractions, e.g. the Sandy Lane Gold Cup horse race held every March, Polo competitions staged each winter season, and a variety of Golf tournaments, including the PGA Seniors Tournament held at the Barbados Golf Club in 2003, and the PGA 2006 Golf World Cup event at Sandy Lane Country Club. These sports categories have the potential to draw large visitor groups and further the development of a sports tourism niche in Barbados.

It has been recommended that the creation of a multi-purpose sporting venue would be the most viable solution to the challenge of housing the range of sporting associations in Barbados (Bennett, 2013). However, it was noted that the cost of building such a facility would be substantial. Further, the maintenance of alternative venues at the standard of the

National Stadium and Kensington Oval was viewed as a key means of reducing the dependence on or overuse of any single facility.

Sports Tourism Opportunities

Within the sport of cricket, the new Caribbean Premier League (CPL) Twenty 20, launched in Barbados in 2012, anticipates attracting players back to the region. In addition, the Foundation Joel Garner Twenty 20 was held successfully since 2009 and involves 16 old scholars' teams from a range of secondary schools, including two community teams (Garner, 2012). The Sagicor Cup, Sagicor Shield and Twenty 20 championships are also well supported. The inter-parish T-20 competition, a 15-match tournament that started in 2007, is also an event that promotes domestic tourism in the island. Aside from matches involving the West Indies Teams and the national side, events such as the Cricket Legends of Barbados Inc. (CLOBI) Cup draw high numbers of regional and international visitors.

There are also opportunities to promote Barbados through international sporting events in North America, a significant tourism market for Barbados. Currently, the island's brand awareness in Canada is below where it could be, in comparison to other competing warm weather destinations. Given Jamaica's overwhelming success at the Olympics in London 2012, along with their masterful Jamaica 50th Anniversary branding, messaging, and events, Jamaica has once again become the 'top of mind' Caribbean destination among many Canadians. There is no better way to capture the hearts and minds of people in Canada than to utilize a theme that resonates with them. For Canadians, it is ice hockey.

The Canadian Broadcasting Corporation's (CBC) Hockey Night In Canada (HNIC) is the longest running and most influential sports programme in Canadian history (now in its 60th season), playing a unique role in the shared experiences of millions across the country. HNIC is the world's leader in ice hockey coverage. It represents the game from the grass roots level to the bright lights of the National Hockey League (NHL) stage. The show provides hockey-based information on multiple platforms, and provides a unique viewing experience to viewers tuning in.

Through Kevin Weekes (former NHL player and currently a leading analyst on HNIC, NHL network, and NBC Sports), a prominent sports personality with strong Diaspora links to Barbados (Canadian Broadcasting Corporation, 2013²), there are opportunities to promote a relationship between the BTA and HNIC that would benefit the local tourism industry. HNIC is the most watched show in Canada, a country of 35 million whose national and international sport is ice hockey, and through which more Canadians can be enticed to make Barbados their destination of choice for personal, work, or sports travel. HNIC is an effective way to accomplish this.

Regarding viewership numbers, CBC's HNIC recently announced a 16% increase in their average audience for a prime east coast hockey game relative to its previous record set in 2007. More than 3.3 million viewers watched the opening match on January 19, 2013 (CBC, 2013). For the start of their 2013 season, HNIC also introduced an interactive experience that resulted in 23,700 unique visitors logging on and engaging with the broadcast as well as features throughout their opening day. In addition, their live stream viewing of the same match hit a record high of more than 80,100 views via

www.cbcsports.ca, more than twice the audience of last season's debut game. Ice hockey fans spanning the globe who tune in on a regular basis also achieve live streaming of the hockey games worldwide.

Visitors can easily identify with the HNIC logo since a variation of it is prominently featured at a local sports bar on the south coast (i.e. the "Hockey Night in Barbados" logo; see Figure 3.14). There is a potential opportunity to link HNIC marketing promotions to Barbados through the operation at Bert's Bar. Linking with major sports initiatives overseas via strong Diaspora linkages is another way of contributing to a vibrant sports tourism niche market in Barbados.



Figure 3.14. The Hockey Night in Barbados logo prominently exhibited in the reception area at a south coast sports bar.

Another prime opportunity to promote Barbados through international sports is through the National Football League (NFL). The Baltimore Ravens recently won the coveted 2013 Super Bowl Championship; their team includes Ramon Harewood, the first Barbadian national ever to play in the NFL and make it to the Super Bowl. This presents an excellent opportunity for the BTA to showcase this achievement and capitalize on it via marketing schemes and promotions through the NFL. The 'Big Mon Elite Athlete Development Training Camp' hosted by Mr. Harewood was held at Kensington Oval in April 2013 attracted 110 eager participants (Bennett, 2013¹). Future sports camps and training sessions are amongst the avenues open for exploration.

It is therefore suggested that Barbados' Diaspora linkages be maximized via key figures in professional sports to improve the nation's visibility and promote increased visitor numbers from the major markets (refer Action 2.1f-2).

Across several niches such as sports, faith, and creative and performing arts, events are held to benefit local organizations that support charitable causes. The Duke of Edinburgh's Award hosts annual fundraising events under the patronage of HRH Prince Edward in support of youth development programmes in Barbados. Sports such as golf have been at the forefront of charitable drives that draw participants for worthwhile causes and stimulates

the movement of locals and visitors across the island. Such events are beneficial on many levels and a programme of charitable sporting events should be developed more fully in association with the BTA and non-profit organizations.

In addition to any initiatives by associations and non-profit groups, notable personalities such as NHL hockey analyst Kevin Weekes volunteer on an individual level, hosting charitable sporting events in Barbados and drawing sports personalities from North America as star participants. This type of activity should not only be encouraged, but also supported and promoted by the relevant tourism and sports agencies in Barbados.

Hosting a Charity Circuit of sports events, and inviting local, regional, and international personalities, would stimulate further activity in this regard and help to increase visitor numbers. A core list of local charities and non-profit groups should be developed and renowned personalities can be twinned with a charity of their choice for a promotional event or showing.

Niche Development Potential

According to Preece (2012), following expected infrastructural upgrades, it is estimated that Barbados can successfully host 3 major sporting events annually which can be complemented by 15 smaller events. Events are estimated to attract BDS\$2 million and BDS\$1 million respectively based on current performance rates. It is expected that 60% of the benefits would accrue to the accommodation and culinary sectors.

According to the White Paper, *“traditional sports like cricket, hockey and football will be promoted, however non-traditional sporting events like rallying, surfing, badminton, road tennis and nautical activities will be focused upon to strengthen sports tourism in Barbados”* (Strategic Solutions Inc., 2012, p. 146). Moreover, the Minister of Culture, Sports and Youth recently proposed that stakeholders should unite nationally to advance the nation’s sporting development under a “Team Barbados” concept toward developing financing and entrepreneurial opportunities (King, 2013).

The following sports categories can be developed to advance sports tourism in Barbados:

Golf

Barbados has raised its profile regionally and internationally through the development of world-class golf courses including Royal Westmoreland, Sandy Lane, and Apes Hill. Golfing opportunities should be marketed to the Silver Market demographic that constitutes approximately 80% of golfers from the UK and the USA. Surveys conducted by the CTO (CTO, 2010; CTO 2011) indicated that 80% - 95% of golfers are accompanied by vacationing spouses /partners, other family members, or groups that may include friends. Engaging family members in compatible, alternative activities or events should be considered for this local sports niche.

Hosting high profile golf events would help to attract visitors in this sports category; promoting and linking with sports personalities who host these types of events, such as the Kevin Weekes Golf Tournament, would help to attract golfers, as well as international sports personalities, along with their family members and friends. Linking marketing packages with recreational programmes that focus on family/groups traveling for golfing holidays would add interest and appeal to this type of initiative.

Cricket

Aside from cricket matches staged at Kensington Oval and other cricket grounds on the island, there are attractions that complement the sport, including the Cricket Legends Museum and the UWI Cricket Walk of Fame. Matches for events such as the CLOBI Cup (Cricket Legends of Barbados Inc.) should be packaged with tickets to these sites to increase the visitor experience. The development of tour packages that include matches and promotions for heritage and cultural cricket sites is therefore recommended.

Sailing

The Barbados Yacht Club hosts competitive sailing throughout the year. Activities include dinghy regattas and sailing events in Carlisle Bay. The Club also hosted the 505 World Championships in 2013 and the annual Mount Gay Rum Regatta, which will raise its profile to deliver top sailing events. The event attracts primarily regional participants. Beyond this, the advent of high-end sailing, heralded by the Panerai Transat Classique Regatta held in December 2012, reveals greater opportunities for the expansion of sports tourism in Barbados.

As with golf, participants in cross-Atlantic yacht racing often stay for extended periods. In addition, participant delegations include both teams and their entourages. Upgrades in 2012 to the Careenage basin have increased the island's scope for accommodating such activities. These upgrades included the installation of buoys to berth 40 vessels, and the provision of potable water and electrical outlets on either side of the basin for use by vessels.

Future work proposed in the Barbados Port Inc.'s 10-year master plan aims to facilitate berths for an additional 50 vessels in the Shallow Draught outer basin (Hutson, 2013). The new facilities were utilized during the Panerai Regatta that included Regatta Village in Independence Square, a prime location for hosting a new water festival. The proposed Barbados Water Sports Festival would allow for exposure of the sport to the wider public and engage domestic tourists in more active participation.

An annual water-sports festival can be considered for development that would combine competitive sailing events, recreational boating centered in the Careenage, and utilizing Independence Square for programmed community activities and entertainment features.

Diving

Sunken attractions such as the Greek freighter SS Stavronikita off the west coast, along with 6 major shipwrecks within Carlisle Bay, are key dive sites. Barbados also has diverse,

offshore reefs surrounding the island which are excellent for snorkeling, the majority being off the southwest coast. Although Barbados has included diving and snorkeling as part of its visitor attraction since the 1960's, this popular activity has not remained competitive with other Caribbean destinations. Amongst the best dive sites in the Caribbean for shipwrecks are Grenada, Bermuda, Bahamas, British Virgin Islands and Aruba.

A recent poll identifies the top 10 snorkeling sites in the region as Bonaire, Dominican Republic, Dominica, Grenada, St. Kitts, Cancun, Bahamas, British Virgin Islands, Puerto Rico and Grand Cayman (Caribbean Journal, 2013). To raise Barbados' profile and maintain a competitive edge, a new sunken wreck is required to develop another artificial reef. Recent investigations into potential decommissioned ships have confirmed that an estimated budget of \$2 million is required to purchase a suitable vessel (pers. comm., André Miller, Barbados Blue Water Sports, 2013).

Surfing

For several decades, surfing has been popular in Barbados due to its excellent conditions. In recent years, wind surfing, kite surfing and stand up paddle boarding have been introduced to the local market (pers. comm., Brian Talma, January, 2013). Wave conditions are considered comparable with world-class surfing destinations such as Hawaii, Puerto Rico, Costa Rica, and Brazil.

Primary surfing locations on the south coast include Miami Beach, Freight's Bay, Long Beach and Silver Point, along with High Rock, Parlour and the Soup Bowl located at Bathsheba. The Barbados Surfing Association's Independence Pro Competition that takes place in November at the Soup Bowl attracts competitors from all over the world. One of the top surfers claimed that Barbados offers "one of the top 3 waves in the world" (Kelly Slater, in: Pergament, 2009).

The principal markets for the island are USA, Canada, UK and Brazil. By virtue of its location, Barbados has the potential to raise its international profile and achieve greater visitor numbers for this tourism niche market (pers. comm., Barry Banfield, Director, Barry's Surf School, May, 2013). Importantly, every effort should be made to further improve amenities and visitor facilities located at the Caribbean's #1 surf break, the Soup Bowl, Bathsheba. **Current challenges include congestion due to heavy vehicular traffic to the event. A park and ride shuttle service is of critical importance if the crowds are to be adequately managed.**

According to local surfer, Brian Talma, Barbados is at the point where a balance needs to be found regarding the development of the sport, and that the island should be marketed more as one that has an active beach culture, but in a balanced way in order to retain the appeal that the island still has to international surfers (Pergament, 2009). *It is recommended that surfing and its related beach culture be used as a means to foster community-based tourism due to its potential to become a broad-based activity.*

Adventure and Extreme Sports

The CTO profile of the adventure sports market has shown rapid growth in popularity. However, the number of participants is lower than other sporting activities owing to the need for a specific degree of skill or physical fitness. Students were identified as one focal market for this level of sport. Therefore creative products in this niche could be marketed in association with websites for local universities and colleges or through social media (Acorn, 2008). There is a local website called *AdrenalineSun* for Caribbean Action Sports (refer www.adrenalinesun.com) which features a wide range of sports as well as up to date news on local and international categories within this sector.

The over 55-age group was also highlighted as another market with growth potential in this segment. Within Barbados' primary source market, the UK, the Association of British Travel Agents (ABTA) Travel Trends Report (2013) indicates that the pace of modern life has prompted an increase in the number of adventure travelers for whom two weeks on a beach holds little appeal. ABTA research shows that 5% of UK consumers are expected to take an adventure or challenge holiday in 2013. CTO identified Brazil as the main emerging market in proximity to the Caribbean (Acorn, 2008).

Adventure sports have been developing in Barbados, including zip-line attraction, caving (e.g. Coles Cave), mountain biking, and scuba diving. The east coast waters have steeper topography than the west and south coasts, with caverns and overhangs. Some dive operators also offer shark dives. Challenge courses, such as Outward Bound, have become a popular abroad, e.g. USA and UK, and can expand the current tourism product offering.

In this regard, the TMP suggests the following initiatives:

- Identify local adventure sports providers (both marine and land-based), and market these services collectively via web-based media
- Promote the development of an annual extreme sports event/competition incorporating existing outdoor sports and venues or a combined event at one selected site/arena (refer Action 2.1f-3)
- Update the BTA website to feature an "Adventure Locator" with dedicated tabs or direct links to "Adventure Locations" or services within the "Trip Ideas" menu similar to other categories such as Weddings or Sports. These would complement the map links on each page

Beach Volleyball

Barbados has excellent conditions in which to host beach volleyball events, and given the popularity of the sport worldwide, there is the potential to grow the sport significantly on the island and contribute more to sports tourism. Beach volleyball is one of the most watched sports in the Summer Olympics, is a great spectator sport, and if properly organized, visitors will travel far to attend (Beckford, 2005).

For the last 9 years, the Sizzlin' Sands beach volleyball event has been staged in October or November each year at Brandons Beach. Spanning a 2 to 3 day period, the event takes place in conjunction with the Barbados Volleyball Association, and is sponsored by BTA, NSC, the Barbados Olympic Association, and other private sponsors. The event attracts teams from the Caribbean, USA, and Canada, as well as hundreds of spectators per event.

Offering Barbados as a location for the international beach volleyball circuit would add to current initiatives being staged in this sport and contribute to the development of sports tourism as a primary niche.

Combat Sports

The Barbados International Combat Sports Festival attracted delegations from 10 regional and international countries. The Caribbean Combat Sports Association has emphasized the market potential of this niche. In Barbados, karate is the most popular of the combat sports that include boxing, wrestling, judo, kickboxing, and Olympic Taekwondo. Karate has been popularized through training groups across all age groups, and Barbados has achieved regional and international acclaim in the sport.

Barbados can build on this base for expansion of tourism opportunities through further promotion of combat sports.

Skating

Barbados would benefit from a multi-purpose sports and entertainment centre that could service multiple activities appealing to both visitors and locals. Skating and its associated sports is a very popular activity globally. It is internationally recognized through Olympic competitions, and is a favourite leisure time activity. Barbados has strong linkages to ice hockey, especially through the National Hockey League (NHL) in North America, e.g. several NHL players have roots in Barbados, and the official Caribbean home of the NHL's Ottawa Senators hockey team is located in Barbados.

At present, the only other skating arenas in the Caribbean region are in Haiti and Puerto Rico. This type of development in Barbados would be a unique attraction for all ages and would have substantial social benefits. It could be designed to service a number of sports, including ice-skating and rollerblading (which is currently a growing activity in Barbados); and be converted for entertainment events such as the staging of local and international musical and cultural performances. It could also appeal to international sports teams or skating groups wishing to practice in their off-season periods in a destination that could also provide other health & wellness benefits such as those offered in Barbados.

Linking Sports to Health & Wellness initiatives in this way would help to build both these niche markets in Barbados and contribute to the development of the visitor economy.

The White Paper (2012) states that “*the product offering with respect to attractions has not just stagnated, rather, it is regressing. The island is particularly weak in the area of attractions and activities that cater to the family market*” (Strategic Solutions Inc., p. 50).

The development of a multi-purpose sports and entertainment arena where multiple sports can be practiced would provide a substantial attraction to capture the ‘family market’.

It is recommended that the arena have a full size ice surface and seating capacity of approximately 3,000 – 5,000 persons. It would also require ancillary space for functions such as change /shower rooms, retail space for skating equipment, basic food services, equipment rental space (e.g. skates) and common space. A full size professional arena such as used by professional hockey teams is not recommended; this is more in keeping with community arenas found in North America and Europe. The retail space could be substantial and a provider of required equipment through sale or lease. The broad range of equipment and related clothing could become a major profitable venture.

Potential activities at this type of sports arena would include: ice hockey, hosting professional players and figure skaters to put on training clinics, hosting professional teams to come for exhibition games, an indoor road tennis facility, bowling alley, school outings.

It is proposed that the facility make full usage of green technologies in order to minimize energy expenditures and demonstrate best practices.

The uniqueness of including an ice surface in a warm, tropical country that can attract visitors from temperate countries and others who would be “curious” to try something new would make this a highly unique venture.

The following Actions recommended to promote Sports Tourism are in support of Strategic Imperative 2 on ‘**Enhance the Visitor Experience**’ and corresponding Strategy 2.1 which states: “*Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending*”.

2.1f-1 Create the Barbados Sports Tourism Association

2.1f-2 Develop International Partnerships with Key Sports Personalities

2.1f-3 Promote Extreme Sporting Events

2.1f-4 Develop a Multi-Purpose Sports and Entertainment Arena

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Sports Tourism

2.1f-1 Create the Barbados Sports Tourism Association

Description:

Create a unified private sector organization that, through the use of advocacy, collaboration, participation, expertise, technology and research, develops a collective sporting body while making sporting development a productive enterprise athletically and financially, and enhances the sports tourism product.

Expected Outcomes:

- An increase in local, regional and international awareness and participation in Barbados sports
- Greater private sector participation in sport promotions
- Generating a lobbying framework for public and private agencies to represent the interests of member associations and promote constructive processes to enable those associations to maximize sporting opportunities and potential revenue in support of their athletes

Guidelines for Implementation:

- Ministry of Culture and Sport, in association with local sporting bodies, to develop a Barbados Sports Tourism Association (BSTA) policy framework that defines the membership, roles and scope of the organization
- Monitor, rationalize, and distribute annual scheduling of sporting events and generate a holistic calendar
- Generate a Sporting Activity Funding Enterprise (SAFE) through member subscriptions, sponsorship and funding initiatives (e.g. advertisement at events and via web resources)
- Develop focused and dedicated project groups based on agreed sports programmes and national events
- Develop insurance (life and health) provisions for member associations' athletes
- In recognition of the global competitive environment of sporting events, assist in the marketing and development of sports as a viable product for the generation of revenues toward the support of the member bodies
- Collaborate with member associations to collect, evaluate, and circulate data (e.g. users, attendance at events, available sporting equipment and facilities, etc.) regarding formal sporting activities
- Promote resource sharing amongst member associations
- Facilitate member training in relevant fields through courses, seminars and programmes
- Ally with local, regional and international bodies and service providers to generate collaborative partnerships and mutually beneficial agreements toward the promotion of sports and tourism:

Local associated agencies would include:

- Ministry of Culture and Sport
- Barbados Hotel and Tourism Association
- Barbados Tourism Authority
- Tourism Development Corporation
- Tourism Advisory Council
- Small Hotels of Barbados Inc.

<p>Challenges With Implementation:</p> <ul style="list-style-type: none"> • Enrolling all the sporting associations • Agreement on the mandate and subscriptions • Establishing a unified ethos in fund allocation and project development
<p>Recommended Implementation Agency: Barbados Tourism Authority (in association with the National Sports Council)</p>
<p>Priority / Implementation Timeframe: High/Short Term: This is viewed as an enabling priority action in the TMP Implementation Plan (refer Report I, Section 5.0)</p>
<p>Target Users: All local sporting associations</p>
<p>Who Benefits:</p> <ul style="list-style-type: none"> • Barbados sporting associations • Visitors and locals attending sporting events or using facilities • Athletes participating in programmes or events
<p>Risks: Generating and updating a holistic calendar can be time intensive, although the staff requirement should be small and could be coordinated with other tourism projects such as the proposed Tourism Informational Public System, Island Ambassadors, and the Barbados Shopping Guide</p>
<p>Estimated Costs: Seed funds for an NGO to be determined</p>
<p>Source of Funds: BSTA membership</p>
<p>Revenue Generation Potential: Indirect through improved sports planning and marketing</p>
<p>Further Development Work Required: Overall planning of mandate and coordination with associative bodies.</p>
<p>Other Considerations: Linkages with Tourism Awareness, Tourism Policy</p>

2.1f-2 Develop International Partnerships with Key Sports Personalities

Description:

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

This initiative aims to create an ongoing Multi-Platform Relationship between Barbados and the Canadian Broadcasting Corporation's (CBC) Hockey Night In Canada (HNIC). Currently, the island's brand awareness in Canada is below where it could be, in comparison to other competing warm weather destinations. Given Jamaica's overwhelming success at the Olympics in London 2012, along with their masterful Jamaica 50th Anniversary branding, messaging, and events, Jamaica has once again become the 'top of mind' Caribbean destination among many Canadians.

There is no better time or way to capture the hearts and minds of people in Canada than to activate

a strategy that resonates with them. For Canadians, this is ice hockey. Forging and leveraging an relationship through the most watched show in a country of 35 Million whose national and international sport is ice hockey, would entice more Canadians to make Barbados their destination of choice for their upcoming personal, business, or sports travel. HNIC is the best programme to accomplish this.

CBC'S HNIC is the longest running and most influential sports programme in Canadian history, playing a unique role in the shared experiences of millions across the country. There is nothing that unites Canada from coast to coast the way that the sport of hockey and specifically HNIC does for the last 60 years. HNIC is the world's leader in ice hockey coverage. It represents the game from the grass roots level to the bright lights of the National Hockey League (NHL) stage. The show provides hockey-based information on multiple platforms; but above all, it gives viewers the feeling that you can't get anywhere else.

HNIC delivers to not only a broad TV audience (reaching from 2 to 5 million viewers in Canada alone, as well as the USA and their international audience), but a targeted one for Barbados, as the audience over indexes on travel and also has higher than average household income that would be partly disposable for travel.

HNIC also represents the general population as well as hockey fans, primarily adults 25 to 54 (male skew), and secondarily, children 8 to 14. As a result of the trend of emerging technologies, the Hockey Night brand has a multi-platform target of 18 to 34. More than just a hockey game, Saturday nights at an NHL rink are a big time event that is the core business of the show. Players, fans, and the unmanufactured drama of sport comprise the umbrella of what is broadcasted on HNIC.

Expected Outcomes:

- Engaging millions of Canadian viewers
- Significantly increasing the profile of Brand Barbados in a primary market
- Barbados becoming a 'top of mind' travel destination and differentiating itself from competing warm weather destinations
- Improving the long-standing relationship between Barbados and Canada
- Increasing stay-over tourism arrivals
- Increasing accommodation occupancies

Guidelines for Implementation:

Given there were over 1 million live stream views to CBC's HNIC during the past season, along with an average of 3.6 million page views per week to CBC Hockey, and CBC Sports attracted 1 million unique visitors this past Quarter, the use of online media is suggested as a significant draw for Barbados tourism from that particular market:

- *Develop an online contest to help Barbados build engagement and followings around their social media touch points:* Could be run through *Kevin Weekes' Twitter feed, HNIC/CBC Sports Twitter feed, and HNIC/CBC Sports Facebook page. Trips to Barbados could be a prize option.
- *Develop online scavenger hunts:* These have become very popular on Twitter. Consumers are asked to find something and tweet it (be it an image of Barbados that they capture with their mobile device, or something that they find on a Barbados website) for a chance to win prizes.
- *Provide online NHL game streaming:* A very interesting opportunity for Barbados to purchase

some ownership of the HNIC online game streams. Barbados would get an affluent audience that is more targeted (and cost effective) than the broadcast rights.

- *Barbados Night at Scotiabank Place in Ottawa:* Develop a night of contests, prizes, giveaways with Barbados ownership of online streaming of that night's HNIC game, with HNIC's Kevin Weekes broadcasting from the game and a potential tie-in to the After Hours programmes. After Hours and Online could be used as the platform for the night to deliver the Barbados message. This initiative could also offer a prize that pre-promotes this night, by giving 2 lucky fans the chance to win an "HNIC Behind the Scenes" experience and meet & greet with Kevin Weekes, 2 tickets to the game, etc. that would be executed at this event.
- *Hockey Night / Hockey Day in Barbados concept:* Develop a contest to win the ultimate Hockey Fan trip to Barbados, inclusive of airfare, hotel, etc. as well as an HNIC Experience watching NHL game(s) at Bert's Bar in Rockley (the Caribbean home of the NHL team, the Ottawa Senators) with hockey alumni/personalities. Winning a trip to watch Hockey Night / Day in Canada from Barbados with 2 hockey legends would be highly desirable for hockey fans.
- *HNIC Broadcast Advertising:* Barbados is without any consistent type of on-air ads or commercials that run on major TV Networks in the USA, i.e. NBC, CNN, CNBC, ABC, CBS, ESPN, BET, etc., or in Canada via CBC, CTV, MTV, Global, TSN, Sportsnet, etc. North America is comprised of over 400 Million people, providing a large potential viewership.

**Kevin Weekes is a former NHL goalie who is now a regular broadcaster on HNIC, as well as a sports analyst on NHL Network and NBC Sports Network. His Barbadian parents immigrated to Canada, where Kevin was born. He is one of a few NHL professional athletes with Barbadian roots. Kevin continues to foster those roots through his strong links with and keen interest in Barbados.*

Challenges With Implementation:

- Developing the online initiatives that would best attract the HNIC audience
- Sourcing the necessary funding to partner with HNIC
- Identifying the hockey legends who would agree to partner in the initiative
- Coordinating and efficiently running the programme so that it remains viable

Recommended Implementation Agency:

Barbados Tourism Authority

Priority / Implementation Timeframe:

High/Short Term: This is viewed as a **sustaining** priority action in the TMP Implementation Plan (refer Report I, Section 5.0).

The NHL hockey pre-season starts in September and the regular season in October of each year and runs until April, with playoffs ending in late June. To jump-start a 2015 initiative, the priority would have to be high and short term in order to achieve an output during the 2014-2015 NHL season which runs from October 2014 to June 2015.

Target Users:

- Canadian sports fans and those around the world that follow HNIC online and on TV
- Social media users that follow CBC's HNIC and Kevin Weekes' online feeds

Who Benefits:

- Government of Barbados through increased tourism revenues from increased visitor stay-overs promoted through this initiative
- Local accommodation establishments and business owners providing ancillary services for visitors targeted through this promotion
- Improved relationship between Canada and Barbados via this sports medium
- Fostering a long-standing relationship between Barbados and HNIC
- Promoting more interest in ice hockey in Barbados which would add to the suite of sports currently being followed regularly by locals

Risks:

- Attracting more visitors and not providing the quality of services expected as a result of the promotion
- Ensuring follow-up at the Barbados end to ensure high visitor satisfaction
- Commitment to performing the necessary research that would help to inform the success of the initiative so that it can be further developed and sustained

Estimated Costs:

- Commercial advertisements on HNIC – to be determined
- HNIC online streaming rights – to be determined
- Sponsorship of visitors who win the promotions – to be determined
- HNIC multi-platform relationship programme – to be determined
- Estimate of BDS\$10,000 per fan trip to Barbados

Source of Funds:

- Government of Barbados – Ministry budget allocations via BTA
- Canadian private sector interests, including banks that sponsor hockey in Canada and that are well established in Barbados

Revenue Generation Potential:

- Attracting more visitors from a major target market would increase tourism revenues and help to fill available room stock
- Would help to increase visitor spend through the increase in visitor stay-overs

Further Development Work Required:

- Costing
- Source of financing
- Developing and fostering the link between Barbados and HNIC

Other Considerations: Aside from visitors who win trips to Barbados through these types of promotions, the online and television exposure for Barbados would be significant, with potential to translate into increased stay-over visitation from this major untapped market segment. Links with other sports initiatives on the island is recommended to foster foreign interest in local sports programmes and competitions.

2.1f-3 Promote Extreme Sporting Events

Description:

Promote the development of an annual hard sports event/competition incorporating existing outdoor sports and venues or creating an event at a selected site/arena. Developers of Extreme Barbados would partner with local fitness clubs in terms of packaging for domestic tourism.

Expected Outcomes:

- The scope of informal sporting activities will be broadened for niches such as Domestic Tourism, the Silver Market, and students.
- Individuals or groups can participate in select events without in-depth formal training into a particular sport
- Increased revenues to existing operators participating in the Extreme Sports package

Guidelines for Implementation:

Plan and market the extreme sport options presented below:

Option (a) New Day, New Sport:

- Develop a cumulative hard sports package of existing events
- Select and market a package of hard sports events held over a 3 to 5 day period
- Develop and post a web training plan and nutrition guide to inform future participants of the range of physical requirements

Option (b) Mega-man and Phoenix Challenge/Rock Monsters:

- Develop a site with a designed closed course to encompass a complete obstacle challenge course to be run within 3 hours
- Teams and individuals can access the course for a fee at fixed times. The event should be distant from residential areas owing to potential for noise

Option (c) Barbados 3-Range Hikeathon Challenge:

- Develop a 3 day hiking competition for local and international entrants based on the following characteristics:
 - 3 routes – A different routes would be assigned, marked and mapped for each day's challenge; the route must be completed in the course of the day
 - 3 age groups – Age categories can be set to maximize competitiveness within groups (e.g. 16-29, 30-45, and 50+)
 - 3 fitness levels – This category will accommodate 'just for fun' hiking enthusiasts, participants of intermediate fitness and also experts. The graded levels could be titled as follows:
 - Making Sport, Moderates, Maestros

Group participation will also be encouraged. Prizes would be offered for the fastest finishers (individual or group)

Challenges With Implementation:

- These activities requires training/higher level of overall fitness from participants
- *New Day, New Sport* activities require the agreement of existing sports facilitators to participate in the package
- *Mega-man and Phoenix Challenge* – Requires purchase or lease of a minimum-sized 1 acre site for use

Recommended Implementation Agency:

National Sports Council; Private organizations in association with the Barbados National Trust for Option (c)

Priority / Implementation Timeframe:

Option (a) - Low/Medium Term – the coordination of current sports and hosts/promoters to form a holistic package suitable for marketing will require close planning with event organizers

Option (b) - Medium/Medium Term: The preparation will require knowledgeable trainers

Option (c) - Medium/Medium Term: The preparation will require delineation of routes in the Scotland District or coinciding with Naturally Barbados themes (refer Action 2.4-1)

Target Users:

- Visitors and locals/ Persons aged 25 - 40
- Cadets, Barbados Defence Force, members of Youth Service
- University and College teams
- Corporate teams

Who Benefits:

Young visitors, locals, fitness groups seeking physical exertion, informal sports

Risks:

- Coordination of *Extreme Barbados* partners
- Attracting visitors through targeted marketing

Estimated Costs:

Option (a):

- Marketing of package estimated at BDS\$20,000
- Managing the packages - Personnel costs to be determined

Option (b):

- Site purchase, design, and development costs – estimated at BDS\$450,000
- Marketing and promotional materials: estimated at BDS\$12,000 per annum

Source of Funds:

- Option (a) - Existing events continue to develop and maintain their own product while contributing to the overall promotion
- Option (b) and (c) – Private enterprise and sponsors

Revenue Generation Potential:

- Option (a) and (c) – package fee
- Option (b) – admission fee with option for discounts for locals/Caribbean nationals, and repeat frequent users
- Online coaching estimated at BDS\$50-70 per session

Further Development Work Required:

- Identification of a sports package developer
- Design of marketing strategy
- Identification of package components and coordination of sporting activities

Other Considerations: Zipline adventures, biking, extreme hikes, paint ball, and paddle-boarding

2.1f-4 Develop a Multi-Purpose Sports and Entertainment Arena

Description:

To design and build a multi-purpose sports and entertainment arena that will augment the current sporting facilities available in Barbados and expand the variety of sports activity opportunities for visitors and locals.

Skating is a very popular multi-trillion dollar industry globally. It has spawned other types of associated activities, many being competitive at Olympic levels, and is a favourite leisure time activity for families and individuals around the world. The recommendation is to construct a sports arena that would include a full size ice surface, with seating capacity of 3,000-5,000 spectators, and space for ancillary services as follows:

- Providing a place to practice activities such as skating on ice and rollerblading on a converted, suitable surface. Rollerblading is currently a growing leisure activity in Barbados
- Establishing a well-equipped retail space
- Offering a broad range of activities including the following:
 - Hosting professional hockey players and figure skaters to put on training clinics
 - Hosting professional teams to play their exhibition games
 - Figure skating lessons
 - Converted for entertainment uses (e.g. musical and theatrical performances)

In design, green technologies would be utilized to make the facility energy efficient, particularly electrical generation, because of the high use of electricity to freeze an ice surface. A location readily accessible to many residents and visitors (near south & west coasts and the cruise port) is preferable to optimize use and viability.

A private sector 'champion' needs to be found to proceed with this development, as it belongs with the private sector as a built-for-profit venture. However, Government would have an important role with facilitation.

Expected Outcomes:

- A place where residents can engage in a new set of professional and recreational activities
- A place where locals, including the youth, can develop their potential in sports activities not now available, and potentially for some at international competitive levels
- An opportunity to host professionals to demonstrate, teach and interact with residents and visitors
- A profitable revenue generation centre through ice rentals, space rentals, equipment rentals, and retail sales
- An education resource for school children
- Increased opportunity for new job skills training
- An environmentally specialized facility
- Can provide social benefits to residents
- Greater product diversification of new offerings to increase visitor satisfaction
- Appealing to the 'family market'

Guidelines for Implementation:

- Further develop the concept through a design/ feasibility study
- Government and/or one of its agencies fund the feasibility/design study
- Approach private sector parties to encourage interest in implementation
- Develop potential partnership programmes with private sector interests, Government and agencies
- Select a consulting design team with proven ability to plan and design such a facility
- Work with the champions and partners to obtain the required funding

Challenges with Implementation:

- Having Government prepared to fund feasibility/design
- Raising sufficient funds for feasibility/design
- Finding key private and public sector partners agreeing to champion this project

Recommended Implementation Agency:

BTII (in collaboration with private sector interests)

Priority / Implementation Timeframe:

High/Short-Medium Term: Feasibility and design aspects can be completed initially in the Short Term

Target Users:

- All visitors and locals
- School children
- Families
- Aspiring athletes
- Athletes (professional and others)
- Private sector
- Sponsors of other events

Who Benefits:

- All visitors
- Barbados residents
- Students and youth
- Communities and businesses
- Government through increased taxation revenues

Risks:

- Public sector not contributing funds for feasibility / design assessment
- Proceeding with the development planning and design, then not having partners for implementation
- Not having champions on board
- Not being able to approve and implement in a timely fashion

Estimated Costs:

- Construction independent of land costs of approximately BDS\$25 million
- Feasibility / design budget of BDS\$2 million

Source of Funds:

- Government of Barbados
- Private sector
- There may be potential for various corporate sponsors and associated 'naming' opportunities that can offset building and operations

Revenue Generation Potential:

- Substantial for ice rental and venue rentals
- Equipment sales and rentals
- Related facilities sales (e.g. food services)

Further Development Work Required:

- Obtaining agreement of Government to fund feasibility / design
- Finding private sector partners with interest
- Development of terms of reference
- Finding the BDS\$2 million to proceed with planning and design

Other Considerations: Linkages with Health & Wellness Tourism, Domestic Tourism

3.2.1.7 Diaspora

Overview

The nature of the Barbadian Diaspora is two-fold: a community residing outside of Barbados, and a specific African Diaspora. Beckles (2012) advised that we view the Diaspora as being a part of a global African civilization. In order to find strategies that would strengthen the competitiveness of the tourism industry, aid diversification beyond traditional target markets, and generate wider distribution of its benefits, the impetus to explore the prospects for mobilizing the economic power of a Diaspora group with strong and deep connections to the region is growing (IDRC, 2012). Barbadians living outside of Barbados represent a primary focus for programming of tourism activity, including a source of visitation, funding, philanthropy, and as an extension of the tourism marketing efforts of Barbados.

Diaspora tourists already have a significant impact on the economies of Caribbean countries. These travelers constitute a substantial portion of total tourist arrivals, e.g. nearly two-thirds for Guyana and Suriname. Members of the Diaspora return home not only to relax and visit family, but also to invest and do business, to improve education, to establish a new residence, to attend festivals or family events such as weddings or funerals, and to find out more about Caribbean heritage and lineage. It was found that returning first-generation nationals primarily stay with friends or family, and travel locally rather than explore the country. They also favour indigenous cuisine and shopping, whereas later generations, which have higher incomes and are not so close to the homeland communities, are more likely to stay in commercial accommodation and book outings related to history and heritage (IDRC, 2012).

International organizations such as Africa UK promote a range of activities that emphasize engagement by and with the Diaspora. These 'routes to our roots' are part of the global network that remains to be fully tapped. Connections through Barbadian embassies and Barbados Tourism Authority international offices will be useful in any future Diaspora tourism strategies.

Situation Analysis

Communication with international institutions that feature African Diaspora studies is an avenue to explore towards creating linkages throughout the Caribbean. These programmes are prevalent in North America and can be found in the UK as well. With appropriate interface, the Barbadian community abroad represents a source of information and a means for leveraging the governments of the countries in which they reside, and the businesses and activities in which they are engaged. Transfers of technology as well as physical resources have been an area where the Barbadians abroad are active, and such activity can be developed.

"There is a tendency to think that Diaspora tourists will always come, that we don't have to market to them, that we don't have to entice them, that we don't have to plan for them. That is not true, because they operate in market spaces that are very competitive. Our advantage is that they have identity links to the region. Unless we begin to strategize about this target market, and target them in a more sophisticated way, we may begin to lose this market share" (Nurse, 2011).

Diaspora tourism is seen as a priority primary niche market for Barbados. Indeed, the Ministry of Economic Affairs has indicated that the Barbadian Diaspora is vital to the island's development, and underscored the importance of remittances that grew from \$64 million in 1992, to \$263 million in 2006. Regular visits to the island by the Diaspora were also credited with helping to "level out the peaks and troughs of the tourism year", prompting the recognition of the Barbadian Diaspora as an essential member of 'Team Barbados'. The establishment of the Charter for Returning Nationals in 1991 has laid the groundwork for progress within this niche, allowing specific concessions (Wilson, 2010).

Government initiatives and proposals that affect the involvement of the Diaspora include:

- Creation of the Barbados Network databank to encourage the investment of foreign exchange by Barbados Networkers
- Establishment of a Council for Investment, Exports, Foreign Exchange and the Diaspora (CIEX)
- Development of a Foundation for Corporate Social Responsibility and Philanthropy

Potential for Niche Market Development

One aspect of the Diaspora that capitalizes on the fact that persons wish to rediscover lost roots and personal connections can be developed through genealogy tourism. Development of linkages with Barbadian communities is therefore being explored to stimulate interest in those abroad with reconnecting with local names and places. A community tourism

marketplace and programme of reunions will help to promote these linkages. According to the Journal of Travel Research, the baby boomer generation constitutes the primary profile of genealogical travelers. Linkages with programmes that appeal to the Silver Market (see Section 3.2.1.2) are therefore crucial and will involve the overlap of marketing themes from both niche segments (Santos & Yan, 2010).

In order to profit fully from this segment, Barbados will need to develop its capabilities for linking persons overseas more firmly with their Barbadian origins and utilizing available connections to also attract friends and family members.

The White Paper (Strategic Solutions Inc., 2012; p. 166) states that:

“While they do not spend as much money as foreign tourists on average, Diaspora tourist expenditures are more likely to go directly into the hands of local businesses, which results, in some respects, in a more positive and sustainable development impact”.

Currently, the Barbados Department of Archives does not possess the human resources and technical capacity to provide individuals researching their genealogy with accurate records. Cross-referencing of records located at religious institutions and cemeteries may also become necessary for detailed research. The Tourism Advisory Council (2009) advised that a research facility be developed to trace family roots through reference books, censuses, and oral history in order to attract the Diaspora market.

As one potential mechanism to achieving this goal, the Department of Archives could be equipped with additional personnel and technological tools to effectively fulfill the potential of this project. The initial scope could be determined by offering an online invitation through stakeholder groups for expressions of interest from individuals, families, and organizations. Digital records could then be made available online to the Barbadian Diaspora as a paid service provided by a dedicated branch of the Archives Department (Fraser, 2011). Histories could also be solicited from applicants through an online collection centre for historic documentation. Photographs from personal archives can also be used to compile a story and fill information gaps that would benefit the archives (Cummins, A. 2012).

At the 8th African Diaspora Heritage Trail Conference held in Barbados in September 2012, the Heritage Speed Dating concept fostered the exploration of professional linkages and networking. In addition, the conference allowed for the application of the concept of genealogy tourism that builds on the enthusiasm people have for their genealogy and family heritage. The Barbadian Diaspora engages in both passive and active aspects of this niche, either seeking general heritage connections with their native land or actively investigating personal family history via the Department of Archives. It is proposed that the development of an online genealogical research facility providing paid services through a new branch of the Barbados Department of Archives may create a financially viable sector within tourism.

Initiating new, long-lasting relationships is a primary mode by which visits to the island can be diversified and sustained over time; attracting the younger Diaspora community is one such source of expansion. Where youth participate in a family trip to the island, the potential of return visits is high. However, opportunities remain available to attract those Barbadians who have emigrated, but have never returned to the island with their children. The offer of staycation incentives to the Diaspora may promote increased travel from this demographic.

It is recommended that to complement the BTA's "Barbados Family & Friends Club", a unique promotional event is held to inspire expatriates to plan their children's return to Barbados, preferably with parental accompaniment.

In this regard, the launch of a unique promotion is proposed highlighting the theme 'Barbados First' that would help promote more activity that involves the Barbados Diaspora, and contribute to the tourism sector. Herein, members of the Diaspora may accompany or send their children who have never visited the island. Also, youth of the Diaspora that are under a selected age and have not visited the island in the preceding 15 year period would be eligible. Special welcome packages, travel incentives or prizes could be offered to reconnect with Bajan heritage. Children permanently residing abroad whose parents reside in Barbados may also be eligible for participation on their first visit (refer Action 2.1g-2).

The connection of gifting and remittances that exists between the Diaspora and the local population can be more fully developed to allow the Diaspora to participate in Domestic Tourism even while off-island. This can be accomplished by furnishing the Diaspora with a formal mechanism to share the best of local niche experiences and products with Barbadian counterparts on special occasions or simply as a gesture of friendship. The enterprise would afford the Diaspora community a structured means to send gifts that allow all parties to participate more substantially in the Barbados Visitor Economy.

It is suggested that Barbados develop a web site presenting the Gift of Barbados, through which persons, particularly members of the Barbadian Diaspora around the world, can give a gift of any local product or niche experience, (e.g. hotel stays, health and wellness services, or tours to local attractions) to a family member or friend in Barbados through an online payment system that guarantees accountability for the delivery of the funds remitted for the transaction (refer Action 2.1g-3).

The number of Barbadians within the Diaspora who contribute to the island's visibility worldwide include icons within the creative industries and sports arena. Barbados should continue to foster such roots through evolving stronger connections with members of the Diaspora who have a keen interest in the island. Invitations to participate in a Barbados charity circuit also provides an opportunity to create a comprehensive programme between local and international associations and key personalities who wish to cultivate mutually beneficial ties with the island. For example, NHL sports analyst and Diaspora visitor Kevin

Weekes has hosted a Celebrity Golf Tournament since 2005 to help raise funds for Barbados youth charities. In 2009, the event raised BDD\$20,000 for the Phoenix Academy (Gill, 2009). At the same time, the initiative has brought celebrities and sports personalities to the island to participate in the golf tournaments, which continues to promote Barbados tourism in the area of sports and philanthropy (refer also Action 2.1g-1).

In addition, events organized by Barbadian associations overseas, such as the St. Patrick's Association which gathers past and present residents from the area for periodic local celebrations, is a notable example of community spirit and stewardship of local heritage by the Diaspora. International Personalities such as Anson Carter, a former professional NHL player, retains connections through this community linkage.

There is significant potential to further engage the Diaspora in the marketing of the island utilizing social media through online interactive competitions and promotions (refer Action 2.1g-4).

The following Actions recommended to promote Diaspora Tourism are in support of Strategic Imperative 2 on '**Enhance the Visitor Experience**' and corresponding Strategy 2.1 which states: "*Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending*".

2.1g-1 Develop a Diaspora Philanthropy Programme

2.1g-2 Promote a 'Barbados First' Initiative

2.1g-3 Create a Diaspora Gift Programme

2.1g-4 Implement a 'Journey to Barbados' Competition

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Diaspora Tourism

2.1g-1 Develop a Diaspora Philanthropy Programme

Description:

The development and implementation of a philanthropic initiative for Barbados offers opportunities to involve members of the Barbadian Diaspora and locals in long-range stewardship of the island and national projects.

Tourism enterprises and other commercial businesses can be invited to support a philanthropic programme and non-profit venture aimed at stimulating the pursuit of tourism-related projects in both primary and secondary schools. Through the programme, hotel guests would be invited to sponsor projects in a range of categories that benefit sustainability of the Barbados Visitor Economy, and the tourism sector by extension, e.g. energy efficiency, water conservation, environmental conservation, and cultural heritage. Hotels may in turn provide donations from their own charitable fund, match school fundraising, or donate supplies toward a given project.

These philanthropic efforts, if implemented on a holistic basis across a number of hotels, will set a foundation for giving back to the communities of Barbados, and generating connections and networks with the entrepreneurs and service professionals of tomorrow, whose greater appreciation of the Visitor Economy will bode well for the tourism industry. Students developing projects that are chosen by donating sponsors can be invited to interact with the sponsoring hotel. This type of input into the educational sector will reap rewards, as youth are inspired to innovate and learn in valuable creative and scientific fields.

Expected Outcomes:

- Increased philanthropy and the development of philanthropic management skills throughout our communities
- Development of a public platform that will expand the network 'craftsmen' working toward a goal
- Special training and information workshop to help charities make the most of fundraising and outreach opportunities
- Improved connections between local non-profit organizations and their associated communities that would benefit from development projects and application of resources to ventures that would benefit both the community and tourism

Guidelines for Implementation:

a) *Philanthropy Package*

- Engage key stakeholders in promoting philanthropic projects and educational goals within their spheres of influence utilizing a Philanthropy Package in print and web formats that defines long term goals and allows for planning input from stakeholders on a project-specific or educational project basis:
 - Ministry of Foreign Affairs, Barbados National Organizations in the major markets (USA, Canada and UK)
 - Participants of Barbados Network Consultation Diaspora Conferences

b) *Philanthropic Education*

- Initiate a programme of philanthropy education in schools and at the University of the West Indies to develop a culture of philanthropy and the development of the skills needed for not-for-profit and philanthropic management. Production and distribution of educational materials can also be the subject of a Philanthropic Project in Education.

c) *Philanthropic Projects*

- Identify key projects to be activated or funded toward which philanthropy can be directed, and objectively assessed and monitored, for example, school education programmes, heritage restoration projects or supply of tangible products for upgrade of World Heritage areas, e.g. implementation of an interpretive signage programme throughout the Garrison Historic Area (GHA). With long-term projects, phased implementation with measurable outputs builds the trust and commitment of philanthropists. Donations may be recognized through philanthropy awards to donor groups or organizations.
- Identify local non-profit organizations with the common development goals or projects to initiate collaboration, coordinated resource development and maximized outputs. For example, the Tourism Development Corporation operates a 'Special Projects' facility that facilitates contributions by non-member organizations towards specific tourism-related projects supported by the TDC. Contributors benefit from the 150% tax credit

d) *Potential Philanthropic Drives*

- Within the scope of specific philanthropy programmes, fund raising drives can be identified that link tourism goals with philanthropic resources as follows:
 - Heritage Walk-a-thons: A fundraising series through which participants identify a heritage or community project that would benefit tourism development, e.g. heritage site restoration, provision of site amenities e.g. within beaches or community parks. In addition, walk-a-thons may be general to a given locale such as the GHA whereby the Garrison Savannah walking track may be commissioned for a comprehensive event featuring associated activities like food stalls within the GHA
 - Percentage contributions can be assigned to a broad range of fundraising events through which funds sourced from tickets can be applied to projects (e.g. 5% of ticket proceeds from specified performance events may be dedicated to a given project goal
 - Dollar Philanthropy: Non-profit organizations, schools and educational institutions, or community group can be engaged in silver dollar drives for which awards (e.g. "Philanthropies") or other prizes are given by interested sponsors

Challenges With Implementation:

- Legal requirements/legislation with regard to philanthropy in Barbados and the legislation in the countries where philanthropy is being sourced.
- Trust of the Barbados implementation agency by the potential philanthropists

Recommended Implementation Agency:

A new independent not-for-profit agency with a formal institutional relationship with the Prime Minister's office (in collaboration with the BTA)

Priority / Implementation Timeframe:

High/Short Term: This is viewed as an **enabling** priority action in the TMP Implementation Plan (refer Report I, Section 5.0)

Target Users:

- Residents
- Educational planners at key stakeholder institutions, Ministry of Education, UWI
- Barbadians Diaspora
- Visitors to Barbados
- Foreign nationals living in Barbados
- Friends of Barbados

Who Benefits:

The beneficiaries will be Barbadian residents, guests to the island, businesses in all sectors, approved tourism projects/ heritage development projects, and government through revenue generation by both the components of this initiative

Risks:

None perceived

Estimated Costs:

- Establishment of on-line interface and establishment of the independent not-for-profit agency is estimated at BDS\$100,000
- Training and information workshops estimated at BDS\$10,000
- Minimum marketing budget of BDS\$50,000 per annum

Source of Funds:

- Self-funding through philanthropy and grant foundations.
- Workshops would be funded through participant fee submissions.

Revenue Generation Potential:

This initiative can generate in excess of \$100 million in philanthropic giving

Further Development Work Required:

- Review of recently completed research on philanthropy conducted by the Ministry of Foreign Affairs
- Philanthropy Package design and execution
- Educational programme design and selection of educational institutions through which to initiate programme
- Project design and planning for specific development projects

Other Considerations: Linkages with other niche markets, including Domestic Tourism, Health & Wellness Tourism; Tourism Awareness, through specific philanthropic project development

2.1g-2 Promote a 'Barbados First' Initiative**Description:**

Launch of a unique promotion highlighting the theme 'Barbados First' that inspires members of the Diaspora to encourage their children's return to Barbados, preferably with parental accompaniment where the more senior generation is living abroad. Special welcome packages, travel incentives or prizes would be offered to reconnect persons with their Bajan heritage. Barbados records a high level of repeat visitors, a trend that should be actively stimulated along avenues that complement and uphold the Barbados Friends and Family programme.

Expected Outcomes:

- Increased travel to Barbados by members of the Diaspora
- Contribute revenues to the tourism sector
- Visiting members of the Diaspora may accompany or send their children who have never visited the island.
- Diaspora visitors may visit with friends, thereby extending the visitor's circle
- Barbados will be promoted by word-of-mouth and through social media
- The Barbados Friends and Family programme will gain additional promotion

Guidelines for Implementation:

- Diaspora youth under a selected age who have not visited the island within a given preceding period (e.g.10 years) would be eligible to participate
- Children of the Diaspora who are permanently residing abroad but whose parents reside in Barbados may also be eligible for participation on their first visit
- Visitors from twinned cities such as Charleston, South Carolina, with which Barbadian towns are officially twinned, would also be considered for eligibility in this programme (refer to Report II, Section 1.3 on the twinning of Speightstown)
- The promotion would provide general incentives in addition to special incentives for certain 'firsts' e.g. first participant in given age categories, or first visit after longest period abroad
- Participants will also be introduced to the Barbados Friends and Family programme
- Incentives may include:
 - The application of Staycation rates for promotion participants
 - First-timer special recognition activities planned at intervals (e.g. quarterly) through the year. These may include special recognition greetings at ports of entry by the proposed Tourism Ambassadors (refer Strategy #2VE: ATRC – IX in Report VI, Section 9.0),
 - Ground transportation discounts for initial journey to hotel by registered taxis
 - Discounts to select heritage attractions or events
- Participating businesses and sponsors will be recognized on the attendant "Barbados First" Facebook page

Challenges With Implementation:

Spreading awareness of the promotion amongst Diaspora communities

Recommended Implementation Agency:

Ministry of Tourism

Priority / Implementation Timeframe:

Medium/Medium term

Target Users:

All potential first-time Diaspora visitors to Barbados and their family members

Who Benefits:

The tourism industry as a whole will benefit through increased visitor numbers

Risks:

Incentives will need to be adequately coordinated with industry stakeholders such as hotels and attractions

Estimated Costs:

Costs will be dependent upon the level of promotion and incentives developed

Source Of Funds:

Funds will be supplied by businesses participating in the initiative and sponsors providing funds, services or promotional products.

Revenue Generation Potential:

Improvement in overall tourism revenues through increased visitor numbers over the long term

Further Development Work Required:

Development of programme participating stakeholders and overall planning of promotional incentives and "first" categories

Other Considerations: Linkages with Tourism Awareness

2.1g-3 Create a Diaspora Gift Programme

Description:

It is proposed that Barbados develops a web site presenting the Gift of Barbados through which persons, particularly members of the Barbadian Diaspora around the world, can give a gift of any local product or niche experience (e.g. hotel stays, spa services, or tours to local attractions or events) to a family member or friend in Barbados (whether it is a local or a guest staying in Barbados) through an online payment system that guarantees accountability for the delivery of the funds remitted.

Expected Outcomes:

- Increased revenues through expanded sale opportunities and wider marketing exposure for local products and services across the international scene
- Maintenance of connections between the Diaspora, friends and family and local counterparts
- Encouraging international persons to 'Buy Bajan', and to supply Barbadians through a non-fund 'remittance' via gifting of products and services
- Facilitating persons who are overseas to add to the experience of a friend or family member visiting Barbados

Guidelines for Implementation:

Develop and promote a website featuring local goods and tourism services amongst tourism stakeholders, shopping outlets and suppliers / producers of local arts and craft aimed particularly at the Diaspora community

Recommended Implementation Agency:

BTA (in collaboration with TDC and BMA)

Priority / Implementation Timeframe:

Medium/Medium Term: This strategy provides an opportunity for a consistent turnover of local products and services.

Target Users:

- All friends and family of Barbadians
- Barbadian Diaspora
- Local users

Who Benefits:

- Local producers and tourism service providers will benefit from international promotion of marketable products via the internet
- Barbadians receiving 'remittances' in the form of gifted local good or services

Risks:

Achieving buy-in from local service providers and suppliers of locally produced products

Estimated Costs:

- Primary cost will be associated with development and management of the website which will need to be interactive. Costs are estimated to be approximately BDS\$100,000 for start-up
- Final costs will be related to the number of providers subscribing to the system

Source of Funds:

- Commercial providers will pay an annual subscription fee to be hosted on the website
- Retail services and providers will pay a nominal fee based on the number of products to be showcased

Revenue Generation Potential:

Direct revenues through product and service sales.

Further Development Work Required:

Planning of the web format and registration of businesses and suppliers in addition to advertisers.

Other Considerations: Linkages with Shopping, Tourism Awareness

2.1g-4 Implement a 'Journey to Barbados' Competition

Description:

Plan and implement a promotional international competition hosted on Facebook, the winners of which will be granted all-expense-paid weekend trips to Barbados inclusive of airfare, hotel or apartment stays for two persons. Entrants must be over 18 years of age. The promotion is targeted toward first-time visitors who are friends and family of Barbadians.

Expected Outcomes:

- Broad exposure of Barbados as a travel destination within the youth market, both locally and internationally
- Stimulation of first-time visitors through word-of-mouth promotion by Barbadians, both at home and abroad as locals with a circle of friend overseas will be invited to participate
- Promotion of local attractions, experiences and activities
- The Barbados friends and family programme will be highlighted to new visitors

Guidelines for Implementation:

- The competition will be advertised on Facebook and also featured on YouTube
- The completion would be open to select countries
- Entrants must submit links to BTA for their video post on Facebook and/or YouTube of a 30 second video clip entitled "I'm Going to Barbados". The clip must include the applicant's reasons for wanting to visit the island and at least one activity they wish to pursue when on the island
- The entrant must be a first time visitor to Barbados; however, their guest/partnering entrant must be a local or Barbadian (whether living either at home or abroad but having Barbadian identification)
- The video clips from 10 finalists should be specially highlighted. Winners may be selected by votes or "Likes" for their entries.
- Sponsors of the competition will be advertised on the BTA Facebook page. The competition should be held more than once a year with new creative themes for specified groups (e.g. "Honorary Bajan", "Barbados I Come From" or "I is a Bajan") and the entrant can be drawn from

select countries.

- The competition should be promoted amongst the Diaspora, particularly through associations and councils in the UK, US and Canada in order to encourage Barbadians to promote the island amongst their friends.
- Participants will also be introduced or linked to Facebook sites of the Barbados Tourism Authority and other sites such as the Barbados Friends and Family Club



Recommended Implementation Agency:

Barbados Tourism Authority in alliance with private sector sponsors

Priority / Implementation Timeframe:

Medium/Medium Term

Target Users:

- All tourists
- The Diaspora
- Barbadian residents and other tourists

Who Benefits:

- Barbados as a whole will benefit from international promotion through the social media network, word-of-mouth advertising, and potentially repeat visitors
- Sponsors will benefit from wide ranging advertising

Risks:

Non-participation in competition by sponsors or participants

Estimated Costs:

Cost will vary depending upon the origin of the visitor and the accommodation chosen. Airlines, hotels, apartments or guesthouses, or restaurants may choose to participate as sponsors

Source Of Funds:

Private sponsorship for travel packages and stays.

Revenue Generation Potential:

Indirect revenues through increased visitor numbers stimulated by the promotion

Further Development Work Required:

Planning of the submission formats, schedule and confirmation protocols

Other Considerations: Linkages with Tourism Awareness

3.2.1.8 Domestic Tourism

Overview

Domestic tourism occurs when residents take holidays, short breaks, or stays in their own country, in addition to day trips across the island. A key factor influencing domestic tourism is the diversity of experiences available to domestic visitors who continually seek new options. By promoting greater dispersal of domestic visitors, it will be possible to spread the benefits of tourism to more areas and over longer periods, thereby assisting with issues relative to seasonality in the industry.

Visitors can be families, neighbourhoods, or whole villages. Domestic tourism is also considered to be a vehicle for promoting national integration. In countries such as Honduras, the national population has been found to account for 30% of the country's tourist nights, and in Belize the figure is 11% (Dehoorne et. al., 2010). The profile of the domestic visitor was found to have two primary characteristics:

- Younger persons or those of modest income who choose to sample local recreational options. Stays are conducted in basic rental accommodation away from the prime international circuits
- Persons from higher income brackets who frequent tourist locations that have a quality reputation and who vacation with international tourists

The White Paper (Strategic Solutions Inc., 2012, p. 91) noted that:

“Governments around the world...are investing heavily in the promotion and development of their respective tourism industries in order to hasten their economic recovery. They are also promoting domestic tourism in order to ensure that spending remains at home to bolster the local economy”.

Domestic tourism is likely to continue to gain in popularity as residents try to avoid the increasing costs of long haul travel and benefit from lower costs by vacationing locally.

Situation Analysis

The WTTC Report on Economic Impact (WTTC, 2012) found that domestic travel spending in Barbados generated 8.7% of direct travel and tourism GDP in 2011 compared to 91.3% for visitor exports, i.e. foreign visitor spending or international tourism receipts. The projection for 2012 is that domestic travel spending will fall to 8% in 2012 (to BDS\$211.6 million), and rise again by 2.8% per annum (to BDS\$281.3 million) in 2022. Comparatively, foreign visitor spending or international tourism receipts are expected to grow by 0.2% in 2012 (to BDS\$2,254.1 million), and rise by 2.6% per annum (to BDS\$2,903.8 million) in 2022.

An examination of the general flow of visitors through the island, including those from the domestic tourism market, is conceptualized in Figure 3.15. Since much of the island's built

infrastructure is related to tourism or commerce, the Tourism Development Zones defined in the PDP (Government of Barbados, 2003) along the south and west coasts experience the highest visitor flows. The ABC Highway allows users to avoid these densely developed areas by traversing a more central route on the island. The predominant movement of people can be summarized within 8 distinct categories as follows (refer Figure 3.15):

- **Category A:** *Tourism Development Zones and flows between urban centres:* Travel along coastal Tourism Development Zones and commercial town centres primarily for work or leisure purposes inclusive of tourism workers engaged in activity at hotels, guesthouses, apartments and villas
- **Category B:** *Inter-community travel:* For recreation, family visits and community activities
- **Category C:** *Intra-community travel:* Includes family reunions, community functions and fairs
- **Category D:** *Community connections to prime commercial zones:* Travel to and from communities engaged in commercial activity along the south and east coasts
- **Category E:** *Community connections to Barbados National Park:* Travel to and from areas within the Barbados National Park zone via community centres. These tours include village shops. The introduction of formal gateways to the National Park would lend to the appeal of transitioning to a “new” experience. This category comprises vacation stays in properties along the east coast of the island
- **Category F:** *Barbados National Park / Scotland District travel:* Movement within the Scotland District and Barbados National Park, or its associated communities, for work or leisure purposes, e.g. individual or group excursions, retreats for relaxation, wellness or faith, horse trails, hiking
- **Category G:** *Island tours:* Around the island travel in the form of island tours (public transport or chartered, 4x4 tours, near-shore activities, and beach visits)
- **Category H:** *Marine tours and activities:* Off-shore activities

A Staycation Barbados programme was initiated in 2009 to mitigate declining occupancy levels at BHTA member hotels. Currently, BHTA category B-class accommodation offers average rates of BDS\$180 per night. The staycation prices being offered through the programme vary from BDS\$100 per night for a selection of 2 apartment hotels, and from BDS\$150 for a choice of 9 hotels (staycationbarbados.com). These costs can represent a savings over standard rates.



Figure 3.15. Conceptual modes illustrating the flow of visitors through the island (Source: TMP consulting team).

To date, the programme has been a success, generating over US\$4 million for participating hotels, activities and attractions. Its success has been evident at such properties as The Crane, one of the first hotels to offer year-round staycation services. Staycations are becoming an established brand amongst domestic tourists who are increasingly taking advantage of local opportunities for getaways throughout the year. Accommodation stakeholders have emphasized the need for increased awareness with respect to domestic tourism opportunities to dispel lingering reservations held by some Barbadians about local stays (Riley-Thornhill, 2011).

The White Paper noted that Government, in an effort to promote sustainability in the tourism sector, will implement strategies to off-set plummeting visitor arrivals, including the setting up of *“an effective framework to further develop a domestic tourism industry...Indeed the best way for Barbadians to understand and foster a greater appreciation of the industry is if they get an opportunity to be tourists, sample the Barbadian product as consumers and become more involved in the decision-making process”* (Strategic Solutions Inc., 2012, p. 90).

The social desirability of domestic tourism will be enhanced by the appropriate marketing of products. Concepts presented in previous programmes such as Rediscover Barbados with community elements such as Rediscover Speightstown can be revamped to provide complementary products in culinary tourism whereby local restaurants are willing to provide an authentic experience with menus featuring local dishes. Stronger linkages with culinary tourism can be made, as this is one of the main aspects of domestic tourism. In addition, the use of local media to encourage locals to seek out new places can be enhanced through targeted media competitions involving village shops and key locations along the island’s trail system being developed by the BTA (e.g. BTA Rum Trail and Faith Trail).

Further, the Grantley Adams International Airport, through its proposed 2012 master plan, aims to positively impact all visitors. This would be achieved through engaging domestic visitors and communities in on-site interactive programmes where tourism awareness would be increased via promotion of topics such as energy conservation and development of the island’s green economy.

Local street fairs and parades such as the Haynesville Youth Group and Tuk Band provide prime opportunities for dynamic community events. Old Scholars Associations and church groups also form a vibrant year round stream of domestic tourism events to include scenic tours. Church groups also form a large part of the domestic tourism market. The Barbados Association of Retired Persons is another association that supports domestic tourism activities for its members. In this regard, the development of an online calendar of local community events distributed via social media and internet-based networks would help to support the domestic tourism industry (refer Action 2.1h-3).

Potential for Niche Development

Within each category of domestic tourism described in Figure 3.15, there are opportunities to add value to the local product through the implementation of new initiatives and the upgrade of existing systems.

Local promotion of tourism products and experiences will need to be enhanced to stimulate increased domestic travel.

Suggested activities are summarized as follows:

-
- Implementation of a pilot project for the weekly operation of a guided bus tour loop from Speightstown linking Farley Hill Park and the Barbados National Park. An opportunity exists to share the stories of the Scotland District, e.g. the windmills (including Morgan Lewis Mill), geological features, and the Old Train Line
 - Increased regularity of transportation services for persons living in more distant communities
 - Revitalize the community parks programme administered by the National Conservation Commission offering the incentive of a Tree Grant for selected specimens to be planted in participating parks

The wealth of activities open to Barbadians allows for a vibrant domestic tourism economy. Nevertheless, greater interaction across all categories described in Figure 3.15 can be promoted in the area of events and visits to local attractions. Also, local exhibitions of art, craft, technology and professional services provide major linkages in this segment with conference tourism through showcases such as BMEX and the Home Expo. Stronger connections related to culinary heritage can be made through greater emphasis on local farmers markets, village shops and restaurants offering Bajan cuisine, as well as re-launching programmes such as the former Taste of Barbados, which was associated with the BHTA and BDC in promoting local cuisine and products. International tradeshows such as the UK Rum-Fest held in London highlight tropical foods and value added products from Barbados and the Caribbean. These events should be maximized to rekindle personal linkages with Barbados and local products and services.

Social media is recognized as a major tool for expanding awareness and marketing of products and services. The local population is a significant resource relative to promoting the tourism industry. Essentially, every Bajan is a potential ambassador for the nation. The Barbados Visitor Stay-over Surveys (CTO, 2010; CTO, 2011) indicate that visitors to the island are informed primarily by the internet 45% to 55% of the time. Barbados' greatest resource, its people, linked with social media usage can generate high levels of awareness of products and markets. There are opportunities to maximize these linkages utilizing both domestic and Diaspora communities.

The following proposed initiatives could help stimulate Domestic Tourism in Barbados:

- Exhibitions in more locations outside Category A routes can be developed to boost visitor activity across the island
- Encourage more dynamic cross-island adventure travel and support of events through a long-term reward system whereby participants are rewarded for higher levels of activity and personal interaction with formal Barbadian experiences (refer Action 2.1h-5 and Action 2.1n-1)
- Stimulate local youth to increase their patronage of domestic experiences through promotional programmes for institutions and school bodies in addition to incentives for internal participation
- Increase awareness amongst officials of schools and colleges regarding alternative sites and amenities available on the local scene using direct correspondence via internet linking (refer Action 2.1n-3 and Action 2.1h-4)

-
- Local marketing of Staycations should be prioritized within the month preceding holidays on the national calendar since (a) most Staycations will be taken during long holiday weekends or overlapping days between a holiday and the nearest weekend, and (b) the CTO Barbados Stay-over Surveys (CTO 2010; CTO 2011) indicated that Caribbean domestic visitors plan vacations within the month preceding their trip
 - Promotion of honeymooning by locals, which is one of the more active market segments recorded by CTO surveys for Barbados (CTO, 2010; CTO, 2011), may provide a smaller but viable option
 - Promote new advertising concepts to help generate increased awareness, domestic interactions, and resultant commercial activity across the island with respect to authentic Barbadian experiences
 - Collect data from local attractions regarding domestic visitor statistics to be used in planning of tourism awareness programmes, promotions and diversification of experiences
(refer Action 2.1h-2)
 - Engage resident Barbadians in the marketing of the island utilizing social media through on-line interactive competitions and promotions (refer Action 2.1h-4)

The following Actions recommended to promote Domestic Tourism are in support of Strategic Imperative 2 on '**Enhance the Visitor Experience**' and corresponding Strategy 2.1 which states: "*Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending*".

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

2.1h-2 Promote Traditional Bajan Village Shops

2.1h-3 Develop an Activities Programme and Calendar of Events

2.1h-4 Initiate a Public Information System for Tourism

2.1h-5 Create an 'Experience Barbados' Rewards System

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Domestic Tourism

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

Description:

In Barbados, a wealth of opportunities exists for residents to vacation away from home while remaining on the island. This is facilitated through the Staycation programme that offers special rates to locals, in addition to stays in accommodation across the island. The majority of accommodation is located along the south and west coasts within the Tourism Development Zones, and others are located along the east coast within the Barbados National Park (see Figure 3.16). In addition, several local operators of boats and catamarans offer cruises and day-trips that are open to local guests. Many operators do not currently display rates for locals or CARICOM residents on their websites, which may limit awareness and patronage by local clientele.

Utilizing the *Staycation Barbados* programme and website as a launch pad, it is proposed to develop a pool of accommodation providers, including sea vessels, that would cater specifically to daytrips and overnight stays. These would be promoted independently, particularly to families, many of whom who are seeking affordable locations in which to rejuvenate and escape for short periods.



Figure 3.16. View of Bathsheba coast (left); accommodation on the east coast (middle and right).

Expected Outcomes:

- Increased occupancy in accommodation establishments through local Staycations
- Reduction in foreign exchange required by Barbadians for overseas vacation purposes
- Generation of an additional revenue stream that transcends traditional tourist seasons
- Strengthening of the domestic tourism brand combined with development of individual domestic property brands for accommodation providers
- Promoting day trips as viable getaway
- Daytrips will also allow families to take advantage of a hassle free vacation option for picnics and excursions
- Persons within the Silver Market will be encouraged to take advantage of inter-generational holidays

Guidelines for Implementation:

- Liaise with management of accommodation establishments and attractions to obtain rates for the Barbados “staycation” programme
- Develop a schedule of rates. Special local rates by participating establishments should be promoted on attraction websites in order to encourage locals to discover Barbados and also persons overseas to give a gift of a local experience to locals through the *Gift of Barbados*

website (refer Action 2.1g-3).

- Utilize local surveys to ensure that attractions and services meet target market expectations
- Collaborate with all operators to develop special packages and rates that incorporate attractions, on-island stays, and cruises.
- Collaborate with vacation home owners in Bath, East Coast Road, Bathsheba, Conset Bay, West Coast properties, and other locations around the island to facilitate utilization of traditional summer vacation homes

Challenges With Implementation:

- Increasing awareness of vacation packages and benefits to the local market
- Package pricing for accommodation and activities that would be attractive to the local community

Recommended Implementation Agency:

BHTA (in collaboration with the BTA)

Priority / Implementation Timeframe:

High/Short Term: This is viewed as an **enabling** priority action in the TMP Implementation Plan (refer Report I, Section 5.0)

Target Users:

- Locals
- CARICOM residents

Who Benefits:

The beneficiaries will be all residents of Barbados and the tourism sector, especially the attractions and accommodation segments

Risks:

None perceived

Estimated Costs:

Marketing costs in the local and regional media estimated at BDS\$25,000 per annum as well as the programme costs of assembling the package components.

Source of Funds:

BTA marketing budget and cooperative marketing contributions by participating properties and beneficiaries.

Revenue Generation Potential:

- Initial data regarding the Staycation programme commencing in March 2011 showed over 3,000 room nights sold, with over US\$1 million dollars in revenue
- Incremental revenue potential is anticipated to be BDS\$500,000 per annum
- Reduction in the foreign exchange requirement for vacation travel by the local population

Further Development Work Required:

- Detailed planning and implementation
- On-going monitoring of the programme's performance with revision and revitalization on an annual basis

Other Considerations: Linkages with Silver Market Tourism; potential for development as get-away packages that can be marketed around public holidays, birthdays, and special events

2.1h-2 Promote Traditional Bajan Village Shops

Description:

Develop and promote local recognition / certification of traditional village shops (e.g. see Figure 3.17) to participate in an 'Authentically Bajan' programme where shops that meet basic criteria are invited to participate in a regular tourism promotion.



Figure 3.17. Examples of traditional village shops in Barbados.

Expected Outcomes:

- Increased recognition and pride in traditional village shops and services as an integral part of the local landscape and contributing to cultural heritage value
- Engagement of locals in domestic tourism
- Promotion of the shops as recreational hubs and outlets for shopping
- Highlighting of local businesses to the visitor market
- Stronger public-private partnerships and co-operation toward stewardship of local heritage

Guidelines for Implementation:

The basic criteria for participation in the promotion are as follows:

- Formal agreement by shop owners to participate in the programme
- Current health certificate
- Participating village shops will be affixed with an *Authentically Bajan* logo/decal (see Figure 3.18) in formats or colors associated with the category for which they are being recognized
- Shops to be nominated on a monthly basis by members of the public in categories such as: *Born in Bim* (e.g. Heritage village shops), *Bajan to the Bone* (Barbadian savoury delicacies), or *Bajan Flavours* (e.g. cakes, pastries, baked goods, and confectionery), etc. Selected shops will be placed on visitor maps for distribution at key locations, e.g. hotels, ports of entry

The programme will initially be publicized via radio and social networks to receive nominations and shortlist local enterprises for registration and verification of eligibility under selected categories. Shops with the decal form part of an advertising campaign implemented on a competition basis where Barbadians and visitors are invited to call in to a local radio promotion to identify the answer to a select clue given via radio or the proposed *Public Information System for Tourism* identifying a particular *Traditional Village Shop* that is being promoted and its location. Prizes would include tourism services or products some of which may be provided by tourism providers, e.g. hotels. Prize donors would receive promotional exposure through the radio promotion. Shop owners would receive equivalent prizes for participation.

The promotion would need to be publicly advertised and an invitation extended to interested shop owners to participate by submitting shop details. Each month a number of shops would be selected for certification and entry into the promotion.

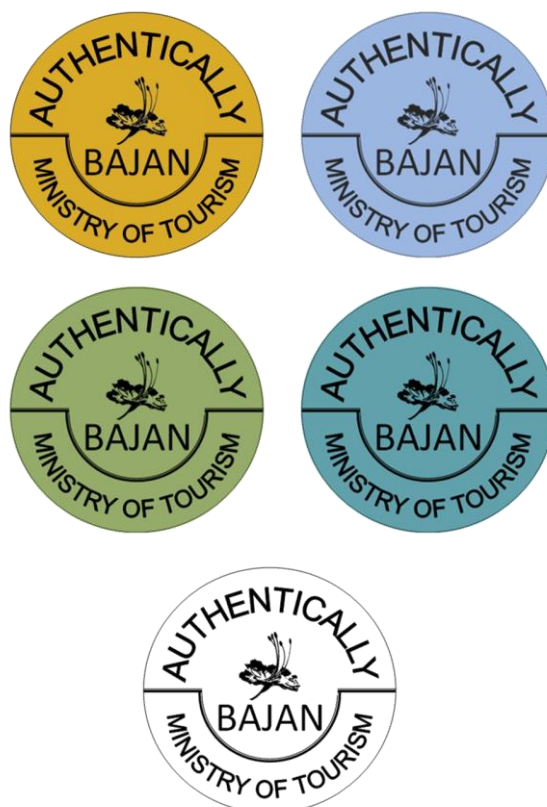


Figure 3.18. Sample of proposed logos for the Authentically Bajan programme.

Challenges with Implementation:

- Attracting comprehensive registration for village shops
- Verifying eligibility and setting a standard for qualification
- The processing time for registering village shops and applying decals will be a major determinant

Recommended Implementation Agency:

National Cultural Foundation (Consultation with the Barbados Association of Rum Shops as required)

Priority / Implementation Timeframe:

Medium/Medium to Long term

Target Users:

- Village Shops
- Locals and non-resident visitors

Who Benefits:

- Communities and visitors to those communities
- Small local enterprises
- Barbados through improvement of the tourism network

Risks:

Establishing a high level of participation of shops and small enterprises

Estimated Costs:

- Cost decals and installation: BDS\$500 each
- Advertising campaign: BDS\$36,000 per annum
- Staff: To be determined according to projected programme enrolment

Source of Funds:

Community councils and programme sponsors/advertisers

Revenue Generation Potential:

Promotion of a network of community shops to increase direct sales

Further Development Work Required:

- Developing requirements for shops
- Developing radio advertising structure

Other Considerations: Linkages with Cultural Heritage and Attractions, Culinary Tourism, and Shopping Tourism

2.1h-3 Develop an Activities Programme and Calendar of Events

Description:

Generate a local events calendar that is coordinated with the National Calendar of Events. The process would consist of a consolidation of faith, charity and NGO events consisting of fairs and markets that are open to the public. These may pertain to religion, health, culinary, sports, creative and performing arts, and general community activities; all of which will form a comprehensive monthly programme of events / activities.

Expected Outcomes:

- More efficient event planning and promotion of local events
- Increased attendance, particularly local participation at faith and charity events resulting in greater revenue turnover
- Improved information on island-wide events in all categories

Guidelines for Implementation:

- Publicly announce the calendar information collection dates to all local churches and charitable organizations
- Content would need to be submitted by the requested date. The calendar may be collated and rationalized from November of the year preceding the activities
- Collate the data and receive feedback and individual schedule confirmations where applicable
- Allow for data entry into digital format
- The information would need to be reliably disseminated to participating organizations via the web in a format that could be printed by the organization or recipient. Monthly updates would be conducted for new events. The calendar should be linked to the BTA and BHTA web portals
- The information would also be publicized as part of the Public Information System for Tourism pilot project (refer Action 2.1h-4)
- Where historic churches are involved, a heritage tour package / open days may be scheduled on the particular church's activity day. This would need to be coordinated with individual churches through the Barbados National Trust

Challenges With Implementation:

- Timely submission and collation of data
- Managing schedule overlaps

Recommended Implementation Agency:

National Cultural Foundation (in association with BTA and the Community Councils)

Priority / Implementation Timeframe:

Medium/Medium term: Implementation is of overall benefit to the health of the domestic tourism industry and participating organizations and businesses

Target Users:

- All locals and visitors interested in faith, community, or charity events
- Visitors interested in church heritage for tours of historic churches
- Small businesses and community organizations

Who Benefits:

- School organizations
- Charities and NGO's
- Businesses participating in fairs or markets through event promotion
- Fair/Market attendees - visitors and Barbadians through historical awareness of local religious histories
- Visitors and locals seeking information on local events and activities

Risks:

Generating and updating a holistic calendar can be time intensive, though staffing requirements could be coordinated in tandem with other tourism projects, such as the proposed Public Information System for tourism (refer Action 2.1h-4), Tourism Ambassadors (refer Action 2.3-8 in Report VI, Section 9.0) and Barbados Shopping Guide (refer Action 2.1p-1 in Section 3.2.2.8).

Estimated Costs:

- Proposed staffing fees for a minimum of 2 persons to develop the calendar and keep it updated
- Computer equipment – 2 computers, a printer and a telephone estimated at BDS\$5,000. Use of existing public sector office accommodation would reduce office rental fees
- Advertising in print media as required
- Website development estimated at BDS\$20,000

Source of Funds:

Recommended annual subscriptions for web advertising or print media

Revenue Generation Potential:

Improvement in domestic spending through direct promotion of products and services available at promotional events

Further Development Work Required:

- Overall planning of themes / promotional groupings / advertising categories
- Sourcing advertisers from the participating organizations for faith-based events

Other Considerations: Linkages with Tourism Awareness, Community Tourism, Faith Tourism, Sports Tourism, Culinary Tourism, Creative and Performing Arts, Health & Wellness Tourism

2.1h-4 Initiate a Public Information System for Tourism

Description:

Institute a pilot project to utilize existing media and public information systems that employ computer screens / digital displays in public places, e.g. post offices, banks, Government buildings. This system would provide news briefs or notices regarding tourism events and accomplishments in addition to promotion of tourism-related events, data, tourism niches, and products, or even cover live events.

Expected Outcomes:

- The information network will support tourism awareness to youth, visitors and locals entering public venues where such media is currently used, e.g. in supermarkets, gas stations and shopping malls
- As an extension of traditional media, the system conveys information to the viewer in relaxed and familiar environments. Content can be instantaneously uploaded to the screens which are connected to the Internet (Nation News, 2010)
- The system will facilitate tourism awareness as well as promotion of tourism products

Implementation Methodology:

- Engage tourism stakeholders in the planning process
- Development of content
- Planning of prime advertising locations
- Consideration of new locations, e.g. at ports of entry, enclosed bus terminals
- Selection of screen sizes (varies from 19 to 42 inches)

Challenges with Implementation:

- Design and regular update of content
- Achieving widespread participation of tourism stakeholders

Recommended Implementation Agency:

Barbados Tourism Authority

Priority / Implementation Timeframe:

Short to Medium term: Since the service is already available in Barbados, and infrastructure is in place at the majority of locations, implementation can be readily achieved.

Target Users:

All locals and visitors

Who Benefits:

- All tourism stakeholders
- Barbadians and visitors

Risks:

Management of content and timely production

Estimated Costs:

- For the existing, locally managed network, a 15 second advertisement repeating 8 times hourly will cost BDS\$1,000 monthly at 5 supermarket venues
- BDS\$500 for animation of content provided (photos, text, and voice over)

Source of Funds:

Barbados Tourism Authority

Revenue Generation Potential:

Indirect through improved knowledge base of events and information to generate wider participation and "buy-in" over the short term for immediate events and long term for tourism awareness and educational purposes

Further Development Work Required:

- Selection of viewing venues
- Overall planning of content and content sources; digital content must be produced at 720psi resolution to fit existing screens
- Sourcing advertisers from the participating organizations

Other Considerations: Linkages with Tourism Awareness

2.1h-5 Create an 'Experience Barbados' Rewards System

Description:

- A reward system is to be created for Barbadians where benefits will be achieved through participation in selected tourism events, or by using the services of *Experience Barbados* tourism partners
- *Experience Barbados* rewards will be issued through 5 levels of participation
- Partnering tourism businesses, attractions, tour operators and NGO's may offer discounts, specials and promotions commensurate with any chosen level of participation

Expected Outcomes:

- Improved participation by locals in tourism events and tourism-related businesses
- Increased revenues from higher event participation
- Promotion of tourism events and services

Guidelines for Implementation:

Experience Barbados interactions will typically consist of purchases of tickets or authorized products at local events and establishments. The proposed process is outlined below:

1. Participants look for the *Experience Barbados* logo and the corresponding event code at any paid, participating event. Digital codes (QR codes to be scanned with mobile phones) will be supplied by tourism representatives or partners at prescribed locations / booths and Experience Barbados partners
2. Scan the QR code shown with the logo or text your name, telephone number, email address, ticket number/receipt number & event code to a given telephone number to receive a text message or email confirming your reward points
3. Each event you attend will qualify you for even bigger rewards
4. A variety of rewards, discounts and offers are available from Experience Barbados partners, attractions and events where rewards can be claimed
5. Simply show your reward ID confirmation to experience Barbados and its rewards any day



Sample of a QR Code

QR codes would be customized with promotional messages from Experience Barbados partners for instant playback upon download.

Participation Levels:

- a) **Level 1 – Bronze:** This level has a minimum initial reward value and primarily serves to recognize the first level of active participation or interaction with a specific tourism activity or niche market. Subsequent participation in Experience Barbados activities will earn increasing rewards.
- b) **Level 2 – Silver:** This level is associated with a basic level of discounts or offers that will be made to an individual upon their second interaction. Participants either exchange their Bronze card for a silver card, or show the QR message / tag or reward confirmation to trade up or advance to this higher level. Each successive level offers greater benefits.
- c) **Level 3 – Gold:** Intermediate level and rewards
- d) **Level 4 – Diamond:** The diamond standard will be the penultimate level and rewards
- e) **Level 5 – Platinum:** This represents the highest level of reward

Reward Options:

At any time, Experience Barbados partners may offer special promotions or discounts to Experience Barbados participants for a prescribed value or time period. Options for rewards include:

- Graded levels of discounts
- Free or discounted products or services
- Tickets or ticket discounts to events or tours

Promotional materials would be developed by the BTA (e.g. see Figure 3.19).

Future consideration should be given to extending the programme to visitors who may use the rewards during repeat stays.

Recommended Implementation Agency:

Barbados Tourism Authority – (Tourism ambassadors may be delegated to staff booths at select events to promote Experience Barbados and issue cards or codes).

Priority / Implementation Timeframe:

Medium/Medium Term: It is critical that the domestic tourism market be engaged in boosting revenues gained within the tourism sector through paid events. This initiative can commence with a small number of providers and can be expanded over time to encompass a wider range of tourism services.

Target Users:

All Barbadians

Who Benefits:

All participants and partnering businesses

Risks:

Lack of interest in participation in the programme should there be inadequate marketing of Experience Barbados

Estimated Costs:

- Initial marketing costs are estimated at BDS\$10,000
- Administration costs for an Experience Barbados office to run the programme – to be determined
- Proposed Tourism Ambassadors would be paid an agreed rate to staff Experience Barbados booths when necessary (refer Action 2.3-8 in Report VI, Section 9.4)

Source of Funds:

- BTA
- Service providers will facilitate in-store or event promotions for their businesses and activities

Revenue Generation Potential:

Direct revenue will be generated through increased participation by Experience Barbados members

Further Development Work Required:

- Evaluation of reward types or options in addition to the parameters for awards
- Set-up of digital reward confirmation mechanism (i.e. QR codes, messaging system)
- Liaising with potential partners
- Creation of promotional material and forms
- Attracting private sector participants and sponsors
- Marketing of the programme

Other Considerations: Linkages with Accommodation, Creative and Performing Arts, Sports Tourism, Shopping Tourism, Conference Tourism, Cultural Heritage and Attractions



Figure 3.19. Proposed 'Experience Barbados' promotional poster.

3.2.2 Secondary Niche Markets

The secondary niche markets that have been reviewed include:

- Agro-tourism
- Creative & Performing Arts
- Faith tourism
- Community tourism
- Medial tourism
- Education tourism
- Volunteer tourism
- Shopping tourism

These niche markets are examined separately in Sections 3.2.2.1 through 3.2.2.8, and include strategies and actions specific to those markets.

3.2.2.1 Agro-tourism

Overview

Agro-tourism is considered to be any activity, enterprise or business that links agriculture with products, services and experiences in tourism (Waithe, 2006, p. 6). Since 2005, the Inter-American Institute for Cooperation on Agriculture (IICA) has been at the forefront in promoting agricultural business opportunities in rural farming communities through linkages between agriculture and tourism.

The ability of islands in the region to limit food imports through promoting the national supplies of fresh produce allows for a more competitive structure with respect to costs. In the Caribbean Region, Jamaica, St. Lucia, Guyana, and Trinidad and Tobago are major fruit growers, while Belize and Jamaica are the primary producers of citrus fruits and papayas. In Barbados, commercial opportunities for linkages between agriculture and tourism have been investigated since the 1970's (Miller, 1984).

It has been stated that often in the Caribbean "growth and development in the agriculture and tourism industries have been pursued separate and apart from each other" (McBain, 2007). This leads to inefficient linkages and supply chains that could otherwise benefit both industries. Moreover, significant foreign exchange can be lost through leakages generated by direct or indirect importation of agricultural goods and payment of external expenses to support the tourism sector (see Figure 3.20). Barbados continues to import many components of the productive process, resulting in the transfer of higher costs to consumers and tourists. Where products can be generated more economically through the use of improved technology, cost reductions can be transmitted to the consumer via savings at hotels and restaurants (pers. comm., K. Holder, Agricultural Consultant, 2012).

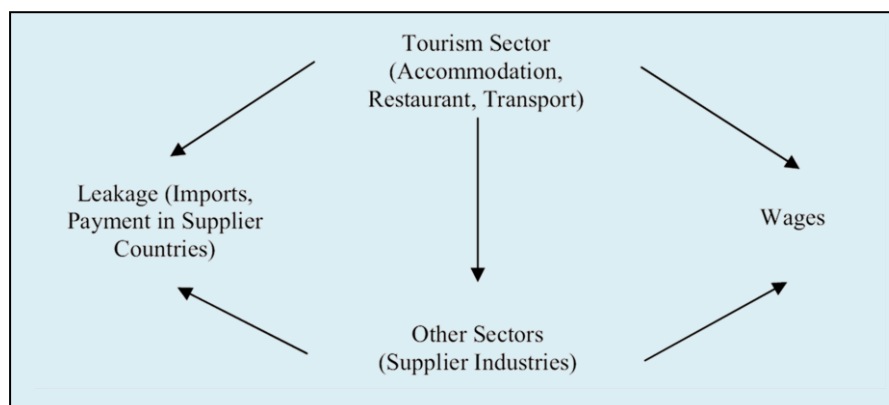


Figure 3.20. Flow chart illustrating the impact of tourism expenditures on agriculture (McBain, 2007).

The reasons offered for the high level of imports by Barbados hotels is the inability of small producers to consistently produce adequate supplies or to meet quality standards. The supply of agricultural products to the tourism industry can be influenced by:

- Tourism accommodation that imports most of their food supplies (in part due to a focus by their chefs on international cuisine, and a preference for sourcing secure supplies via agents through importations rather than directly with local farmers)
- Small scale of agricultural production
- Underdeveloped processing technologies, production and marketing infrastructure

According to Waithe (2006; 2012), six categories of agro-tourism have been identified which are summarized as follows:

- *Agro-trade* – creating trade partnerships within the tourism sector including floriculture, farmers' markets, marketing produce and processed foods to hotels, restaurants and other agencies
- *Culinary Tourism* – promoting local cuisine and authentic Barbadian food festivals
- *Farm-based and Agro-ecotourism* – increasing farm income by presenting rural landscapes or activities to visitors encompassing overnight stays and tours
- *Community Tourism* – markets, special events and enterprise development linked to tourism in rural communities
- *Health and Wellness Tourism* – promoting vacations with organic treatments and developing a local herbal industry
- *Agro-heritage Tourism* – tours of plantations, agricultural museums and heritage sites

The inventory of agro-tourism agencies conducted in 2006 listed stakeholders who used local ingredients primarily for tourism activities. The assessment showed the majority of the stakeholders were engaged in the following:

- Culinary tourism (42%)
- Agro-trade (25%)

- Farm/Agro-ecotourism (14%)
- Agro-heritage (9%)
- Health and Wellness (8%)
- Community tourism (2%)

The predominance of agro-trade and culinary tourism as the foremost contributors to agro-tourism is supported by the use of local products by domestic tourists who frequent local markets and restaurants. Business promotion and financing were two of the key challenges identified. Other key needs for the sector are skills training and the formation of cooperative alliances that enhance the efficiency of operations (Waithe, 2006).

Situation Analysis

The White Paper emphasized the importance of developing a sustainable agro-tourism sector in Barbados.

“It is critical it [Government] remain unwavering in the commitment and resolve to develop and possess its own brand of agro-tourism. The active pursuit and the development of a sustainable agro-tourism sector is an important element to the objective for the sustainable development of the industry” (Strategic Solutions Inc., 2012, p. 104).

It also noted the high level of food imports that are brought into the island mainly to accommodate the tourism sector. The recent development of a produce warehouse by Super Centre Ltd., which acts as a clearinghouse for local farmers’ products to be sold to tourism businesses, should help to improve the reliability of supply and quality of produce required by the tourism sector. According to the White Paper, more has to be done to ensure that a stronger agro-tourism linkage becomes a reality (Strategic Solutions Inc., 2012, p. 104).

At a Caribbean regional workshop held in Barbados in September 2011, the CARICOM Secretariat developed a 4 year Plan of Action for Agriculture -Tourism linkages. The Plan identified strategic objectives that would support initiatives at the country level, aiming to:

- Facilitate linkages
- Increase the trade of goods into the tourism and hospitality sectors
- Promote culinary tourism in the rural landscape

The Pilot Linkages project will serve as “a demonstration of trade linkages with the hotel and foodservice sector” (CARICOM Secretariat, 2011). Costing proposals to secure financial support are the next steps to be implemented.

The Green Economy Scoping Study for Barbados (UWI, forthcoming 2014) emphasizes that sustainable tourism will be critically affected by adoption of internationally recognized production standards. The Study states that this must be predicated upon urgent investment in mechanisms to reduce imports of food, manufacturing, labour and technology.

Towards this goal, Government has proposed to set a target of 10% increase in local food production during the next 5 years, with a corresponding aim at a 25% reduction in the food import bill. The Ministry of Agriculture will be modernized to take full advantage of the latest technology with a view to enhancing productivity in that sector (Belgrave, 2013). The use of water harvesting to reduce production costs was one method employed to make producers more competitive through sustainable water use, which is in keeping with the objectives towards a green economy.

Since 2002, IICA has been actively promoting agro-tourism in Barbados. The focus has been primarily on culinary, agro-heritage, farm stay or agro-trade between farmers and visitors (Hinds, 2012). IICA facilitated a workshop on “Managing an Agro-tourism Business from Seeds to Success” in 2009 for existing and potential entrepreneurs, and hosted an inter-agency agro-tourism symposium along with national and regional presentations promoting IICA’s vision for agro-tourism. With respect to agri-business, a national workshop was also conducted toward improving Barbados’ local supply chain/commodity distribution system (pers. comm., R. Waithe, IICA representative, April 2013).

The annual Barbados Agrofest is the island’s premier agricultural exhibition under the aegis of the Barbados Agricultural Society (BAS) in association with the Ministry of Agriculture and the Rural Development Commission. Strategic partners include Ministry of Tourism, BTA and BHTA. It grew from 22,000 attendees in 2005 to over 70,000 in 2012 (Waithe, 2012). At Agrofest 2013, IICA featured a Plantation Breakfast, as well as a Dinner Under the Stars that presented a range of Caribbean foods, both very popular events. IICA also hosted a “*Sweet Life Folk Fair*” in 2009 to promote the island’s agro-tourism product. The event offered a range of local fare that includes folk performances, handicraft, culinary treats, and heritage tours.

While its strengths have been in the appeal of its exhibits largely to a local audience, wider promotion of Agrofest to visitors and the hospitality sector is recognized by BAS as being important for growth. Like similar attractions in other countries, its marketing could be enhanced by advertising brochures and maps which should be made available to hotels, online social media, and at the entrance to the exhibition.

Barbados is seeking to maximize the potential of local agricultural products in the tourism industry, and to promote a Farm to Table programme that links local farmers to hotels and restaurants through initiatives including Slow Food Barbados. Importantly, farm-based ecotourism could be enhanced by the development of further initiatives to showcase farms and local produce, including outputs such as horticultural products that supply the tourism industry (refer Action 2.1i-1).

To impact the supply leakage of tourism revenues, tourism providers have sought to increase their intake of local agricultural products. If properly promoted and administered, this type of initiative needs to be supported by both the Ministry of Tourism and the Ministry of Agriculture.

The cruise ship market is one niche that can be further explored. It has been highlighted as functioning similar to all-inclusive hotels where host countries do not gain significant benefits

unless returns are maximized through land-based farm tours or supply of food products. Through the 2006 Seatrade convention held in Miami, Barbados introduced local fish-based products and tropical condiments to the cruise ship market (McBain, 2007).

In order to address the challenge of supplying higher quality agricultural produce at lower prices to serve the various niches within the tourism sector, it was recommended that agricultural stakeholders be informed, encouraged and supported in the utilization of scientific information and progressive technologies in agriculture. These would make processes more efficient, leading to lower input costs as the generation of products would take into account elements including soil typologies, planting regimes, pest control techniques and growth cycles (pers. comm., K. Holder, Agricultural Consultant, December 2012).

Identified as a major constraint to agriculture in Barbados, praedial larceny results in the short and inconsistent supply of fresh produce for tourism-related entities (Chandler, 2013). It has been proposed that “*Government introduce and enforce praedial larceny legislation to help farmers protect their production*” (Belgrave, 2013).

Resilience to climate change effects must also be prioritized since the threat of disasters and climatic variability create an unstable base for generating food resources. This is critical in light of the harsh negative impact that a lack of food resources would have on the nation's tourism industry (Kentish, 2013).

There is a need in Barbados for more high quality agricultural markets to allow for the expansion of agro-tourism to its full potential (see Table 3.14). Markets facilitate domestic tourism as well as trade with international visitors seeking fresh produce and also craft items (refer Action 2.1i-2). The historic Cheapside Market is currently the primary location for fresh produce. This venue has tremendous potential for tourism development on par with international markets, e.g. Charleston City Market, South Carolina, Boston's Faneuil Hall marketplace and Montreal's Jean-Talon Market, but exhibits major deficiencies due to lack of vision, marketing, and poor site management. It is generally unkempt and suffers from lack of enforcement of guidelines and regulations pertaining to vendors' activities within the market environs. This is of particular concern since it is strategically located at one of the entry nodes to the UNESCO World Heritage property (refer Action 2.2b-8 in Report VI, Section 5.0). An obvious linkage with the Bridgetown Port would enhance visibility and benefit all stakeholders, including peripheral communities through increased commercial activity in those areas.

In response to tourism demand, two new markets have recently been established along the west coast at Holders House, St. James and Art Splash Centre, Christ Church. However, the need exists for certification of organic produce for distribution and supply at all venues. In accordance with best practices, having the ability to provide a record of traceability with respect to pests, diseases and chemicals used during production is a major consideration if local producers are to gain access to markets such as the cruise industry (N. Nyhathu, BADMC Area Manager, radio interview on January 24, 2013, on CBC 100.7 FM). Some producers and suppliers are now promoting organic, pesticide free produce in order to satisfy trends in the industry.

Table 3.14. Existing public markets in Barbados.

Market Name	Parish
Cheapside Market	St. Michael
BARVEN Open Air Market	St. Michael
Holder's Farmer's Market	St. James
St. George Farmer's Co-op	St. George
Brighton Farmer's Market	St. George
Hastings Farmer's Market	Christ Church
BADMC Southern Farmer's Market	Christ Church
Holetown Farmer's Market	St. James

A recent IICA agri-news feature is Green Tech Barbados, a pilot project launched in 2012 with several objectives including the promotion of organic gardening through traditional and social media. Social media is also now a mechanism for wider discourse on sustainable gardening through 'Backyard Gardening Zone', a virtual space on Facebook. This initiative augurs well for generating agro-tourism interest in overseas markets, particularly among the Diaspora and travel groups that may be focused on health and wellness vacations.

The Government's Hotel Refurbishment, Energy Efficiency and Food Production Fund will provide up to BDS\$20 million for access by local agro-businesses (Caribbean Elections Today, 2012). Agricultural incentives will be provided to encourage farming output, for example, an increase in the rebate for returning idle lands into production.

The Fund Access agency for micro-enterprise development can also assist with loans for business start-ups or expansions (Fund Access, 2012). Suppliers working capital needs for raw materials can also be met through the Fund. An expanded factoring programme aims to mitigate cash flow constraints encountered by small and medium sized enterprises that are owed funds by debtors. The programme is applicable to agriculture and livestock, manufacturing, food services, tourism and tourism-related industries and services.

The key issues are those that surround the need for establishing ownership with respect to the agro-tourism market (pers. comm., Roxanne Waithe, IICA, 2013). Consolidation of efforts at all levels will be required to strengthen perceptions and awareness of agro-tourism as a key niche that brings locals and visitors together with the technological farmers of today (Waithe, 2013).

Having raised public awareness in culinary tourism through events including the Food, Wine and Rum Festival and also some aspects of community tourism, greater attention should be focused on farm-based and agro-ecotourism, health & wellness tourism as it relates to the consumption of fresh, local foods, and agro-heritage tourism, including tours of plantations, agricultural museums and heritage sites.

In this regard, the following areas comprise some key considerations to enhance the efficiency and profitability of the agro-tourism niche market:

- Acquiring the UNESCO World Heritage listing for '*The Industrial Heritage of Barbados: The Story of Sugar*' which was submitted to UNESCO for inclusion on the Tentative World Heritage List. This necessitates the commitment and participation of numerous agencies, both public and private, working towards not only the potential realization of such an achievement, but also the development of the brand should the goal be realized (refer Action 2.3.2 in Report VI, Section 4.1)
- Increasing awareness of the benefits of local foods: enhancing the gastronomical experience relative to Bajan cuisine with the use of fresh local produce given that the expectation of quality, value, authentic nature, local taste experiences, and reduced wastage of products is increasing (refer Action 2.1i-2 below; see also Action 2.1c-6 in Section 3.2.1.3)
- Develop a programme with stakeholders, including hoteliers and restaurateurs, to compile an online promotional booklet outlining desired product quantities, ranges or types and quality standards for products to increase awareness of local farmers / food producers; packaging and labelling should also be addressed to make products acceptable to the tourism market
- The BMA is currently compiling an inventory of select local products to oversee distribution to participating tourism businesses. Commitment is first required from hotels to several of the products being proposed. The BHTA is seeking to re-establish linkages with suppliers of agricultural produce and hoteliers through a new programme
- Collaborate with entities such as the Caribbean Institute of Meteorology and Hydrology in supporting the Caribbean Agro Meteorology Institute project for mutually beneficial outputs. This project was developed to produce long-range weather forecasts that can be applied to both agricultural development and tourism future planning (Nieves, 2011¹)
- Encourage youth and educational institutions at all levels to interact with a broad range of agro-tourism services and providers in order to stimulate interest in the niche market elements (see also Report III, Section 5.0)

The following Actions recommended to promote Agro-tourism are in support of Strategic Imperative 2 on '**Enhance the Visitor Experience**' and corresponding Strategy 2.1 which states: "*Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending*".

2.1i-1 Develop an Island Farm Festival

2.1i-2 Promote the Development of Parish Markets

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Agro-tourism

2.1i-1 Develop an Island Farm Festival

Description:

Develop and promote an island-wide agricultural tour experience focusing on fruit, vegetable and horticultural producers (see Figure 3.21). The festival would be held on select days annually that fall within the prime harvest season for produce.

Expected Outcomes:

- Increased publicity and awareness of local farms and greenhouses, farming procedures (greenhouse technology, hydroponics, etc.) and outputs
- Generation of a heightened agro-tourism experience through direct interaction with producers, product origins, and supply chains
- Development of an expanded forum in which to highlight 100% Bajan value added products, including jams, sweet potato and cassava products, cut flowers, milk and juices
- Increased awareness of the benefits of organic farming techniques and products
- The unique flavour of fresh local produce would be highlighted
- Stimulation of new outlets and farm product supplies



Figure 3.21. Agricultural landscape - traditional rural scene in Barbados.

Guidelines for Implementation:

- Participating farms will be placed on an Island Farm Festival map that would be publicized through local media and made available to visitors and locals
- On the festival day, farmers would place for sale, at pre-arranged price rates, farm produce and/or value added products directly associated with a local farm
- Farmers may also offer refreshments for sale; however, at all venues, featured produce must be predominantly locally produced
- Tours of farms could also be offered
- Organic farms would be differentiated using a unique symbol on the map
- Farms may also choose to utilize advertising space available on the map for a nominal fee
- The map may also be used by the Barbados Nutrition Centre to feature the advantages of using fresh fruits and vegetables in meals
- Farmers groups may provide sales, displays or tours in one location directly associated with the farm of a participating farmer. This would allow farming communities to create partnerships at a farm site to feature a more complete experience and foster collaboration between neighbouring farms (see Figure 3.22)



Figure 3.22. Typical roadside vendor's stand (left); solar dryer (middle); rural landscape in St. Andrew featuring organic cultivation (right).

Challenges with Implementation:

Achieving a high level of participation from the farming community

Recommended Implementation Agency:

Barbados Agricultural Development Management Corporation (BADMC)(in association with the Ministry of Tourism)

Priority / Implementation Timeframe:

Medium/Medium term: The support given to local farmers will help to boost the use of local foods within the tourism industry

Target Users:

- Locals and visitors
- Diaspora
- Local chefs and restaurants interested in fresh produce or organic suppliers

Who Benefits:

Locals and visitors will benefit through improved nutritional choices, awareness of local produce available per season, and exposure to local product origins and value chains

Risks:

- Achieving farmer's "buy in" to the festival
- Scheduling of the event to coincide with prime seasons of harvest, yet minimizing conflicts with competing events
- Attracting high visitor numbers through target marketing

Estimated Costs:

- The cost associated with displays or tours at each farm will be borne by individual farms
- Marketing and production of maps is estimated at BDS\$20,000

Source of Funds:

- Sponsorship by the Tourism Development Corporation and BADMC
- Advertisements on the map

Revenue Generation Potential:

- Product sales by produce / food stalls
- Indirect through reduction in purchase of imported foods

Further Development Work Required:

- Promotion of the festival within the farming community
- Engagement of farmers for the festival
- Screening of farms for legitimacy during the festival planning and on the festival day

Other Considerations: Linkages with Culinary Tourism

2.1i-2 Promote the Development of Parish Markets

Description:

The markets would be assembled on historic sites in a variety of parishes, including St. Philip, St. John, St. Joseph, St. Andrew, St. Lucy, and St. Peter. The remaining parishes have active markets (e.g. see Figure 3.23). The aim would be for all parishes to have at least one main farmer's market that is open regularly. The markets would showcase the following items:

- Locally raised meats, i.e. beef, lamb, mutton and poultry
- Locally grown organic produce, which can include the selling of plant seedlings for kitchen gardens
- Craft market that carries locally-made craft from natural resources such as wood carvings, jewellery made from local or regional materials, local and Caribbean art and pottery, including old time traditions such as the coal pot, mortar & pestle, heating iron, and goblets / monkey pots
- Locally made furniture constructed from wood, cane, bamboo, grass and any locally grown products

These markets would be set up exclusively for locally made products and locally grown produce, and would be opened each weekend on Saturdays or Sundays.



Figure 3.23. Holder's Farmer's Market in St. James.

To increase the appeal of each market, there would be food stalls to facilitate the sampling and selling of local meats, vegetables, ground provisions and drinks at each market. Various chefs from around Barbados would be stationed at each market to provide good quality food and ensure that a high service standard is maintained. Each chef would be required to exercise creativity and prepare the sampling of various local dishes. Local recipe books would be on sale and these could be used as souvenirs from Barbados. Craft and furniture catalogues would be developed to facilitate customized orders.

Expected Outcomes:

- To provide an additional attraction which will give visitors an additional event to attend and to provide the local farmers and craft persons an outlet to showcase their products
- To generate additional revenue that will have a positive effect on revenue generation
- To create employment and entrepreneurship opportunities
- To increase the number of farmer's markets in Barbados
- To promote the availability of fresh local produce per parish on a regular basis
- These markets provide increased opportunity for all users to benefit from additional revenue for the country that can have a positive effect on the GDP

Guidelines for Implementation:

- Identification of a minimum of two (2) acres of land at each parish site, preferably associated with a heritage site such as a plantation property
- Planning and designing of markets would be required, including the development of attractive customized kiosks to display products
- Barbadian traditional musical performances could be included (Tuk Band, steel pan)
- Exhibits could include:
 - Provision of souvenir packs, containing the by-products of sugar cane
 - Cotton industry exhibits
 - Plants and horticultural exhibits using local creativity
 - Food and beverage samplings
 - Tours using Donkey carts could be included to show how food used to be transported
- A managing board would be appointed to administer this venture
- Electricity could be supplied through the use of wind turbines and solar panels to control the maintenance costs
- A full maintenance team would be set up to ensure quality control

Challenges with Implementation:

- Obtaining land in each of the parishes. Crown lands may not be available, therefore acquisition from private owners may have to be considered
- Time consuming processes to obtain approval for the project through the various agencies

Recommended Implementation Agency:

BADMC (in association with the BMA)

Priority / Implementation Time Frame:

High/Short-Medium Term

Target Users:

Visitors and locals

Who Benefits:

- Local farmers
- Visitors and locals
- Service providers
- Manufacturers
- Creative practitioners

Risks:

- The greatest risk is not being able to provide enough variety over time in the markets to maintain their attractiveness to the locals. The markets may be novelties to visitors, but local participation is essential. The planners must think “outside the box” to create the variety required to sustain interest over time
- Vandalism of open market premises is also a concern where no security is provided

Estimated Costs:

An estimate of the cost for implementation would be BDS\$3,000,000 if 12 acres of land has to be purchased. This cost would include all set up costs. Further research is needed to provide specific set up costs, including maintenance, marketing and operating

Source of Funds:

Financing could be sourced by the FAO and TDC

Revenue Generation Potential:

- Fee packages as well as singular pricing strategies (a portion of the entrance fee could be redeemable at the food court)
- Food purchases
- Sale of produce
- Leasing of food court stalls
- Customized orders of manufactured goods
- International export potential of packaged goods

Further Development Work Required:

- Qualitative and quantitative research with the farmers, manufacturers and local chefs
- Policy development outlining the pre-requisites, service standards, design layout and price positioning strategy
- Research of the financing required
- Design of the markets
- Determination of the appropriate location
- Coordinating a project team to spearhead the setting up of the facility

Other Considerations: Linkages with Creative and Performing Arts, Health & Wellness Tourism, Culinary Tourism

3.2.2.2 Creative and Performing Arts

Overview

Globally, the creative industry sector is a multi-billion dollar industry. The worldwide apparel industry alone in 2006 was valued at US\$1,252.8 billion, including the design, manufacturing, distribution, marketing, retailing, advertising, and promotion of varied forms of apparel. In the same year, Chinese products comprised a significant part of the global market (i.e. at 65%), with the countries in South-East Asia also dominating product markets (CEDA, 2011). By 2012, the global value was forecasted at a similar level, i.e. US\$1,249.3 billion (Research and Markets, 2013).

The following sub-sectors are included within the creative industries sector, as defined by the UK Department for Culture, Media and Sports (UK DCMS, 2006):

- Advertising
- Architecture
- Art and antiques
- Crafts
- Design
- Fashion
- Film and video
- Music
- Performing Arts
- Publishing
- Television and radio
- Software and computer games

Due to the diverse nature of the creative industries and the number of independent operations, the identification of stakeholder successes with respect to creativity, production and marketing is often defined through media recognition.

The Local Scene

The White Paper notes that an effective fusion has not yet been achieved between the creative industries in Barbados and the tourism sector. The White Paper (Strategic Solutions Inc., 2012, p. 105) emphasized that:

“The tourism sector has to play a greater role in assisting in showcasing of local Barbadian talent to the world...A framework must be set up whereby the local tourism sector understands the importance of, and is committed to, providing well-compensated career opportunities for a wider cross section of local singers, dancers, musicians, poets, actors, comedians, writers and technicians. Local talent, in every form, must play a significant role in the differentiation and diversification of the Barbados tourism industry”.

The creative industries sector represents an area of potential growth for Barbados (Smith, 2011). Cultural projects in Barbados include film production, the performing, literary and visual arts, progressive cultural heritage, technological advancements, training and professional development of artists and students, in addition to product design, marketing and distribution of cultural goods and services. In order to receive approval for a cultural project, practitioners must apply to the Ministry of Culture, Sports and Youth (GIS, 2013).

Projects also extend to cultural heritage programmes or facility development, site restoration, and relevant research in related areas. The Special Development Areas Act (2002) provides various concessions to approved developers for carrying on specific activities in select locations in Barbados, namely Speightstown, Carlisle Bay Redevelopment Area, St. Lawrence Gap, and the Scotland District Conservation Area. Eligible activities include arts and cultural investments for which tax concessions may be granted in building construction, land tax exemptions, and income tax reductions.

Assistance to the creative industries through education and training includes the NCF's 'Know the Business of Your Art' (BOYA) seminar series that was launched in 2011. Through BOYA, participating stakeholders are assisted in developing their trade through elements such as viable business plans. Practical business skills for entrepreneurs in the creative industries, as well as interactive discussions with successful businesses persons, are a feature of the programme (Nieves, 2011). Educational programmes for the creative industries are currently held primarily at the Barbados Community College and the Errol Barrow Centre for Creative Arts. Also, the Youth Achieving Results (YAR) programme of the NCF and the Ministry of Culture provides opportunities for youth to access their musical and visual arts talents that may ultimately be showcased in the tourism arena. However, the availability of training opportunities for mature musicians is still considered to be an area for improvement (pers. comm., Sheron Johnson, Director of Cultural Policy, Ministry of Culture, Sports and Youth, January 8, 2013).

The Caribbean Export Development Agency (CEDA) has proposed strategies for industry improvement in such areas as fashion and handicraft. CEDA notes that critical elements required for the creation of a fashion industry are lacking, e.g. designer accreditation and apprenticeships, standard sizes and a regional industry association. Cultural products, decorative accessories for hotels and restaurants, designer goods, indigenous art and uncommon souvenirs were noted as gaining popularity in the handicraft market. Poor collaboration between designers and manufacturers has been identified, in addition to inefficient business procedures. Access to financing on appropriate terms is seen as a critical issue for small and micro-enterprises. Solutions regarding equity funds and the provision of venture capital are urgently needed to stimulate the sector (CEDA, 2008).

The BIDC has recommended the establishment of economic clustering so that small producers can cooperate and network to achieve economies of scale. Strengthening the network of local partnerships was also viewed as key to leveraging marketing opportunities. The cluster arrangement serves to empower artisans by making them active stakeholders towards upgrading their skills, applying quality standards, acquiring infrastructure support, and creating centres of excellence, since the cluster creates a hub for distribution of information and innovation and developing business connections (BIDC, 2008). The primary

benefits of clustering are to provide access to finance, raw materials, technology and product design.

The NCF's Cultural Industries Symposium and Trade Show, in partnership with the BTA and BIDC, aims to provide mechanisms for professional business development and training opportunities, market research, market development and cultural product and service development. The 2013 symposium, eCREATE, focused on art and music, and explored the potential for international exposure of local artists and musicians in the Brazilian market. One of the main objectives of the symposium was the creation of a short film using cultural heritage to market Barbados as a premium destination, in addition to a market-ready mobile application focused on the heritage tourism market.

The symposium also featured high quality Barbadian cultural products and services in an arts and crafts exhibition. The NCF is liaising with the BTII on an animation competition featuring an animated virtual tour of Historic Bridgetown and its Garrison to be featured on the World Heritage website. The Cultural Industries Symposium and Trade Show is viewed as a timely and necessary step towards industrialization of the creative industries sector, and generation of an enabling environment where there can be improved earnings for entrepreneurs (NCF, 2013).

Other key opportunities for product exhibitions include GAIA and the Bridgetown Cruise Terminals Inc. Innovative methods for presenting Barbados' range of creative skills must be introduced, particularly where the interface with visitors is greatest. For example, the Bajan Pride Exposition, a community development initiative of the Ministry of Tourism, highlights the products and services of a wide range of exhibitors, and facilitates the host community in displaying their talent (Carrington, 2013). In outreach abroad, the BIDC facilitates the participation of local artistes in the International Music and Conference Tradeshow, last held in January 2013 in France.

Select Creative Industries Sub-Sectors

With specific reference to the Barbados *music industry*, there has been a drop in performances and live music at nightclubs due to the expense of live entertainment; entertainers may want more than consumers can pay. According to the Copyright Society of Composers, Authors and Publishers (COSCAP), there has been no study relating to fees that should be paid for creative products in Barbados, including those involved in the music industry. Furthermore, the English speaking Caribbean does not have a regional organization with expertise in music to arrange and coordinate musical showcases and festivals (pers. comm., E. Smith, COSCAP, July, 2012). Barbados faces regional competition from musical events such as the St. Lucia Jazz Festival, Dominica's World Creole Music Festival, Jamaica Jazz & Blues festival and Reggae Sumfest, and Spicemas in Grenada.

COSCAP's mandate is to license music and pay royalties, but it has gone beyond its original mandate; it has set up a Foundation to play a developmental role in the sector. Financing has been difficult as well as sourcing the personnel to drive it (pers. comm., E. Smith, COSCAP, 2012). The COSCAP Foundation is intended to provide a mechanism for promoting and stimulating growth for the Barbadian music industry by creating

developmental opportunities for COSCAP members and creating educational activities with the aim of fostering understanding of the local creative industries overall, and music in particular (COSCAP, 2009).

The *crafts industry* is a creative sector that produces traditional handicraft items and functional wares. Artisanal products include those constructed of fibre, leather, metal, pottery, textiles or wood. Despite the potential for establishing a vibrant industry from locally produced crafts, “the sector continues to struggle to realize that potential and establish itself as a viable and vibrant economic activity for prospective entrepreneurs”. The BDC’s register of artisans indicates that approximately 112 of them trade commercially. In the domestic market, imports of craft items exceeded BDS\$13.6 million in 2008(BDC, 2008).

Table 3.15 provides data that shows a small number of new manufacturing enterprises established in recent years. This has been accompanied by fluctuations in job numbers. Between December 2009 and December 2011, the manufacturing sector recorded average employment of approximately 8,400 persons, with a variance of 200 persons entering or leaving the sector during that period (Government of Barbados, 2012).

Table 3.15. New manufacturing enterprises established between 2006 and 2011.

Categories	2006	2007	2008	2009	2010	2011*
Textiles, Apparels and Leather	1	0	0	1	1	0
Wood, Wooden Products and Leather	0	0	1	0	0	0
Fabricated Metal Products	0	0	1	0	0	0
Handicraft	0	0	2	0	3	0
Other Manufacturing	1	0	1	3	2	0
<i>Source: Government of Barbados, 2012</i>						
<i>*Provisional figures</i>						

The principal market for handicrafts is the visitor segment. This segment, however, is impacted by economic conditions in countries like the USA and UK. In 2012, only 2.3% of the 558 manufacturing jobs created were related to handicraft. Linkages with tourism can involve the provision of craft products to the hotel sector, including decorative accessories, furniture, employee’s uniforms, household goods, and toiletries. Stakeholders within the creative industries sector have also noted that access to cruise ship visitors is considerably difficult. Greater collaboration between the BTA, BHTA, stakeholders and tour companies will be necessary to facilitate greater exposure to products within these markets.

Awards such as the UNESCO Award of Excellence for Handicrafts, the first of which was accorded to a Barbadian, are avenues through which development and recognition within the creative industries can be stimulated (Pilé, 2013). The acknowledgement of success stories in the sector, and the importance of assessment and benchmarking of excellence were highlighted at the inaugural Caribbean Excellence Conference held in Barbados in March 2013.

The Barbados Manufacturers Association (BMA) is seeking to develop a consistent supply chain for several categories of related items to the hotel sector. This segment of the market is catered to largely through the Pelican Craft Centre, and retail shops at the airport and seaport. Domestic crafts sales are facilitated primarily through crafts shows, or community events. There has been an inability of operators to effectively integrate unique craft products into the growing tourism sector, or to adequately promote their craft as a branded product.

The BIDC (2008) noted that many craft persons have been unable to earn considerable benefits outside of limited production and retailing through craft fairs and the Pelican Craft Centre. Although intended to be the premier, local craft resource, the Pelican Craft Centre has been performing below expectations. Trends in the international market are focusing on recycled and eco products (labeled 'eco-chic') for the transformation of recycled materials into functional and beautiful accessories. Hence, new product niches are open for development, but would require more intensive research and technology investment by the local craft sector. Available financing, design skills, and access to inexpensive raw materials are the keys to expansion of this niche (BIDC, 2008).

In the area of fashion and design, it has also been recognized that increased consumer demand for exotic clothing by international consumers has created an opportunity within both visitor and export markets. However, competition in the clothing industry occurs through regional and extra-regional imports (pers. comm., B. McKay, BMA, 2012). Hence it will be important for local artisans and designers to meet the changing demands of the consumer.

CEDA (2008) noted that the apparel industry is generally volatile, having unpredictable demand, short product life cycles, and extended, inflexible supply processes. It further noted that developing countries require the financial resources and manpower to establish factories. Additional needs for developing the industry to its potential were cited as:

- Requirements for accreditation of the region's designers,
- Apprenticeships for designers,
- Standardized sizes for the Caribbean
- Establishment of a regional industry association
- Availability of on-line stores

Festivals and Events

Festivals combine a variety of the creative industries' sub-sectors, including art, music, design, fashion, television and radio, film and video, and performing arts. They will continue to grow as the arts, popular music, entertainment, and special themed events become more recognized. Reggae Sunfest in Jamaica, the Trinidad Carnival, Santo Domingo's Festival de Merengue, the St. Lucia Jazz Festival, the St. Kitts Music Festival and the Barbados Crop Over festival are amongst the leading Caribbean festivals. These festivals impact airlift, visitor arrivals, and hotel occupancy rates in addition to other cultural industries and media, local transportation, and the food and beverage sectors.

Festivals are an area with the potential to build linkages with tourism and can showcase the widest range of products or experiences (pers. comm. Erica Smith, CEO, COSCAP,

February 2012). Barbados' roster encompasses a variety of jazz festivals, film festivals, performing arts festivals, and music awards, in addition to the Holders Season, Oistins Fish Festival, Barbados Reggae Festival, Gospelfest, the National Independence Festival of Creative Arts (NIFCA), the Crop Over Festival, CARIFESTA, the St. Lawrence Gap Music Festival, the Celtic Festival and the newly-launched Barbados Summer Arts Festival (BSAF). The BSAF presented the Hastings Arts Mart in 2012 as an umbrella event showcasing a wide range of cultural and creative arts.

Crop Over is Barbados' most prolific festival. It was estimated that approximately BDS\$80 million was injected into the economy in 2012 based on visitor arrivals and revenue generation during the Crop Over period (Madden, 2012). The Crop Over Festival is considered an indigenous and composite carnival festival that includes music, dance and masquerade arts. The Festival provides significant opportunity for a wide range of creative practitioners to market their products, including music, arts (including culinary), design, crafts, film and video, television and radio. Event planners in Crop Over are seeking smoother mechanisms for facilitating the hosting of events. In particular, statutory requirements regarding entertainment licenses will need to be geared toward smoother enabling processes.

Other high quality, unique festival events such as jazz and indigenous music festivals attract international media, promoting valuable exposure that can be gained more cost effectively towards enhancing the image of a destination. However, it has also been found that a large number of beneficiaries (e.g. hoteliers, airlines, restaurants) often do not share the cost of production. Thus, where corporate sponsorship is weak, most festivals are unsustainable without needed public investment (Nurse, 2003).

Other local festivals that offer platforms for cultural and creative talent include Agrofest and food festivals, e.g. Food & Wine and Rum Festival. Major sports festivals and events where cultural products are presented include hockey and golf festivals, motorsports, and horse racing events such as the Sandy Lane Gold Cup. Most of these festivals are held in proximity to Bridgetown or in the south of the island. Events in the north of the island would allow for a wider distribution of cultural products to engage both the international and domestic tourism markets. Importantly, festival organizers and producers have identified the acquisition of sponsorship as being a major challenge to the longevity of productions.

Festival visitors were found to be knowledgeable regarding the art forms, culture and history of the region, and they typically booked longer stays, engaged in more repeat visits and spent more on local goods and services than conventional travelers. They also engaged in more 'word-of-mouth' promotion of their chosen destination. Caribbean nationals were found to comprise approximately 25% of visitor arrivals for the Barbados Crop-Over Festival (Acorn, 2008). St. Lawrence Gap, known as the entertainment centre of the island, hosts the Craft and Food Festival as well as a Carnival in May and June respectively (Belgrave, 2013¹).

Given the number of festivals that are organized annually in Barbados, it is suggested that a Barbados Festival Association be established to represent the major festival partners and market advertising packages to business partners to help foster sponsorship, promotion and representation (refer Action 2.1j-9).

The NCF promotes areas of cultural development, including dance, film/video, literary arts, music, theatre arts, and visual arts. The Foundation also seeks international fora to display Barbadian art, generate interest in the local product, and stimulate travel of art enthusiasts and collectors to the island. The NCF encourages the international exposure of Barbadian art through exhibitions abroad and Barbados' participation in selected biennials, which are the exhibitions where curators gather who are most influential on the international arts scene (NCF, 2013).

Through enhanced education, cultural practitioners can be taught to be more entrepreneurial; there is no structure at present that teaches business development for the sector. One major issue is that there is no 'middle market' for professional advancement. The situation is that Barbados has a festival-based calendar that is part-time instead of year round, which translates into a temporary seasonal market, and there is no active network to promote local suppliers outside of the festivals (pers. comm., Stacia Bryan, BDO, NCF, 2013).

Incentives and Improvements for the Creative Industries Sector

Regarding financial incentives, all imports of raw materials, packaging and equipment used by registered manufacturers were zero-rated in 2008 for VAT purposes. Duty free concessions for small manufacturers contained in the Small Business Development Act (1999) encompass a range of tax exemptions. The Fiscal Incentives (Amendment) Act (2001) provides a maximum 15-year tax holiday to any manufacturer of products exported outside of CARICOM that contain a notable percentage of local value added or are highly capital intensive. In addition, there are allowances on market research and development, investment and export (BIDC, 2009). Further, the Special Technical Assistance Programme administered by the BIDC provides BDS\$7 million annually to manufacturing and services sub-sectors, with BDS \$1million granted to the basic industries towards performance enhancement and mitigation against high production costs (BIDC, 2009).

The Barbados Investment Fund provides equity financing for Small and Medium Sized Businesses (SME) operating in Barbados and engaged in manufacturing, agro-industry, tourism and a range of services sub-sectors. The Enterprise Growth Fund provides local companies with loan financing, venture capital, and technical assistance through, inter alia, Loans & Equity for SMEs, and the Small Hotels Investment Fund. Other mechanisms include the Tourism and Manufacturing Guarantee Facility (BIDC, 2009).

The BMA, BEF, SBA, and institutions such as UWI continue to collaborate toward achieving excellence in the sector. The BIDC Incubator Programme for start-up and emerging enterprises offers businesses key development support. The Small Business Association, Barbados' representative body for micro, small and medium enterprises, operates Small Business Venture Capital Inc., a government supported company that makes equity finance available to qualifying businesses.

The BIDC (2008) has identified the following areas that require increased effectiveness in order to provide the standard of goods for improving the creative industries sector in Barbados:

-
- Lack of understanding of the role of product designers and product development, and a reluctance by some craftpersons to embrace product development; thus there is not enough creative talent in product designs
 - Insufficiency of certain raw materials and a decline of some local sources
 - Unrealized potential on a large scale
 - Not enough recognition for crafts as an important area of economic activity
 - Limited management skills
 - Lack of adequate marketing of products
 - Uncoordinated approach to marketing and inability to intercept opportunities
 - Informal networks and scale of operations

According to McClean (2012), the need for the application of science and technology, and increased investment in research and development, must be underscored. Capturing trade data on craft products is also considered a key step in progressing the creative industries in Barbados.

McClean (2012) also provided the overarching goals of the BDC relative to the manufacturing sector as follows:

- Developing unique product offerings that appeal to both the domestic and international markets, and taking advantage of the strength of the Barbados brand
- Linkages with other productive sectors that contribute to economic growth and employment
- Environmental sustainability, preservation and conservation of Barbados' natural resources, showing resilience to hazards and minimizing negative environmental impacts
- Production of goods that meet and exceed the expectations of customers
- Supportive and facilitative policy and legislative frameworks, and an efficient business environment

Future governmental objectives for enhancing the industry were noted by Belgrave (2013¹) and include:

- Enactment of the Cultural Industries Bill
- Establishment of a National Art Gallery and a Film and Digital Media Commission
- Restoration of the Daphne Joseph Hackett Theatre at Queen's Park
- Pursuit of the acquisition of the Globe Cinema and transformation of the building into a Centre for the Creative Arts

A Cultural Industries Development Bill in Barbados has recently been drafted which will provide for "the establishment of a regulatory framework to facilitate and encourage the sustainable growth and development of cultural industries, funding for cultural projects, as well as duty free concessions and income tax benefits in respect of cultural projects" (Farnum, 2011). This Bill was approved by Cabinet in February 2013, and will soon be going before Parliament to be enacted (CaribJournal, 2013). Policies such as this provide the framework in which cultural development can be pursued.

"One of the things that cultural practitioners, in particular, cry out for is seed capital to assist at the outset. Since the cultural industries are not yet recognized by traditional financial institutions in Barbados, and intellectual property is not yet considered collateral, it is hard to get seed money from the traditional lending institutions such as banks. So, having an instrument like the Bill, in which Government will seek to provide partial funding for feasible cultural projects, is going to be good, because it is a novel avenue for prospective cultural entrepreneurs, who do not have working capital, to access it" (Andrea King, in: Austin, 2012).

High customs duties and taxes on equipment and raw materials are expected to be addressed through the passage of the Bill. A sum of BDS\$50 million is to be made available over a 5 year period to assist in development of the sector. Government is also preparing a database of cultural practitioners and industry stakeholders (Austin, S., 2012).

A Cultural Industries Development Fund is also to be established under the Bill. The Fund will include monies transferred from the Arts and Sports Promotion Fund, voted by Parliament for the Fund, received from the private sector, or from gifts, grants or donations. The purpose of the Fund encompasses financing of cultural projects and programmes, training, loans, and repayable and non-repayable grants. It also will enable cultural practitioners to participate in workshops and seminars toward training, marketing, export and product development. Provision is also made for equity financing to allow investors to fund cultural businesses in exchange for equity shares in the capital of those businesses.

Creative and Performing Arts Centres

The Queen's Park Gallery (QPG) has collaborated with institutions and organizations such as the National Art Gallery Committee, BIDC, Audio-Visual Aids Department, Commission for Pan-African Affairs, and diplomatic embassies in Barbados when presenting artistic showcases. It has provided an accessible venue suitable to patrons and visitors. Also facilitated were the mounting of exhibitions and sale of work by artists who would not otherwise have that capability (NCF, 2013).

The Gallery has served well as a venue for hosting small meetings in the various arts sectors. However, the building that includes the Daphne Joseph Hackett Theatre is now closed due to its dilapidated condition, and consequently the Gallery was moved to Pelican Craft Centre. The work of the Gallery incorporates the production of catalogues for gaining recognition of artists' work. The availability of print and online catalogues to local tourism establishments and visitors such as the Barbados Arts Directory can broaden the scope of marketing within the tourism industry.

Pelican Craft Centre, established in 1964 as a "tourist-oriented industrial park, is the main art and craft hub of the island (see Figure 3.24). Pelican Village is also home to the Barbados Arts Council that represents local artists, and through the Pelican Art gallery artists can host exhibitions. A new pilot project offering is the 'Barbados Arts and Crafts Experience' that invites visitors to work with a local artisan to make personalized souvenirs for a small fee. Transportation and lunch are included in this experience. The Pelican Craft Centre, which is situated within the buffer zone of the UNESCO World Heritage Site, needs to be more widely promoted as a cultural hub and learning facility for all visitors.



Figure 3.24. The Pelican Craft Centre (left), and the former Empire Theatre that is to be restored (right).

The Pelican Craft Centre would increase in popularity if it could be marketed as an attraction (Browne, 2013). According to PCS (2009), the Pelican Craft Centre, if suitably developed, could generate a new and vibrant tourism product. The use of interpretation would improve the historic significance of the Centre. Meeting facilities at Pelican Craft Centre include the Bagnall's Point Gallery and Annex which has theatre-style seating for approximately 100 persons, while the Pelican Training Room is suitable for meetings, workshops and seminars. Forty-five enterprises and shops currently work out of the Centre.

To enhance the presentation of Pelican Craft Centre as an attraction, using interpretive signage and media to tell the story of the artists and artisans and the nature of their work, it is proposed to link the Centre through marketing initiatives with proposed attractions such as the Caribbean Walk of Fame. Linkages with the proposed Sports Hall of Fame (Belgrave, 2013) should also be pursued (refer to Action 2.3-11 in Report VI, Section 4.8).

The Empire Theatre (see Figure 3.24), built in 1922 and now listed as a UNESCO World Heritage building in Bridgetown, is to be restored through a public-private agreement that will allow for it to be leased by a private consortium. The property will feature the following elements:

- A seating capacity for up to 290 persons
- Craft Brewery demonstrating Barbadian beer production and sampling by visitors
- A visitor centre selling art and craft, and a small museum

The refurbished theatre, whose operation aims to be self-sustaining, seeks to attract locals and visitors. The building is likely to be managed by the Ministry of Culture (Austin, 2012).

The National Art Gallery Committee serves to develop programmes that are attractive to an international audience while providing opportunities for the local community to be exposed to regional and international art exhibitions, biennials and visual art symposia (Cummins, 2008). The National Art Gallery Committee is responsible for the coordination of local exhibitions, catalogues and DVD production. Events that have been held include the Black Diaspora Visual Art Symposium and The Road to Many: Toward a Genealogy of Barbadian Art. These high quality exhibitions and symposia are of keen interest to local, Diasporic and international audiences. Linkage of the National Art Gallery Committee website with other

sites that interface with international visitors, such as the BTA's, can serve to boost exposure in the local art and craft niche. It is recommended that existing sites offer web links to key cultural sites in Barbados within their menu options.

Currently, the number of world-class facilities and performing centres for the arts and entertainment industry of Barbados is limited to the Frank Collymore Hall, the Errol Barrow Centre at UWI Cave Hill, and public open spaces and parks. There is an urgent need for a National Dance Theatre, National Portrait Gallery, National Performing Arts Company, and National Theatre Company (pers. comm. Stacia Bryan, BDO, NCF May, 2013). Private organizations such as the BEAT Foundation (Building Capacity for the Creative Arts) aim to foster a "thriving entertainment industry through the fusion of creative and passionate people, enabling and inspirational facilities, with excellence applied to projects and productions." Visionary infrastructural projects include an amphitheatre, a Performing Arts Theatre; a School for Media and the Creative Arts; and a dedicated entertainment and arts district in Historic Bridgetown (BEAT, 2013).

Further to the closure of performance venues, such as the Daphne Joseph Hackett Theatre and Plantation Garden Theatre, which served as key entertainment centres for the creative industries, it has been re-emphasized that Barbados would benefit immeasurably from the establishment of a dedicated performing arts centre as a home for dance, drama, film, poetry and fashion, with requisite performance amenities such as rehearsal areas (Austin, 2012).

Strategic Outlook

Owing to the small size of local creative industries operations, the following recommendations were made by Smith and Young Marshall (2006) as a way forward to enhance prospects within the sector:

- Develop an expansive cultural policy to encompass varied sub-sectors
- Generate fiscal incentives for industry participants and sponsors
- Develop funding programmes to promote public/private partnerships
- Create programmes for stimulating innovation
- Institutional networking and resource sharing
- Promote local content on media outlets
- Use of ICT and e-commerce opportunities
- Maintain up-to-date intellectual property mechanisms
- Identify and develop primary products or services for export

With respect to the local music industry, publishing and licensing agreements are necessary to strengthen the industry. The promotion of such agreements would facilitate the more efficient functioning of the industry in areas such as revenue collection. The Corporate Affairs and Intellectual Property Office (CAIPO) and COSCAP are the existing public and private sector agencies that offer protection to locally created works. Whereas the Intellectual Property Section of CAIPO facilitates trade marking, patents and the registration of other categories of intellectual property, COSCAP functions primarily in the music industry

with respect to issuing licenses to allow legal use of musical works and the collection of royalties (pers. comm., E. Smith, CEO, COSCAP, July, 2012).

In recognition of the ubiquitous nature of digital media, Smith (2011) recommended that the protection of works that utilize digital modes be addressed through a review of the Barbados Copyright Act (1998-4). Expanded access to the mobile music market and subscription-based services are areas of potential benefit, where musical works can be used as a vehicle for promoting Barbados beyond its shores. The CARIFORUM-EU Economic Partnership Agreement makes provision for the export of creative services such as entertainment through income tax and customs duty concessions, in addition to incentives and credits. This will allow for persons in the creative sectors to carry the Barbados brand into the European market, and also to enter into collaborative partnerships through a Cultural Protocol (Smith, 2011).

For Barbados, the introduction of festivals and culture into a new, broad arena as a means of promoting the island internationally can be beneficial. According to Smith (2011), an existing model has been highlighted in Jamaica where upscale residences also accommodate music studios to attract long-stay international artistes whose activities boost employment in both the music industry and in tourism. Evidence for this model has been confirmed by local real estate agencies.

The potential for linkages between tourism and the music sector is very significant. The Ministry of Culture has assessed opportunities for growth in both the tourism and cultural sectors. These are summarized as follows:

- *Access to Funding* - Knowledge of the viability of the creative industries sector by lending institutions will be key to the development of this niche. The ability of cultural practitioners to access funds from the banking sector will have a significant impact on the future growth of the sector (pers. comm., Sheron Johnson, Senior Cultural Policy Officer, Ministry of Culture, January 8, 2013).
- *Collaboration with the Tourism Sector* - The interface between the creative industries and tourism establishments provides a number of avenues to foster greater cooperation for growth in both sectors. From the perspective of the hospitality industry, live performance opportunities in the hotel and entertainment sector, specifically with respect to nightclubs, have experienced a sharp decline. A stronger linkage between development of the creative industries and the provision of high quality entertainment in the hotel sector will need to be generated. Facilities such as changing rooms and performance spaces available to entertainers are lacking in most hotels. These are particularly warranted in 4 and 5 star accommodations where high quality entertainment packages should be developed. A greater presence of local art and craft is substantially needed in hotel establishments that are a prime showcase for local products (pers. comm., Sheron Johnson, Director of Cultural Policy, Ministry of Culture, January 8, 2013; refer Action 2.1J-1).

Regarding the audio-visual creative industry in Barbados (e.g. television, radio, cinema, and theatre), updated broadcast policies are required to enhance the industries potential; in addition, a film authority needs to be developed to authorize non-local film-makers wishing to

produce films on the island. Some key stakeholders in this sector include the Association of Music Entrepreneurs, the Fashion and Design Association, the Craft Union, and the Barbados Arts Council (King, 2013¹). Although mechanisms for the protection of intellectual property are now well developed, enforcement remains a challenge, particularly for musicians (Farrell, 2010). This process is overseen locally by the Copyright Society of Composers, Authors and Publishers.

New and regular events showcasing aspects of Barbadian heritage such as folk culture, songs and storytelling can expand this niche in an area that has been made popular by local groups such as the Cavite Chorale and regionally in islands such as Jamaica. Linkages with the faith tourism sector have also been fruitful in producing high quality shows. Within the jazz arena, performances such as Christmas Jazz, Naniki Jazz Safari and Honey Jazz provide opportunities to present Barbadian artistes and musicians on the national stage. Venues include the Frank Collymore Hall and Ilaro Court.

The sector is also limited by a lack of diversity in product offerings. **Performance fees are also considered by many artistes to be low, and this has been worsened by the economic climate. Tax incentives that encourage hotels and nightclubs to use local performers are considered to be a key mechanism for promoting the music industry** (pers. comm., E. Smith, CEO, COSCAP, July, 2012). Further, the provision of facilities to accommodate performers or infrastructural improvements would be supported under the TDA.

Other destinations use festivals as a magnet to combine nightly performances of local musicians at restaurants serving local cuisine with retail shops open to sell local crafts, demonstrating linkages between tourism, food, music, and craft sectors. If Barbados promotes events such as these, it will be necessary to review the Shops Act that still requires retail businesses to close at specific times.

The strength of the entertainment sector ultimately affects the scope of local product offerings. Additional music festivals that allow more interaction with the community and feature local products like food and crafts can be of substantial benefit. Barbados needs to develop further opportunities and festivals that encourage interaction with visitors, generate revenue, and showcase Barbadian music in a creative way (Smith, 2012).

In this regard, it is recommended that additional themed festivals and events be developed in Barbados to complement Crop Over and provide community and cross-sectoral promotions (refer Actions 2.1J-3, 2.1J-4, Action 2.1J-6, Action 2.1J-8).

For example, creative arts festivals can be staged in Speightstown, the site of the Caribbean Gallery of Art; there is significant potential for further development of the town as an arts hub for Barbados. Queen Street and associated infrastructure, including the Boardwalk and

Esplanade (see Figure 3.25), are key areas that can be used for this purpose (refer Actions 2.2a-1 in Report VI, Section 4.5; and Action 2.1J-8 below).



Figure 3.25. Spightstown sites: Town centre (left); Boardwalk (middle); Esplanade (right).

Another example relates to the film industry in Barbados. According to Harewood (2013), local film productions should focus on culturally unique presentations that will be distinguished from international stories. He further noted that *“the (film) industry is only sustainable if we create a system that allows people to profit and reinvest in filmmaking”*. The provision of a cost-effective venue for the screening of films was also highlighted as a critical component in exposing Barbadians to local film productions. Hence, it is proposed that Farley Hill National Park be utilized as a venue for the introduction of ‘film nights under the stars’ where local films can be aired and coupled with other cultural performances, particularly during film debuts (refer Action 2.1J-7).

Another avenue for development is the mobile music market, i.e. the digital distribution of Barbadian music. This has strong marketing potential for tourism, and could strengthen online linkages with possible extensions into online live concerts. In the same manner that the BTA and private firms sponsor production of local shows, this might be extended to international broadcasts online, which offers a potentially strong opportunity to showcase the extended tourism product.

There is also a market for Barbadian music and videos on ‘YouTube’ and other media. Barbadian artistes performing live concerts and performances can be presented as products for domestic and international tourism (refer Action 2.1J-2).

Regarding the marketing of local arts and crafts, the absence of a dedicated, semi-enclosed market constitutes a missed opportunity for the regular showcasing of these local creative products. The development of a permanent site that would allow craft vendors to display locally made craft, art, sculpture, woodcraft, textiles, metal craft, fashion, and photographic works on a weekly basis would be an important step in propelling the industry beyond dependence on transient presentations at farmers markets and national exhibitions.

The development of a large, permanent craft market facility that is tastefully designed and attractive to consumers would help to promote small business entrepreneurs in the art and

craft sector (see Figure 3.26 for examples in other Caribbean countries). The market could also offer local musical performances.

The ability to showcase local crafts independent of agricultural produce, without the high overheads of space rental, would help to generate interest in, and support of, the local craft industry in Barbados. Vacant lands in the vicinity of Bridgetown, e.g. in Spring Garden or Carlisle Bay, could be considered as a venue for this permanent market.



Figure 3.26. Craft market stalls at Crown Bay, St. Thomas, USVI (left) and Playa Costa Verde, Cuba (right). (Source: *beyondships.com*; *tripadvisor.com*).

It is also suggested that new outreach avenues be explored for the creative arts industries. For example, it is recommended that a display module be developed for use at ports of entry and secure locations such as hotels for exhibiting local artwork, fashion, textiles, sculpture and performing arts creations on a monthly rotation basis. The modules would also be useful for the display of Quick Response coding (QR Codes) for information regarding each exhibit item (refer Action 2.1J-1).

The development of art tours is also recommended where visitors are provided with the opportunity to mingle with artists in their working environment (refer Action 2.1J-5). In addition, the recently announced Government 10-point plan for Barbados tourism, estimated to cost BDS\$20 million, includes a proposal to rebrand the Hastings to St. Lawrence Gap strip as a weekend 24-hour indigenous arts and crafts and cultural performers' market (Alleyne, 2013). This will not only help to stimulate commercial activity relative to local creative arts along a popular coastal section of the island, but also to promote the sector to both local and international visitors.

There is significant opportunity for linkages between the creative industries and other tourism-related sectors. Prime areas include UNESCO heritage events and promotions that focus on uniquely Barbadian assets that can be promoted utilizing authentically Barbadian talent. This has been successfully achieved through events such as Bridgetown Alive.

New themes can also be introduced for the “love boat” rides along the Careenage that were first held in July 2012 and attended by approximately 200 persons. “We have created a demand which only needs supply. We are trying to spark activity and those who have the boats can continue this, and it can be an attraction for locals and tourists” (Fields, 2013).

Live performances by local artistes can also be maximized at sporting events at the parish and community levels. Collaboration between Community Councils, the National Sports Council and performers from the community can serve to identify and promote the engagement of community artistes for events hosted on National Sports Council grounds. This would stimulate Domestic Tourism while supporting the Creative and Performing Arts.

The following actions recommended to promote the Creative and Performing Arts in Barbados are in support of Strategic Imperative 2 on ‘**Enhance the Visitor Experience**’ and corresponding Strategy 2.1 which states: “*Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending*”.

2.1J-1 Develop Creative Arts Showcases

2.1J-2 Create Local Music Kiosks

2.1J-3 Promote an Annual Historic Barbados Festival

2.1J-4 Organize a Caribbean Folk Festival

2.1J-5 Develop Local Art Studio and Gallery Tours

2.1J-6 Create a Storytelling Festival

2.1J-7 Develop a Local Film Event Series at Farley Hill

2.1J-8 Organize a Speightstown Festival Series

2.1J-9 Create a Barbados Festival Arts Association

2.1J-10 Develop a Festival Series at Park Sites

Full descriptions of the Actions are presented below.

Actions Recommended to Promote the Creative and Performing Arts

2.1J-1 Develop Creative Arts Showcases

Description:

Develop creative arts display modules with closed display units (e.g. see Figure 3.27) at ports of entry (i.e. GAIA, BCTI) and other key locations in Barbados for exhibiting local creative art products such as paintings, fashion, textiles, sculpture and performing arts creations on a rotation basis.



Figure 3.27. Example of an enclosed creative arts display.

Expected Outcomes:

- Valuable exposure for local artisans and persons in the creative arts in public locations and high traffic areas
- The rotating displays would allow a high number of creative practitioners to be featured
- The QR codes are a key part of new technology that allows for efficient communication of information in a concise, innovative format

Guidelines for Implementation:

- Coordinate a viable location for the closed displays with Grantley Adams International Airport and the Bridgetown Cruise Terminals Inc.
- Promote the showcase amongst stakeholders, cataloguing display items and types
- Plan and design the showcases, scheduling, display type, duration, and nominal fee to be charged for installation
- Add quick response coding (QR Codes) to the showcases for information regarding each exhibit item displayed
- Include signage to facilitate artist contact
- Commission the construction of the showcases applicable to the display selections
- Organize staff (2-3 persons) to set up the display areas
- Set up and rotate displays
- Promote and organize future rotations

<p>Challenges with Implementation:</p> <ul style="list-style-type: none"> • Regularly updating the work and creations showcased and maintaining the module • Establishing the QR Codes for display items
<p>Recommended Implementation Agency: Ministry of Culture, Sports and Youth (in association with the Barbados Arts Council)</p>
<p>Priority / Implementation Timeframe: Medium / Long Term</p>
<p>Target Users: All locals and visitors to the key locations identified</p>
<p>Who Benefits:</p> <ul style="list-style-type: none"> • All visitors and locals utilizing the key sites identified • Craftsmen and designers
<p>Risks: Upkeep and maintaining the quality of the displays</p>
<p>Estimated Costs: BDS\$10,000 to construct each showcase</p>
<p>Source of Funds:</p> <ul style="list-style-type: none"> • Tourism Development Corporation • Display sponsors and display participants for individual projects
<p>Revenue Generation Potential: Indirect revenues through improvement in visitor spending as a result of promotion of products and services available</p>
<p>Further Development Work Required:</p> <ul style="list-style-type: none"> • Overall planning of themes / promotional groupings / advertising categories • Sourcing advertisers from participating organizations
<p>Other Considerations: Linkages with Community Tourism, Domestic Tourism, Accommodation</p>

2.1J-2 Create Local Music Kiosks

Description:

To provide the opportunity for visitors and locals to sample a range of local music at kiosks designed for users to choose download songs to a mobile device. The kiosks would feature a touch screen interface for self-service use via AMTs (i.e. automatic music teller device/digital music hubs/stations; see Figure 3.28) featuring selections submitted by Barbadian artistes.

- The digital interface would allow users to:
 - Become familiar with local performers
 - Access digital music selections from registered Barbadian artistes
 - Purchase/download selections or order CD's through existing online sites
 - Contacting of artistes can be facilitated
 - Download music apps related to local performances
- Track transactions made through kiosk
- 1 portable unit for use at events such as BIMEX
- Advertising included by sponsoring agencies
- Corresponding contact card station with promotional cards for artistes



Figure 3.28. Example of a kiosk module (Source: <http://quote.kiosk.com/home.php>).

Locations:

- Ports of entry
- Hotels
- Malls
- Exhibitions

Expected Outcomes:

- Promotion of a wide range of Barbadian music and artistes in a variety of locations
- Increased revenues for artistes through music sales
- Promotion of the music industry will give a needed boost in awareness for musical works available for purchase, generating improved opportunities and revenues for participating artistes, organization and businesses

Guidelines for Implementation:

- Select kiosk module type
- Plan locations for modules
- Promote the kiosks with stakeholders
- Compile music playlists and permissions - artistes submit category /music styles / genres
- Install music onto modules
- Distribute proceeds from digital sales

<p>Challenges With Implementation:</p> <ul style="list-style-type: none"> • Compilation of a full range of music in a digital format • Collating data, receiving feedback and individual calendar confirmations where applicable • Data entry into digital format • The information would need to be dependably disseminated and regularly updated
<p>Recommended Implementation Agency: Barbados Tourism Authority (in collaboration with COSCAP)</p>
<p>Priority / Implementation Timeframe: Medium/ Medium-Long Term</p>
<p>Target Users:</p> <ul style="list-style-type: none"> • All visitors and locals utilizing the key location sites of the kiosks • Marketing tool for musicians / artistes
<p>Who Benefits:</p> <ul style="list-style-type: none"> • Music artistes through promotion and sale of local products • Users through cultural exposure • Barbadians overall through publicity of the island's rich talent
<p>Risks: Technical inability to service, update and maintain the digital interface</p>
<p>Estimated Costs: BDS\$20,000 per kiosk</p>
<p>Source of Funds: Tourism Development Corporation</p>
<p>Revenue Generation Potential:</p> <ul style="list-style-type: none"> • Music sponsors • Advertising • Direct digital sales
<p>Further Development Work Required: Quantity of content, kiosk design and digital interface construction with web links to sites of participating artistes</p>
<p>Other Considerations: Linkages with Cultural Heritage and Attractions, Diaspora, Domestic Tourism</p>

2.1J-3 Promote an Annual Historic Barbados Festival

Description:

Develop and promote an annual themed festival based on historic Barbados, surrounding Independence celebrations with the following features:

- Location to be Queen’s Park, Bridgetown
- Musical performances - Barbados’ classics: Period themed / genre music- Spooze, Tuk, Steelpan, Calypso
- Shopping bazaar
- Historical/educational area – Barbados Museum and Historical Society, Sugar Museum
- Donkey rides
- Art and craft village with themed displays
- Patrons in historically themed costumes pay discounted admission
- Prizes given for best “costume”
- Food stalls
- Booth registration fees

The event may provide an opportunity for hosting a second Bridgetown Night Tour to compliment the First Citizen’s Bridgetown Night Tour held as part of the Crop Over calendar. The activity may be promoted by a town crier, and may be in keeping with the UNESCO Heritage activities for Bridgetown and its Garrison.

Expected Outcomes:

- Collection of revenues from fees, sales and activities
- Promotion of Barbadian cultural heritage forms and artistes
- Exposure through regional and international visitors to the festival

Guidelines for Implementation:

- Plan event date, potential events and performances
- Promote event with stakeholders
- Advertise event to potential registrants and the public using a range of media
- Organize staffing for security needs, booth layout and clean-up

Challenges with Implementation:

- Planning of the event and timing to maximize returns
- Attracting sponsors

Recommended Implementation Agency:

National Cultural Foundation (in collaboration with Barbados Tourism Investment Inc.)

Priority / Implementation Timeframe:

Medium/ Medium term

Target Users:

- Locals and visitors
- Diaspora
- Merchants
- School groups

Who Benefits:

- Visitors and locals through exposure to cultural forms
- Students through educational displays and cultural information

Risks:

- Risks include the appropriate scheduling of the event to minimize clashes with competing international events
- Attracting visitors through promotional activities

Estimated Costs:

Staging of the event, inclusive of marketing and regional promotion, is estimated to require BDS\$150,000

Source of Funds:

- Advertisers and event sponsors whose products are promoted at the event
- Vendor booth registration fees

Revenue Generation Potential:

- Gate admission fees
- Merchandise sales by stalls (art, craft, food)
- Revenues gained through sponsors and advertisements
- Charitable donations

Further Development Work Required:

- Planning and design of the event
- Design of marketing strategy
- Identification of performing groups
- Sourcing sponsors

Other Considerations: Linkages with Domestic Tourism, Diaspora and Culinary Tourism

2.1J-4 Organise a Caribbean Folk Festival**Description:**

Develop and promote an annual event / competition open to local and regional artistes in musical folk performance, including Tuk Band, Steel Pan, and traditional folk music, as follows:

- Performances will be based by invitation or open applications to performing groups
- Recordings of the songs to be performed would be assessed and approved prior to confirmation of selection
- Establish a junior and adult section of the festival
- Prizes may be linked to tickets for other local events
- Hotels offer accommodation prizes or discounts associated with the prize to encourage return visits
- Event can be coordinated in association with a charity to encourage participation by international and regional groups
- Performance by the Barbados Landship can be a focal event, in addition to regional chorale groups such as the Cavite Chorale and folk dance groups

Expected Outcomes:

- Collection of revenues from fees, sales and activities
- Promotion of Barbadian cultural heritage forms and local artistes
- Exposure of tourism products via regional and international visitors to the festival
- This festival will broaden the scope of folk performances, complementing presentations such as the local “Crop Over Folk Heritage Concert” held in 2013

Guidelines for Implementation:

- Plan event date, potential events and performances
- Promote event with local and regional stakeholders
- Advertise event to potential registrants and the public using a range of media
- Organize staffing for security needs, booth layout and clean-up

Challenges With Implementation:

- Planning of the event and timing to maximize returns
- Securing sponsorship and venue rental would be a high priority
- Advertisizing to the right target group with sufficient advance notice for participants to establish travel schedules and sources of funds
- For participating bands, the transport or on-island availability of equipment would be critical

Recommended Implementation Agency:

Ministry of Culture

Priority / Implementation Timeframe:

Medium/Medium Term: The staging of the event will require contact with regional and local groups, and the coordination of group schedules to ensure maximum participation

Target Users:

- Locals and visitors
- Diaspora
- Families of participants
- Local and regional folk groups

Who Benefits:

- Cultural artistes and musicians
- Vendors
- Benefits would accrue to Barbados as a whole through the encouragement of larger visiting performing groups and their families, in addition to visitors attending the event. Local communities would be exposed to international standards of choir performance in development of the arts locally

Risks:

- Risks include the appropriate scheduling of the event to preclude or minimize clashes with competing events
- Attracting visitors through targeted marketing

Estimated Costs:

Staging of an event, inclusive of marketing and regional promotion, is estimated to require approximately BDS\$200,000 – \$250,000

Source of Funds:

- Advertisers and event sponsors whose products are promoted at the event
- Booth registration for vendors of food and craft

Revenue Generation Potential:

- Gate admission fee
- Merchandise sales by stalls (art, craft, food)
- Charitable Donations

Further Development Work Required:

- Planning with event producers
- Design of marketing strategy
- Identification of target countries and folk groups
- Sourcing sponsors

Other Considerations: Linkages with Domestic Tourism, Community Tourism, Diaspora, Culinary Tourism

2.1J-5 Develop Local Art Studio and Gallery Tours

Description:

To offer tours for visitors featuring local artists' studios and art galleries that showcase their range and talent, including exhibits featuring local heritage elements. Studio locations include Art Splash Centre, Pelican Craft Centre, Frangipani Art Gallery, Caribbean Gallery of Art, the Potteries, HP Batik Studio, On the Wall, Tides Gallery, Earthworks (see Figure 3.29). There are also individual local artists who may open their studios to the public for viewing. A sample of paintings from a local artist that is displayed at one of the local galleries is illustrated in Figure 3.30.

This initiative aims to create a relationship between the Barbados Arts Council and international counterpart agencies to promote visual and creative arts in Barbados.

Expected Outcomes:

- Engaging increased numbers of travelers from primary markets, and attracting those from emerging ones
- Significantly increasing the profile of the Barbados brand
- Barbados becoming a 'top of mind' travel destination and differentiating itself from other competing warm weather destinations
- Increasing activities and experiences for visitors
- Increasing the variety of themed island tours by adding one based on the visual arts

Guidelines for Implementation:

The use of online media to promote the art studio/gallery tours is suggested as a significant draw for Barbados tourism by:

- Developing an online contest to help Barbados build followers in the international art community around social media touch points on the web
- Developing online scavenger hunts: These have become very popular on Twitter. Consumers are

asked to find an object or image and tweet it (be it an image of Barbados that they capture with their mobile device, or something that they find on a Barbados website) for a chance to win prizes

- Building linkages with counterpart agencies, in addition to regional and international art museums and private sector art groups globally

Art Tour Planning

- Barbados Arts Council to collaborate with key governmental agencies and private sector stakeholders (e.g. Ministry of Tourism, Ministry of Culture, gallery owners, BTA, BHTA, Barbados Council for the Disabled, and tour operators) in generating a tour structure and promotional mechanism
- Optional tour routes and locations may be established for tours to generate interest and visitor response
- Transportation with lunch at a local eatery may also be offered on the art tours (e.g. Changers Restaurant is the site of On the Wall Gallery and could be an appropriate stop for lunch)



Figure 3.29. Art studio locations in Barbados. An art circuit can be set up using these locations.



Figure 3.30. Paintings from Frangipani Art Gallery by local artist, Marilda Weatherhead, entitled "*Oistins Bus Stop*", oil on canvas (left); "*Catching up with the News*", oil on canvas.

Challenges with Implementation:

- Developing effective online presence for promotion and marketing through the Barbados Arts Council website barbadosartscouncil.com with links established on other local websites including the BTA and BHTA
- Creating partnerships with selected cruise ship lines
- Marketing and promotion to target audiences, e.g. Silver Market

Recommended Implementation Agency:

Ministry of Culture (in association with Gallery owners)

Priority / Implementation Timeframe:

Medium/Short-Medium Term

Target Users:

- Silver Market group
- Cruise visitors
- Educational groups
- International artists
- Diaspora
- Locals

Who Benefits:

- Stay-over and cruise visitors
- Barbadians through local art and cultural exploration
- Barbados through diversification of the tourism product and increase in revenues for tours
- Tour operators
- Participating artists through art promotion and revenues
- Local accommodation establishments and business owners providing ancillary services for visitors targeted through this activity

Risks:

- Ensuring visitor satisfaction through monitoring and evaluation to promote
- Formalizing and maintaining contacts with international art communities in urban centres and academic institutions

Estimated Costs:

- Marketing costs estimated at BDS\$10,000 annually
- Hiring of Barbados Transport Board buses (BDS\$700 per tour) or private coaches (BDS\$3,200 for a 40 seat coach)
- Installation of signage at 6 locations (BDS\$12,000)
- Guides: BDS\$800 - \$1,200 per tour

Source of Funds:

- Ministry of Culture's budget
- Private sponsors

Revenue Generation Potential:

- Attracting more visitors from target markets would increase tourism revenues and help to fill available room stock
- Would help to increase visitor spend

Further Development Work Required:

- Costing
- Source of financing
- Developing and fostering links between Barbadian artists and overseas counterparts

Other Considerations: Linkages with Cultural Heritage and Attractions, Silver Market Tourism, Domestic Tourism, Diaspora

2.1J-6 Create a Storytelling Festival**Description:**

"We so is experts at how to lime!" Excerpt from 'Keeping Bajan Time' by Alfred Pragnell in *Skylarkin'* (2003).

Alfred Pragnell, Timothy Callender, and Sir Frank Collymore rank among Barbados' icons of storytelling. The future of this legacy is carried on through the National Independence Festival of Creative Arts and the BIM Literary Festival and Book Fair held over a 5 day period in May. Storytelling and poetry are a vibrant aspect of Barbadian culture that, if marketed, will uplift national pride and attract regional and international interest.

Expected Outcomes:

- International visitors will increase as patronage of the festival grows
- Barbados literary arts will receive support, promotion and recognition, including among younger audiences
- Exposure will be given to outstanding NIFCA contributors in this area of performance arts
- Storytellers and poets would make special presentations to students at primary and secondary schools
- This festival will expand upon existing literary showcases such as the 2013 "Crop Over Read In"

Guidelines for Implementation:

- Develop and promote an annual storytelling performance event / competition open to local, international and regional artistes in storytelling and poetry as a complement to the *BIM Literary Festival*. An important part of the festival would be the hosting of “Keeping Bajan Time”
- Special packages should be arranged for hotel accommodation for visitors and families attending the festival
- The festival would be held at heritage sites across the island over the course of a month. Open-air sites such as Farley Hill and the courtyard of the BMHS can be selected as venues
- Select events may be held free of charge to stimulate interest
- Schools may also benefit from special appearances by story-tellers

Challenges with Implementation:

- Coordination of the event to incorporate Barbadian food stalls and “street food”
- Securing sponsorship and venue rental would be a high priority
- Advertizing to the right target group with sufficient advance notice for participants to establish travel schedules and sources of funds

Recommended Implementation Agency:

Ministry of Culture, Sports and Youth

Priority / Implementation Timeframe:

Medium/Medium Term

Target Users:

- Locals and visitors
- Diaspora

Who Benefits:

- Locals and visitors
- School groups
- Diaspora
- Vendors at events

Risks:

- Risks include the appropriate scheduling of the event to minimize clashes with competing international events
- Attracting visitors through targeted marketing

Estimated Costs:

Staging of the month of events event, inclusive of marketing and regional promotion is estimated to require BDS\$50,000 - \$75,000

Source of Funds:

- Advertisers and event sponsors whose products are promoted at the event
- Vendor booth registration fees

Revenue Generation Potential:

- Gate admission fee
- Merchandise sales by stalls (art, craft, food)

Further Development Work Required:

- Planning and producing the event
- Design of marketing strategy
- Identification of local storytellers
- Sourcing sponsors

Other Considerations: Linkages with Domestic Tourism, Culinary Tourism; Barbados' Mighty Gabby has represented Barbados at the acclaimed *Gimistory*, an International Storytelling Festival held since 1998 in the Cayman Islands

2.1J-7 Develop a Local Film Event Series at Farley Hill**Description:**

Development of a series of local film presentations to be held under the stars at Farley Hill National Park, St. Peter, in order to generate exposure for local film talent and the cultural heritage of Barbados (see Figure 3.31).



Figure 3.31. Farley Hill, St. Peter (left); film poster for *Island in the Sun* (middle); depiction of Inkle and Yarico (right).

Expected Outcomes:

- Generation of a new experience within a key heritage landscape that served as one of the precursors to the local film industry experience
- Diversification of venues to maximize northern locations and open opportunities for the northern centres such as Speightstown
- Promotion of the local film industry and local filmmakers

Guidelines for Implementation:

- Collaborate with local film producers to develop a film series based on productions of history and cultural heritage such as:
 - “Island in the Sun”: The film examines race relations and interracial relationships set in the fictitious island of Santa Marta. Barbados and Grenada were selected as the sites for the movie which stars Harry Belafonte as a black politician representing the common people
 - “Inkle and Yarico”: The reportedly true story of Inkle, an English trader shipwrecked in

<p>the West Indies, and Yarico, an Indian maiden who comes to his aid, first appeared in Richard Ligon's 1657 book, <i>'A True and Exact History of the Island of Barbadoes'</i></p> <ul style="list-style-type: none"> • Schedule the showings at regular intervals throughout the year in order to establish regular patronage • Investigate linkages of individual film themes with other cultural performances
<p>Challenges With Implementation: Expertise and technological requirements may need to be accessed externally</p>
<p>Recommended Implementation Agency: Ministry of Culture and BMHS (in collaboration with private stakeholders)</p>
<p>Priority / Implementation Timeframe: Medium/ Medium Term</p>
<p>Target Users:</p> <ul style="list-style-type: none"> • All visitors and locals • The Diaspora • Local artistes
<p>Who Benefits:</p> <ul style="list-style-type: none"> • Local film makers through promotion and presentation of films • Users through exposure to cultural heritage • Barbadians will benefit through publicity of the island's diverse talent • Performing artistes
<p>Risks:</p> <ul style="list-style-type: none"> • Weather considerations for the open air site • Not being able to source consistent private sponsorship
<p>Estimated Costs:</p> <ul style="list-style-type: none"> • Rental of Farley Hill and site maintenance estimated at BDS\$12,000 per night • Security: BDS\$4,000 per event • Film rights to be determined
<p>Source of Funds: Private sponsorship</p>
<p>Revenue Generation Potential:</p> <ul style="list-style-type: none"> • Advertising • Product sales at associated booths • Gate receipts • Performer fees
<p>Further Development Work Required: Presentation of the event to international standards</p>
<p>Other Considerations: Linkages with Domestic Tourism, Diaspora, Culinary Tourism</p>

2.1J-8 Organise a Speightstown Festival Series

Description:

Develop Speightstown as a creative arts hub, capitalizing on existing heritage offerings in Speightstown, such as art galleries and museums, and exploring new opportunities such as craft markets. The implementation of a biweekly festival series would involve local artistes, visitors and entrepreneurs to stimulate increased activity in Speightstown. The business environment would benefit from more regular activity through renewed interest in Speightstown as a commercial centre with a rich heritage.

Expected Outcomes:

- A core of distinctive activities that would draw persons from across the island
- Increase in the number of visitors and locals patronizing Speightstown businesses
- Familiarization of persons with businesses and activities within the Speightstown area, and generating more commercial activity
- Highlighting the heritage aspects of Speightstown and preserving its historic attributes

Guidelines for Implementation:

- Design each activity or event in the series with a particular theme
- Maximize use of the variety of public spaces such as the boardwalk, the esplanade and jetty, which would need to be adequately repaired. This would also include the public car park and the Speightstown Bus terminal
- At each event, food, arts and craft would be on sale. Designated areas would need to be outlined. For example, the Speightstown Esplanade could be utilized for free events and the Barbados Tourism Investment Inc. car park could be used for events requiring a fee for entry
- Sponsors would be solicited for each activity day
- An event planning team would need to be established to promote and oversee each event, liaise with sponsors and participants, and implement promotions and marketing of the series of activities

A selection of events and themes are proposed below:

Speightstown Arts Festival – This annual event would be held in the core of Speightstown. The festival would be developed as a street fair to be located along Queen’s Street from the junction of Chapel Street to the Junction with Sand Street. This section of Queen’s Street would be closed to vehicular traffic to accommodate the Festival (see Figure 3.32). Parking would be centred at the BTII car park accessible from Church Street. The Speightstown Bus terminal is also within walking distance. Additional paid parking is available in association with the Speightstown Mall complex.

Key sites adjacent to the proposed venue are the Speightstown Esplanade and Jetty, Arlington Museum, the St. Peter Parish Church, the Caribbean Gallery of Art, in addition to several restaurants and shops. Additional tours featuring historic elements of the town such as the historic forts and walking tours to Arbib Nature Trail may be offered during the festival. The proposed art and craft exposition would feature handicraft, artwork, and sculpture from local and regional craftsmen.



Figure 3.32. Speightstown Arts Festival: Street Fair routes are presented in yellow dashed lines and pedestrian routes in blue.

Write on Time: Poetry, Book, and Writer’s Fair - This Fair would be coordinated with the Barbados Speightstown Public Library. Students would be encouraged to sign up for the library on that day to increase interest among the youth for engaging library services on a more regular basis. Local writers, poets and literary artists, and Speightstown book stores would be invited to participate. The event could also involve a book exchange where attendees are asked to donate a book and free books would be distributed at a donor’s book table.

Sounds: Police Band and School Band Concert - Involvement of northern school bands in a concert event featuring Barbados Police Band performances.

Music, Music, Music - A musical event featuring D.J.'s from around the island. D.J.'s may be chosen based on varying categories, e.g. by parish. The event may also be developed as a competitive event.

Speightstown Fun Sports and Craft Fair - This event could be held at the Speightstown Playing Field would feature prizes for entrants to races and athletic competitions. Activities would be planned for staff of businesses, families, children and visitors. Craftsmen from across the island would be invited to exhibit their products.

Speightstown Health Fair- The Maurice Byer Polyclinic and medical and health practitioners would be the focus of this event, giving advice and health checks according to the services they provide. Health information may also be distributed.

Additional activities proposed include:

- Speightstown Market & Culinary Expo - A local food fair for northern parishes and businesses
- Outdoor Film Night for Barbadian Films
- Talent Night - Amateur night of varied performances
- Faith Fest - Concert and mixed performances by church groups
- "Get on Board"- Event featuring the Barbados Transport Board in association with transport providers in the north with round-trip sightseeing tours to northern nature tourism and heritage locations such as Farley Hill and the Scotland District
- Parish Lime: Parish Representative Meet and Greet - Parish Ambassadors, parish sportspersons and performers, Ministerial representatives and Community Councils can interface with the public at an open event

Challenges with Implementation:

Engaging the interest of local artistes and business persons, particularly within the Speightstown area.

Recommended Implementation Agency:

The Ministry of Culture, Sports and Youth will be responsible for coordinating the events

Priority / Implementation Timeframe:

High / Medium Term: To help revitalize commercial activity and interest in Speightstown

Target Users:

- All tourists
- Locals within the northern parishes.
- Speightstown businesses

Who Benefits:

- Tourists and locals
- Speightstown retail businesses will benefit through participation in the events by offering their products for sale or promotion

Risks:

Inadequate participation by business persons, visitors and locals

Estimated Costs:

The cost for each event will need to be determined separately

Source of Funds:

Sponsorship by local businesses in exchange for promotion will be necessary for each venture

Revenue Generation Potential:

Revenues are anticipated through direct and indirect sales associated with each event

Further Development Work Required:

- The structure, scheduling and participants of the series will need to be planned in depth in association with all stakeholders
- Dates of major national events or other major activities will need to be taken into consideration in the planning stage

Other Considerations: Linkages with Domestic Tourism, Community Tourism, Cultural Heritage and Attractions, Creative and Performing Arts, Diaspora, Culinary Tourism, Health & Wellness Tourism

2.1J-9 Create a Barbados Festival Arts Association**Description:**

The proposed Barbados Festival Arts Association (BFAA) would act as the premier association for supporting and facilitating festival activities and event stakeholders, both in the professional arena as well as amateur performers within the creative and performing arts sector. The Association is intended to oversee the planning and coordination of events and stimulate individuals, groups, communities, participating hotels, and businesses to participate in Barbados creative celebrations.

Expected Outcomes:

- Improved opportunities for island-wide involvement in a range of festival events at all levels of society; this addresses a lack identified by stakeholders of the music industry (pers. comm., E. Smith, COSCAP, 2012)
- A more comprehensive and cohesive system through which communities can stay informed and involved
- Improved opportunities for education of artists, artistes and all persons within the creative industries, which was identified as a need by the Division of Culture and Sports (pers. comm., S. Johnson, 2013)

Guidelines for Implementation:

- Establish a private sector association for arts festivals in Barbados that would provide a central group through which festival planning in Barbados may be affected
- Develop an administrative system for event staff. Hold regular (i.e. at least monthly) meetings to facilitate festival planning and encourage the involvement of communities and stakeholders across the island, and at varied levels
- Develop a system of membership with associated benefits. Membership levels would allow for paid and non-members, including student groups and honourees
- Establish a system and schedule of volunteers, non-profit groups, partners, supporters and locations willing to contribute to festival implementation or host events. A schedule of fees and rates would be formulated for standard activities. Festivals can include visual arts, dance,

drama, music, sports, and food

- Develop an online presence through a dedicated website with linkages to tourism and stakeholder sites. This will allow members to promote e-products and services
- Identify advertisers and match requirements to festival plans and marketing packages
- Facilitate activities relating to education, programming, identification of products and resources, networking and representation
- Collaborate with local groups and individuals, both private and public, such as Community Councils, and arts councils in the advancement of UNESCO's World Heritage programme goals
- Identify new events, vendors, stages, etc. that can be incorporated into event schedules
- Develop an Industry Code of Professional Conduct and Ethics to guide the standard of interaction between participating stakeholders
- Develop annual expositions, symposia, and trade shows in collaboration with the BTA
- Collaborate with local and regional educational institutions having creative and performing arts courses (e.g. UWI)
- Collaborate with the International Festivals and Events Association (IFEA), "a globally united industry that touches lives in a positive way through celebration... with a target audience that includes all those who produce and support quality celebrations for the benefit of their respective communities" (IFEA, 2013)

Challenges With Implementation:

Acquisition of funding and sponsors to establish the organization

Recommended Implementation Agency:

Private sector group (in collaboration with the Barbados Chamber of Commerce and Industry)

Priority / Implementation Timeframe:

Medium /Medium Term: The Association is intended to provide a year-long thrust for festival development and promotion

Target Users:

All persons within the creative industries

Who Benefits:

- Stakeholders will be provided with a forum for introducing new ideas and events in which to participate
- Tourists and locals are expected to benefit from expanded festival options and cultural activities throughout the year
- Persons engaging in related business activities

Risks:

Effective formation of the Association

Estimated Costs:

Legal costs to form the Association

Meeting room costs - BDS\$5,000 per meeting, depending on venue required

Source of Funds:

Membership fees, sponsors, and advertisers

Revenue Generation Potential:

Indirect revenues would be generated through broad scale participation at all planned events sponsored by the Association

Further Development Work Required:

Identification of a core group of stakeholders to spearhead the development of the Association and its organizational structure

Other Considerations: Linkages with Community Tourism, Marketing, Tourism Awareness, Youth in Tourism, Educational Tourism, Accommodation

2.1J-10 Develop a Festival Series at Various Park Sites

Description:

Develop a festival series featuring professionals in the creative sector in addition to up-coming talent within Barbados' academic institutions. The aim is to stimulate individuals, performing groups, businesses and communities to participate in cultural celebrations throughout the year. Dancers, musicians, visual artists, poets, theatre companies, art galleries, school groups, church groups, would be able to participate in the planned event series to be showcased in different park sites in Bridgetown and other areas (e.g. see Figure 3.33).



Figure 3.33. Sample posters proposed for the festival series events.

Expected Outcomes:

- Increased opportunities for professionals and amateurs in the creative industries to showcase their talents and market their products to locals and visitors (e.g. see Figure 3.34). Performers would be allowed to sell merchandise related to their craft such as compact discs of their recorded work
- Enrichment of the activity base within this historic urban area over a more extended period
- Attracting increased visitors to the city throughout the year
- Developing an enhanced interface between the international visitor and the local talent

Guidelines for Implementation:

- Select a minimum of 5 prime park sites throughout Greater Bridgetown with amenities such as public bathrooms or nearby parking. A stage area will be key to the Open Stage showcases. Recommended sites are as follows:
 - Church Village Park Amphitheatre (currently under construction)

- Independence Square
- Jubilee Gardens
- Queen's Park
- Pelican Craft Centre
- The Barbados Museum
- Carlisle Bay Esplanade
- St. Lawrence Gap



Figure 3.34. Local art display (left); Tuk band performers (right).

- Develop a schedule of events for weekly lunchtime and evening performances and art exhibitions
- Access to electrical connections would be required for select performances requiring the use of pre-recorded or amplified audio-visual accompaniment
- Longer presentations such as those involving theatre or drama may be scheduled for weekends to accommodate student groups or working professionals willing to participate
- Engage local businesses in forming creative performance groups to be scheduled for appearance at any one of the select sites
- Coordinate permissions for use of performance venues with the relevant public or private overseeing agencies, including the Central bank of Barbados, BTII, Ministry of Transport and Works
- Collaborate with the BTA on marketing to visitors, particularly during cruise visits
- Collaborate with the BCCI and the Urban Development Commission in facilitating vending by local entrepreneurs during performances
- Market weekly performances throughout Bridgetown using the traditional town crier bedecked in period dress
- Each performance can be attended by Tourism Ambassadors (refer Report VI, Section 9.0, Action 2.3-8) to facilitate tourism awareness regarding other events or local attractions
- A presenter to be appointed to introduce the artists and artistes featured during each event
- Provision of adequate security for the event
- Park-'n-Ride services can be planned for this type of event
- Marketing of the event will be required, including on site advertisements of the different performers and exhibitions per site

Challenges With Implementation:

- Scheduling of regular events and adequate participants to minimize the effects of emergency cancellations by performers
- Coordinating the event with others that are planned for the city zone

Recommended Implementation Agency:

The proposed Barbados Festival Arts Association (refer Action 2.1j-9) will be responsible for coordinating the events (in collaboration with the Ministry of Culture, the BCCI and Urban Development Commission)

Priority / Implementation Timeframe:

Medium / Medium Term

Target Users:

- School Performance Groups
- Visual art exhibitors
- Local vendors
- Businesses within Bridgetown

Who Benefits:

- Creative stakeholders showcasing their talents
- All visitors and locals attending the event
- Persons engaged in commercial activity related to each event

Risks:

- Non-participation by stakeholders in staging performances or exhibitions
- Lack of support by locals and businesses
- Inadequate marketing of the event

Estimated Costs:

Costs for staging a performance will depend on the scope of each festival, and be borne by each performing or exhibiting group in association with their individual sponsors

Source of Funds:

- Proposed Barbados Festival Arts Association
- NCF
- Private sector sponsors
- Academic societies or individual schools in support of their group
- BTA for marketing

Revenue Generation Potential:

- Revenues through product sales at performances or exhibitions
- Indirect revenues are anticipated through promotion of each site

Further Development Work Required:

Activity planning with stakeholder groups

Other Considerations: Linkages with Community Tourism, Marketing, Tourism Awareness, Cultural Heritage and Attractions

3.2.2.3 Faith Tourism

Overview

Faith tourism, also known as religious tourism, occurs where travel is motivated primarily but not exclusively by the spiritual or religious content and associated services of a destination. Faith tourism encompasses secular and religious ideals that can involve recreation, leisure, interest, intellectual edification, healing, and spiritual experiences that provide spiritual value to visitors (Kohler, 2012).

Faith-based visitors combine a vacation with their religious travel. Faith tourism includes missionary travel, faith-based cruising, faith-based attractions, leisure vacations, adventure trips, and conferences. These trips appeal to all ages and all demographics. Travel with a fellowship intent for conferences, retreats, faith-based cruises and adventure trips was identified as the fastest growing group. In spite of the destination, faith is the central theme, and the experience is balanced by sightseeing and leisure activities.

The World Religious Tourism Association (WRTA) has stated that contemporary faith tourists “seek out and purchase first-class products and services”. Key benefits of faith tourism are that it involves both domestic and international tourism, and may occur throughout the year, not limited by seasonal tourism patterns. Furthermore, faith-based travel is enjoyed by all age groups, from youth to the Silver Market (Tesse Fox, 2008).

Agard (2011) noted that Christians account for 40%-45% of all Americans, with an estimated combined spending power of more than US\$ 5.1 trillion annually. The U.S. Commerce Department has reported that in 2008, over 900,000 people from the USA travelled internationally for religious purposes and, according to a study by the U.S. Travel Association, nearly 25% of all U.S. travelers are interested in spiritual vacations. Globally, the faith tourism market is substantial, estimated at US\$18 billion through 300 million travelers, with approximately 16.6 million of them residing in the USA.

The growing popularity of faith tourism was recognized by the WRTA who hosted the first World Religious Travel Expo in Orlando, Florida in 2012. The World Religious Travel Expo, a global trade show and convention for the faith tourism industry, connects multiple stakeholders in the faith tourism industry, major tour operators, travel destinations, cruise lines and others service providers seeking to expand their presence. In addition, the WRTA commenced the Travel Ministry Conferences in 2010, where industry stakeholders participate in global exchanges of information and expertise.

Within the region, the St. Vincent and the Grenadines Gospel Fest is the premier Christian event on that island, celebrated through a variety of cultural, spiritual and entertainment activities. The International Caribbean Gospel Festival in Curacao and the Tobago International Gospel Festival are each similar to the Barbadian event, where international, regional and local gospel artistes are featured. With respect to religious gatherings, Puerto Rican towns also hold annual festivals to honor patron saints.

Situation Analysis

The White Paper identifies faith-based tourism as an area that has great potential for growth, and notes a renewed emphasis on the spiritual niche market through which the BTA can seek to spread the message of the island's strong religious roots. According to the White Paper (Strategic Solutions Inc., 2012, p. 149):

“Barbados is a country that has a deep foundation in spirituality and is therefore perfectly poised to capitalize on faith-based tourism. Barbados has a great deal to offer faith-based visitors and there is therefore much scope for expanding the offerings to this market...The island is perfectly poised to develop a church tourism product with the array of historic churches available on the island.”

Traditional faith-based events in Barbados include Super Gospel, Gospelfest, Flame Gospel Music Awards and Worship in the City, the Caribbean Day of Prayer, Jesus Week, and Praizone, hosting up to 3,000 patrons. Gospelfest has the potential to attract more than 1,000 international visitors (Best, 2011). These main events are complimented by numerous small to medium scale performances, events and island tours.

Specifically, the primary events on the Barbados faith calendar include Gospelfest, the Flame Awards, and the inaugural Joyful Voices choir competition held in February 2013. These are complemented by individual or group performances by local, regional and international artistes. A greater range and quality of local musical abilities can be encouraged in this niche through the provision of expanded opportunities to showcase local talent. New events, scheduled at alternate times of the year, should be developed to complement existing offerings to further develop this niche.

Barbados Gospelfest, established in 1993, is now produced under the auspices of the Gospelfest Organizing Committee made up of persons from the Christian community. Adrian Agard, Event Manager for Gospelfest, believes that the identification of BTA representatives who are proficient at liaising with market stakeholders within a diversity of denominations is critical to the future expansion of the industry. At a Town Hall meeting held by the Ministry of Tourism to facilitate consultation with the general public relative to the development of the White Paper on tourism in Barbados, Mr. Agard reiterated that “there is so much dance, drama and poetry going on in our churches, but only those there are seeing it. Our aim is to allow Barbados and the world to see this talent and how it can affect people because at the end of the day, if we are doing what we are doing, and we cannot change people's mindsets we see in our community, then why are we here” (Agard, 2012).

In addition to Gospelfest, the Flame Awards are another product within this niche that focuses on encouragement of Christian artistes in musical development and other artistic forms, e.g. dance and drama. Emphasizing that the Caribbean possesses sufficient talent to supply the demand for new worship music, the aims and objectives of the Flame Awards are captured in their mission statement: "rewarding excellence is our purpose." These awards have been held in Barbados since 2002. Flame Awards shine the spotlight on performers, creating an avenue for career development and future performances, e.g. local artistes from the 2008 awards were invited to perform at a gospel music retreat by internationally

renowned entertainer Dr. Bobby Jones that was aired in over 150 countries with a worldwide audience of approximately 50 million (Cummins, 2012¹).

It is proposed that industry stakeholders develop an annual Christian performance event/competition that would be open to national, regional, and international participants in choir and band categories. International promotions would maximize connections with the Diaspora and international Caribbean communities (refer to Action 2.1k-1; see also Section 3.2.1.7).

Faith Tourism can benefit from development in the area of meetings, conferences and events (refer Section 3.2.1.5). Domestic Tourism (refer Section 3.2.1.8) can also benefit as various Pentecostal assemblies congregate at the meeting centres that include the Garfield Sobers Sports Complex. Regional and international celebrations, such as the ceremonial installation of church officers, are also occasions for stakeholders to provide hospitality and tourism services. A faith-based website would allow for the publicity of these events, which can be incorporated in a holistic package of faith-based promotions, marketed both locally and abroad.

Faith Retreats

The internationally published Good Retreat Guide, available in both online and print versions, is a primary resource that promotes a diverse range of spiritual retreats worldwide. Many of the retreats operate all year round, offering dedicated services incorporating residential accommodation. It is suggested that Barbados' retreat services be promoted in an online format, either within an existing location or a new website. An inventory of existing operations would need to be compiled to facilitate a comprehensive publication.

Spiritual retreat services encompass spiritual and mental revitalization through disciplines such as meditation or yoga. Physical renewal options also include dietary balancing and exercise regimens. Spiritual retreats in Barbados are predominantly held in west and east coast locations that are preferred for their ambience. These facilities are not necessarily dedicated only to retreat services, and can be used for other accommodation purposes. Local retreat sites include:

- Villas and townhouses that cater to individuals or smaller groups, and range from chattel house styled villas to larger villas or townhouses with more modern accommodations
- Apartments that are used to accommodate larger groups, particularly where adjoining units can be made available with a dedicated conference area or outdoor space for group meetings. The Palms apartment hotels have been highlighted as an example of a typical location for retreat activities
- Hotels that offer the widest accommodation options with ample meeting spaces are options for the larger groups, however private external areas are less feasible in this setting
- Home accommodation which is provided primarily on a voluntary, no-fee basis by local hosts from a particular faith group
- Schools and educational buildings providing basic services through temporary camp locations or permanent properties

- Seminaries and missions held at such venues as Codrington College and the Barbados Baptist College (now converted to the Women's Inner Spiritual Healing Centre, or WISH) in Fortesque, St. Philip, function as theological bases for study abroad programmes (see also Section 3.2.2.6)

Youth With a Mission (YWAM), an international missions and discipleship organization with a branch in Barbados, is strengthened through its vast international network of offices which include more than 1,000 locations in over 180 countries, with a staff of over 18,000 worldwide. The YWAM site can also be commissioned for use by other faith groups hosting retreats. YWAM Barbados also offers Discipleship Training Schools (DTS) biannually (YWAM, 2011). The DTS sessions last between 2 and 3 months and cater for approximately 10 students. Missions are taught by regional and international missionaries, and emphasize themes such as social injustice or sports to students from across the world.

The small number of dedicated facilities for retreats limits the current scope within this niche. The Wish Centre provides a base for both international and domestic retreat attendees. The Centre can host 76 persons and provides a self-catered dining and kitchen facility in addition to accommodation within 4 buildings. An on-site chapel allows for formal fellowship (pers. comm., the Wish Centre, December 7, 2012). The facilities under previous ownership served faith groups such as the Silvertones of Barbados (pers. comm., Allison Norville-Forde, Gospel Artiste, December 7, 2012).

In the future, it is intended that the WISH Centre property will be purchased and its operations sustained by the development of an international Christian renewal conference centre and timeshare resort titled Goshen Conference Resorts – Barbados (thewishcentre.org). YWAM hosts training schools for 4 to 6 months each year and can also be commissioned by other faith groups hosting self-catered retreats (ywambarbados.org).

Retreats in Barbados include gospel music retreats and camps, as well as spiritual retreats that focus on health relative to mind, body and spirit. Gospel music retreats serve a range of purposes including musical exploration and discovery, vocal training, and fellowship. Some retreats work with children and incorporate talent shows with other fun activities. Gospel retreats can serve to connect artistes, record executives, media outlets, industry promoters and songwriters who collaborate in panel discussions or seminars. Other activities include musical showcases teaching harmony, vocal techniques, choral and solo singing, and directing.

Barbados promotes only a small number of formal spiritual retreats during select months. The Crane Hotel is the site of one internationally organized tropical healing retreat. The retreat run by Retreat Facilitators offers self-empowering and holistic programmes that are promoting self-healing. Retreat events focus on physical, emotional, and spiritual health processes to include detoxification and nutritional guidance toward healthy living. Other destinations such as the Bahamas, Antigua, Hawaii, Costa Rica, and other Latin American locations are also preferred tropical locations.

Spiritual retreats in Barbados offer stays in west and east coast locations, with modern services such as privately owned townhouses. Airport transfers, personalized concierge

service, daily massages, yoga and meditation are some of the options available in these retreat packages. High quality recreational facilities including tennis courts and a clubhouse with pool and yoga studio are incorporated in these retreats. Spiritual retreats promoting personal transformation are primarily held in east coast locations that favor the rugged environment overlooking the Atlantic Ocean. Trail hikes may form part of the packages.

World Sport Ministries International based in England has developed an evangelistic ministry using sports events for a sports-centered ministry through the development of Community Sports Teams. World Sports Ministries was most active in Barbados in 2007 during the Cricket World Cup, but further development of their activities has been limited. The concept of a sports ministry is supported by YWAM Barbados that operates a gym on site for use by community persons that practice fellowship and sharing of a Christian ministry.

Connecting Visitors with Religious Places of Worship

The importance of local places of worship to the integrity of the historic landscape of Barbados in a post-colonial era can be viewed as an opportunity to stimulate more increased visitation to these historic sites, some of which have been recognized under the UNESCO World heritage designation (e.g. St. Mary's church, St. Michael's Cathedral, and St. Paul's Church). There are at least 17 religious denominations in Barbados, with a vast array of churches, some of which are heritage buildings. Tours to these sites can be promoted via formal tours (refer to Action 2.1k-3; see also Strategic Solutions Inc., 2012, p. 149). There is also a historic Synagogue located in Bridgetown dating back to 1654, which is recorded as the oldest in the western hemisphere (Gordon, 2013). The Nidhe Israel Synagogue (restored in 1986 by the local Jewish community), the recently discovered ritual bath (known as a Mikvah), and the recently developed Nidhe Israel Museum, are all listed as UNESCO World Heritage properties. Further proposed development of the Synagogue site will help to promote faith-based tourism and cultural heritage tourism in Barbados (refer Report VI, Section 7.3.2, Action 2.2b-2).

The upcoming BTA barbadostrails.com web portal presents a series of faith-based sites to be enjoyed by locals and visitors. These are listed in Table 3.16 and include 5 distinct denominations in Barbados.

With reference to international travel experiences, visitors often need to depend on front-desk services at hotels or tourist accommodation to provide summary information regarding denominational events and church services. This information may be vague and dependent upon the desk staff's personal knowledge. The availability of an electronic application for local places of worship, identifying their locations and religious events, would aid in increasing visitor access to places of faith. The site would also feature events, services and activities that can be promoted in particular to international church groups (pers. comm., Pastor Edla Lowe, December 6, 2012).

Table 3.16.BTA Barbados Faith Trail (proposed).

Christian	Bhuddist
Sharon Moravian Church	Tara Kadampa Buddhist Centre
St. Paul's Anglican Church	Hindu
Bethel Methodist Church	Sanatan Dharma Mandir
St. Michael's Cathedral	Jewish
St. Patrick's Cathedral	Nidhe Israel Synagogue, Museum, and Mikvah (ritual bath)
St. Mary's Church	
St. Lucy Parish Church	Muslim
St. George Parish Church	Jumma Mosque
Christ Church Parish Church	
St. John Parish Church	
St. Andrew Parish Church	
St. Peter Parish Church	
St. Thomas Parish Church	
St. Philip Parish Church	
St. James Parish Church	
<i>Source:www.barbadostrails.com</i>	

Stakeholders of the faith tourism industry have confirmed that initiatives such as an online faith tourism calendar may be beneficial. A calendar of church events and activities identified by month and denomination would be used to promote events both locally and internationally. Since churches tend to link primarily with familiar groups overseas, a holistic site such as www.faithbarbados.com would provide a comprehensive portal linking potential visitors with more specific faith information and provide connections via web links to churches of their choice (pers. comm., Zudi Hurley, Gospel Artiste, December 9, 2012).

Information presented would include the calendar of events, descriptions of churches, groups, and services, in addition to links with the proposed BTA Faith Trail. The 20 independent trail sites currently identified by the trail programme can be featured, utilizing an application describing location and historic attributes of each. The following web categories were proposed for web development (pers. comm., Zudi Hurley, December 9, 2012):

- Evangelistic Ministry (song, dance, and drama)
- Missions
- Podcasts
- Denominations

Faith-event bulletins for churches and communities are announced periodically on local radio stations, however these are not comprehensive. It is therefore suggested that faith-based events be incorporated into a more comprehensive calendar that is readily available (refer to Action 2.1h-3 in Section 3.2.1.8).

Strategic Outlook

During a BTA meeting in 2011, Senator David Durant stated that faith tourism is a new stream worth tapping into (Barbados Advocate, 2011). According to other stakeholders in the sector, further development of the faith tourism product in Barbados may require the following actions:

- Identification of point persons within the BTA who are adept at interacting with the local and international faith-based market, and who have experience with persons across the myriad of religious denominations (Agard, 2011)
- Encouraging greater marketing support and financial assistance for faith-based activities from public and private sponsors (pers. comm., Harold Briton, Manager, Silvertones, August 5, 2012)
- Development of an integrated website promoting:
 - Faith events in addition to a range of tools to equip local visitors and potential international visitors with information about the local faith industry (pers. comm., Zudi Hurley, Gospel Singer, December 9, 2012)
 - The history of the island's religious institutions, including UNESCO World Heritage religious sites
 - Directional information to locate places of worship, improving connectivity between visitors and faith-based sites, service schedules, and opening hours (pers. comm., Pastor Edla Lowe, Chief Labour Officer (Retired), December 6, 2012)

The successful development of the Faith Tourism industry will also require an internationally recognized platform from which to promote existing products and launch new initiatives (e.g. see Action 2.1k-4).

Although this can be implemented via web-based mechanisms, the direct exposure of industry stakeholders to products has been recognized to be an effective way of conveying product quality, and has already been utilized to galvanize tour operators to include the products on their rosters. For example, annual events such as "Backin' Barbados" (Selman-Moore, 2009) and the BTA Mega Fam seminar and market place have been used to encourage international tour operators to drive the "Barbados brand" utilizing a variety of themes such as Crop Over, cooking, or attractions.

It is proposed that a comparable exposition be developed for Barbados to showcase its faith-based tourism products and cultivate knowledge for tour planners and operators (refer to Action 2.1k-2).

In order to further promote the Faith Tourism niche market in Barbados, the following recommendations are provided:

-
- Promote local faith-based groups and developing a wider range of local performance opportunities to generate greater exposure for artistes
 - Create an activities calendar that can be distributed for the purpose of coordinating and promoting faith-based events. Conflicting scheduling of events erodes time, resources and revenues
 - Develop and promote annual Christian performance events or competitions to complement Gospelfest. Activities would be held at an alternate time of year. The involvement of regional and international artistes strengthens the attractiveness of these events
 - Encourage public-private partnership in successful Faith Tourism initiatives
 - Increase revenues gained through local and international ticket sales for paid events
 - Increase global exposure through world faith tourism expositions and conferences
These events and linkages can aid faith communities in developing travel programmes
 - Encourage greater local participation to boost the domestic tourism market
 - Encourage visitors to combine travel with their faith through promotion of the range of faith-based vacation opportunities available in Barbados

The following Actions recommended to promote the Faith Tourism in Barbados are in support of Strategic Imperative 2 on '**Enhance the Visitor Experience**' and corresponding Strategy 2.1 which states: "*Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending*".

2.1k-1 Develop Additional Faith-Based Performance Events

2.1k-2 Organize a Faith Tourism Expo

2.1k-3 Plan a Series of Heritage Church Tours

2.1k-4 Market the Historic Nidhe Israel Synagogue and Associated Sites

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Faith Tourism

2.1k-1 Develop Additional Faith-Based Performance Events

Description:

Develop and promote an annual Christian performance event/competition to complement Gospelfest and the inaugural Joyful Voices choir competition held in February 2013. The event, open to international, regional and national participants, would be scheduled at an alternate time of year to existing events. “There is so much dance, drama and poetry going on in our churches, but only those there are seeing it. Our aim is to allow Barbados and the world to see this talent ...” (Agard, 2012). Elements of the event would include:

- Performances will be based on choir, chorale and musical band/ instrumental submittals for these 3 categories
- Recordings of the songs / pieces to be performed would be assessed and approved prior to confirmation through a process of selection
- Establishing a junior and adult section
- Offering choir prizes, such as tickets to events, to be offered linked to Gospelfest
- Inviting hotels to offer accommodation prizes or discounts associated with the prize to encourage return visits
- Coordinating the event in association with a charity to encourage participation by international and regional groups

Expected Outcomes:

- Greater exposure of local faith-based groups
- Revenue gained through ticket sales
- Promotion of faith tourism through attendance
- Public-private partnership toward event success
- Increased domestic tourism opportunities
- Forum for artistes to perform

Guidelines for Implementation:

- Planning the event and timing to maximize returns
- Extending invitation to faith performers
- Securing sponsorship
- Prioritizing venue rentals
- Advertising to the appropriate target group with sufficient advance notice for participants to establish travel schedules and sources of funds

Challenges with Implementation:

- Enrolment of regional participants
- Securing funding and sponsorship to promote and stage the event
- Engaging performers suited to the event

Recommended Implementation Agency:

Barbados Tourism Authority (in association with the producer and sponsors of Gospelfest)

Priority / Implementation Timeframe:

Medium/ Medium Term: The staging of the event will require contact with regional and international groups and the coordination of group schedules to ensure maximum participation. For participating bands, the transport or on-island availability of equipment would be crucial.

Target Users:

- Locals and visitors
- Diaspora
- Families of participants
- Local and regional churches and schools choirs

Who Benefits:

Benefits would extend through the encouragement of larger visiting performing groups and their families, in addition to visitors attending the event. Local communities would be exposed to international standards of choir performance in development of the arts locally.

Risks:

- Risks include the appropriate scheduling and programming of the event to avoid or minimize clashes with competing local and international events
- Attracting visitors through targeted marketing

Estimated Costs:

Staging of the event, inclusive of marketing and promotion, is estimated to be approximately BDS\$200,000

Source of Funds:

- Event sponsors and advertisers whose products are promoted for the event
- Local and regional church contributions through church fund raising efforts

Revenue Generation Potential:

- Admission 'fee' to the event
- Merchandise sales by stalls
- Charitable Donations

Further Development Work Required:

- Discussion with event producer
- Design of marketing strategy
- Identification of target countries and choir groups
- Sourcing additional sponsors

Other Considerations: Linkages to Creative and Performing Arts, Diaspora, and Domestic Tourism

2.1k-2 Organise a 'Faith Tourism Expo'

Description:

Plan and implement an annual one-day Exposition (modeled by exhibitions such as BIMEX or the Home Show) to be presented to local, regional and international tour guides, visitors and locals to promote annual or upcoming local faith events (e.g. Gospelfest), faith retreats, concerts, faith groups, musicians and their products. Musical or other performances may be featured throughout the exposition.

Expected Outcomes:

- Introduction of all aspects of faith experiences to tourism stakeholders, locals and visitors
- Promotion as a spiritual travel destination with respect to the island's rich history in faith development
- Increased number of international visitors patronizing events and accessing heritage products
- Exposure will be given to local artistes and their products

Guidelines for Implementation:

- Setting dates and venue / space requirements
- Setting entrance fees to the event
- Publicizing the exposition with invitations extended to relevant stakeholders and event producers
- Establishing the number of booths/participants and associated fees
- School groups, such as the Inter-school Christian Fellowship, may be granted free or reduced admission
- Establishing a list of performers proposed by participant organizations and associated technical requirements
- Soliciting sponsorship and promoting sponsorship packages

Challenges With Implementation:

Engaging the participation of the widest number of faith groups and sponsors as possible through advertising the event in order to attract a high degree of participation

Recommended Implementation Agency:

Private event management group (in collaboration with Faith Tourism stakeholders)

Priority / Implementation Timeframe:

Medium/ Medium Term: The event will require collaboration with local and regional churches, charities, and faith-based NGO's

Target Users:

- Tour operators and event producers
- Local and regional churches
- Schools and Christian Fellowship groups
- Locals and visitors

Who Benefits:

- Churches, charities, and faith-based NGO's
- Both locals and visitors as attendees
- Local tourism industry stakeholders through expanded product offerings and growth

Risks:

Risks include the scheduling, programming and targeted marketing of the event to attract high numbers of participants and visitors.

Estimated Costs:

- Rental of conference area: BDS\$18,000 (for a one day set-up, one day venue rental, 30 booths @ 10'x10', and one stage area for vocal performances)
- Advertising – BDS\$3,000
- A proposed venue could be the Hibiscus Room at the Lloyd Erskine Sandiford Centre. Costs for a larger production would be dependent upon additional space booked

Source of Funds:

Admission fees to event, booth fees and sponsors recognized in local advertising.

Revenue Generation Potential:

- Future visitor expenditure through an increase in international visitors
- Registration fees from stalls
- Admission fees for the public
- Merchandise sales by individual booths (CD's, books, craft, etc.)

Further Development Work Required:

- Production planning with event producer
- Design of marketing strategy
- Identification of target countries and tour operators
- Sourcing sponsors

Other Considerations: Linkages with Educational Tourism, Shopping Tourism, Diaspora

2.1k-3 Plan a Series of Heritage Church Tours

Description:

Develop a scenic island tour featuring local historic churches. The tour would comprise of 2 routes featuring select church sites inclusive of parish and other historic churches. Tour dates should be prioritized for Easter and Christmas seasons when religious sentiment is highest. A picnic stop would be included as part of the tour since excursions are notably popular within the local domestic tourism market.

Expected Outcomes:

- Increased awareness and visitation of Barbados' heritage churches within the domestic and international tourism market
- Diversification of the tourism product range and experiences
- Tapping into the existing significant demographic of visitors who seek faith-based experiences
- Opportunity for a public-private partnership
- Generating jobs for on-site tour personnel as well as the tour bus guides

Guidelines for Implementation:

- Planning of tour routes and sites to be incorporated. UNESCO World Heritage properties can be focal points on the tours (e.g. see Figure 3.35)
- Advertising the tours on the internet

- Presenting church histories by a guide accompanying the tour
- Developing interpretive signage to be located at selected sites



Figure 3.35. Examples of UNESCO World Heritage properties: St. Michael's Cathedral (left); St. Mary's Church (middle); St. Patrick's Cathedral (right).

Challenges With Implementation:

Finding tour providers to establish and market high quality tours

Recommended Implementation Agency:

National Cultural Foundation (in association with a private tour operator)

Priority / Implementation Timeframe:

Medium/ Medium Term: The event will require collaboration with regional and international tour operators and the coordination of participants

Target Users:

- Local and regional churches
- Schools
- Locals and visitors
- Large family groups

Who Benefits:

Both locals and visitors can take advantage of the tour as a recreational event.

Risks:

- Risks include the appropriate scheduling and programming of events which clashes with competing international events
- Inadequate attraction of visitors through targeted marketing

Estimated Costs:

- Hiring of Barbados Transport Board buses (BDS\$700 per tour) or private coaches (BDS\$3,200 for a 40 seat coach)
- Installation of signage at 6 locations (BDS\$12,000)
- Guides: BDS\$800 - \$1,200 per tour
- Marketing costs estimated at BDS\$10,000 annually

Source of Funds:

Fees for scenic tour and bus transportation

Revenue Generation Potential:

- Admission fee per tour
- Merchandise sales by stalls (books, etc.)
- Charitable donations

Further Development Work Required:

- Tour planning with primary stakeholders
- Design of marketing strategy
- Identification of target countries and tour operators
- Sourcing additional sponsors

Other Considerations: Linkages with Cultural Heritage and Attractions, Silver Market Tourism, Domestic Tourism, Diaspora

2.1k-4 Market the Historic Nidhe Israel Synagogue and Associated Sites

Description:

Establish an effective marketing campaign that focuses on increasing visitation to the historic Nidhe Israel Synagogue and associated cemetery, Nidhe Israel Museum, and Mikvah (ritual bath), all situated in Bridgetown within the UNESCO World Heritage Site.

The Nidhe Israel Synagogue is one of the oldest in the Western Hemisphere, dating back to 1654. It was beautifully restored in the 1980's and is currently used by the Barbados Jewish Community for Sabbath services during the winter season.

The Nidhe Israel Museum was recently developed in one of the old buildings on the Synagogue site. It describes the story of the Jewish settlement in Barbados dating back to the mid-1600's through a series of interactive displays that explains the significant contribution of the Jewish community to the history of Barbados. The tour of the Museum is enriched by a viewing of the Mikvah, located between the Synagogue building and the Museum; it was uncovered through an archaeological excavation in 2008, and features the original marble steps leading down to the ritual bath and the natural spring fed cavity below flanked by arched openings in the walls that would have held lanterns. The Mikvah is thought to pre-date the Synagogue in the early 1650's, also one of the oldest in the Western Hemisphere.

The Synagogue and associated sites are a significant cultural heritage attraction in Barbados that draws interest from both stayover and cruise visitors; but they could attract much greater visitation if the sites were marketed effectively at the ports of entry, in travel media, with tour operators, and relevant faith-based organizations internationally.

Expected Outcomes:

- Greater visitation of one of the island's significant heritage treasures
- Increased visitor numbers and spend
- Support for the island's UNESCO World Heritage Property
- Increase in attractions for domestic tourism
- Enhanced promotion of the Faith Tourism niche in Barbados
- Promotion of a significant cultural heritage attraction in Barbados

Guidelines for Implementation:

- Develop a marketing plan with a specific focus on increasing visitation of this historic site in Bridgetown

<ul style="list-style-type: none"> Secure sponsorship from the private sector Establish an advertising campaign that targets the ports of entry, travel media, tour operators, and relevant faith-based organizations internationally such as Judaica travel groups and Jewish congresses
<p>Challenges with Implementation:</p> <ul style="list-style-type: none"> Creating an effective campaign that would successfully draw more visitors to the site on an annual basis Securing funding and sponsorship to support the marketing campaign
<p>Recommended Implementation Agency: Barbados Tourism Authority (in association with the Barbados Jewish Community and the Bridgetown Synagogue Restoration Committee)</p>
<p>Priority / Implementation Timeframe: High/ Short Term</p>
<p>Target Users:</p> <ul style="list-style-type: none"> Locals and visitors Diaspora Faith-based travelers
<p>Who Benefits:</p> <ul style="list-style-type: none"> Locals Visitors Increased interest in Barbados as a destination with properties that are showcased within its UNESCO World Heritage Site
<p>Risks: Attracting ample visitation that justifies the targeted marketing</p>
<p>Estimated Costs: Marketing and promotion is estimated at BDS\$150,000 per annum</p>
<p>Source of Funds: Tourism Development Corporation</p>
<p>Revenue Generation Potential:</p> <ul style="list-style-type: none"> Admission fees to the Nidhe Israel Museum and Mikvah Merchandise sales in the Museum Charitable Donations Increased visitor spend in Bridgetown as a spin-off to visitation at the site
<p>Further Development Work Required:</p> <ul style="list-style-type: none"> Design and launch of marketing strategy Identification of target groups Sourcing funding and sponsors if required
<p>Other Considerations: Linkages to Cultural Heritage and Attractions, Diaspora, and Domestic Tourism</p>

3.2.2.4 Community Tourism

Community Tourism Defined

There are numerous definitions of community tourism. In their 2008 survey of 116 practitioners from across the globe, Goodwin and Santilli found there was no agreement about the meaning of community-based tourism, and they therefore defined the term to place emphasis on the academic definition that focuses on community ownership and community benefits. As such, their definition included projects that met any one of the following characteristics:

- Benefits going to individuals or households in the community
- Collective benefits – creation of assets that are used by the community as a whole, roads, schools, clinics, etc.
- Community benefits where there is a distribution of benefit to all households in the community
- Conservation initiatives with community and collective benefits
- Joint ventures with community and/or collective benefits, including an anticipated transfer of management
- Community owned and managed enterprises
- Private sector enterprises with community benefits
- Product networks developed for marketing tourism in a local area
- Community enterprise within a broader co-operative
- Private sector development within a community owned reserve (Goodwin and Santilli, 2009, p. 5)

The Caribbean Tourism Organization (CTO) also proposed a working definition of sustainable community-based tourism as "a collaborative approach to tourism in which community members exercise control through active participation in appraisal, development, management and/or ownership (whole or in part) of enterprises that delivers net socio-economic benefits to community members, conserves natural and cultural resources and adds value to the experiences of local and foreign visitors" (CTO and EU, not dated). This definition is very holistic because it encompasses both tourism activities in a community and goods and services supplied to the tourism industry by one or more community members.

Another critical point about community tourism was made in the CTO report. The fact that it is important to note that community tourism products are not necessarily:

- Small-scale - Las Terrazas Complejo Turistico in Cuba is a government-community owned and managed resort destination that includes a 26-room hotel in 5,000 hectares of replanted forest
- Rural - the Oistins Fish Fry in one of the urban centres in Barbados is very popular with tourists
- A collective effort - this can be referred to as 'classical Community-Based Tourism (CBT)' and more recent focus is on community/private partnerships, micro-entrepreneurs and the supply chain to the wider tourism economy

- A product delivered at the community-level and/or centred on guest-host interaction – tourists do not visit St. Helena Women's Group in Jamaica but purchase 'calabaskets' in gift shops in all-inclusive hotels (CTO and EU, not dated, p. 6)

Equally important to the discussion of community tourism is the definition of community. If community is narrowly defined based solely on geographic location, then this eliminates the possibility for communities of interest coming together to create products, develop services, and provide them as part of the tourism industry. Therefore, community in this report is taken to have a much broader meaning, i.e. “an interacting group of people who share a common functional link, such as kinship, occupation, interest, place of residence or religion” (Renard, 1991). Therefore a group of artists or a group of persons with an interest in agriculture can be a community, and they can collectively create and provide products and services for the industry.

This broader perspective on community is reflected in the White Paper (Strategic Solutions Inc., 2012) that states there is a symbiotic relationship between local communities and tourism. The White Paper stresses that “*community tourism should not be considered to be a niche area per se, but rather an extremely ingrained and valuable component of the overall tourism product offering*”. The policy document calls attention to the fact that “*tourism is a people-centred service industry, in which tourists visit Barbados because they want to experience what is uniquely Barbadian and it is the Barbadian people that bring the destination to life. Thus, it is the potential and passion within communities that hold the key to a nation’s development*” (Strategic Solutions Inc., 2012, pp. 133-134).

For the purpose of the TMP therefore, community tourism is taken to be:

*Tourism in which community members **exercise control** through active participation in the **appraisal, development, management and/or ownership** (whole or in part) of enterprises that deliver net socio-economic benefits to community members, conserves natural and cultural resources and adds value to the experiences of local and foreign visitors. Community in this case is represented by **an interacting group of people who share a common functional link**, not necessarily defined by a geographic location.*

Critical to this definition is that the community be able to exercise control over all aspects of the development, ownership and operation of the enterprise, and that the concept of community is not confined to a geographic characterization.

Policy Direction –The Barbados Tourism White Paper

The 2012 Barbados Tourism White Paper draws upon a statement made in the 2001 “Green Paper on the Sustainable Development of Tourism in Barbados: A Policy Framework” which urged that unless Barbadians were at the centre of every effort, the industry would not perform optimally. As such therefore, it was stated that there was a need for “*involving local people through community tourism and developing strong linkages with other sectors*” (Strategic Solutions Inc., 2012, p.1). The White Paper reflects this philosophy of people-centred tourism by making a significant justification for the expansion of community tourism as part of the national tourism product. It states that community tourism, in addition to other alternative forms of tourism such as sports tourism, cultural heritage tourism, culinary

tourism, agrotourism, health and wellness tourism, faith-based tourism, events tourism and genealogy tourism, should be developed, in order to “*attract the most sustainable segments of the travel market so that Barbados can become a differentiated, year-round destination, with a spectrum of unique attributes appealing to several key segments of the mid to upscale market*” (Strategic Solutions Inc., 2012, p. xi). However, the document cautions that “*outside of sand, sea and sun and traditional niche markets like Weddings/Honeymoon, Dive, MICE, Golf, Soft Adventure, Epicurean etc., Barbados’ other key unique selling points with respect to its cultural heritage, culinary and community tourism components either have not been identified or fully exploited*” (Strategic Solutions Inc., 2012, p. 66).

In light of the above, the White Paper proposed a series of policy directives for community tourism. These have been divided into four categories as follows: (i) the development of an enabling environment for community tourism; (ii) building local capacity for community tourism; (iii) promoting community tourism product development; and (iv) monitoring and evaluating local efforts at community tourism to ensure quality.

(i) Creating an enabling framework for community tourism

- Establish institutional frameworks to develop sustainable niche products like volunteerism, agro-tourism, youth tourism, community tourism, cultural heritage tourism that will involve communities to provide memorable and experiential experiences
- Provide fiscal incentives for individuals or groups seeking to develop community tourism programmes
- Offer incentives for the financial services sector to provide facilities to support community tourism product development
- Encourage the development of strategic partnerships and a greater role for local communities in the development of tourism products and experiences to ensure the protection of communities and culture in locations where local community activities occur

(ii) Building local capacity for community tourism

- Develop a framework to encourage home stays’ to offer a more authentic sustainable experience where visitors stay at a Barbadian home and learn firsthand the Barbadian way of life
- Create a strategy for consultation with communities throughout the project cycle of tourism related developments which may impact on them
- Develop a participatory approach to empower local communities to plan, develop, implement and manage feasible community-based tourism development projects or activities pertinent to them
- Facilitate the education of the general public and tourism stakeholders about the value of tourism as a tool to empower local and rural communities, alleviate poverty and foster balanced development

(iii) Promoting community tourism product development

- Facilitate tour operators/travel agencies who specialize in selling and promoting community tourism packages

-
- Facilitate the development of Parish Branding to showcase the unique identity of each parish
 - Engage local communities to develop sustainable tourism products to benefit their respective communities
 - Facilitate entrepreneurial efforts by local communities and small, micro and medium sized businesses in the tourism sector
 - Collaborate with relevant agencies to develop packages for visitors who wish to be engaged in voluntourism programmes to assist local causes or communities
 - Collaborate with the accommodation sector to promote local community events to visitors to provide authentic Barbadian experiences, enhance visitor satisfaction and increase visitor spend

(iv) Monitoring and evaluation of community tourism products

- Establish and maintain a system for dynamic assessment of carrying capacity and social impact assessments within each community to ensure preservation of a balance between tourism development and cultural preservation to eliminate any form of social exploitation, and to limit excessive pressure on natural resources, pollution generation and damage to ecosystems
- Benchmark the fundamentals of the successful Oistins Model as a basis for developing other community tourism projects across the island

Global and Regional Experiences in Community Tourism

Notwithstanding the emphasis placed on community tourism in the White Paper, researchers contend that many community based tourism enterprises do not succeed, fail to produce significant benefits, or do not last beyond initial external funding (Armstrong, 2012, p. 2; Goodwin and Santilli 2009, p.4). These researchers cite examples including responsibletravel.com and Conservation International's research, where the majority of projects they were able to survey had occupancy rates of around 5%; and a Rainforest Alliance and Conservation International study of 200 initiatives which produced similar results. They also cite Dixey's research in Zambia which found that only three of 25 community-based tourism enterprises surveyed were "*generating enough net income per year for tangible development and social welfare in the wider community*", all of which had private sector backing (Armstrong, 2012, p.2).

It is therefore important to determine key success factors if community tourism initiatives in Barbados are to be successful. To this end, three global and three regional research projects were reviewed to identify success indicators. The results of these global and regional projects are described separately below.

1) Community tourism in the global context

The first research project was conducted by Goodwin and Santilli in 2008. They interviewed 116 practitioners across the globe to ascertain criteria used to define successful community based tourism initiatives. They found that social capital and empowerment was the most

frequently cited reason for a community-based tourism initiative being identified as a success by 69.8% of the 116 practitioners. Improved livelihoods and standard of living was identified by 67.2% and local economic development by 58.6%. All other factors scored less than 50% including commercial viability at 40.5% and collective benefits at 12.1%. These results were quite startling, given the prominence placed upon commercial viability in the development of any tourism product as well as the need for collective benefits highlighted in academic literature (Goodwin and Santilli, 2009, p. 19).

The researchers went further and attempted an assessment of the projects that had been judged by the practitioners to be successful. Only 28 projects responded, and of these only 15 were categorized as CBT initiatives by the researchers using the traditional meaning, i.e. being community owned and with some element of collective benefits. The projects offered a range of activities in the areas of cultural heritage, ecotourism, conservation and agrotourism, and many also included an accommodation package. They were located in Thailand, Nepal, Uganda, Namibia, Peru, Costa Rica, Mozambique, Vietnam, Tanzania, Ethiopia, and Ecuador. Among those which had been deemed successful by the practitioners but which did not meet the community ownership and collective benefits criteria by the researchers was De Heart uh Barbados® - Heritage Celebration, Barbados (Goodwin and Santilli, 2009 pp. 24-27).

The researchers discovered that the successful projects were able to offer community benefits - 64% of projects reported that they provided an additional income, and 96% of projects reported that they had contributed to reducing poverty and/or improved the standard of living of the community. In addition, there were collective benefits - all but one of the initiatives has resulted in an improvement in community assets ranging from road improvements to classical music lessons. However, the researchers found it difficult to assess local economic development impacts because there was a wide range of different linkages between the projects and the local economy, and the linkages were extremely difficult to quantify. The researchers were not able to determine whether or not CBT initiatives contributed more than the others, but felt that it was very unlikely as the major determinant of impact is scale.

Of grave concern was sustainability, especially as it related to commercial viability - two were Joint Ventures and were successful as a result of the close relationship with a commercial organization, and four other initiatives reported that they had attained viability. However, the remaining nine indicated that they were not yet economically sustainable and could not be without further grant aid (Goodwin and Santilli, 2009, pp. 27-32). One of the researchers' major conclusions was therefore the fact that community-based tourism initiatives were highly donor dependent.

In the second research project, Armstrong (2012) analysed the conditions for success of community-based tourism enterprises by conducting a thorough literature review and consulting with 17 community-based tourism experts in relation to 8 successful community-based tourism enterprises in South Africa, India, Honduras, Ethiopia, Thailand, Brazil, Ecuador and Swaziland. Armstrong (2012, p. 3) defined a successful community-based initiative as one that:

- was economically viable, the central part of its operations having been at least break-even for at least two years in the last four
- did not depend on grants or subsidies
- delivered collective and individual benefits to the community

From the literature and the interviews, Armstrong (2102, pp. 28-29) concluded that a number of conditions were required to secure the success of community-based tourism as follows:

1. **A cohesive and resilient community** is most likely to make an enterprise work. A community with well-established and strong institutional structures and decision-making processes has good prospects of success.
2. **Genuine community participation, ownership and control** – beyond simple consultation, are critical to success by ensuring local buy-in and long-term commitment. A broad, genuine process of community consultation, agreement and practical involvement should begin well before enterprise development and be embedded into all stages of it.
3. **Community based tourism enterprises must adopt a commercial mindset** - planning for financial viability from the outset is important when entering a sophisticated, competitive industry such as tourism.
4. **Engagement with the private sector – on a formal or informal basis, is vital from beginning to end.** Strong and collaborative relationships, partnerships and strategic alliances with the private sector will offer access to its knowledge of the market and its ability to find the best route to it.
5. **Market research and demand-driven product development** – research must be *with*, not simply *for*, the market to be successful.
6. **Successful enterprises are accessible to tourists** - and provide attractive, quality products based on the natural and cultural assets.
7. **Success takes time.** Enterprise development of any type can take many years, and in this context it is vital that it is done at a pace and on a scale that is appropriate to the community's resources and skills.
8. **The engagement, support and collaboration in the enterprise by stakeholders with key areas of expertise is key to success** - in particular, stakeholders should each play to their own strengths and adopt a "market-savvy" approach.
9. **Transparent and accountable governance, leadership, decision-making structures as well as sound, skilled financial management are essential.**
10. **Community benefits must be wide-ranging** and delivered as soon as possible. The whole community must be able to see an increase in net benefits and in its quality of life from as early a stage as possible and that such benefits are delivered regularly thereafter.
11. **Monitoring and evaluation** of outcomes and benefits should be conducted, as simply but effectively as possible. Progress from pre-enterprise data should be plotted to measure local economic impact from tourism, so that communities and others can share and learn from experience and ensure continued success. In

particular, donors should demand robust data to critically assess the success of initiatives they fund.

The third global research project that was assessed was undertaken jointly by the Overseas Development Institute (ODI), the International Institute for Environment and Development (IIED) and the Centre for Responsible Tourism (CRT) at the University of Greenwich, together with in-country case study collaborators. The project was funded by the Economic and Social Research Unit (ESCOR) of the UK Department for International Development (DFID).

The research reviewed practical experiences in making tourism work for the poor, drawing mainly on six case studies of current pro-poor interventions in tourism drawn from South Africa, Ecuador, Namibia and Uganda, Nepal and St. Lucia. The initiatives were being undertaken by a range of actors: companies, government, non-governmental organizations (NGOs), donors, and communities. The study addressed four core questions:

- What strategies are being followed to ensure that the poor benefit from tourism?
- What impacts do these have on the poor?
- What are the factors affecting progress?
- What are the key implications and recommendations for others interested in pro-poor tourism?

It must be noted that while the 2010 Barbados Country Assessment of Living Conditions does not indicate a significant degree of poverty in Barbados, pro-poor tourism strategies aim to unlock opportunities— whether for economic gain, other livelihood benefits, or participation in decision-making – and these goals are consistent with those espoused in the Barbados Tourism White Paper.

The research revealed 4 critical factors that can constrain or facilitate progress as follows:

(i) Market accessibility:

- *Success depends on where you are.* If there is a significant distance between the clientele and the product, then the physical conditions of access can often reduce the opportunities for the development and marketing of activities
- *Success depends on who you are.* Important decisions are usually not made by community members nor by those who seek to develop community tourism policies and programmes. Most of the critical decisions that affect the sector are made outside of the country or by a few powerful local interests. Except on rare occasions, processes of public policy formulation are not participatory
- *Success depends on what you have.* The ability to enter the sector and to create employment and income-generating opportunities is naturally based on the availability of financial or physical assets. Community people are often constrained by the absence of assets, and by the difficulty they face in accessing and using common property assets
- *Success depends on what you know.* Efforts (to participate in the industry) are hampered by a lack of understanding of how the industry functions. In the absence of a profound understanding of the manner in which this complex sector operates, the current status quo is unlikely to change (Ashley et. al., 2001, p. 28)

(ii) *Commercial viability:*

If community tourism initiatives are to be commercially successful, they need to succeed in competitive tourism markets. This means that the product must be attractive and of a high quality so that they can draw private investment, increase their clientele, and/or charge higher prices. Where products are not sufficiently attractive, problems of low demand and profits will occur. They must be able to establish and secure an appropriate market. This will require at a minimum the development/improvement of marketing skills; the identification of markets and matching of products; the securing of support by the National Tourism Board; and establishing effective links with the private sector (Ashley et. al., 2001, pp. 29-31).

(iii) *Policy framework:*

Communities engaged in tourism must have some influence on the policy framework. The content of policy, the process of policy-making, and the capacity to implement policy reform are all critical factors. Moreover, Government must demonstrate commitment to community tourism policies through collaboration and communication. In other words, the policies must move from paper to action.

In addition, the framework must address a number of factors, e.g. land tenure. Communities without secure land tenure are not in the strongest position to manage tourism on the land and gain benefits (Ashley et. al., 2001, pp. 32).

(iv) *Implementation challenges in the local context:*

Among the implementation issues are skills and capacity gaps. Therefore, capacity building is an essential component of any community tourism initiative, and some form of external facilitation may be required. Communication and collaboration is another critical area. Community-based tourism is most effective when different stakeholders work together, and therefore, investment in communication is essential. Communities must also have realistic expectations. Mismatched expectations and benefits can kill initiatives. It is important to deliver short-term benefits while long-term schemes are developing (Ashley et.al., 2001, pp. 33-35).

2) Community tourism in the regional context

In December 2000, a number of projects funded by the International Fund for Agricultural Development, non-governmental organizations and government agencies involved in community-based tourism projects in the Windward Islands were consulted to assist in identifying initiatives for an analysis of their impacts. Five tourism initiatives were selected that involved some collective action and a community institutional base for managing the tourism initiative (see Cooper, 2004, p. 2):

- Dublanc and Bioche community tourism project, Dominica (DBCTP)
- The Carib Territory, Dominica (CT)
- Anse La Raye seafood Friday, Anse La Raye, St. Lucia (ALRSF)

- Desbarras Turtle Watch project, Grand Anse, St. Lucia (DTWP)
- Royal Mount Carmel Falls, St. Andrew's, Grenada (RMCFP)

Based on the analysis of the five initiatives, a number of success factors that have contributed to the development and execution of community-based tourism initiatives were identified by Cooper (2004, pp. 21-22) as follows:

1. *A supportive institutional structure*: A supportive environment requires an institutional structure that has the necessary policies, linkages between agencies and other tourism organizations, and has access to the necessary skills to provide or source technical assistance and support to community-based groups.
2. *Participatory process of development*: Positive social impacts have been demonstrated where there has been a participatory process of decision-making in planning a tourism initiative and where tourism development is perceived as one component of a rural development strategy.
3. *Strong NGO or government agencies working alongside that have a good knowledge of the industry*: Particularly in the beginning stages of the initiative, having a competent agency working alongside to develop the initiative and build capacity at the community level, at a number of levels, has proven invaluable.
4. *Access to funds*: Provision of start up funds for tourism initiatives through soft loans and funding of costly infrastructural development has provided a successful catalyst for community-based tourism initiatives, but must be provided within the context of a participatory process of development so that there is transparency on the allocation and management of funds.
5. *Tourism development does not have to be based on a particular attraction*: Economic opportunities for communities from tourism have been shown to be successfully developed where there was no natural attraction (such as a waterfall or nature trail). Well organized events (cultural) and the identification of products that add value to the existing package (e.g. craft) have created more opportunities for a wider cross-section of the community.
6. *Access rights and/or equitable participation in the management of the tourism resource*: This allows the community group some control over the use of the resource and can prevent more powerful interests taking advantage of the tourism opportunities.
7. *Management and organizational capacity needs were identified and developed*: Capacity is needed at a number of levels (organizational management, project administration, resource management and product development and marketing) to adequately orchestrate a community-based tourism project.
8. *Initiatives that realize the role of women and tailor activities to maximize their input and benefits*: When project planning activities and jobs created can accommodate women's skills and roles in Caribbean society, the benefits to the community as a whole have been significant.
9. *Non-partisan development of tourism planning*: Community-based management structures that are not politically polarized and reflect a cross-section of stakeholders have shown best results.

10. *Conflict management mechanisms*: The recognition and anticipation of the “role” of conflicts and creation of adequate opportunities to reveal and address conflicts through ongoing dialogue and negotiation has contributed to a successful project.
11. *Support for marketing*: Adequately marketing a site/event is a complex and costly undertaking, and community-based groups need support in the development of the marketing products, funding and promotion.
12. *Creating a local market*: Developing a local market (as well as a regional market) is useful for protecting revenues in the ‘low season’, and improving the durability of the product. Considering a local and regional market in product development may also help to ensure its authenticity.

Li et. al. (2005) published the results of a study designed to determine critical developmental constraints affecting the establishment of community attractions in the Caribbean, and to formulate a framework within which the attractions can be developed. The study research was conducted in Guyana, Jamaica, and Trinidad and Tobago, and a survey was conducted with 200 respondents from the retail, agriculture and tourism sectors. They also interviewed students and unemployed persons. Based on the findings, the researchers recommended that the following 11 factors were critical to the development of sustainable community tourism attractions (from Li et. al., 2005):

1. *Policies*

- Develop and continually review the legislative framework governing the planning and development of sustainable community-based tourism attractions
- Create an agency that will be responsible for monitoring and enforcing policies and standards related to community tourism attraction and development particularly in the case of Guyana, and Trinidad and Tobago
- Government needs to constantly review the operations of community-based attractions in order to ensure that services offered are maintained at a consistently high standard
- Government needs to develop specific standards for the development of attractions and efforts should be made to ensure that these standards are adhered to

2. *Incentives*

- Create a more transparent and open method for the granting of incentives for tourism development
- Less stringent selection criteria should be set for community-based attractions seeking incentives
- The awarding of incentives such as duty-free concessions should be made known to prospective tourism attraction managers, inter-sectoral agencies and other industry stakeholders

3. *Marketing*

- The marketing and promotion of community-based tourism attractions should be conducted with inputs from local community members
- Governments need to assist local community-based attractions with their marketing efforts. Feasibility studies need to be conducted for tourism related projects
- Greater efforts need to be made to allocate adequate financial resources for marketing and promotion of community-based tourism attractions
- The private and public sectors need to be more creative and innovative in their marketing efforts. Special attention needs to be placed on product formulation and promotion
- The private sector should also provide support to local communities in the marketing and promotion of community-based attractions
- Non-traditional areas such as sports, culture and heritage need to be marketed aggressively to cater to niche markets from which local community tourism attractions can benefit
- Tourism managers in both the private and public sectors need to develop creative strategies to deal with discontinuities in the sector such as market loss and competition

4. *Funding*

- Funding for projects needs to be balanced between all stakeholders. Greater self-funding by communities needs to take place whereby communities are responsible for funding a percentage of the project
- Opportunities for funding local community tourism attractions need to be expanded and this has to be communicated to the private sector and local communities

5. *Community Participation*

- Local communities should be involved in the planning and development of tourism attractions and projects from conceptualization to implementation
- Local communities need to be involved in the decision making process and opportunities for dialogue between local communities and the private and public sectors should be pursued at all times
- Local communities need to explore opportunities for involvement and make a conscious decision to participate in all activities related to the development of community attractions

6. *Education and Training*

- Training should be provided to local communities that will enable them to improve their financial, technical and human resources capabilities. This will assist local communities to become more self-reliant in their approach to planning
- There is a need for increased awareness among the public of the importance of community-based tourism attractions and the role these attractions play in the development of the local communities
- The community has to assume some of the responsibility for determining their training and education needs which would be critical for the development of their communities

- The private sector needs to be more involved in the provision of training to local communities. The private sector could act as a catalyst to ensure that local communities are empowered to make decisions relating to their development

7. *Linkages*

- Stronger linkages between public sector and private sector stakeholders should be established

8. *Sustainability*

- Managers of community tourism attractions need to understand the changing needs and expectations of the market in order to cater to their needs
- Local communities must seek to understand how the sustainability of community-based tourism attractions can be compromised. This awareness and understanding can be achieved through training especially in the area of environmental practices
- Government needs to provide the private sector and local communities with the technical and infrastructural support to that would serve to ensure that community tourism attractions are sustainable over the long term

9. *Carrying Capacity*

- Community tourism attraction managers need to make greater effort to understand the basic principles of carrying capacity and how it relates to the sustainability of community tourism attractions
- Government should take steps to ensure that the concept of carrying capacity is well defined and understood

10. *Communication*

- Local communities need to actively participate in constant dialogue with relevant government agencies that influence the development of attractions
- There should be more communication between the private and public sector regarding the development of community-based tourism attractions
- In order for community attractions to be developed in a sustainable manner, there needs to be consultation and involvement at several levels. In the first instance, government needs to assist with developing the legislation needed to control the development of particular attractions as well as provide other forms of technical assistance

11. *Government Input*

- Government needs to support the development of community-based tourism attractions to a greater extent. Efforts need to be more focused on the needs of the industry such as infrastructure, safety, product development and security

In a study commissioned by the Caribbean Regional Sustainable Tourism Development Programme on Good Practices in Community-Based Tourism in the Caribbean, the following projects were deemed among the best (CTO and EU, not dated):

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- Portsmouth Indian River Tour Guides Association (PIRTGA), Dominica
 - Giraudel/Eggleston Flower Group Inc., Dominica
 - Rivers Community Life Package in Grand Fond Village, Dominica
 - La Ruta del Café, Dominican Republic
 - St Helena Women's Group (SHWG), Jamaica
 - Walkerswood Jerk Country Tour, Jamaica
 - Anse La Raye Seafood Friday (ALRSF), Saint Lucia
 - PlasKassav, Saint Lucia
 - Roxborough Estate Visitor Services Cooperative, Republic of Trinidad and Tobago
 - Nature Seekers (NS), Republic of Trinidad and Tobago

Notably Barbados is not on the list even though it is identified as the model upon which the Anse La Raye Seafood Friday was based. The criteria for selecting these examples as good practice were (CTO and EU, not dated):

- Active participation of local people in the planning, implementation, management and/or ownership of the tourism enterprise
- Aspects of innovation and/or demonstration value
- Positive and tangible net socio-cultural, economic and environmental impacts
- Access to the tourism market
- Commercial viability
- Support of any relevant community-based tourism policy frameworks
- Implementation issues (e.g. skills gap) adequately addressed and mitigation measures for tourism impacts introduced where necessary

3) Summary of success indicators

Based on the research findings of these global and regional projects, it can therefore be determined that there are a number of success factors that contribute to the best practice experiences both regionally and internationally. These have been summarized here using the 4 categories of policy directives from the White Paper (Strategic Solutions Inc., 2012) to delineate the areas of focus. As indicated earlier, community is not constrained by a geographic location, and refers to communities of interest as well.

(i) Enabling Framework

- Supportive policies – the presence of a legislative framework governing the planning and development of sustainable community tourism attractions
- Supportive institutional framework – the establishment of an agency or assigning an existing agency to be responsible for facilitating the development, implementation and monitoring of community tourism attractions
- Communication and collaboration – engagement among public, private and community sectors - especially stakeholders who have a good knowledge and expertise within the industry
- Linkages between community and private sector – formal or informal linkages both promote successful community tourism projects

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- Cohesive and resilient community – the group, whether geographic or based on common interest must have strong bonds; an institutional structure with a mechanism for decision-making processes would be ideal
 - Genuine community ownership and control – communities/stakeholders should be involved in the planning, development and decision making process of tourism attractions and projects from conceptualization to implementation
 - Good governance - transparent and accountable leadership, decision-making structures as well as sound, skilled financial management are essential
 - Provision of incentives - such as duty free concessions
 - Access to funds - funding for projects needs to be within the control of the community
 - Access rights and/or equitable participation in the management of the tourism resource – communities/stakeholders should have control over the product
 - Time - success takes time and communities should have realistic expectations of when they will see a return on their investment

(ii) Building Local Capacity

- Capacity building in the community - to improve their financial, technical and human resources capabilities. This should include conflict management mechanisms
- Commercial mindset – communities/stakeholders pursuing a tourism goal must adopt a commercial mindset, planning for financial viability from the outset
- Increasing awareness among the public - to the importance of community tourism attractions and the role these attractions play in social development
- Public and private sector financial support – a broader base needs to be found for community tourism capacity building efforts

(iii) Product Promotion

- Market research - feasibility studies need to be conducted for community tourism projects. Market research and demand-driven product development *with*, not simply *for*, the market is key to success
- Marketing funds – government and the private sector should assist with the allocation of adequate financial resources for marketing and promotion of community tourism attractions
- Marketing approaches – should include inputs from the community/stakeholders and be creative and innovative
- Accessibility - successful enterprises are accessible to tourists and provide attractive, quality products based on the natural and cultural assets
- Creating a local market - developing a local market (as well as a regional market) is useful for protecting revenues in the 'low season', and improving the durability of the product
- Sustainability: addressing changing needs - managers of community tourism attractions need to understand the changing needs and expectations of the market in order to cater to their needs

(iv) Monitoring and Evaluation

- Development of standards - specific standards for the development of community tourism attractions and efforts should be developed and utilized
- Review the operations of community-based attractions – constant review in order to ensure that services offered are maintained at a consistently high standard

Community Tourism in Barbados

The importance attributed to community involvement in tourism in Barbados is highlighted by the fact that it is identified in the National Strategic Plan 2005-2025. According to the Plan, one means of advancing the island's tourism sector centres on capturing the ownership and control of tourism distribution channels by domestic entrepreneurs. Such a stratagem would position Barbadians in the management of all aspects of the industry, as well as reduce the leakage of foreign revenue. Community participation in the planning and operation of the sector was therefore identified as a key strategy in sustainable tourism development. As communities play an integral role in the overall visitor experience, it is fitting that they themselves should benefit directly from tourism. Strategies to facilitate this objective include:

- Creating an appropriate social and economic climate, complemented by the requisite facilitating mechanism, which allows communities to contribute to the planning and development of the tourism industry
- Sensitizing all Barbadians to the importance of tourism and the benefits to be derived from its success (Ministry of Finance and Economic Affairs, 2005)

Currently, however, the experience of community tourism is limited. As stated in the White Paper *“there have been attempts to involve segments of the local population through several community tourism projects facilitated by the Ministry of Tourism and other agencies, but these have been episodic, as a non-sustainable institutional framework has been set up for the ongoing involvement of the local communities”*. The Policy document continues by stating that *“greater effort has to be expended by both the government and the tourism private sector to redress previous imbalances, to gain the trust, commitment and support of the local communities and previously marginalized groups, to demonstrate that tourism in Barbados can and will directly benefit Barbadians”* (Strategic Solutions Inc., 2012, pp. 118-119).

In the next sections, the experience of community tourism in Barbados is explored, based on input from representatives of key tourism agencies, as well as a brief description of some of the past, present and proposed initiatives. A selection of the initiatives is then assessed using the success factors that were identified from the global and regional experiences. This then leads to an identification of advantages that must be seized and challenges that must be overcome to allow community tourism to play a more effective role in the tourism industry in Barbados.

1) Perspectives from the industry

As part of the process of analyzing the past, present and potential impacts of community tourism on the local industry, interviews were conducted with representatives of leading tourism agencies. The interviewees included Dr. Keith Nurse (UWI Cave Hill), Michelle Smith-Mayers (BHTA), and Sharon Trotman (MTI).

They were asked to focus their responses on the following issues:

- Which groups are actively involved in community tourism?

- What challenges are hindering the forward movement of community tourism?
- What recommendations would you make to improve community tourism?

(i) Community tourism initiatives

Overall the three informants felt that community tourism had not been properly developed in the island as a result of lack of vision, poor planning and government bureaucracy. They suggested that in fact there were very few activities that could be considered community tourism in Barbados. Indeed, two of the informants were challenged to identify active initiatives in Barbados. However, they were able to readily offer examples in other islands such as Dominica, Grenada and St. Lucia. When prompted with the example of Oistins Fish Fry, one informant stated:

“If defining community tourism as an activity that impacts the community then yes, the Oistins Fish Fry has a strong and diverse impact on a number of the participants: the vendors, fishers, as well as the other businesses in the area that benefit from the patrons attracted to Oistins.”

In addition, the informant cited Pelican Village as another possible example of community tourism. It was suggested that this craft market was underutilized because, despite its ideal location near to the Harbour, it appeared to be largely unknown by visitors and even by the local population. One reason posited was the fact that it was not well advertised.

Another point made was the fact that most of what was considered community tourism initiatives was food related such as Oistins, Moon Town, and Lemon Arbour. The informant suggested that other than these, they were no other active community tourism groups on the island.

(ii) Hindering factors

In response to what may be hindering the progress of community tourism in the island, it was suggested that there was (i) a lack of political will; (ii) a lack of understanding of the impacts of community tourism on the visitor experience; and (iii) failure of the local population to recognize the role that they can play in community tourism as the main obstacles. The informant also highlighted the absence of regulations to control or guide persons becoming involved in community tourism which could have a negative impact on the visitor experience: e.g., there was no liability on the part of private water sports operators in the event a visitor was injured; there was nothing in place.

In emphasizing the absence of institutional support for community tourism on the island, one informant stated that:

“...there is a general lack of interest in community tourism on the part of government agencies; it does not have a “home”. Although the Ministry of Tourism has spoken about it, there is no real plan for its development, no business plan for its sustainability or marketing, nor has funding been made available for its development.”

Another informant expressed deep disappointment that little progress had been made with community tourism in the island thus far. This informant suggested that one of the hindering factors was the fragmented nature of community tourism on the island:

“It is not a cohesive programme and as such it is hard to identify “active groups” in community tourism. There are a few groups trying to do their own thing, e.g. fisherfolk at Martin’s Bay, Conset Bay, Weston, and of course Oistins. However these persons may not even consider themselves as ‘community tourism’ operations.”

There was recognition of the fact that the Ministry of Tourism was making a contribution through the implementation of the “Bajan Pride” project. However, it was suggested that should not be the only item in the Ministry’s community tourism portfolio.

It was also suggested that “community tourism should be by the community and within the community.” The informant in this case felt strongly that community-based tourism would not thrive in a bureaucratic environment, and that this was in fact hindering the progress of community tourism in Barbados, as it prevented the concept from developing the way it should, and stifled creativity. The informant referred to “De Heart uh Barbados” which was initiated to show case the community of St. Thomas. It was opined that there had been insufficient follow through, and indeed similar activities should have been initiated in each of the 11 parishes of the island to exhibit the features unique to each parish. Reference was made to a focus group that had been conducted with visitors to the island in preparation for the White Paper on tourism that revealed that many people were no longer travelling primarily for the beaches, but instead wanted to experience the people and their culture.

(iii) Recommendations for improving community tourism

One of the informants suggested therefore that the way forward was to motivate locals by marketing community tourism in such a way that individuals could see direct personal benefits. In short, there needed to be greater recognition of the fact that tourism was vital to the development of the economy as well as the development of the individual.

Another recommendation was that the task of developing community tourism be placed in the hands of a private agency:

“Community tourism does not fall under the mandate of the BTA nor the Ministry of Tourism, and is going to primarily be an entrepreneurial and private sector initiative. Therefore, give funding to the private sector, such as the BHTA, and allow them to develop community tourism. The Ministry of Tourism and BTA are concerned about getting “heads in beds”, not in developing community tourism as a tourism product. Take for example the attempt at the Home Accommodation Programme during the 2007 Cricket World Cup; although there was incentive for persons to participate, there was no mechanism in place for its continuity; it was neither properly planned nor regulated. A private entity would better be able to develop and market community tourism without all the red tape that government agencies must go through. Alternatively a department of BTA could be formed to focus on product development.”

It was suggested that the current restructuring within the Ministry of Tourism could help to address the hindrances caused by bureaucracy. It was felt that tourism was too dynamic to be within the confines of a bureaucratic environment, and thus product development should be taken out of such an environment that slowed its progress. The informant stated that while there was a need for checks and balances, there was also a need for a paradigm shift with regards to the way product development was handled.

2) Examples of community tourism in Barbados

Community tourism in Barbados has focused on a diverse range of products, both cultural and natural, including, arts and craft, entertainment, food, accommodation and nature trails. However, as noted by the White Paper (Strategic Solutions Inc., 2012), a number of governmental, private sector and non-governmental agencies have attempted a diversity of community tourism initiatives over the decades but not many have lasted past the initial investment of donor support, technical input of consultants for the start up, or preliminary efforts that were primarily coordinated and administered by the sponsoring agencies.

Some examples of community tourism initiatives past, present and proposed are presented below. This listing is not comprehensive. It is intended to convey the diversity of community tourism projects that have been on the Barbadian landscape over the past decades. It also highlights some of the constraints that have hindered the success of these projects. A common feature of many of these initiatives is the heavy reliance on governmental support, both administrative and financial. Notably, the initiatives that have survived are those with their own institutional base of support.

(i) Craft-based community tourism

One of the earliest examples of community craft-based tourism in Barbados is the Chalky Mount Potteries. This rural village experience consisted of potters who would not only offer a diversity of clay products, but would also demonstrate the process of making the products to many visitors who, in some cases, had the opportunity of trying out the potter's wheel. This all took place amidst the breathtaking panoramic views of the St. Andrew coastline. This experience is in decline now, with heavy competition from more recent private sector pottery ventures.

Another long lasting example of community craft-based tourism is the Pelican Village, which since it opened in 1964 has provided a location for a diversity of arts and craft vendors to ply their trade. Pelican Village has however, experienced a number of challenges, and despite being redeveloped in 1999 with renovated buildings, it has not ever held pride of place as a craft village nor received the level of visitors that would have been expected given its proximity to the Barbados Port and Bridgetown. Among the reasons posited for its poor performance is the lack of effective marketing as well as limited visibility to passers-by. The latter point is argued by many, in spite of the 1999 facelift to the area.

More recently, the Bajan Pride Exposition was developed as one component of the Ministry of Tourism's Community Tourism Programme, with core objectives of encouraging the use of local arts and craft within the tourism industry; and providing opportunities for local artisans

to sell their products to both visitors and locals (Ministry of Tourism, 2011). The Exposition, which got started in 2008, showcases the wealth of available locally made products such as pottery, basketry, paintings, woodcraft, aromatherapy products, handmade jewellery, leather, local fashion and traditional Bajan delicacies (Gill, 2010; Hutchinson, 2012). To date, the Bajan Pride Exposition has been held at Holetown, Pelican Craft Village, Independence Square, Bathsheba, Dover, Jubilee Gardens, the Bay Street Esplanade and Chalky Mount. This initiative is coordinated by the Ministry of Tourism and takes place at the Ministry's initiative more so than that of the vendors. This approach challenges the criteria in the definition of community tourism that requires control by the community.

Another recent pilot project of the community tourism craft landscape is the Barbados Arts and Craft Experience launched in 2011 during tourism week. It is an initiative of the MTI, which incorporates experimental tourism as the visitor is involved in the artisan experience by doing and not only seeing. The visitor pays a fee to learn to work alongside and learn the skill of an artisan in areas such as basket making, jewellery, pottery or other local crafts. Thus, the visitor becomes intimately involved as part of the experience. An opportunity is also provided for the visitor to sample local cuisine, as a light lunch is provided as part of the experience.

The MTI organizes through local guides, taxis, hotels and craft companies to inform visitors about the experience. The fee paid by the visitor covers transportation, food and beverages, and the craft persons' time. These activities have only been undertaken in Pelican Village thus far. Marketing is done by putting flyers in hotel rooms and at the reception areas, through travel agents, websites, and the Intimate Hotels group. This therefore is initiated by the MTI as opposed to the various stakeholders who participate, once again challenging the criteria in the definition of community tourism that requires control by the community.

(ii) Performance-based community tourism

Perhaps the earliest and longest lasting example of performance-based community tourism is the Landship. Indigenous to Barbados, it started in 1837 as a friendly society to benefit its members. The dance performances of this group, which mimic the British navy organization, are still a highlight at many tourism events. The Landship, although declining in numbers, has its own management structure and continues to attract members to ensure its survival.

The initiative "1627 and all that," was the brainchild of the Pinelands Creative Workshop (PCW) and another example of performance-based community tourism. The show ran from the early 1980s until 2000. "1627" was a dinner show that showcased the history of Barbados in song, dance and theatre. The show focused on five aspects: the historical landing in 1627; the religions of the island; the indigenous civil society group; the Landship; the English-African fusion; and the carnival festival of Crop Over. The show was created, produced and performed by the PCW and designed for performance at a dinner show at the Barbados Museum. Mr. Rodney Grant, CEO of PCW stated that the Museum was the ideal location for the show because it focused on the history of the island. Not having ownership of the venue eventually proved to be one factor in the demise of the show, since performances required a partner who would provide a venue. After the relationship with the Museum ended, the show was moved to Tyrol Cot, but this did not prove to be as good a

venue for the performance. Another factor that was challenging was marketing for the show. Mr. Grant said that the tour representatives would ask for increasing amounts of income to promote the show to their clients. Mr. Grant also said that they are trying to bring back the “1627” show.

(iii) Nature-based community tourism

One example of nature based community tourism was the coastal nature trail from Bath to Martins Bay, which followed the old train line and was tried as part of the Coastal Zone Management Unit (CZMU) demonstration projects which aimed to encourage groups such as fishing communities and shorefront property owners to contribute to the development of the Coastal Zone Management Plan. The aim in this case was to get fishers in Conset Bay and members of the surrounding communities to earn additional income by marketing tours of the trail that they would maintain. Many meetings were convened, training sessions were conducted with potential tour guides, an attempt was made to establish an NGO to manage the trail, and a marketing plan and trail development plan was drafted. However, although the trail continues to be used by many hikers, no paid tours were ever taken. Once the CZMU project came to an end, the impetus for the project also ended.

A more recent proposal for the development of a trail has been proposed by a consortium that includes Professional Engineering Services Inc., C.O. Williams Construction Ltd., Inniss Associates Social Development Consultants, and Environ. The Barbados Trailway has been described as: “an adaptive reuse project that will convert a portion of the disused Barbados Government Railway into a trail for pedestrians, runners and cyclists. It will be a sustainable tourism product that will seek to leverage benefits to Barbados’ heritage and sports tourism, while creating recreational and economic opportunities for Barbadians, especially those in rural communities”. The current route that has been identified for the project would establish a trailhead at Bulkeley Sugar Factory leading to Conset Bay. Water, shelter and rest-stops/picnic areas would be established along the route, and interpretative signage would be posted along the railway trail and particularly at the old railway stations (Bridgetown; Rouen; Constant; Bulkeley; Windsor; Carrington; Sunbury; Bushy Park; The Crane; Three Houses; Bath; Bathsheba; Atlantis; and Belleplaine) (Professional Engineering Services Inc. et al., 2012). This proposal has not been implemented as yet.

The most sustainable nature tourism trail initiative thus far has been the Barbados National Trust weekly hike programme. This activity, which commenced under the late Dr. Colin Hudson, was designed to showcase the natural and cultural beauty of Barbados while providing an opportunity for exercise. It is well attended by many tourists.

(iv) Festival-based community tourism

The Hometown Festival and the Oistins Festival are the two longest lasting festival-based community tourism initiatives to date. Like other sustainable community initiatives, they draw upon an existing management structure for support. These are annual events with activities that take place over the span of one week. There is also the National Cultural Foundation sponsored Crop Over events which span the full range of arts, craft, food and performances. It is the largest opportunity for local groups to showcase and sell their

products and services to locals and visitors. However, it is an annual event sponsored by Government, with activities concentrated in the months of May, June, July and the first week of August.

A not so successful effort at a festival-based community effort in St. Thomas was 'de Heart uh Barbados®' (dHuB). Started in 1999, the Government of Barbados, through the then Environmental Special Projects Unit, now the Natural Heritage Department, in collaboration with residents, a team of volunteers, members of the AXYS Consulting Team and attraction owners/managers of Harrison's Cave, Welchman Hall Gully, Jack-in-the-Box Gully, the Flower Forest, Highland Outdoor Tours, Abyssinian Sustainability Project, and Springvale Eco-tours and Heritage Museum hosted an inaugural two-day weekend of activities to highlight the central uplands of Barbados. The Integrated Nature Tourism Area (INTA) focused on heritage (natural, cultural and built) of the Harrison's Cave Communities, and nature-based tourism. The two-day event was eventually rebranded and registered as de Heart uh Barbados®. It was coordinated and funded by Government and lasted until 2008 when the government financing was no longer available. To date, the walk and 10K run are all that remain of the "dHuB" celebrations, and this component celebrated its 10th anniversary in June 2012.

More recent community tourism initiatives that focused on festivals would be Agrofest and Settlers: The West Coast Experience. Agrofest is a revival of the old Annual Agricultural Exhibition that used to be held in Barbados. Now in its ninth year, it is sponsored by the Barbados Agricultural Society (BAS) and it affords the farming and food producing communities an opportunity to showcase livestock and food. They are joined by crafts persons and performers, as well for a weekend which is enjoyed by, on average, 60,000 locals and tourists. The institutional base of Agrofest is the BAS, a 150 year old organisation established in 1845 by an Act of Parliament in Barbados and representing several farmers groups across the island (<<http://www.basonevoice.org/content/welcome>>).

Settlers: The West Coast Experience was started by a group of youth who conceived a midnight carnival to be held during the tourist season that would provide an avenue for community involvement. The carnival is a heritage tourism entertainment product featuring themed moonlight costume revelry along Barbados' platinum coast, culminating with Barbados Breakfast Festival at Trents. It has now been running since 2011, but the group relies heavily on private sector sponsorship for survival (<<http://www.settlerswce.com/>>).

(v) *Food and farmers markets*

The Cheapside market is the longest lasting farmers' market in Barbados and continues to attract tourists who either wish to soak up the ambience of a local market, take photos of local fruit vegetables and other produce, or cook for themselves and include local ingredients. In recent times, new farmers' markets have emerged, some of which provide additional attractions that might cater to the visitor. There are weekly farmers' markets at Brighton in St. George and Holders in St. James. They offer arts, craft and a diversity of food in addition to the farmers' produce. Specialty coffees, such as espressos etc., and cheese by a local artisan are some of the items that can be bought. These markets' are operated by the private sector (see also Section 3.2.2.1).

An offshoot of the now defunct “dHuB” is the Grapefruit and Molasses Foodies Inc. This NGO holds a farmers’ market on the last Saturday each month in Sturges, St. Thomas and its goal is to celebrate St. Thomas as the bread-basket of the island with the focus exclusively on local produce, food and drink. Art and craft are welcomed but must be locally made and produced. They also offer breakfast comprising bakes, fishcakes and other local foods and teas. They operate on grant funding including a grant from the Ministry of Environment, and utilise the grounds of the Natural Heritage Department for their market. They have not advertised and have relied on word of mouth; their patrons have therefore been more local than tourist.

(vi) Accommodation-based community tourism

In 2003, the Ministry of Tourism and the Environmental Special Projects Unit (now the Natural Heritage Department) of the then Ministry of Housing, Lands and the Environment, conceptualized a Bed and Breakfast Accommodation Pilot Project. This project was earmarked for execution in those communities which were participants of the ‘de Heart uh Barbados®’, specifically the communities in St. Thomas. The objectives of the pilot project (UWI Business Development Office, 2011) were provided as follows:

- To ensure that local communities in ‘de Heart uh Barbados’ area benefit economically and socio-culturally from tourism opportunities
- To train residents in the delivery of services and in so doing establish centres of excellence in ‘de Heart uh Barbados’ communities
- To increase Barbados’ accommodation capacity
- To foster community participation in the planning and development of tourism products in Barbados
- To establish standards for alternative accommodation resulting from the Bed and Breakfast Accommodation Pilot Project
- To promote responsible tourism practices for all stakeholders in ‘de Heart uh Barbados’ communities

Prior to the full-fledged implementation of this pilot project, Barbados was awarded the distinction of hosting the finals of the 2007 International Cricket Council (ICC) Cricket World Cup. Consequently, there was a need for Barbados to augment its room stock to accommodate the influx of visitors expected to travel to Barbados to participate in and to view the event. As a result, the parameters of the pilot project were expanded to the extent that it was no longer a pilot project focusing on one specific geographic locale, but a national project for implementation in all areas of Barbados where feasible. The project was called the Home Accommodation Project (UWI Business Development Office, 2011; see also Section 2.0 in Part 1), with the following noted objectives:

- To diversify Barbados’ accommodation sub-sector by encouraging the development of accommodation facilities within the homes of Barbadian residents
- To encourage greater public involvement in the tourism industry by way of facilitating entrepreneurial opportunities within the accommodation sub-sector
- To augment Barbados’ room stock

- To provide tourists with a more authentic experience through direct interaction with local residents

The UWI study reports that the customers were largely pleased with the product, in fact 85% of the 54 customers interviewed reported that they were either likely or very likely to return to the same accommodation on a future visit to the island, and the same high percentage of customers reported that they were either likely or very likely to recommend the accommodation as a place of stay to other people. However, as of July 2008, only 94 rooms were registered under the Home Accommodation Programme. The study determined that some of the key challenges faced by home accommodation operators included poor marketing/advertising resulting in low business activity, the global recession, and lack of communication and assistance from the Government. In addition, the key reasons for discontinuing home accommodation operations provided by 75 past home accommodation operators included no formal support or assistance from the Government, the level of difficulty of accessing further financial assistance, the stringent home accommodation guidelines and standards / requirements (UWI Business Development Office, 2011).

(vii) Geographically-based community tourism experiences

In the north of the island, tourists are attracted to the Moon Town experience in Half Moon Fort, St. Lucy. This historic rural village comes alive on weekend nights, with local patrons as well as tourists who party, drink, eat and “hang out”. The fishing village offers a quaint setting for this experience, which continues to grow in popularity. Lemon Arbor in St. John also provides a rural geographic village experience of food and drink to locals and tourists. In contrast, Baxter’s Road, which was very popular but went into decline in the late 1990s, was the place to secure food, drink and entertainment in the main urban centre of the island for many decades. Many can still recall the fish and ground provisions obtained from smoking coal pots; or the liver cutters from the Pink Star. Baxter’s Road was also the place to get the first edition of the daily newspapers “hot off the press” in the wee hours of the morning. However, the proximity to low-income areas with escalating crime levels was one of the reasons for the demise of this once popular community attraction. The Barbados Police Force has been engaged in a focused and targeted programme to address the crime in the Orleans and areas surrounding Baxter’s Road, and therefore some consideration could be given to investigating infrastructural improvements and the revitalization of this area, especially in light of the fact that Bridgetown is designated as a UNESCO World Heritage Property.

However, even as Baxter’s Road declined, the Oistins Fish Fry began to rise. Indeed it is the exemplary experience of community tourism cited in magazines and academic literature. Perhaps one reason for its success is that it combines the majority of the various aspects of community tourism in one location – craft, performances, an annual festival, and weekly farmers’ market. Every weekend crowds of locals and visitors alike travel to the Christ Church fishing town of Oistins, where they congregate by the fish market to sample the local cuisine (popular dishes include fish with macaroni pie or cou-cou), socialize, and enjoy the vibrant music. This year-round event has become self-sustaining, and has expanded to offer opportunities for local craftspeople to display and sell their wares to the hundreds of people who have chosen Oistins as the “must be” entertainment spot.

In addition, annually the Oistins Fish Festival is held in the month of April to celebrate those who work in the local fishing industry. Visitors are treated to live calypso and reggae music, craft fairs, family games and stalls selling an array of seafood dishes. Popular events and attractions also include the fish boning tournament, boat races and the grease-pole competition. So renowned is the Oistins Fish Fry that it was chosen as the model for the Anse La Raye Seafood Friday in St. Lucia. There, the initiative was recognized as a way of creating additional employment for the local community (Cooper, 2004).

Oistins is identified by the White Paper *“as the initiative that should be benchmarked as a basis for developing other community tourism projects across the island”* (Strategic Solutions Inc., 2012). Already, other community groups have started to emulate this initiative, for example, recent research conducted by May Hinds consulting for the Barbados Tourism Authority sponsored National Tourism Host Programme reported that at least one group in Weston, St. James wishes to follow the Oistins model in developing a community tourism product. It is reported that the project *“aims to create an “Oistins-styled” fish fry and social area for locals and tourists; to create a “green-space” and/or “window-to-the-sea” between the Weston Public Market and John Moore’s Bar, beautifying the area, providing a recreational environment for locals and tourists, and accommodating the Weston Experience social events; to create business opportunities for food and craft vendors from the community; and to further develop tourism on the West Coast by providing a new local dining experience and social area”* (May Hinds Consulting Inc., 2012, p.67).

Given the prominence afforded Oistins by the White Paper, it was decided that a closer look be taken of this enterprise for the purpose of the TMP. This was done by interviewing the manager of the National Conservation Commission, the government agency tasked with maintaining the Oistins facilities; as well as a sample of the food and craft vendors who utilize the space.

(a) Interview with Manager of NCC

Mr. Neblett confirmed that the Barbados Tourism Investment Inc. (BTII) was responsible for the redevelopment of Oistins, and the management of the property was handed over to the National Conservation Commission (NCC) on April 1, 1999. Since then, the NCC has been responsible for the upkeep and maintenance of the property, including the allocation of space to vendors.

Mr. Neblett identified several areas of concern in the Oistins area, mainly pertaining to the inadequacy of the infrastructure, as follows:

- Drainage – As currently designed, two vendors share a single grease trap. As a consequence, when both vendors are working in their respective kitchen areas, there have been back-ups in the grease traps and there is always a need to have a plumber on site every Saturday night. Even if one vendor tries to stop the grease from going into the trap and the other is not doing so, both suffer. In addition, the system is not entirely connected to the sewage system.

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- Space – The area was designed for far less visitors than it currently receives. According to Mr. Neblett, it was initially set up for the long serving vendors, and then additional BTII vendors went into the area. He says that there are currently 33 food vendors and 20 craft vendors, and more customers than the area can service properly. He says that there can be 200 or more customers in the area at any one time during weekends, public holidays and special events like the Oistins Festival. He noted that there are always long lines for the vendors and for the washrooms.
 - Barbecue Grills - According to Mr. Neblett, when the kiosks were built, only the people on the front were allowed to grill. Now most of the vendors are grilling and the area was not laid out to accommodate this. Since there was no design to accommodate the grills, the smoke from one person's grill can impact on the customers of another vendor down wind. This also means that the walkway spaces have been reduced.
 - Seating and Canopies - Vendors have started to put up canopies to cover their waiting areas in the event of rain and they also started installing seating, thereby causing further congestion. He is concerned that the entire scenario increases the possibility of fires and that the limited space means that there would be chaos in the event of an emergency. He indicated that all new contracts require the occupants to have fire extinguishers. He also noted that with regard to the inter-vendor issues pertaining to space, for the most part they try to work it out themselves.
 - Washrooms – When Oistins was redeveloped, no specific washroom had been allocated for the operators, and the NCC had to provide this because vendors using the same communal place as the public was not sanitary. Unfortunately, because of the sheer numbers that go through Oistins and the long lines that build up by the bathrooms, the vendor bathroom sometimes has to be opened to the public. Currently there are toilets in 3 locations; there is a set near the superintendant with 2 seats for females and 2 seats and 2 urinals for males; for the vendors there are 3 seats for females and 1 seat and 2 urinals for males; and then a set for the general public with 4 seats for females and 2 seats and 3 urinals for males. Noting that there are always long lines for the toilets, especially at peak hours, Mr. Neblett said that this causes patrons to have to either go to nearby establishments such as KFC and ask to use their facilities, or persons will find secluded spaces which causes sanitation and health concerns.
 - Traffic and Parking – Currently there is traffic congestion on all the access roads to Oistins on weekends and public holidays and during special events. Patrons park in all available parking lots and spaces in the area, and there is also space behind Grannies Restaurant for parking, but it has wallaba posts that make navigation within the area somewhat difficult.

Mr. Neblett recommends the following as possible solutions to the problems:

- Move the craft vendors across the street to where the temporary bases had been located during the redevelopment process. He stated however, that they are not likely to want to move from the main area for fear of reduced visibility and loss of sales
- Install additional washroom facilities on the other side of the street

- Redesign the existing car park which could accommodate 25% more cars, and there is another area adjacent that if developed could create 60 more spaces

Mr. Neblett also made the point that although Oistins is well loved by the public and visitors, and has been acknowledged as one of the main attractions to visit while in Barbados, there is little opportunity for the NCC to make input into tourism planning processes, so that concerns such as the ones he has raised can be identified and solutions found.

(b) Interviews with food and craft vendors at Oistins

Interviews were conducted with 11 food vendors and 6 craft vendors in the Oistins area representing one third of both groups. They were asked to respond to the following questions:

- What do you like about operating in Oistins?
- What do you not like about operating out of Oistins?
- Do you feel that you have a say in the operations of the Oistins Fish Fry?
- Do you think that a similar community tourism operation would be successful in another part of Barbados and if so, then where?

All 11 food vendors interviewed stated that what they liked most about the Oistins Bay Garden operation was the opportunity to interact with visitors from all around the globe. One vendor reported that he has repeat customers who have visited him annually over the past 9 years. The open-air setting and the popularity of the location among locals as well as visitors were also highlighted as benefits of the Oistins Bay Garden operation.

The craft vendors spoke less of their interactions with visitors and more of the financial benefits that they receive as a result of operating in such a popular location. Their responses seem to lend support to the view of one of the informants that some in the industry may not even view themselves as being involved in community tourism. Half of the craft vendors interviewed sell their craft solely at Oistins, while the other 3 vendors have outlets elsewhere.

All of the 11 food vendors interviewed identified the layout of the stalls to be their main objection with the operation. The parallel rows of stalls results in more business for those stalls along the road side which is the first point of contact for most patrons and as such hinders the view of those vendors at the back. Another complaint that was raised by all food vendors interviewed was the location of the stage, which faces south. This also contributed to an uneven distribution of customers, since patrons tend to sit in order to view the stage. Therefore, those vendors located towards the north (or back) of the stage cannot benefit from the entertainment. The vendors also expressed dissatisfaction over the lack of adequate shelter and proper drainage that result in discomfort for themselves as well as their customers when it rains. Drainage was also the primary concern for the craft vendors since water collects along the walkway directly in front of their stalls during inclement weather and when the dining area is cleaned.

The groups were divided as to whether they felt they had a say in the operations of the Oistins Fish Fry. Five of the food vendors and one of the craft vendors stated that they felt

they had the opportunity to voice their concerns, compared to 6 of the food vendors and 5 of the craft vendors who share the opposite view. Opinions shared ranged from those who felt that a strong community spirit exists among them and that they (the workers) "...make Oistins what it is"; to others who felt they have no voice and that even if concerns or recommendations are presented to the Oistins Bay Garden Committee, the NCC has the final say, and the implementation of changes is too often prolonged. Notably, the majority of craft vendors interviewed felt that they do not have much influence or input with regards to the management of Oistins.

Speightstown and Baxter's Road were most often named as locations where a community tourism operation similar to Oistins could be set up successfully. Interviewees consider Speightstown to be an attractive location that should be promoted as well as provide benefits for communities in St. Andrew and St. Peter. Due to its previous popularity, Baxter's Road was also thought to be a desirable location if given a facelift.

Assessment of Community Tourism Initiatives

An assessment was undertaken of the community tourism initiatives based on the success factors identified from the global and regional research. The analysis shows that some of the success factors such as supportive policies and institutional frameworks are completely absent from the Barbadian landscape; and there is wide variation in the experience of the many initiatives with respect to the other success factors.

1) Enabling framework

There is no overarching legislative framework and there are no supporting policies governing the planning and development of sustainable community tourism attractions. Similarly, there is no single agency with responsibility for facilitating the development, implementation and monitoring of community tourism attractions. Moreover, no specific financial or other incentives have been established for community tourism. This reflects the fact that there is poor governance of community tourism processes in Barbados.

Many of the initiatives have experienced good communication and collaboration with the various public or private sector agencies required to facilitate their operations. Examples include the Hometown and Oistins Festivals and Crop Over. However, one of the complaints from the Home Accommodation Programme was the absence of communication and assistance from the Government.

There is limited evidence across the projects of linkages with the private sector. Again there are exceptions such as the well-established Hometown and Oistins Festivals and Crop Over; the heart of Barbados experience which engaged community-based, public and private sector enterprises; "1627 and all that" which was a collaborative effort between Pinelands Creative Workshop and initially the Museum and subsequently Tyrol Cot; and the newly proposed Trailway project. However, notwithstanding these examples, linkages between the community initiatives and the private sector could therefore bear improving, indeed in some cases the private sector proves to be the competition that drives the community activity out of the market. For example, as the Chalky Mount experience declines, newer private sector pottery initiatives continue to thrive and there is no evidence of Joint Venture initiatives.

There is also much variation with respect to the level of cohesion within the communities of persons who come together to supply the various products or experiences. For example, the Bajan Pride Expo is comprised of a set of individual crafts-persons whom the Ministry invites to participate when the Expo is staged. The crafts-persons have not formed an institutional structure such that they could organize the event on their own. Conversely, the Landship is a well-established organization that has survived several generations; the Barbados Agriculture Society, which implements Agrofest is also over 150 years and has a legislative mandate.

Genuine community ownership and control is also problematic. In most cases, the community controls and owns the product or service – craft, performance, or food item. However, the location where it will be sold or performed is usually owned by Government or the private sector and in many cases the community is invited at the will of the Government or private sector to participate; they are not actively engaged in the decision making process, and there are no joint-ownership contracts. This is the situation with the Bajan Pride Expo, the Landship and “dHuB” for example. In Oistins, there is a committee with representatives of the vendors, but even in this case, the survey showed that 5 out of 11 food vendors and 1 out of 6 craft vendors do not feel that they have a say in the operations of the Oistins experience.

A related issue is access rights. This was particularly problematic for the “1627 and all that,” because while Pinelands Creative Workshop owned the performance, they did not own the venue that was a critical aspect of the overall product. While the Landship is invited to participate at events, it does not operate a venue of its own. Therefore, their continued participation is at the whim of the event coordinators.

Access rights also proved problematic for the Bath to Martin’s Bay Trail. The community did not own the trail, and the public was free to walk it without a guide and could at the same time benefit from the work that the community group had put in cleaning up the area and erecting signage.

Oistins vendors also have suffered as a result of this fact. They have infrastructural challenges, but because they are renting the space, they have to wait for the NCC to fix the problem. While ownership of property would be an ideal situation, it is hampered by the fact that many of the groups have to apply to the various micro-enterprise funds that are being approached by all other sectors. As stated earlier, there is no dedicated fund to stimulate and support community tourism efforts. The ownership, access rights, and control issues are further evidence of the poor governance of community tourism initiatives.

One final enabling factor, time, frequently plays out in direct relation to funds. Many of the projects that were dependent on Government funding – “dHuB”, or the Bath to Martins Bay Trail - ended when the funding finished.

2) Building capacity

There are a number of institutes that provide training for the industry. These include the Hospitality Institute, which offers a wide range of tourism-related courses and programmes.

There are tourism degree programmes at the University of the West Indies; and the Barbados Institute of Management and Productivity offers certificates and a degree in business administration. Report III Section 3.0 provides an assessment of the main constraints with respect to capacity building. However, without standards, there is no incentive or disincentive to encourage capacity enhancement. This is probably compounded by the absence of programmes to increase public awareness of community tourism and the need for training to gain or improve the necessary skills.

Notwithstanding the existing programmes which could serve to build capacity for community tourism, the commercial mindset is limited or absent in many cases, especially in those projects that fail upon the conclusion of project funding. It is clear that having that commercial mindset from the beginning, and developing a separation plan from the donor, would lead to a higher level of sustainability with these projects.

There is also the challenge of funding, because there is no dedicated fund for persons engaging in community tourism. Report IV, Section 3.0 presents an analysis of the various micro-enterprise funds available in Barbados, but nonetheless demand outstrips supply.

3) Product promotion

One of the key challenges attributed for the failure of the Home Accommodation Programme was poor marketing and advertising. The limited visitation of cruise ship passengers and other tourists to Pelican Village is also blamed on poor marketing and visibility. Indeed, Oistins is the only activity among the list reviewed that receives any level of consistent marketing at a national level, because of its recognized value added to the local industry. A perusal of the websites of the leading three tourism agencies – Ministry of Tourism, BHTA and BTA, shows that they do not place any emphasis on community tourism. The Ministry of Tourism's website currently only advertises the arts and craft experience. Neither do the booklets and leaflets that are located in many of the tourism areas highlight community initiatives – other than Oistins. There are no funds earmarked for this aspect to support market research so that creative approaches can be devised to make the community products more visible and accessible.

4) Monitoring and evaluation

In the context of assessment and evaluation, there are no standards currently focused on community tourism, and there is no continuous assessment of the various community tourism initiatives. Although there has been the recent introduction of the Hospitality Assured Certification Programme, at an Action Planning Meeting of the executive and members of the BHTA held in October 2012, the representatives assessed its impact to be low, and recommended that information be re-distributed to all entities.

The absence of standards is related to the fact that there is currently no legislative framework that governs the development of community tourism on the island, and in which such standards could be embedded. Neither has any institution been assigned the responsibility of using the standards to monitor the community tourism enterprises.

Actions Recommended to Promote Community Tourism

Community Tourism needs work in all four areas – enabling framework, capacity building, product promotion, and monitoring and evaluation – if communities are to become engaged in the tourism industry and make it more sustainable. The analysis highlighted challenges that have been faced by various Community Tourism initiatives in the Barbados tourism product.

The following recommendations are made to address these challenges and to enhance opportunities to move Community Tourism forward:

- Amendment of existing legislation to provide policy support, incentives and standards for community tourism initiatives (refer Action 12.1-2 in Report III, Section 7.4)
- Establishment of an agency to facilitate the design, implementation monitoring and evaluation of community tourism/ or assignment of the responsibilities to an existing agency
- Establish standards against which community initiatives could be measured
- Create incentives to enhance joint ventures between the private sector and community-based initiatives
- Establish a fund to support community-based tourism initiatives (see Action 5.1-3 in Report IV, Section 3.4.3)
- Identify and implement appropriate infrastructural changes to enhance the Oistins product
- Develop a plan for joint ownership of Oistins between Government and a cooperative representing the vendors
- Use Oistins and the Landship to showcase successful community ventures to raise public understanding of the benefits
- Conduct market research to identify the best mix of community tourism products and locations (for examples of potential initiatives, see Actions 2.1L-3 and 2.1L-4)
- If supported by the market research, replicate Oistins at suitable locations such as Speightstown and Baxters Road
- If supported by the market research, create a tourism market place that operates from dawn to dusk providing the best of Barbadian cuisine, accompanied by visual and performing arts (refer Action 2.1L-1)
- Promote community family reunions to attract Barbadians who were born and/or raised in specific neighbourhoods/districts and who now live abroad; or who have moved away from that area to return for a special celebration centered on their location of origin (refer 2.1L-2; see also Section 3.2.1.7)

The following Actions recommended to promote Community Tourism are in support of Strategic Imperative 2 on **‘Enhance the Visitor Experience’** and corresponding Strategy 2.1 which states: *“Focus product development, including service delivery, as well as*

marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending”.

2.1L-1 Create a Tourism Market Place

2.1L-2 Promote Community Family Reunions

2.1L-3 Explore Barbados Communities

2.1L-4 Organize National Parish Games

Full descriptions of the Actions are presented below.

2.1L-1 Create a Tourism Market Place

Description:

To create a Tourism Market Place that operates from breakfast until dinner, providing the best of Barbadian cuisine, accompanied by visual and performing arts.

- It would be an experience where both visitors and locals could have a Barbadian breakfast in the morning; local drinks and snacks throughout the day (competition for the coffee shops); lunch in the middle of the day to early afternoon; and dinner at night. The menu would be exclusively Barbadian. There would be more than one restaurant serving complementary not competing food, e.g. sandwiches and snacks and a full service restaurant
- There would be booths - something more permanent than the Bridgetown Market set up, but not permanent infrastructure. The idea is to make it flexible enough that it could be renovated and refreshed annually so that repeat patrons, both locals and visitors, would be kept excited by the product
- An inland location where there is a heritage property and some acres of land would be ideal. The house could be the main restaurant, or it could be the location for the sale of arts and crafts
- The grounds would include activities for children
- There would be scheduled performances of music, poetry, dance and drama. There would always be live entertainment to accompany dinner. There would also be occasionally scheduled breakfast and lunchtime performances. The idea is to use the performances as the attraction to draw in the patrons to eat at the restaurants. At special festival times – Crop Over and Christmas, there would always be performances. Craft persons would be encouraged to sell appropriately Barbadian themed items that also reflect the seasonal changes
- This Market Place should be operational year round. However, for practical purposes, some elements could be removed during the off-season periods. During the main tourist season and all local festivals it should be in full operation
- The Market Place would contribute to building relationships between locals and visitors, and creating value for locals, which would help them to better understand the value of tourism to their livelihood

Expected Outcomes:

- Increased employment opportunities for cooks, chefs, waiters, performing artistes, visual artistes, event coordinators
- Spin-offs for persons in the indirect and induced sectors – food and beverage; artistic supplies, building and maintenance; finance
- New opportunities for dining – especially for breakfast which is currently lacking

Guidelines for Implementation:

- A meeting would be convened with all critical stakeholders in tourism - MTI, BHTA, BTA, BTI, TDC; the business investment sector - BIBA, SBA, CDB; to share the idea and obtain feedback on their perspectives on its feasibility and possibilities for financing
- Preparation of an attractive concept brief which would be shared with a wider diversity of tourism stakeholders as well as with stakeholders in the performing and visual arts and food and beverage sectors to garner support for the initiative
- Establishment of a small collective that would work on moving the venture forward (see implementation section for details)
- Field trips to identify and short-list suitable locations
- Investigation of the lease options available for the most suitable locations
- Development of a full project description including a phased approach for development and implementation. This would include all the preparatory work up to the Grand Opening as well as a business plan that indicates the timeframe within which the venture will be able to be self-financing
- Preparation and submission of funding proposals
- Legal incorporation of a business to run the venture

Challenges With Implementation:

- This is a major undertaking that crosses numerous sectors. Ownership and leadership could be challenges
- There could be initial concerns that it would be competition for Oistins. However, Oistins is largely an evening event and is most intensive on weekends

Recommended Implementation Agencies:

- A *venture collective* (to avoid using the term project team) would be convened in the first instance to undertake the initial activities – convening of meetings; identification of location; preparation of detailed project description; preparation of funding proposal. This would comprise at a minimum: the MTI, BTI, BTA, representatives of the funding sector; representatives of the visual and performing arts; representation of the building/construction sector
- The venture collective would eventually become the advisors to the project and the day to day work would be taken over by a legally incorporated business comprising at least three staff members who would combine the skills of project manager; tourism planner; financial management; artistic design

Priority / Implementation Timeframe:

Medium/Short Term:

This can have substantial impact and should be looked at in the short term. Certainly within the first quarter after the acceptance of the Master Plan. Within another year, once there has been successful securing of finance, the small business should be established to pursue additional finance; to secure the property; to design and build the infrastructure; to develop contracts and hire the various persons who would comprise the Market Place; and to develop a plan for the grand opening

Target Users:

All tourists and locals

Who Benefits:

- A wide range of stakeholders in the culinary and arts sectors
- The indirect and induced sectors

Risks:

- Agencies are unwilling to actively participate in the venture collective
- Start-up capital cannot be sourced
- It does not prove self-financing within sufficient time to make it a viable project

Estimated Costs:

- Planning – BDS\$5,000
- Implementation – BDS\$2,000,000

Source of Funds:

Private sector combined with investment from the participating shareholders and funders such as the Inter-American Development Bank that has a special fund called Compete Caribbean.

Revenue Generation Potential:

- The plan is predicated on receiving finance to acquire/lease the property, to initially support the small management company, and to support the venture until it is self-financing.
- There are a number of ways that revenue could be managed:
 - Each of the operators (vendors, restaurants, performers) in the Market Place charging the patrons directly and paying rent to the management company
 - Each patron pays a nominal entrance fee to the management company then pays each vendor individually. The entrance fee could be varied based on age and nationality – Barbadians vs. non-Barbadians; there could be packages as well, e.g. annual membership which allows free entry and some benefits at specific stalls (e.g. drinks or food)
 - There is a flat rate for entry that includes some combination of food, beverage and entertainment. All other purchases (arts and craft, experiences) would be extra
- The management company would earn revenue to maintain and operate the Market Place from rents from the vendors as well as from the visitors who enter. Ideally the place should earn between BDS\$20,000 per month in the low season and as much as BDS\$100,000 in the high season to allow it to be self-financing

Further Development Work Required:

The first issue is to dialogue with the relevant stakeholders to develop management options

Other Considerations: Linkages to Creative and Performing Arts, Culinary Tourism, Cultural Heritage and Attractions, Shopping Tourism, and Tourism Awareness. This has implications for Marketing, ICTs and New Media, as well as Institutional Strengthening.

2.1L-2 Promote Community Family Reunions

Description:

The goal is to attract Barbadians who were born and/or raised in specific neighbourhoods / districts and who now live abroad; or who have moved away from that area to return for a special celebration centered on their location of origin.

Family reunions have some popularity. The St. Patrick's community and surrounding communities in Christ Church and St. Philip took advantage of this and in 2010 organized a very successful village reunion of persons primarily from the UK, Canada and the USA who had originated from that district; but also from the Caribbean Diaspora and from those persons now living elsewhere in Barbados. This reunion was so successful and so well attended that arrangements are well in train to have a repeat in 2013.

The formal activities lasted no less than a week but persons took the opportunity to extend their stay much longer since they were "home". Persons were encouraged to, and actually did the following:

- Return to Barbados and stay in hotels or in homes with relatives
- Bring along relatives and friends who were not born in Barbados or who had never visited
- Provide financial support to the planning and implementation of a series of activities that included, but was not be limited to: a church service; picnics; sporting activities such as cricket, football, golf, swimming, dominoes, draughts; mingle events to allow them to share experiences of what it was like to live in Barbados before they left and to learn what it is like now and how they could contribute to the ongoing development of their community; a range of other activities that could include concerts and hikes, and honouring those members of the community who had contributed in some measure to the community
- The idea would be to build interest in sufficient districts that there could be multiple reunions occurring throughout the year across the island

Expected Outcomes:

- An influx of Barbadians to the island with increasing regularity
- An increase in non-Barbadian visitors who are family or friends of visiting Barbadians
- Increase in hotel occupancy
- Increase in visitor spend from the Diaspora
- Direct community level social and economic benefits

Guidelines for Implementation:

- Meetings with the St. Patricks group to understand their model and how it works
- Meetings with MTI, Community Development and other CSOs to share the idea
- Meetings with Foreign Affairs and the Consulates abroad to share the idea and to develop interest
- Develop a model for the community reunion which would include a marketing plan, a process for mobilizing local communities, and an event coordination plan

Challenges With Implementation:

This requires coordination abroad and locally

Recommended Implementation Agencies:

- Ministry of Tourism and Ministry of Community Development to initiate the idea
- The local communities would have to put a committee in place and there would have to be corresponding ones in the Diaspora
- Parish councils could be involved

Priority / Implementation Timeframe: Medium/Short Term
Target Users: All districts in Barbados
Who Benefits: <ul style="list-style-type: none"> • Hotels • Restaurants • Local attractions • Community members
Risks: There is not sufficient willingness on the part of the communities to organize reunions
Estimated Costs: BDS\$100,000 per community reunion
Source of Funds: <ul style="list-style-type: none"> • Members of the Diaspora who wish to participate • Government through BTA / Community Development could contribute
Revenue Generation Potential: Varied because of the wide range of possible beneficiaries
Further Development Work Required: Meetings with the St. Patrick's Group to get more information
Other Considerations: Linkages to Diaspora. Information on this type of initiative can be obtained from Neville Edwards and Ambassador Robert "Bobby" Morris.

2.1L-3 Explore Barbados Communities

Description:

Develop a custom-designed guided exploration of Barbados and its communities using local guides. These totally Bajan-style tours will utilize public transport and visit local leisure hubs, restaurants and street food hot spots, community festivals, markets, and village shops, scenic locations, museums, and shows, along with the gamut of cultural nooks off the beaten track that are known primarily to locals (see Figure 3.36). Tours such as the Barbados Arts and Crafts Experience that allow visitors to work with a local artisan to make personalized souvenirs can be incorporated.

Visitors will be introduced to local travel routes, locales, authentic culinary experiences, with the reassurance of having a local chaperone who is familiar with local traditions and places. Visitors may also be introduced to approved home-stay locations for full immersion in the Bajan experience or to 'dine-at-home' service providers who can deliver a Bajan-style meal within the comfort of the visitor's own accommodation.



Figure 3.36. Public transport bus in a rural setting (left); Bajan cuisine eatery in the highlands (right).

Expected Outcomes:

- Increased cultural awareness for visitors
- Expanded low-cost tourism opportunities to further Youth-in-Tourism initiatives and local involvement in the industry
- Maximization of existing physical and human resources to present the Barbadian product in a more unique, intimate and authentic way using personalized guiding

Guidelines for Implementation:

- Development of a guide team with the appropriate skills to host visitors within a range of experiences and locales
- Tours would be presented to small, intimate groups in order to create a more authentic experience
- Training of guides will be necessary within the National Tourism Host Programme to ensure broad experience and competency
- Tour fees would be charged on a per person or group rate basis according to pre-defined packages. Visitors would pay entrance fees to events or attractions selected

Challenges With Implementation:

Recruiting guides with the necessary competencies such as foreign language capability

Recommended Implementation Agency:

Private tour operator (in collaboration with the BHTA)

Priority / Implementation Timeframe:

Medium/Medium Term

Target Users:

- International visitors
- Silver Market

Who Benefits:

- Communities can benefit from showcasing their authentically Bajan products and leisure locations
- Visitors benefit from receiving personalized service and cultural exposure

Risks:

Unavailability of suitable guides

Estimated Costs:

Marketing of the service to hotels and established tour operators is estimated at BDS\$10,000 annually

Source of Funds:

- Private tour operators
- BIDC

Revenue Generation Potential:

Tour fees would be charged

Further Development Work Required:

- Selection and training of guides
- Marketing of the programme

Other Considerations: Linkages with Cultural Heritage and Attractions, Culinary Tourism, Creative and Performing Arts, Silver Market Tourism, Youth in Tourism

2.1L-4 Organise National Parish Games

Description:

There is an opportunity to develop cultural heritage and expand community tourism through initiation of sporting events and inter-parish tournaments that allow demonstration of skills beyond formal full-team formats, traditional schools meets, and National Senior Games. The generation of national pride, and indeed, parish pride, can be cultivated through the unifying theme of sports.

Expected Outcomes:

- Generating a series of events that will attract nationwide interest through active participation and spectator attendance
- Creation of sales and showcasing opportunities for small businesses and artisans
- Opportunities to showcase musical performances and entertainment
- Teaching youth their heritage through sport

Guidelines for Implementation:

A recommended structure for the National Parish Games that may be amended according to levels of participation is presented as follows:

- Participants would compete in individual events with their scores being cumulative toward an overall parish tally. The parish with the highest point total would be declared the winner. There would also be individual awards in various categories
- Parish teams would consist of a pre-set number of participants for 10 events. These events could include challenges that engage other sports. Examples of these include:
 - *Heritage Game Challenges:* These games would require the demonstration of skill in indigenous activities such as Guttaperk target shooting, Roller Races, Warri, etc.

<ul style="list-style-type: none"> ○ <i>Cricket</i>: Cricket Ball Stump Throw based on bowling accuracy ○ <i>Road Tennis</i>: Single game elimination tournaments ○ <i>Football</i>: Best Goalie, Best Striker - Goalies or Strikers would be paired against entrants from other parishes for penalty shot competitions <ul style="list-style-type: none"> ● Targeted sports would be those that can be held on a given day at a single location in order to maximize attendance and sales at the venue ● A maximum of 4 persons per parish would be entered per event ● Entrants should be aged 20 - 40 since primary and secondary schools events and National Senior Games cover other age categories ● A semi-final elimination event would be held prior to final events to increase spectator interest ● Registration forms for the National Parish Games would be made available at the National Assistance Board, the National Sports Council, and the Barbados Olympic Association. The website for the Ministry of Social Care, Constituency Empowerment and Community Development (http://www.socialcare.gov.bb) would also be used to promote the games and provide registration forms ● Community centres and offices in each parish would be used to promote the Games ● Trials, quarter-finals and semi-final events should be held at different national Sports Council grounds across the island in order to involve and sensitize the widest number of Barbadians and visitors as possible. The final events would be ticketed and held at the National Stadium ● The Games should also be promoted with a health and wellness theme, and health information made available to attendees
<p>Challenges With Implementation: Registering participants from each parish for all events</p>
<p>Recommended Implementation Agency: Ministry of Social Care, Constituency Empowerment and Community Development has had 11 years of experience in organizing the National Senior Games, and is in a prime position to introduce a new community development programme.</p>
<p>Priority / Implementation Timeframe: Medium / Medium Term</p>
<p>Target Users:</p> <ul style="list-style-type: none"> ● Barbadians as participants (ages 20-40) ● Barbadians and visitors as spectators
<p>Who Benefits: Barbados as a whole through:</p> <ul style="list-style-type: none"> ● Revenue generation from events ● Health and fitness ● Merchandise sales at locations ● Sponsors and advertisers through event publicity
<p>Risks: Establishing contact with a wide enough cross-section of communities across Barbados to stimulate interest and participation.</p>
<p>Estimated Costs:</p> <ul style="list-style-type: none"> ● To be determined based on the level of participation and the sport being played ● Cost of National Sports Council grounds that are utilized as venues

Source of Funds:

- Corporate sponsorship
- Advertisers

Revenue Generation Potential:

- Improved promotion and sales of local merchandise
- Gate receipts

Further Development Work Required:

- Establishing desired scope of participation / number of athletes required
- Planning of recruitment and event schedules

Other Considerations: Linkages with Sports Tourism, Health & Wellness Tourism

3.2.2.5 Medical Tourism

Overview

The history of medical tourism dates back to its first recorded case when Greek pilgrims traveled from the Mediterranean to Epidauria in the Saronic Gulf area of Greece. These were the ancient Greeks and Egyptians who went to hot springs and baths to improve their health (Ben-Natan et al., 2009). There were also the 18th and 19th century Europeans and Americans who flocked to health spas and sanitariums even in remote places in the hope that they would receive treatment for diseases such as tuberculosis, gout, bronchitis or liver ailments.

Broadly defined, the medical tourism industry includes products and services made accessible to people traveling from their place of residence for medical or health reasons. The recent phenomenon has been the growth of medical tourism that may be defined as “people traveling from one country to another for medical treatment based upon perceived personal value” (J. Edelheit, 2011).

In terms of global healthcare, the medical tourism market was estimated to increase from US\$78.5 billion in 2010 to US\$100 billion by the end of 2012 (eTN, 2010). For the purpose of this report, a distinction has been made between medical tourism and health & wellness tourism, since there are persons who travel to a particular destination for medical services such as cancer treatment or specific procedures such as coronary bypass. Others travel for general health reasons such as rest and relaxation (Tarlow, 2012). Health & Wellness Tourism is addressed in Section 3.2.1.4.

Medical tourism covers a comprehensive range of therapeutic services including general surgery, orthopedics, urology, gynecology, ophthalmology, dialysis, cardiology, and cardiac surgery. The sector is growing at 20 to 30% annually, and is expected to continue positive growth. The emerging medical tourism market will have a positive impact on the economies of destinations with developed medical services such as Costa Rica, Mexico, Panama, Brazil, Thailand, India, Malaysia, Turkey, Singapore, South Korea, Germany, Poland and South Africa (Healthy Travel Media, 2011).

Patients from the Gulf and Arab states spend US\$2 billion in healthcare travel annually. Germany is the top destination for patients from the Middle East, UK, and USA (eTN, 2010). India's medical tourism is valued at more than US\$310 million with 100,000 foreign patients a year. Malaysia's medical tourism industry has seen a significant growth over recent years. Reports from the Association of Private Hospitals in Malaysia revealed that the number of medical tourists in the country has grown from 300,000 patients in 2010 to 430,000 in 2011, and has 6 Joint Commissions International (JCI) accredited hospitals (Healthy Travel Media, 2011). Turkey is also one of the most popular destinations for medical tourism and has one of the highest numbers of JCI accredited hospitals. It attracts US medical tourists due to its low costs and high quality services.

In Costa Rica, an estimated 40,000 medical tourists traveled to the country in 2011, usually for dental procedures and plastic surgery (eTN, 2013). India, on the other hand, reported

that about 500,000 foreign patients traveled there for medical care in 2005 from an estimated 150,000 patients in 2002. It is estimated that the rapid growth of the medical tourism industry in India could bring in as much as US\$2.2 billion per year by 2012.

Cosmetic surgery is one of the most popular procedures in medical tourism today, something that was not evident ten years ago. In Singapore, it was reported that more than 250,000 patients visit the country per year for plastic surgery. The majority of these patients reportedly come from the Middle East (DeMicco & Cetron, 2005).

Aside from Singapore, among the popular cosmetic surgery tourism destinations are Argentina, Brazil, Costa Rica, Mexico, Lithuania, Malaysia, Philippines, Thailand, Singapore, Poland, and South Africa. These destinations offer attractive packages such as excellent cosmetic surgery services at affordable costs plus a refreshing vacation in the country. Thus, medical tourism is part of the tourism industry that has a significant impact on the economies of destination countries. The most popular cosmetic procedures for women, who make up a large percentage of the market, include rhinoplasty or nose reshaping, weight reduction liposuction, breast augmentation, facelift, and eyelid surgery.

Situation Analysis

Barbados has long been considered the ideal destination for vacation and leisure travel due to its salubrious climate and beaches. A well-documented event in 1751 was the visit of George and Lawrence Washington, the latter being ill with tuberculosis and seeking a health-giving climate for his recuperative needs. Since that period, the opportunity for medical tourism has increased globally, giving rise to the need for specialized facilities and services.

In Barbados, there is a good health care system with well-developed core services for the local population (Hennis, 2011). Table 3.17 lists the primary public and private institutions providing medical services in Barbados.

The island is positioned to be able to offer competitive rates with its quality medical services, well trained practitioners, reliable communications, good transport infrastructure, lower labour costs and a range of tourism services. However, the necessary support services and custom designed recuperative facilities in accordance with international standards must be further developed to meet the special needs of the medical tourism traveller (refer Action 2.1m-1).

Medical tourism involves connecting insurance companies and medical facilitators with hospitals and health care providers. Hotels are a key partner in medical and health tourism, and should be considered in allied partnerships (Stephano, 2010; see also Section 2.8). The futuristic global hospital will create multi-lingual signage, dietary options, culturally sensitive waiting areas, high throughput registration and patient rooms, facilities for religious worship, and international concierge facilities (pers. comm., M. Hess, Perkins + Will Architects, September, 2010).

Table 3.17. Primary healthcare institutions providing medical services in Barbados.

Public Medical Health Care Services	
Queen Elizabeth Hospital	Public 600 bed, tertiary care institution providing open heart surgery, neurosurgery, joint replacements, scoliosis correction
District Hospitals	4 Public sector health centres with resident in-patient facilities
Polyclinics	9 Public sector health centres across the island
Private Institutions	
Bayview Hospital	General medical services, OBGYN & internal medicine
Sandy Crest Clinic	Emergency and Family Medical Services
FMH Medical Clinic	Emergency and Family Medical Services
Barbados Fertility Centre	International JCI Accreditation, offers medical travel packages
The Sparman Clinic	Emergency services in cardiology
Barbados Smile Makers	International medical & dental services
Warrens Healthcare Complex	Oncology, gastroenterology, general medical services
Coverley Medical Centre	Emergency care, family medicine

Barbados does not yet have this network in place to compete in the global arena. However, an important market to explore further is providing health insurance and high quality health care to international employees, diplomatic corps and expatriates resident in Barbados or within regional territories where there are lower standards of health care. Providing quality health care implies clinical excellence with a focus on customer service (Sibal, 2010; refer also Action 2.1m-2).

Standards and accreditation in Barbados are currently under the jurisdiction of the following:

- Barbados Association of Medical Practitioners
- Barbados Dental Association
- The Paramedical Council
- The Ministry of Health

The Government of Barbados has enunciated its policy of diversifying the tourism product. Whereas health and wellness has been a key component of our tourism product with a developmental thrust in the last few years, the potential of medical tourism development has recently been given recognition by government through enabling foreign direct investment opportunities. Spa facilities in Barbados should also be considered as a market for further development if 'buy in' can be achieved from individual spa businesses. The rationale is that there is already a significant number of people travelling worldwide to improve health and beauty with the potential to generate interest in medical travel (Ellis 2010).

Recognizing the growth in demand for specialist services and the future of the Barbadian medical sector as a combination of public and private health service providers, Cave Shepherd & Company Ltd. CEO indicated that the private corporation was pursuing plans to

invest in the health care sector (pers. comm., J. Williams, CEO of Cave Shepherd & Co. Ltd., 2012).

By 2012, more than 350 international hospitals worldwide had been awarded the JCI accreditation, most of which are pursuing international patients (eTN, 2013). At present, the Barbados Fertility Centre remains the only local health facility to have attained the prestigious JCI accreditation that must be renewed every 3 years. This accreditation is considered as a prerequisite to operate within the global medical tourism marketplace.

Further expansion at the clinic in 2013 has added a spa that is open to patients and the general public (pers. comm., R. deGale, Barbados Fertility Centre, April 19, 2013). The White Paper (Strategic Solutions Inc., 2012, p. 147) noted that Government is targeting fertility as an area of specialization for the growth of the medical tourism industry due to the high number of patients from the Caribbean and US markets that have been patronizing the centre in Barbados at significantly lower treatment costs.

Against this background, it is estimated that it will require a minimum of 5 to 10 years of further investment in the medical tourism sector for Barbados to develop adequate capacity, along with the development of supporting hotels and 'green' products in accordance with best practices, to position the country as a key player in this growing international niche market.

The following Actions recommended to promote Medical Tourism are in support of Strategic Imperative 2 on '**Enhance the Visitor Experience**' and corresponding Strategy 2.1 which states: "*Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending*".

2.1m-1 Develop a Recuperative Centre

2.1m-2 Establish a Caribbean Accreditation Board of Medical Tourism Services

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Medical Tourism

2.1m-1 Develop a Recuperative Centre

Description:

A review of current capabilities within the Caribbean health sector to cater to recuperative therapy needs within the region emphasize the present dearth of suitable facilities and services. Such amenities would therefore help to distinguish Barbados from the region, where few islands offer facilities for the purpose of maximizing the recuperative aspect of outdoor locations and warm seas desired by many patients. For example, persons suffering limb loss may utilize prosthetic fins otherwise known as “swim legs” for activities such as snorkeling. In addition, cardiac rehab patients are typically ambulant but can yet benefit from the provision of health care support in a therapeutic environment.

This proposed initiative aims to develop a recuperative centre that caters to patients with chronic diseases in a stable condition and those with physical challenges who would benefit from a comforting, rehabilitative environment. The centre would provide fully accessible accommodation that utilizes green technologies, healthy cuisine, a physiotherapy spa, activity planning including fitness programmes and excursions, and mobility equipment including wheelchairs, walkers, and accessible vehicles. In addition, swimming aids would be available to facilitate water activities for visitors with special needs. Visitors would travel to Barbados for long term stays to promote recuperation from their specific stable medical conditions that would be approved by a physician at their place of residence.

Expected Outcomes:

- Increase visitor numbers by persons seeking recuperative environments
- Promote more accessible facilities
- Increase visitor length of stays for Barbados
- Add a new dimension to the current tourism offering

Guidelines for Implementation:

- Develop a coastal property in proximity to existing medical services that would act as a centre for long-stay visitors recuperating from medical treatments abroad
- Twin any required visitor services with a dedicated medical facility in Barbados, and also to
- Provide a doctor-on-call service for the centre
- If feasible, redevelop and retrofit a coastal accommodation property that would be suitable to this type of venture

Challenges With Implementation:

- Finding a suitable site that would foster recuperation
- Acquisition of adequate finances to develop the facility
- Marketing to the specific demographic
- Fostering linkages with the local medical fraternity

Recommended Implementation Agency:

BTII (in collaboration with a private sector investor)

Priority / Implementation Timeframe:

Medium/Medium Term

Target Users:

- Visitors requiring basic palliative care and recuperation
- Locals requiring basic palliative care and recuperation
- All markets

Who Benefits:

- Visitors and locals seeking recuperative environments
- Accommodation sector

Risks:

- The major risk is acquiring the funds to develop the centre
- Medical waivers to be signed on registration to cover medical liabilities to the centre

Estimated Costs:

Infrastructure and equipment costs estimated at BDS\$5 - \$7million, dependent on whether a new building is required or the redevelopment of an existing property

Source Of Funds:

Private sector investment

Revenue Generation Potential:

- Revenues to the centre providing the services
- Revenues to the medical personnel providing professional services
- Increased visitor spend

Further Development Work Required:

- Design
- Costing
- Source of financing
- Marketing of the centre

Other Considerations: Linkages with BAMP, Silver Market Tourism, Accessible Tourism, Health & Wellness Tourism

2.1m-2 Establish a 'Caribbean Accreditation Board' for Medical Tourism Services

Description:

To promote an approach towards establishing a Caribbean Accreditation Board of Medical Tourism Services to encourage the development of the Medical Tourism market in Barbados.

The Joint Commission International (JCI) based in Chicago, Illinois, is considered the global leader in accrediting health care providers and organizations. Accreditation procedures are normally conducted every 3 years, and there are significant costs attached to this process. JCI requests an average fee of US\$46,000 for a full hospital survey. To attract international clientele, local healthcare facilities must be in a position to establish their 'bona fides' or credentials regarding quality and safety with prospective patients. The Barbados Fertility Center is the only local health

care organization to have attained JCI accreditation (pers. comm., R. DeGale, Barbados Fertility Centre, April 2013).

As an alternative to JCI, a regional equivalent body should be considered offering high quality medical services for public access on a web portal, thereby building stronger regional networks amongst Caribbean physicians and dentists who are internationally recognized professionals. At present, Barbados can export indigenous medical services through small practices, and also build linkages with the public health system.

Expected Outcomes:

- Add a new dimension to the current medical tourism product offering
- Increase in number of accredited local healthcare facilities
- Increase in medical visitor numbers by persons seeking recuperative environments
- Promote more accessible facilities
- Increase visitor lengths of stay

Guidelines for Implementation:

- Government to convene a regional roundtable session in association with Caribbean Export Development Agency, key medical fraternities and NGO's, the University of the West Indies, and the local Strategic Advisory Panel to develop a plan of action
- Establish and launch a Caribbean Accreditation Board of Medical Tourism Services

Challenges With Implementation:

- Overcoming the 'political' dimensions prevalent in the CARICOM region
- Acquisition of adequate funds to set up the Accreditation Board
- Marketing the initiative to the specific agencies
- Fostering linkages with local and regional medical fraternities

Recommended Implementation Agency:

The following agencies should be approached to play a collaborative role in a Public/Private sector venture:

Ministries of Health in CARICOM territories, Barbados Association of Medical Practitioners and counterpart bodies, Barbados Dental Association, UWI Faculty of Medicine

Priority / Implementation Timeframe:

High/Medium Term

Target Users:

- Health care providers and organisations
- All markets

Who Benefits:

- Health Care providers
- Locals and visitors requiring medical care and recuperation
- Accommodation sector

Risks:

- Achieving 'buy-in' from all relevant parties involved in health care services
- Unavailability of financial resources

Estimated Costs:

Likely to be significant initially due to the need for research and training, creation of best practice standards, establishment of framework and guidelines for regional equivalent.

Proposed budget of BDS\$1,000,000

Source of Funds:

Private sector investment required

Revenue Generation Potential:

- Revenues to the centres providing the required health care services
- Revenues to the medical personnel providing professional services
- Increased visitor arrivals and spend

Further Development Work Required:

- High level discussions with regional health ministries and professional organisations
- Source of financing

Other Considerations: Linkages with Health & Wellness Tourism, Silver Market Tourism, Accessible Tourism

3.2.2.6 Education Tourism

Overview

Educational Tourism, also termed as career enhancement, job development or self-actualization, seeks to combine motivating learning experiences with relaxation and experiential diversity. Travel is primarily motivated by education and organized learning as opposed to a tourist experience, and is targeted by education establishments, therefore having less visible tourism-related impacts (Tarlow, 2010)

Collaboration between tourism authorities and educational institutions facilitates the process of attracting students via the tourism sector. Marketing for educational tourism promotes the benefits featured by the destination. Tarlow (2010) presented some of these benefits as follows:

- This form of tourism is not necessarily reliant on having perfect weather conditions
- Use of existing infrastructure and human resources
- The geographic location can be secondary to the overall pursuit depending upon the type of knowledge being shared
- Users can benefit from de-stressing activities such as sports while refining existing skills or learning new techniques

Barbados is poised to take full advantage of its local assets comprising heritage and cultural experiences in pursuit of this market. These experiences complement the educational component of this niche market and include the newly designated World Heritage site, bird watching, coastal reefs, gully systems, or karst ecology as associated with Harrison's Cave. Students who are studying abroad seek leisure activities to complete the overall experience of educational programmes (Williams, 2010).

In order to target the relevant demographics within the educational tourism sector, it is important to understand the various sub-sectors that comprise this market. Tarlow (2010) presented 5 specific sub-sectors that include:

- **University and College Student Study Abroad Programmes** - Primarily organized through major universities around the world who develop or encourage foreign travel student programmes providing intensive study sessions against the backdrop of cultural and linguistic immersion that broaden the educational experience
- **School Tourism** - School trips arranged through school attachments can translate into extended visits with family members on later occasions. Many local schools currently collaborate on competitive sports programmes or exchanges such as netball tournaments associated with select overseas schools
- **Adult Study Tours and Seniors Tourism / MICE** - This encompasses conferences and senior seminars and vacations which are geared toward recently retired persons and have wide ranging appeal, especially those that feature 'hands-on' participation coupled with a learning programme. Meetings and conventions function as educational instruments for many organizations adding professional knowledge to personal growth

- **Edu-tourism-** Skill enhancement trips can range from learning about residential construction to environmental protection. For example, Costa Rica provides ecological training programmes that are combined with travel experiences. Edu-tourism can comprise eco-tourism or cultural tourism experiences
- **Educational Cruises-** These aim to couple the fun of a cruise with educational lectures and opportunities for interactive activities

Situation Analysis

The sub-sectors of education tourism that have been practiced in Barbados include university and college student study abroad programmes, school tourism, MICE, and edu-tourism. They are reviewed separately below, followed by an examination of extra-curricular opportunities:

Meetings, Incentives, Conferences, and Events (MICE) Sector

The Lloyd Erskine Sandiford Centre (LESC) is recognized as the island's primary hub for regional and international meetings, seminars, trade shows and exhibitions (see also Section 3.2.1.5). The LESG provides the most expansive in-house accommodation for conferences and meetings. The expanded parking facility adds to the advantage of the LESG as a regional option. An example of a recent educational event hosted at LESG was the 2012 Caribbean Innovation Challenge, an international competition and business start-up accelerator programme for young entrepreneurs in the Caribbean (OAS, 2013).

Barbados has both the experience and select facilities for small to medium scale activities that support educational tourism. The enhancement and further development of the MICE niche is presented in Section 3.2.1.5.

University and College Student Study Abroad Programmes

Currently, the UWI Cave Hill campus enrollment consists of 20 percent Caribbean students and 10 percent international students. The remaining 70 percent are Barbadian. As a result, UWI Cave Hill has developed a residential complex specifically to accommodate approximately 350 international students. It is expected that revenue will be generated through tuition (i.e. BDS\$80,000 to over \$100,000) and inbound travel of families associated with students who attend campus events (Thangaraj, 2011).

In accordance with the extent of international prospects predicted by the University of the West Indies, particularly throughout the South American countries, it is recommended that Barbados maximize the use of the network of student expositions within this region to attract a larger number of foreign students to the University of the West Indies, thereby increasing the enrolment and expanding the international reach of educational tourism for Barbados. For example, 9,231 students were pre-screened for eligibility and accepted into the March 2012 EduExpos in São Paulo, Brazil. The Brazilian EduExpo attracted 22,628 students overall (EduExpos, 2012). The UWI has undertaken a Portuguese translation for the university website in order to improve communications with existing and potential students (refer Action 2.1n-2).

The White Paper adds that approximately 160,000 Brazilians studied abroad in 2010 with projected increases of over 23%. *“These numbers make Brazil the leading country in Latin America in terms of sending students abroad. Many of these trips abroad are to take short term courses to study English and these are the types of students that can be targeted, in addition to ones seeking longer term tertiary level courses”* (Strategic Solutions Inc., 2012, p. 165).

Further to consultation with UWI representatives, it is recommended that the recruitment drive be reinforced through provision of an alternative translation in Portuguese/Spanish for the University of the West Indies’ website to facilitate promotion/marketing of UWI educational programmes and increased student enrolment.

The 2012 Foundations Bill being developed by the Government of Barbados is intended to attract high net worth individuals from the international business sector and their advisors in the Latin American market (Holmes, 2012). This Bill, along with double taxation treaties, aims to generate profitable interactions between jurisdictions. The TESOL (Teaching English to Speakers of Other Languages) programme that is offered by UWI is poised to facilitate these interactions by overcoming training and communication barriers.

Educational linkages for children of the global African Diaspora, along with members of the Barbadian Diaspora, can be cultivated for future growth in this area. For example, a number of Barbadians migrated to Brazil, where they built an Anglican church in 1912 and Panama to work on the construction of the Panama Canal. A century later, Barbados should seek to rekindle these connections towards a mutually beneficial exchange of knowledge and culture. Overall benefits accrue to the tourism industry through international exposure of Barbadian educational opportunities and word-of-mouth promotion of national assets.

A summary of recommendations was provided by UWI for the further development of Barbados study abroad programmes (per. comm., Andrew Fisher, Director of the International Office, UWI Cave Hill, July 5, 2012) as follows:

- Establish an overall presence in the educational travel arena through integrated tourism-education promotions / joint initiatives, e.g. utilizing existing BTA representation in Brazil to promote the niche
- Attract an increased number of South American students from Venezuela, Brazil and Mexico to Barbados
- Maximization of foreign language immersion programmes and student exchanges
- Opening avenues in prime student markets in Latin America (e.g. Brazil, Columbia, Panama, Venezuela) and Europe (e.g. Finland)
- Furthering access to major expos and student recruitment fairs (Salão do Estudante, Expo-Estudiante, EduExpos)
- Attract companies that seek to expand their foreign language skills in settings such as the UWI TESOL programme
- Maximize opportunities for an international interface through creation of a bilingual web interface that presents the comprehensive opportunities available in Barbados to non-nationals

In addition to the study abroad programmes offered by UWI Cave Hill, Barbados has signed agreements on educational and cultural exchanges with other countries across the world, opening the door for foreign students to study at a range of institutions in Barbados.

Agreements include exchange programmes between teachers and students. The development of two additional offshore medical facilities is planned to further the development of Barbados as an educational tourism hub. The Minister of Education views offshore institutions in Barbados as an opportunity to enhance educational tourism. The Minister stated that “it is part of our educational tourism pursuit, bringing persons from India, North America, Canada, wherever for education within the Barbadian space, what people call offshore medical schools” (Gill, 2012). Other countries in the region, e.g. Grenada, Antigua and Dominica, have also pursued offshore medical schools.

Further, the American University of Barbados (AUB), a subsidiary of Era's Lucknow Medical College and Hospital in India, is expected to generate social and cultural exchange. Ample shopping and social conveniences, communication in English and accessibility of major airline connections to the US, Canada, Europe and Asia were identified by the Director of Admissions, AUB, as primary contributors to the choice of Barbados as a domicile for its university. The AUB director anticipates within the upcoming five years that AUB will expand its facility to create a campus here at an estimated investment of approximately US \$20 to \$30 million (Gill, 2012).

At institutions such as Bellairs Research Institute (BRI), the Caribbean campus of McGill University, hands-on study programmes, intensive courses, and field studies are offered for international students. BRI partners with the University of the West Indies and the National Conservation Commission in this regard.

In addition to tertiary education, primary and secondary institutions also make a contribution to the local educational tourism sector. The Parliamentary Secretary in the Ministry of Education stated that “there are a lot of people [from] my experience in immigration ... who want to send their children to Barbados, for both primary and secondary education; and [we must determine] how we can make these schools, and this aspect of our educational system, a centre of excellence and a generator of critical foreign exchange”. It was recommended that having international certification programmes such as the international baccalaureate currently offered by select private institutions is important to promoting Barbados as a centre of excellence for private primary and secondary education. Further to understanding the private educational sector, it was advocated that mechanisms such as the Accreditation Council, TVET could help in expanding Barbados' scope in this area of education (Joseph, 2013).

School Tourism

Educational tourism at the primary and secondary school level comes in the form of summer camps and sports exchanges. For example, school students from Guadeloupe engage in summer programme activities and meet summer school counterparts at the University of the West Indies. The exchange of teachers and lecturers, especially with respect to training engagements, is seen as a beneficial avenue for growth. Currently, the Erdiston Teachers' Training College has commenced a teacher exchange programme between Barbados and Guadeloupe, providing training for 4 teachers. The Minister of Education indicated that future expansion of this programme requires evaluation to determine its efficacy (Gill, 2011).

Continuing international relations with other countries have also been fostered through associations such as the Barbados China Friendship Association (BCFA) that promotes beneficial Barbados / China relationships. The BCFA hosts Chinese cooking, language and health classes. The BCFA, in collaboration with the local ANNU Institute, aims to establish a Centre for Traditional Chinese Medicine in partnership with a Chinese university (www.annuinstitute.org).

Edu-Tourism

Limited offerings currently exist in the area of education with respect to eco-tourism and cultural tourism programmes. The Barbados Sea Turtle Project at UWI Cave Hill is an example of this type of training and field volunteer options. Youth with a Mission (YWAM) also provides students with the opportunity to interact in the built environment. Edu-tourism programmes for international students can be promoted within the proposed Experience Barbados Rewards system (refer Action 2.1h-5).

Extra-Curricular Opportunities

The collective tourism experience associated with all sub-sectors of educational tourism is generated through products such as accommodation, language schools, travel, tour and transportation services, and activities / attractions. The environmental and social resource base is also important (Williams, 2010). Based on the 2007 and 2008 Mintel reports on student leisure and lifestyles in the UK, Williams (2010) highlighted the following results relative to attractions in destinations featuring educational tourism:

- Promotional incentives and discounts are attractive to students
- Eating out is an emerging trend in student leisure
- More students attend cultural and live entertainment events than other consumers in the 18 to 24 age group
- Students are both consumers as well as future opinion makers
- Students are more inclined to socialize off-campus, impacting on the visitor economy, and in particular, the night time economy
- Approximately 50% of all students aged 18 to 24 are interested in the arts

Opportunities exist for institutions that provide academic training to explore avenues for cultural exposure within their student bodies. For example, the Alliance Française de Bridgetown has actively pursued several initiatives with the Barbadian Ministry of Education. The combination of educational and cultural activities also occurs at events such as the Fete de la Musique where local and regional bands offer free concerts to the public. Film festivals are also a part of annual activities. In addition, UWI Cave Hill promotes its annual Carnival experience. These types of linkages between different niche areas are valuable for the combined exposure of several products, and should be encouraged.

Further, to promote increased patronage of local attractions and events by student populations, it is recommended that a system of student rates be developed, in collaboration with attractions and tour providers, in order to encourage local and international students to maximize formal recreational activities across the island (refer Action 2.1n-1).

Tourism Awareness Programmes in Education

To further tourism awareness in the public school system in Barbados, the Ministry of Tourism works actively with the BHTA in promoting tourism awareness among the school age population. The primary programmes developed to date are the Schools Tourism Education Programme (STEP) and Tourism, Education, and Me (TEAM) programmes.

In 2011, the STEP pilot project commenced with 8 primary and 7 secondary schools. STEP consists partly of an immersion programme that pairs schools with hotels and attractions in order to promote closer collaboration between educational institutions and tourism entities. Through these formal relationships between tourism businesses and schools, students and teachers develop ties to the tourism industry. The areas of interest are varied. Participating teachers were also afforded the opportunity to experience first-hand the hotel environment via staycations or visits to attractions in order to be equipped to better inform their students. The programme builds on the thrust of the former Adopt-a-School programme, retaining some of its original linkages between schools and hotels.

Stimulation of further participation by youth in tourism can be achieved through offering a system of rewards for active participation on tourism-building ventures. A proposed initiative, the Tourism Outreach Point System, seeks to cultivate a spirit of stewardship and responsibility within youth in tourism (refer to Action 2.1n-3; see also Report III, Section 5.0).

The Ministry of Education advocates the twinning of secondary schools to promote more effective cultural immersion. The STEP Committee aims to expand the number of schools in the programme, and has encouraged its members to be more active in taking this initiative forward (Affonso-Daas, 2012). Table 3.18 presents the list of paired schools and businesses. Where participating hotels have since closed, replacements need to be identified.

The TEAM Awareness Programme is managed by the Ministry of Tourism and focuses on awareness and training as key tools to developing the tourism industry. The programme involves a variety of initiatives that target the general public and primary and secondary school students across the island. Awareness activities for the schools include the Annual Florida Caribbean Cruise Association (FCCA) Awareness Competitions and Condé Nast Traveller Magazine Essay Competition in primary and secondary schools as a means of promoting tourism awareness and to harness the literary and artistic talents of young people in Barbados. Primary schools show the highest rate of participation in these competitions, however participation by secondary schools has also been increasing steadily.

Prizes for these competitions include organized tours by the Ministry of Tourism in collaboration with its stakeholders to hotels, on board cruise ships and places of interest across the island to expose students to the Barbadian tourism product.

Table 3.18. Paired schools and businesses participating in the STEP programme.

Primary School	Hotel	Attraction/ Activity
St. Lucy's Primary	Almond Beach Village	Atlantis Submarines
Mount Tabor Primary	Divi Southwinds Beach Hotel	Goddards Shipping & Tours
Roland Edwards	Almond Beach Club	Foster & Ince
St. Lawrence Primary	Accra Beach Hotel & Spa	Island Safari
Bay Primary	Hilton Barbados Resort	Tall Ships
Hilda Skeene	The Crane Residential Resort	Atlantis Submarines
George Lamming	Courtyard by Marriott	Goddards Shipping & Tours
Secondary School	Hotel	Attraction/ Activity
Parkinson Memorial	Sea Breeze Hotel	Island Safari
St. James Secondary	Mango Bay Hotel	Tall Ships
Combermere	Almond Casuarina	Atlantis Submarines
Alleyne School	Turtle Beach Hotel	Goddards Shipping & Tours
Harrison College	Bougainvillea Beach Resort	Foster & Ince
Coleridge & Parry School	Crystal Cove Hotel	Island Safari
Alexandra School	Sandy Lane	Tall Ships
<i>Source: BHTA, 2011</i>		

The Ministry has seen a general interest by schools, teachers and parents in every awareness competition facilitated by them. There has been interest expressed by at least one nursery school in building tourism awareness among its students from an early age through creative displays of places of interest, airport, seaport and educational tours, and industry workers engaging students in discussion about their daily jobs. Over the years, the Ministry of Tourism has reprinted Teacher Manuals developed by the Caribbean Tourism Organisation for Teaching Tourism in Primary and Secondary schools and distributed to Social Studies teachers on the island for use within their classroom activities and teaching tourism within the curriculum. The Ministry is often approached by teachers for guidance in how to incorporate tourism as a theme in classroom projects.

The Ministry has facilitated requests by teachers on numerous occasions for interactive classroom presentations in primary schools on tourism in Barbados, as well as participation in career showcases organized by individual schools and the National Guidance Counsellors' Association.

It is to be noted that adequate personnel is key in facilitating requests from schools and for further expansion of an initiative for tourism to be taught in schools.

The Annual Speech Competition is another component of the TEAM Programme. Participation in this contest was predominantly from schools with debating clubs and a general interest in developing the public speaking skills of students. However, other schools are becoming involved and forming public speaking clubs within their own schools, e.g.

Frederick Smith Secondary, hence the Speech Competition is seen as an ideal way for students to participate in discussions of national interest. The winner of this competition is awarded the title of “*Junior Minister of Tourism*”, and the student represents Barbados at the Regional Tourism Youth Congress hosted by CTO as part of their annual State of the Industry Conference.

The competition involves some awareness activities and training sessions on Leadership and Communication to prepare students for the Competition. The provision of internships for the top three students at the end of the Annual Speech Competition were provided to give the students an insight into the day-to-day operations in a tourism-related entity and to spark their interests in pursuing careers within the sector. The Junior Minister of Tourism is involved in activities hosted by the Ministry and its stakeholders during his/her tenure (pers. comm., M. Armstrong, TDO, Ministry of Tourism, 2013). The number of participants in the Ministry of Tourism Speech Competition since 2007 is presented in Table 3.19.

Table 3.19. Number of participants in the Ministry of Tourism Speech Competition since 2007 (pers. comm., M. Armstrong, TDO, Ministry of Tourism, 2013).

Year of Competition	No. of Participating Candidates
2007	6
2008	16
2010	10
2012	10
2013	20

In addition to the school-based programme, the TEAM Awareness Programme also includes a 15-minute tourism awareness documentary which seeks to relay the benefits of tourism to the island. There are at least 4 documentaries to be produced and broadcasted on CBC TV for the local population.

In addition to efforts placed on tourism education through schools, the National Tourism Host Programme (NTHP) is designed to enhance tourism awareness and training within the wider services sector in Barbados (May Hinds Consulting Inc., 2012; see also Report III, Section 4.0). The NTHP will give participants the necessary grounding for understanding their role in developing a successful tourism industry.

Strategic Outlook

There is further potential to attract more students via the tourism sector and develop the Education Tourism market in Barbados through university and college student study abroad programmes, school tourism, MICE, and edu-tourism.

The following Actions recommended to promote Education Tourism are in support of Strategic Imperative 2 on **'Enhance the Visitor Experience'** and corresponding Strategy 2.1 which states: *"Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending"*.

2.1n-1 Develop an Online Platform of Student Promotions

2.1n-2 Recruit more Students from the Latin American Market

2.1n-3 Establish a Reward Programme for Student Involvement in Tourism

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Education Tourism

2.1n-1 Develop an Online Platform of Student Promotions

Description:

Develop and promote an online service for tertiary education students to access special rates and promotions offered by local attraction establishments and sporting organizations in Barbados.

Expected Outcomes:

The programme would encourage local and international students from campuses and colleges to become more involved in and have greater exposure to tourism offerings in Barbados, leading to:

- Increased participation in local activities
- Increased visitation at local attractions

Guidelines for Implementation:

The development of an online service that offers special student rates to local attractions and sporting venues. Tour operators and private attraction service providers would be invited to participate in the online service. Private operators would develop their own student packages and link their websites to the network. Attractions would include Harrison's Cave, Gun Hill and the Museums across the island. Package rates may also be granted to students for multiple attractions.

Qualifying institutions would include:

- University of the West Indies
- Barbados Community College
- Samuel Jackman Prescod Polytechnic
- Youth With a Mission (YWAM)
- Bellairs Research Institute
- American University of Barbados
- Local study abroad programmes for international students

Presentation of a student ID card from the qualifying institution would be required to access the special rates being offered.

Challenges With Implementation:

- Securing participation of tourism operators and service providers, and developing the appropriate web links
- Creating suitable packages and associated fee structures

Recommended Implementation Agency:

BTA (in collaboration with the Ministry of Education)

Priority / Implementation Timeframe:

Medium/Medium Term

Target Users:

- Local and international tertiary level students
- Student guilds
- Fitness groups at tertiary institutions

Who Benefits:

- Foreign student visitors
- Local students

Risks:

- Attracting enough students through targeted marketing to make the programme viable
- Attracting enough providers to offer a variety of activities for students

Estimated Costs:

- BDS\$15,000 initial set up of online system
- BDS\$ 1,000 quarterly maintenance of the site and updating promotions
- Costs may vary depending upon the number of tourism providers participating

Source of Funds:

- BTA for the establishment of the web interface
- Private operators for links to the programme

Revenue Generation Potential:

Improved sales of activities and services

Further Development Work Required:

- Development of the web interface
- Creation of packages and enrollment of tour operators or individual attractions
- Marketing of the programme to campuses and colleges

Other Considerations: Linkages with Sports Tourism, Cultural Heritage and Attractions

2.1n-2 Recruit more Students from the Latin American Market

Description:

There is a vast network of student expositions hosted in the Latin America region that attracts a significant number of foreign students. Educational institutions in Barbados can target this lucrative market to help increase enrolment and expand the international reach of Education Tourism in Barbados.

The proximity of Latin America to the Caribbean makes it a viable linkage for Education Tourism initiatives. Barbados' ability to provide tertiary level foreign language education programmes is also a primary benefit. The UWI Cave Hill campus provides an excellent educational resource for foreign languages and degree programmes sought by international foreign language students, including those from Latin America.

The EduExpo programme is a key university global showcase that attracts large numbers of students from across Latin America. For example, 9,231 students were pre-screened for eligibility and accepted into the March 2012 EduExpo in São Paulo, Brazil. The Brazilian EduExpo attracted 22,628 students overall (EduExpo, 2013).

Further to consultation with UWI representatives, it is recommended that the recruitment drive be reinforced through provision of an alternative translation in Portuguese/Spanish for the UWI website to facilitate promotion/marketing of UWI educational programmes and increased student enrolment.

Expected Outcomes:

- Establishment of an overall presence in the educational travel arena through integrated tourism-education promotions /joint initiatives (e.g. utilizing existing BTA representation in Brazil to promote the niche)
- Attracting an increased number of South American students to Barbados
- Overall expenditure increases to local organisations, businesses and service providers
- Distribution of tuition fees and living expenses in various local sectors: universities and colleges, Government, local households and properties
- Overall benefits to the tourism industry through exposure of Barbadian educational opportunities and national assets
- Visits by relatives and friends benefiting local enterprise: attractions, hotels, restaurants
- Repetitive student travel, locally and internationally generating expenditure
- Revenue generation through recreational outings to attractions and use of associated services, i.e. transport, food, etc.
- Maximization of foreign language immersion programmes and student exchanges
- Opening avenues in prime student markets in Latin America (e.g. Brazil, Columbia, Panama,

Venezuela) and Europe (e.g. Finland)

- Furthering access to major expos and student recruitment fairs (e.g. Salão do Estudante, Expo-Estudiante, and Eduexpo)
- Attracting companies that seek to expand their foreign language skills in settings such as the TESOL programme
- Maximizing opportunities through a bilingual web interface (e.g. Portuguese translation for UWI website)

Guidelines for Implementation:

- Facilitation of a delegation to attend a minimum of 2 in a series of EduExpos-Intelligent education fairs held annually in South America (Brazil, Venezuela, and Latin America). One of the primary contact agency and exposition planners is FPP Edumedia. Implementation tasks would include:
 - Selection of the most viable expos in consultation with the Director of the UWI Office of Student Corporate & Alumni Relations
 - Organization of promotional information and packages to be presented at each exposition
 - Selection and debriefing of an informed presentation team comprised of tourism and education officials. Knowledgeable representatives are available locally through UWI, Cave Hill. Foreign language competency of attendees would be an asset. Where there are no bilingual team members, a Portuguese/Spanish translator would need to be engaged
 - Planning hotel stays and duration
- Existing UWI website upgrade to bilingual capability
 - Assess the number of site features on the existing site that would require translation
 - Engage a translator to collaborate with the web designer in providing requisite translations
- Link travel industry/charters flights with educational promotions in order to maximize marketing opportunities and increase student airlift

Challenges With Implementation:

- Financing of a presence at educational expositions
- Website upgrade to bilingual capacity

Recommended Implementation Agency:

University of the West Indies (in collaboration with the BTA)

Priority / Implementation Timeframe:

Medium/Term

The preparation will require planning and financing of a presentation team to promote the educational opportunities at UWI in addition to foreign language programmes. EduExpos commence on February 28 in Brazil and continue through October in various South American cities; however, priorities would be set for areas such as Brazil and Venezuela.

Target Users:

- International students in South America
- University the West Indies students and alumni
- Student guilds

Who Benefits:

Barbados as a whole through revenue generation and international promotion of the educational and tourism infrastructure, products and services.

Risks:

Establishing contact with a wide enough range of students and faculty to stimulate interest.

Estimated Costs:

- EduExpo – BDS \$25,000 per expo
- This cost will be dependent upon the number of fair days booked: A sample of constituent costs are presented below:
 - Translator/Stand Assistant: BDS\$220 per day of fair
 - Hotel Transfers between Expos: BDS\$1,500
 - Standard booth registration: BDS\$4,150 - \$7,000
 - Air fare: BDS\$1,500 - \$2,500 per person
- Website upgrade to bilingual capability: TBD. This cost will be dependent on the number of website features to be translated and programmed

Source of Funds:

- Ministry of Tourism and UWI to attend the education showcases in Latin America
- UWI for website development

Revenue Generation Potential:

Improved promotion and sales of both educational and tourism services

Further Development Work Required:

- Prioritization of student recruitment fairs to attend
- Generation of promotional material for distribution
- Inclusion of participation by other educational institutions in Barbados that would benefit from international exposure of their programmes

Other Considerations: Promotions and marketing at each exposition should be explored in collaboration with the Barbados Tourism Authority

2.1n-3 Establish a Reward Programme for Student Involvement in Tourism

Description:

To establish a reward programme for youth involvement in tourism (see also Report III, Section 5.0). Barbadian students (primary, secondary, tertiary) would earn points by voluntary participation in tourism sector events and Community Tourism or Volunteer Tourism initiatives. Credits would be redeemed towards defraying costs for local trips, tours, and event tickets (Agrofest, BIMEX etc.) as applicable. Attractions or tour operators may offer open days during off-peak times when members of this programme may visit select sites or access rewards (e.g. Harrison's Cave, Concorde Experience, Folkestone Marine Park, Gun Hill Signal Station).

Expected Outcomes:

Improved participation of school, college and university students to tourism activities, and expanding recreational opportunities

Guidelines for Implementation:

Students volunteer as part of formal school classes, groups or associations, (e.g. 4H Club, Brownies, Cub Scouts) to earn points in the following areas:

- Environmental Management and Greening – e.g. Adopt-a-Beach /coastal service activities, community beautification, tree-planting schemes, etc. (e.g. see Figure 3.37)
- Community Outreach Programmes
- Community functions or national events

Student group/association heads or NGO participants would register their group or participating students with the Ministry of Tourism. Group status and authority for registration would be confirmed by signature of the principal or registrar of the relevant institution, giving details of the event in which the group will be participating and identifying the event contact person. Registration forms would be available from the Ministry of Tourism.

Points or specific reward materials (e.g. T-shirts promoting the programme and tourism as a whole) would be awarded to educational groups or individuals upon submission of a Certificate of Participation form that is to be returned to the Ministry of Tourism. The Ministry of Tourism would subsequently forward an award letter to the relevant school body. This award letter will confirm the earned points that can be redeemed by the school group's activity head.



Figure 3.37. Advertisement for the coastal clean up in Barbados, 2012 (Source: International Coastal Clean Up, www.facebook.com/ICCB Barbados).

Challenges With Implementation:

Coordination of programme with multiple agencies

Recommended Implementation Agency:

Ministry of Tourism and International Transport (in collaboration with the Ministry of Education)

Priority / Implementation Timeframe:

Medium/Medium Term

Target Users:

All school students and extra-curricular groups

Who Benefits:

Students interested in service-oriented activities

Risks:

Low student registration for the programme

Estimated Costs:

- Programme planning officer: BDS\$3,000 - \$3,500 per month
- Administrative and promotional materials: BDS\$2,000 - \$4,000 per month dependent upon the number of participating institutions

Source of Funds:

Tourism Development Corporation

Revenue Generation Potential:

- Direct revenue will be generated through family and friends accompanying programme members to attractions or events where entrance fees are collected
- The potential is high for increasing tourism awareness amongst the youth and reaping the extended benefits

Further Development Work Required:

- Evaluation of reward types or options in addition to the parameters for awards
- Liaising with educational institutions and groups
- Creation of promotional material and forms
- Attracting private sector participants and sponsors
- Marketing of the programme to schools, campuses and colleges

Other Considerations: Links with educational programmes and non-profit groups and service activities throughout Barbados (e.g. environmental awareness programmes, mentorships through tourism stakeholders; e.g. see Figure 3.38).



Figure 3.38. Example of a school programme activity (Source: Future Centre Trust, www.facebook.com/pages/Future-Centre-Trust).

3.2.2.7 Volunteer Tourism

Overview

According to Wearing (2002), to be a voluntourist is to “*volunteer in an organized way to undertake holidays that may involve aiding or alleviating the material poverty of some groups in society, the restoration of certain environments or research into aspects of society or environment*”. Simply put, volunteer tourism is a form of travel which involves volunteering for a worthy, often charitable cause (Tomazos, 2010).

Voluntourism can take place in a wide range of destinations, from remote rainforests to densely populated cities. However, a common factor of the receiving destination is that it be a developing nation with perceived social, economic and environmental problems that require intervention. Planned activities range from community outreach such as building homes and schools to environment-related projects. Many voluntourism programmes also have days built into the trip for leisure and sightseeing activities (Rogers, 2007).

Rogers (2007) suggests that voluntourism has immense appeal for the traveller who seeks a tourist experience that not only contributes to their personal enjoyment and development, but also positively affects the host culture and community they are visiting. The research shows that the two largest groups participating in voluntourism are college students (including alternative spring break activities) and Baby Boomers who were born between 1946 and 1964 and are now entering their retirement years (Lamoureux, 2011). The motivating factors are wide ranging and include: purely altruistic reasons, social desirability, career enhancement, cultural immersion, camaraderie, and education or bonding with children, among others.

The White Paper indicates that voluntourism is a response to travelers becoming increasingly more socially and environmentally conscious and seeking opportunities to combine work with weekend sightseeing or cultural immersion. These opportunities could range from lengthy trips that involve construction work, community development and/or conservation, to one or two day contributions, such as litter clearing during a hike (Strategic Solutions Inc., 2012, p.135).

The 2007 FutureBrand report, Country Brand Index, indicated that volunteer tourism is a growth area: “As a response to disaster aid, growing global village consciousness and a need to contribute to society in ways big and small, more travelers are planning their trips around humanitarian purposes. From building homes and teaching English, to working at refugee camps and participating in animal conservation research, the menu of volunteer vacation options is growing.” The White Paper cites Virtuoso, which states that seeking personal enrichment through volunteerism was among the top five reasons clients were travelling in 2011 (Strategic Solutions Inc., 2012, p.26).

Lamoureux (2011) shares the following statistics to demonstrate the growing appeal of volunteer tourism:

A Condé Nast Traveler/MSNBC poll (Spring 2008):

- Number of regular volunteer vacationers has doubled since 2002
- Number of those who have volunteered at least once has tripled
- 98% were satisfied with their experience
- Less than 25% of those surveyed have no interest in taking a volunteer vacation
- 55% of those surveyed would like to take a volunteer vacation
- 75% of those who have volunteered are “very likely” to do so again
- 91% of the volunteers believe their efforts were at least as worthwhile as donating money
- 86% believe that voluntourism benefits both the traveller and the destination

A Condé Nast Traveler Readers’ Poll (February 2009):

- 47% interested in volunteer vacations
- 3% regularly take volunteer vacations
- 98% satisfied with their experience
- 95% of those who have volunteered would do so again

USTA Voice of the Traveler Study (November 2006):

- 24% interested in taking a volunteer or service-based vacation. Up 11% from 5 years ago
- 47% of those from the 35-54 age range

Travelocity’s Annual Forecast (2007):

- Volunteer vacations 38% (up from 11% from prior year)
- 68% of travelers would likely use a travel website to learn more about volunteer vacations
- 50% would consider taking a vacation for the sole purpose of volunteering

Peter Yesawich, CEO of Ypartnership, “Taking the Kids: Family Voluntourism” (2007):

- In 2006 over 5 million households took a volunteer vacation

CMIGreen survey on voluntourism (2009):

- 59.1% of those surveyed said they were interested in volunteering during a future trip
- 74.4% have volunteered while traveling
- 37.6% of respondents claimed that the availability of volunteer activity encouraged their selection of a vacation destination
- 46.4% said they would dedicate several days to volunteering during a trip, as opposed to a day or less or an entire trip
- 69.9% say that the most important outcome or goal of a volunteer travel experience is to “give back”
- 7.9% are willing to spend \$51 or more a day on their vacation if it meant they could also volunteer
- 58% continued to be involved with the project they volunteered with after they returned home

Volunteer tourism relies heavily on cross-sector collaboration. It involves a diversity of players including government, the private sector and civil society. A Volunteer Managing Organization (VMO) refers to any organization that is involved in either hosting or organizing groups to participate in volunteer tourism activities. A Volunteer Sending Organization (VSO) refers to the organizations (non-profit, government, or for-profit) that are the first point of contact and that assist with travel arrangements for the volunteer. They also market the tourism activities. A Volunteer Receiving Organization (VRO) refers to the organizations (non-profit, government, or for-profit) that identify volunteer activities, receive the tourists and assist in the organization and delivery of volunteer services.

Lamoureux (2011) provides some examples of lessons learned and best practices in volunteer tourism from experiences across the globe as follows:

Partnerships: Voluntourism is sporadic in nature. Tourists come for a relatively short period of time and then they leave. The needs of the VRO however are of an ongoing nature. Therefore, it is key that organizations with an established record in the host destination continue the necessary work regardless of whether volunteer tourists come or not. This fosters continuity and maximizes impact for the destination. Failure to develop relationships with partners that understand the needs of the community and have an on-going presence will not only hurt the cause in the long-run, it may also produce a less than satisfactory experience for the guest.

Community Ownership: Volunteer projects must be “owned” by the local community. Tour operators and non-profit organizations that bring tourists to do projects that they believe to be important for a host community likely face failure. Experience has shown that the community must be a part (or all) of deciding what is needed for a project to continue, be successful, and have an impact. Ideally, the host community would also be involved in the activity at some level.

Educating the Traveller: Tourism is an invasive activity. Voluntourism allows guests and hosts to interact on a very personal level. It is important that visitors understand the impact they could potentially have on the host community. At times, even the best intentions can have negative impacts. Therefore traveller education is imperative to minimizing potential negative impacts, as well as helping the traveller understand what to expect.

Performance Monitoring: Continually re-evaluating the volunteer programme from the perspective of the VSO and VRO is essential to ensure that real needs are being met for the host population and that the tourist benefits from the experience. Adjusting and changing programmes based on this evaluation will improve the long-term viability of the VRO and VSO.

Business Development: Although VSOs and VROs may be for-profit, governmental or non-profit, operations should take into account the financial viability of the activities. Benefits will cease to exist if the VSOs and VROs are not able to continue their work due to financial constraints. Therefore, programmes must be managed with the goal of creating financial sustainability.

Avoiding Dependency: Care must be taken to avoid local dependence on tourists who bring handouts for the community. Additionally, from the work perspective, if residents feel that the volunteers will come and “fix everything”, that may also foster dependency. Some VSOs address this by varying their project locations and types. Other organizations ask that visitors not provide anything to the host that is not expressly allowed by the VSO.

Situation Analysis

Volunteer Tourism in Barbados is completely under-developed. When it occurs, it is sporadic as opposed to organized and strategic. There are no VMOs currently operating in Barbados to manage this sector of the industry. A brief investigation of experiences on the island reveals the following:

Barbados Sea Turtle Project (BSTP): Every year the BSTP accepts volunteers from countries all around the world. These are individuals that are interested in assisting with data collection, sea turtle rescues, presentations and displays about sea turtles. Darren Browne, field director of BSTP, explained that they advertise online, and persons apply with the specific purpose of working with sea turtles (pers. comm., D. Browne, CERMES, 2013). The project director has to pay close consideration to the applications, because the project requires a significant amount of commitment. He also explained that the project gains attention from individuals who are vacationing in Barbados but have not signed up in advance. Those persons are only allowed to participate in the hatchling releases, which give them an opportunity to be involved as volunteers. He made the point that the perceptions of those who are visiting the island simply for a vacation is different to those who are visiting for conservation purposes, hence the reason why the project only allows those who have signed up in advance to participate in all aspects of the project.

Churches: Telephone calls to local churches revealed that the Roman Catholic Church rents out their Marian Retreat House to groups that visit Barbados. These groups include visiting schools from the USA. Some of these groups have undertaken volunteer work such as painting churches and schools. In the Methodist churches and at one of the local Pentecostal Assemblies, they have had groups visit Barbados and provide volunteer services through visiting prison inmates, helping out in soup kitchens, visiting children and senior citizens homes, as well as conducting HIV/AIDS awareness sessions.

Green Globe Certified Hotels: Phone calls were made to the Green Globe Certified hotels. This was based on the assumption that they would be most ideally placed to facilitate volunteer tourism as part of their social requirement. As Table 3.20 indicates, these properties are actively engaged in a range of socially responsible activities but do not actively encourage Volunteer Tourism as part of their product.

Table 3.20: Green Globe hotel social/community activities.

Property	Description of Activities
Accra Beach Hotel	The St. Lawrence Primary School uses the hotel's facilities for its graduation ceremony. Guests who are interested can make contributions to the school and the principal will provide a tour of the school. The hotel also conducts educational walks and beach clean-ups (these activities occur about once a year). Accra donates to churches and the Kiwanis Club. They are also affiliated with the Future Centre Trust.
Amaryllis Beach Resort	The hotel is engaged with local schools (Garrison Secondary steel orchestra performs for guests; makes presentations to Arthur Smith Primary school about twice a year). Twice a week between three to four local craftsmen displays their products – guests have been receptive to this initiative. These activities occurred prior to certification. There is no voluntourism.
Atlantis Submarine	They provide special pricing for locals and schools. They have adopted schools (e.g. Combermere, St. Lucy Secondary, Hilda Skeene Primary) and have an educational programme where they provide information of the ecology of reefs, their function as a marine based tourism activity and the stresses the reefs face. Atlantis has been supporting schools since 1987 – i.e. prior to certification. They also have an apprenticeship programme; supports charities by providing complimentary tickets; and sponsored magnets for the Barbados Sea Turtle Project (BSTP). There is no voluntourism.
Blue Orchids / Coral Mist Beach Hotel	These hotels support churches' annual fairs with prizes (e.g. weekend for two); and the Vagrant Society. Such involvement was prior to certification (they reopened in 2007). There is no volunteer tourism.
Divi Southwinds Beach Resort	They have been certified since 2008 (Green Hotels Certification) and Travel Life certified. They are involved with, and sponsor a few schools (e.g. St. Lawrence Primary, Deacons Primary). At Bayleys Primary school they assist the Club Scouts with attaining their Environmental Badge. They are also involved with HIV peer-education workshops. They contact the Barbados Sea Turtle Project when necessary to report hatchlings. They also allow local craftsmen to display their wares. There is no voluntourism.

Dover Beach Hotel	They support sports tourism (donate prizes). They also reach out to local community (e.g. Love and Care retirement home – at Christmas when they go carolling and they invite their guests to participate; donates to the HIV Food Bank). Contributions are made to Vauxhall Primary school at their speech day. They were certified in 2008, and their outreach programmes have intensified since then. There is no voluntourism.
Sea-U Guest Houses	Concentrates on beach clean-ups and the promotion of going green. They sponsor clean-ups about two to three times a year. This was done prior to certification – about three years ago. There is no voluntourism.
Southern Palms Beach Club	They have partnered with the Kiwanis Club (south) on a tree planting initiative. Local craftsmen display and sell their products (crochet, jewellery, paintings, clothes, wire work etc.) on property (particularly at the manager’s cocktail). They were involved with a halfway house, but this has been discontinued. They purchase organic produce from local farmers. They contact the BSTP when there are hatchlings. Guests have not expressed an interest in volunteering.
Little Arches (under certification)	They are currently seeking certification and are not engaged in community tourism at present. However, that is their intent.
Island Villas (under certification)	Linkages with children homes and neighbouring communities (e.g. Royal Westmoreland). There is no volunteerism.

Actions Recommended to Promote Volunteer Tourism

Lamoureux(2011) reports that voluntourism in meetings and events is one of the fastest growing areas within voluntourism. She reports that according to Financial and Insurance Meetings Magazine in 2009, incorporating service projects into meetings is the “next big thing.” Industry organizations like the Professional Convention Management Association have incorporated “give back” activities into their annual and regional meetings such as “Network for the Needy” which encourages food donations to local charities and a large volunteering activity (Lamoureux, 2011).

Therefore it is being proposed that volunteer tourism be developed as a value added component to conference tourism and faith-based tourism niche market initiatives, given the reported experiences of the local churches.

A specific recommendation of the White Paper is that the Ministry of Tourism collaborate with relevant agencies including schools, orphanages, the Coastal Zone Management Unit

to explore the possibility of developing programmes like marine conservation and community development projects, cleaning of reefs, beaches and gullies, painting schools and orphanages, and developing packages for visitors who wish to participate in such activities by giving back (Strategic Solutions Inc., 2012, p.135). In addition, the silver tourism segment should also be targeted, because research shows that Baby Boomers who were born between 1946 and 1964, and are now entering their retirement years, are one of the two main groups that are attracted to volunteer tourism.

The following Actions recommended to promote Volunteer Tourism are in support of Strategic Imperative 2 on **'Enhance the Visitor Experience'** and corresponding Strategy 2.1 which states: *"Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending"*.

2.1o-1 Facilitate Volunteer Tourism through the Conference Tourism Market

2.1o-2 Market Volunteer Opportunities for Silver Market Visitors

2.1o-3 Implement a Marketing Programme for Volunteer Activities

2.1o-4 Develop Local Volunteer Management Organizations

Full descriptions of the Actions are presented below. They are presented to enhance Volunteer Tourism as part of the Barbados tourism experience, and are consistent with the directive issued in the White Paper as follows: *"The Government of Barbados collaborate with relevant agencies to develop packages for visitors who wish to be engaged in voluntourism programmes to assist local causes or communities"* (Strategic Solutions Inc., 2012, p.220).

2.1o-1 Facilitate Volunteer Tourism through the Conference Tourism Market

Description:

To develop a division within agencies that focuses on meetings and conferences, e.g. LESC, where large groups of visitors could be targeted to participate in voluntary activities.

Expected Outcomes:

- Increased capacity within conference service providers to facilitate volunteer tourism as part of their package
- A trained set of individuals whose role is to ensure that visitors can undertake voluntary activities while on the island
- Increase in existing volunteer tourism in areas including: marine turtle patrol; sports activities with youth; assistance to the elderly or needy (e.g. repairs and painting of homes; provision of wheelchairs or other required items); various educational activities

Guidelines for Implementation:

- Meet with conference and event coordinators and determine their interest and willingness to expand their services to facilitate volunteer tourism responsibilities.
- Conduct required training for the organizations that are willing to become VMOs

Challenges With Implementation:

Knowledge about Volunteer Tourism is low

Recommended Implementation Agency:

The Ministry of Tourism should designate a member of staff to take up the portfolio of Volunteer Tourism

Priority / Implementation Timeframe:

Medium / Medium-Long Term: This is not a high priority; it can be pursued, but as a more medium to long-term goal.

Target Users:

- The MICE segment
- Faith-based tourists
- Sports teams
- Visitors with an interest in the environment, especially turtles
- The silver market segment

Who Benefits:

The beneficiaries will be the specific recipients of the volunteer effort. If this is the building or repairing of the home of an elderly person then only one person benefits; if it is a school or other building used by many, then the benefits go further afield. If the effort is a conservation project, such as turtle patrol or renovating a heritage property in Bridgetown or some other area, then there is a broader societal benefit.

Risks:

- That Volunteer Tourism remains happenstance because of limited interest
- That no agency is interested in taking on the responsibility of becoming a Volunteer Management Organisation

Estimated Costs:

- Planning phase around BDS\$5,000
- Implementation costs would involve mainly marketing and should be low initially if volunteer tourism could be incorporated into the institutional plans of conference/event planners

Source of Funds:

Potential funding from the small business sector

Revenue Generation Potential:

Not very high since it is value added and rather difficult to measure. "I to I Volunteer" (<<http://www.i-to-i.com/volunteer/>>) estimates around US\$300,000 per annum can be contributed to local economies, i.e. BDS\$600,000

Further Development Work Required:

Working with the organizations to raise awareness about Volunteer Tourism

Other Considerations: Linkages with Conference Tourism

2.1o-2 Market Volunteer Opportunities for Silver Market Visitors

Description:

Market volunteer opportunities to tourists in the Silver Market segment when they are planning their visit to Barbados by:

- Identifying and creating a list of activities in which volunteers can participate, e.g. education and art opportunities for children and adults
- Placing the list on relevant websites – MTI, BTA, BHTA, hotels – sites that visitors would visit when investigating things to do while in Barbados
- Developing a marketing package for the silver market volunteer visitor

Expected Outcomes:

- Links on relevant websites where silver market visitors can sign up for volunteer activities while they are planning their holidays
- Development of art and other educational opportunities for visitors to share their expertise with locals

Guidelines for Implementation:

- Meet with MTI and BARP to share the idea and to determine whether it is feasible and how to make it attractive
- Prepare a marketing component within the wider volunteer marketing strategy that is focused on the silver market
- Identify persons/groups that would wish to participate in the programme. This could be possibly linked to the STEP programme for example
- Place information on website

Challenges With Implementation:

- Currently Volunteer Tourism is not conducted in any organized manner and is very happenstance
- Knowledge about volunteer tourism is low
- There are no local Volunteer Management Organizations (VMOs) (refer Action 2.1o-4)

Recommended Implementation Agency:

- The Ministry of Tourism would take the lead
- BARP could be involved
- Based on Action 2.1o-4, when VMOs are formed, they would take the lead

Priority / Implementation Timeframe:

Medium / Medium–Long Term: This is not a high priority since it will not lead to significant revenue intake. It can be pursued, but as a more medium to long-term goal.

Target Users:

The Silver Market segment

Who Benefits:

The beneficiaries will be the specific recipients of the volunteer effort. Particularly school children and anyone interested in art

Risks:

Volunteer Tourism remains happenstance because of limited interest

Estimated Costs:

BDS\$50,000 for marketing

Source Of Funds:

Small business sector

Revenue Generation Potential:

Not very high since it is value added and rather difficult to measure. "I to I Volunteer" (<http://www.i-to-i.com/volunteer/>) estimates around US\$300,000 per annum can be contributed to local economies, i.e. BDS\$600,000

Further Development Work Required:

Identification of funds and agencies to develop and implement the marketing strategy

Other Considerations: Linkages with Silver Market Tourism

2.10-3 Implement a Marketing Programme for Volunteer Activities

Description:

To market volunteer opportunities to tourists when they are planning their visit to Barbados by:

- Identifying and creating a list of activities in which volunteers can participate, e.g. infrastructure including renovations to buildings (heritage buildings, homes for the elderly, schools)
- Placing the list on relevant websites – MTI, BTA, BHTA, hotels – sites that visitors would visit when investigating things to do while in Barbados
- Developing a marketing package for volunteer tourism that would include a recognizable logo

Expected Outcomes:

- Links on relevant websites where visitors can sign up for volunteer activities while they are planning their holidays
- A full marketing package for volunteer tourism including a logo
- Greater appreciation by locals of how their volunteer activities (through sports, faith-based, youth, environmental activism, etc) are part of, and can benefit from, the tourism sector

Implementation Methodology:

- Meet with marketing and ICT specialists to develop a marketing programme for the Barbados volunteer tourism programme
- Identify specific niches for targeting, including silver market, environmental initiatives, sports, MICE

Challenges With Implementation:

- Currently volunteer tourism is not conducted in any organized manner and is very happenstance
- Knowledge about Volunteer Tourism is low
- There are no local Volunteer Management Organizations (VMOs) (refer Action 2.1o-4)

Recommended Implementation Agency:

- Ministry of Tourism would take the lead by designating personnel to coordinate this process
- Based on Action 2.1o-4, when VMOs are formed, they would take the lead

Priority / Implementation Timeframe:

Medium / Medium–Long Term: This is not a high priority; it can be pursued, but as a more medium to long-term goal.

Target Users:

- The MICE segment
- Faith-based tourists
- Sports teams
- Visitors with an interest in the environment, especially turtles
- The Silver Market tourism segment

Who Benefits:

The beneficiaries will be the specific recipients of the volunteer effort. If this is the building or repairing of the home of an elderly person then only one person benefits; if it is a school or other building used by many, then the benefits go further afield. If the effort is a conservation project, such as turtle patrol or renovating a heritage property in Bridgetown or some other area, then there is a broader societal benefit.

Risks:

That Volunteer Tourism remains happenstance because of limited interest

Estimated Costs:

BDS\$50,000 for marketing

Source Of Funds:

Small business sector

Revenue Generation Potential:

Not very high since it is value added and rather difficult to measure. "I to I Volunteer" (<<http://www.i-to-i.com/volunteer/>>) estimates around US\$300,000 per annum can be contributed to local economies, i.e. BDS\$600,000

Further Development Work Required:

Identification of funds and agencies to develop and implement the marketing strategy.

Other Considerations: Linkages with Marketing, ICTs and New Media

2.1o-4 Develop Local Volunteer Management Organizations

Description:

Develop local Volunteer Management Organizations by expanding on the current sporadic efforts within the church, or as a division within agencies that focus on meetings and conference, e.g. the Lloyd Erskine Sandiford Conference Centre.

Expected Outcomes:

- Fully functioning VMOs on the island capable of attracting and managing volunteer tourism initiatives
- A trained set of individuals whose role is to ensure that visitors can undertake voluntary activities while on the island
- Increase in existing volunteer tourism in areas including marine turtle patrol; sports activities with youth; assistance to the elderly or needy (e.g. repairs and painting of homes; provision of wheelchairs or other required items); various educational activities

Guidelines for Implementation:

- The Ministry of Tourism should designate a member of staff to take up the portfolio of volunteer tourism. This individual would take the lead by coordinating the process of developing the VMOs
- Convene a meeting with representatives of the organizations that currently engage in volunteer tourism. Note that for many (e.g. churches and sports organizations), they are not even conscious that this is volunteer tourism
- Explain about volunteer tourism and demonstrate the value added that it could mean to their organizations and to the country. Determine their willingness to be trained to operate actively as VMOs
- Develop a framework for the operation of local VMOs
- Conduct required training for the organizations that are willing to become VMOs

Challenges With Implementation:

- Currently Volunteer Tourism is not conducted in any organized manner and is very happenstance
- Knowledge about volunteer tourism is low
- There are no local VMOs to build upon

Recommended Implementation Agency:

- The Ministry of Tourism should designate a member of staff to take up the portfolio of volunteer tourism. This individual would take the lead by coordinating the process of developing the VMOs
- There should be investigations into whether local churches that already facilitate volunteer tourism could include this within their organization structure
- There should also be investigations into whether agencies that focus on conferences and events would develop a division/desk with responsibility for this component

Priority / Implementation Timeframe:

Medium / Medium-Long Term: Although there is evidence that this segment of the industry is growing globally, Barbados does not really fit the profile of the destination that attracts this type of tourist. Therefore, this should be implemented as value added to the conference, Faith and Silver Market Tourism segments as opposed to being pushed as a high priority area in its own right.

Target Users:

- Tourists who travel to conferences especially those that have a social/development perspective
- Faith-based tourists
- Silver Market

Who Benefits:

The beneficiaries will be the specific recipients of the volunteer effort. If this is the building or repairing of the home of an elderly person then only one person benefits; if it is a school or other building used by many, then the benefits go further afield. If the effort is a conservation project, such as turtle patrol or renovating a heritage property in Bridgetown or some other area, then there is a broader societal benefit.

Risks:

That existing organizations show no interest in expanding their responsibilities to become VMOs

Estimated Costs:

Would be low initially, if volunteer tourism could be incorporated into the institutional plans of local churches or conference/event planners. BDS\$40,000 mainly for capacity building in existing organizations

Source of Funds:

Uncertain

Revenue Generation Potential:

Not very high since it is value added and rather difficult to measure. "I to I Volunteer" (<<http://www.i-to-i.com/volunteer/>>) estimates around US\$300,000 per annum can be contributed to local economies, i.e. BDS\$600,000

Further Development Work Required:

Working with the organizations to raise awareness about volunteer tourism.

Other Considerations:

3.2.2.8 Shopping Tourism

Overview

Barbados Stay-over Visitor Surveys (CTO, 2010; CTO, 2011) showed that the average visitor expenditure on shopping, other than souvenirs, between October 2010 to December 2011 was approximately US\$12.00. Table 3.21 shows that between July 2010 and June 2012, there were higher expenditures during the period July to September 2011, i.e. during the summer and Crop Over Season. Hence the timing and application of promotion and marketing efforts should correspond to the relevant visitor demographics.

Table 3.21: Stay-over visitor expenditures from July 2010 to June 2012.

Spend (US\$)	Period								Average
	July - Sept 2010	Oct - Dec 2010	Jan - Mar 2011	Apr - June 2011	July - Sept 2011	Oct - Dec 2011	Jan - Mar 2012	Apr - June 2012	
Souvenirs	4.00	4.19	4.11	4.60	3.32	4.42	3.83	4.04	4.06
Shopping	12.14	11.11	10.44	12.45	15.68	11.57	10.84	10.89	11.89
Total	16.16	15.30	14.55	17.05	19.00	15.99	14.67	14.93	15.95
<i>Source: CTO, 2011; 2012</i>									

The category relating visitor experience with sales personnel received a combined 65% good to excellent rating in the CTO Stay-over surveys (CTO, Oct 2010 – Dec 2011). Visitor satisfaction with shopping received a lower rating of 55%. The category of handicrafts / souvenirs received an average grade of over 55% which indicates room for improvement in this product group (CTO, 2010; CTO, 2011). Table 3.22 illustrates the cruise passenger satisfaction in select categories related to shopping.

Regarding the analysis of cruise visitor experience, Barbados received improved satisfaction ratings relative to shopping between 2009 and 2012 in all categories (see Table 3.22). The lowest scored and ranked category was for overall prices of goods (BREA, 2009; BREA, 2012).

The Business Research and Economic Advisors (BREA) group conducted a survey, on behalf of the Florida Caribbean Cruise Association (FCCA), of 29 Caribbean destinations, which included Barbados (BREA, 2009). The survey embraced more than 47,000 cruise tourists and 16,000 crew members.

Analysis of visitor data by BREA (2009) showed that overall visitor satisfaction and shopping satisfaction were highly correlated. St. Maarten achieved the highest spending per cruise tourist (i.e. US\$147.98) during the period May 2008 to April 2009. This indicated the highest overall satisfaction of any of the Caribbean destinations included in the survey, and correspondingly, the highest levels of spending in the region.

Table 3.22: Cruise passenger satisfaction in select categories across participating Caribbean destinations. (Note: Scores are rated from 1 to 10, with 10 being the highest; ranking is allocated based on the total number of participating destinations).

Category	2009 ¹		2012 ²	
	Score	Ranking	Score	Ranking
Overall shopping experience	6.4	20	7.2	7
Satisfaction with merchant courtesy	7.5	24	8.1	5
Shopping variety / variety of shops	6.5	15	7.3	3
Overall prices	6.0	24	6.7	10

¹2009 ranking based on 29 Caribbean destinations
²2012 ranking based on 21 Caribbean destinations
Source: BREA, 2009; 2012.

Figure 3.39 illustrates that the 2009 level of spending in Barbados of US\$69.10 was below the regional average of US\$71.08, and well below the average for the wider Caribbean at US\$97.26. The Southern Caribbean destinations of Curacao (US\$81.21), Aruba (US\$87.41) and Cartagena (US\$90.03) all had spending levels that were above the average for the region, but none exceeded the cruise destination average of US\$97.26. Between May 2011 and April 2012, passenger's onshore visits and expenditures for Barbados fell to \$65.60 for 606,800 passengers (BREA, 2012).

Since shopping satisfaction has been found to be positively correlated with per capita expenditures and number of passenger visits (BREA, 2009), Barbados can address this challenge of achieving higher visitor satisfaction and resultant spend by fully embracing international best practice and raising its standards. This would be necessary to overcoming competitive geographic advantages in comparison with those Caribbean destinations that are in closer proximity to North America and the associated market. However, cruise tourists sourced from the UK and Europe are outside this demographic.

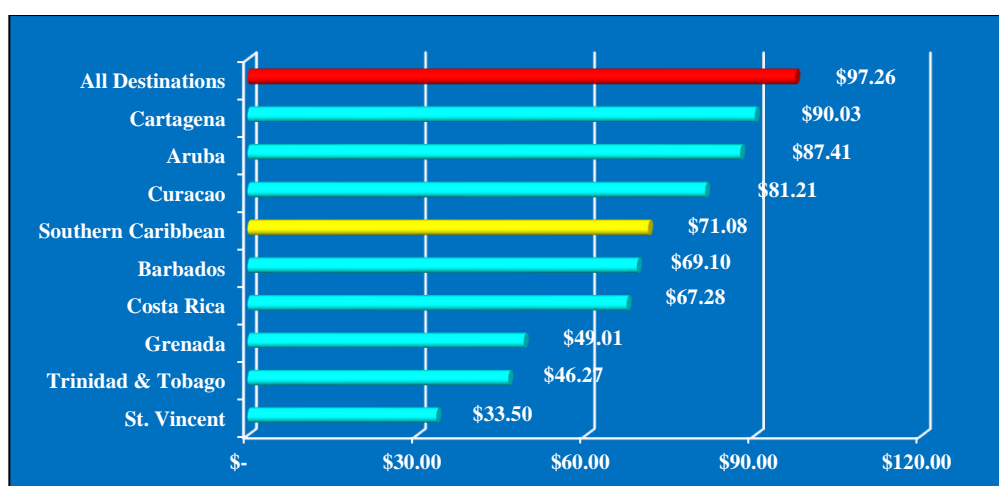


Figure 3.39: Average spend per cruise tourist – Southern Caribbean 2009 (BREA, 2009).

The annual gains that could be made from encouraging increased expenditure by cruise visitors, sea staff, and cruise lines can be significant. Table 3.23 illustrates the expenditure increases Barbados can potentially achieve from cruise passenger spend. Essentially, low standards, lack of attention to detail, and lack of a successful marketing and selling strategy towards cruise tourism are costing the country just under US\$20 million per annum (BREA 2009; BREA 2012). A core objective would be to increase the level of spending of visiting cruise tourists and cruise ship personnel.

The BREA (2012) analysis of the cruise passenger surveys from May 2011 to April 2012 for a total of 21 participating destinations in the Caribbean showed the following major attributes of passenger onshore spending:

- Watches and jewellery accounted for the highest spend
- The most popular expenditure was for shore excursions, accounting for almost 50% of all passengers
- On average, just under half the cruise passengers purchased food and beverages, clothing, local crafts and souvenirs at each destination call; they spent an average of \$10.24 on clothing, \$6.89 on food and beverages, and \$5.68 for local crafts and souvenirs at each port call

Table 3.23: A comparison of average cruise passenger spend for Barbados to average spend for the Caribbean, showing potential gains to be realized.

Cruise Year	Caribbean Average Spend US\$	Barbados Average Spend US\$	Difference in Spend US\$	Number of onshore visits	Total Potential Gain to Barbados if Spend is raised to the Caribbean Average
2008/2009	97.26	69.10	- 28.16	635,000	\$17,887,232
2011/2012	95.92	65.60	-30.32	606,800	\$18,398,176
<i>Source: BREA, 2009; 2012</i>					

In-transit cruise passengers exhibit varying shopping preferences than do home-porting passengers. Table 3.24 illustrates these varying preferences in both groups, showing cruise passenger spend per party for the period May 2008 to April 2009. In-transit visitors recorded a comparatively higher spend for watches and jewellery than home-porting visitors. Home-porting visitors exhibited a higher average spend for retail purchases of Liquor during the period as compared to in-transits.

Table 3.24. Cruise passenger spend in select categories for Barbados.

Barbados Purchase Category	2009 Cruise Spend per Party ⁴ (US\$)			
	In-transit visitors		Home-Porting visitors ¹	
	Weighted Average Spend ²	Average Spend ³	Weighted Average Spend	Average Spend
Local craft and souvenirs	12.10	64.02	2.64	32.68
Clothing	15.38	49.90	2.60	33.34
Liquor – retail	3.64	27.40	2.26	42.70
Watches and jewellery	33.70	330.30	2.30	137.62
Perfumes and cosmetics	2.42	57.70	1.10	65.82
Electronics	0.24	49.00	-	-

1. Homeport passengers = Visitors boarding in Barbados, Jamaica or the Dominican Republic
2. Weighted average spend = Total spend in a category spread over all visitors
3. Average spend = Average amount actually spent by only those survey respondents who reported spending in a given purchase category
4. Average size of a cruise visitor party is 2.0 passengers for Barbados
Source: BREA, 2009

Figures for 2012 cruise passenger spend for Barbados alone were not available for the various purchase categories, however overall trends in 2012 across all destinations with respect to average passenger expenditures by category (all participating destinations) showed variations in the weighted average spend as shown in Table 3.25 (BREA, 2009, BREA, 2012). The percentage decline in the weighted average spend was highest for local craft and souvenirs.

Table 3.25. Weighted average of cruise passenger spend for all participating Caribbean destinations.

All Caribbean Destinations Purchase Category	2009	2012
	Weighted Average Spend*	Weighted Average Spend*
Local craft and souvenirs	7.06	5.68
Clothing	9.57	10.24
Liquor – Retail purchase	2.00	1.73
Watches and jewellery	36.09	37.77
Perfumes and cosmetics	1.24	1.12
Electronics	0.57	0.55

*Weighted average spend = Total spend in a category spread over all visitors
Source: BREA, 2009; 2012

Since consumers tend to favour items that are available duty free, consideration should be given to making the duty free process more attractive to prospective purchasers. A more time effective mechanism should be developed to encourage shoppers to purchase more, particularly during short stays.

Situation Analysis

The White Paper notes good shopping facilities as one of Barbados' strengths, with excellent amenities found at the upscale shops of Limegrove Lifestyle Centre (Strategic Solutions Inc., 2012, pp. 55 and 117). Although the policy document does not specifically address Shopping Tourism as a niche market, it does note that Government will consider enhancing the Bridgetown shopping experience, with specific reference to the cruise tourism market (Strategic Solutions Inc, 2012, p. 250).

The unavailability of detailed statistical data in Barbados regarding customer demographics, shopping preferences, primary shopping locations, or comparisons of shopping attributes compromises future planning. The BCCI aims to collaborate with the BTA and BHTA on identifying these visitor preferences within Bridgetown (BCCI, 2010). The Hometown Chamber of Trade Inc. (HCTI) seeks to define the demographic for Hometown in order to provide businesses with a competitive advantage (pers. comm., Mark Simmons, HCTI, June 2012).

Comprehensive research is required in order to establish the key areas of demand within the tourism shopping market in Barbados. Given that Bridgetown is the major centre of commerce on the island, marketing the city and its collective range of services to visitors from all ports of entry and places of accommodation should be a high priority. In this regard, a more effective mechanism is required to guide shoppers to the city, particularly from the Port to Bridgetown. Trips to Bridgetown can be maximized via public shuttle to offer a travel alternative to walking or the use of private taxis that may opt not to service the short trip from the Port to Bridgetown (refer Strategy #2VE: UNESCO – XV in Report VI, Section 5.0).

In order to engage more shoppers into Bridgetown, it would be necessary to encourage the cruise visitor to leave the Port's terminal area and the stay-over visitor to explore the city as part of their holiday experience. This can be facilitated by plans that would include:

- Beautification and enhancement of the route from the Bridgetown Port to the city centre
- Interpretation and promotion of UNESCO the World Heritage Site, products and memorabilia along key routes to capitalize on the designation
- Select application of local duty free shopping to encourage domestic tourism spending
- Sourcing private investment for implementation projects involving upgrades to city areas
- Upgrading through design coordination and painting of building exteriors to render them more attractive
- Creative promotion of products and services on offer
- Increasing the number of restaurants for visitors to experience local foods and flavours

In this regard, the BCCI revitalization initiative (BCCI, 2012) seeks the following improvements in the city:

- Creation of a centre of excellence for duty free shopping with an improved duty free system that requires less documentation
- Improved security with lighting and closed circuit TV if extended shopping hours are achieved

- Transformation of Bridgetown into a shopping, dining and cultural experience that is totally Barbadian
- Expanded facilities, locations and hours for presentation of goods by artisans
- Use of city parking areas for weekend vending

Regarding waste management in Bridgetown, the Sanitation Service Authority makes approximately 13 visits per week to the city, yet garbage accumulation may be evident throughout the day dependent upon business and shopper practices. Education of the public into appropriate waste management practices must continue, with an emphasis on the health benefits and the benefits to tourism. Stationary waste management equipment (e.g. compactors) may increase the efficiency of overall cleaning operations, however the placement and management of such disposal systems may be limited by a need to maintain a high quality environment in the vicinity of the equipment.

Unightly derelict buildings and vacant lots also pose a health and security threat to passersby. Such properties within the town centers should be prioritized by health authorities and secured against vandalism and intruders. In addition, reduction of harassment by street vendors and transients in Bridgetown would be ameliorated by the presence of dedicated wardens for urban shopping areas who can aid in the surveillance of on-street activities and act as deterrents. Maintaining an adequate balance of support services tending to the needs of the city, e.g. security and sanitation, must be a top priority.

Expansion of the range of local goods offered to visitors traversing the Grantley Adams International Airport (GAIA) and the Bridgetown Cruise Terminal is one avenue for improving revenues. Improved Bridgetown Port facilities through expanded retail areas, and full development of the Barbados Cruise Terminal's web-interface featuring available shopping would allow visitors to maximize options available. Tourism stakeholders interviewed at the TMP workshops held in February 2012 indicated that in order to encourage more visitors, there should be more value for money provided for local goods, and with respect to the primary shopping location adjacent to the Port facility, it was noted that Pelican Village should be made more inviting (TMP, 2012).

The promotion of local products at GAIA requires expanded display areas and mechanisms to attract visitors to product showcases. An advertising board located landside at GAIA would help to inform departing travelers of shopping options on the interior and encourage visitors to clear security earlier, thereby having more time to browse the shops in the departure lounge. Local products are displayed in shops including the BADMC and BDC shops. However, the location of the BADMC store and the BDC Island Craft Shop is at the end of the airside shopping promenade and therefore is challenged in attracting visitors, which has become dependent on repeat customers who know the location. To increase competitiveness within the airport shopping environment, directional signage or information should guide travelers to these local shops and highlight selected products, potentially on a rotational basis. Also, the retrofitting of the BADMC store has significantly improved the décor, however the store would benefit from a more attractive frontage.

Within the accommodation sector, a facilities' inventory of Barbados hotels indicated that 60% of hotels offer shopping amenities on property (PCS, 2009). However, the nature of

these outlets was not quantified. Within this sector, there is an opportunity to promote more locally produced goods to hotel guests and have a more efficient link between local product suppliers and hotel shop operators via a web outlet (refer Action 2.1p-2).

Keen attention must be paid to steadily improving the quality of local products and services, as well as the service provided by vendors, as destinations that feature higher standards overall have been found to experience greater levels of visitor satisfaction. High levels of visitor security, expanded high quality local product ranges, and service excellence within quality shopping environments will translate to higher visitor spend and corresponding revenue increases. There is also the potential to develop Barbados as a shopping hub for the Eastern Caribbean with the implementation of further commercial developments, especially in Bridgetown. The recent opening of Limegrove Lifestyle Centre in Holetown has provided added value to the retail and duty free commercial offering in Barbados, and has increased the appeal of the island as a shopping venue, especially for the high-end visitor. Proposed new ventures in Bridgetown with associated retail outlets, e.g. the new port facility for mega ships and the new marina development project, will add significantly to the shopping appeal in Bridgetown.

Professionalism and Quality Standards

The Barbados 2011 Economic and Social Report (Central Bank of Barbados, 2012) indicated that of the five industries reviewed, the wholesale and retail sector recorded the highest level of absenteeism. The level of absenteeism has increased steadily from 3 days in 2006 to the current overall level of 9.4 days; retail supermarkets and clothing and textile retailers recorded an average of 17.1 days and 13.2 days respectively. The National Survey of Productivity also showed a 6.4% decline in growth for the year. Continued efforts by the National Institute for Service Excellence (N.I.S.E) to promote customer service and worker efficiencies will therefore assist in stimulating valuable improvements in maintaining tourism as our premier business.

Barbadians who trade across the island need to be aware of appropriate sales approaches while interacting with visitors so that “a positive and intimate experience” is achieved; this is also a main aim of the proposed National Tourism Host Programme (May Hinds Consulting Inc., 2012). The ability to ply your trade using hospitable techniques is a critical matter relative to being a good host. Ultimately, increasing visitor spend is a primary aim of the BTA and the Government of Barbados, and locals can help ensure that this aspect of the tourism industry is maximized through awareness and sensitivity to this concern.

High traffic tourism areas such as beaches and urban centres are prime locations for the sale of Barbadian handicraft, jewellery, and personal care items. However, some visitor responses presented in the CTO Visitor Stay-over Surveys (CTO, 2011) identified negative experiences with beach and street vendors. Though they may not be the norm, overly aggressive sales practices by locals can be very detrimental to the Barbadian image.

For instance, duty free sales for visitors require the presentation of valid passports. Repeat incidences have been noted of locals who approach visitors seeking to transact duty free purchases through visitor surrogates. Visitors sometimes find these approaches distressing,

hence the practice should be strongly discouraged by merchants. Visitor perceptions, often conveyed by word of mouth, can negatively impact the Barbados brand, thereby reducing potential visitor patronage of Barbados. Where store personnel recognize individuals as repeat perpetrators of this form of illegitimate purchasing, early intervention will be critical to preserve the comfort level of the visitor with their local shopping experience. The National Tourism Host Programme is a prime mechanism for raising the standard of sales interactions.

Harassment of visitors by local vendors on beaches is not uncommon. The President of the BHTA recently noted that travel partners have raised the issue of harassment on beaches and in St. Lawrence Gap as a notable concern (Affonso-Daas, P. 2013¹). Solutions to mitigate against escalation of this problem are currently being addressed through security training workshops conducted by the Royal Barbados Police Force that will equip 100 security personnel of BHTA member institutions with mechanisms for minimizing impacts of harassment on visitors. The BHTA has revitalized its Safety and Security Committee to help tackle this issue (BHTA, 2013; see also Report III, Section 6.0).

Local merchants, transport providers, and tradespersons need to be encouraged to interact with visitors in such a way that ensures that visitors have a positive experience. The National Tourism Host Programme offers a prime opportunity to elevate the level of professionalism within the industry (May Hinds Consulting Inc., 2012). Public awareness programmes for locals via the media can assist in this regard. Proprietors of accommodation properties can also assist by making visitors aware of local sales practices.

Modern shopping practices and retail development indicate that a review of the parameters set out for the regulation of shopping activities through the Shops Act (1985) should be reviewed. Currently, the regulations of the Shops Act defines a shop as any premises or place in which a person conducts, manages or carries on business for the sale of commodities whether by wholesale or retail, and whether or not such business is conducted, managed or carried on to the exclusion of, or in addition to, any other business, and includes any place used for the storage of, receipt of orders for, or dispatch or delivery of, any goods dealt within the business. Updating of the Shops Act is required to reflect changes to shopping times and styles (see also Report III, Section 7.0).

The Act stipulates that opening hours for stores are from 7a.m. to 10p.m. daily. Employees are entitled to 2 days off per week as well as a break after 4.5 hours of work. Minimum wage for hourly paid shop assistants is \$6.25 per hour and \$250 for workers who are paid weekly. Overtime is paid at 1.5 times the regular rate and double pay for bank holidays. Overtime applies to any work completed after 8 hrs in a work day or more than 5 days in a work week. Reasonable notice of overtime requirements is expected of employers.

For prime locations such as the Grantley Adams International Airport or the Barbados Cruise Terminal, shops and concessions in areas such as the departure lounge may open as early as 5 a.m. to accommodate travellers.

A decision was recently taken by Cabinet to amend the Shops Act to positively impact on the permitted hours of operation for local stores to allow businesses to capitalize on cruise traffic

on days where they would traditionally be closed. This encompasses bank holidays and Sundays when vessels may be in the port (Barbados Advocate, 2012).

Strategic Outlook

The Caribbean Tourism Organization (2008) recommends that tourism stakeholders move beyond websites and online brochures to more fully developed online shopping opportunities. Access to online shopping opens a door for locally produced goods to be marketed to the Diaspora in addition to past and potential visitors to the island. Opportunities for online showcases of local products will need to be maximized.

Currently, the Small Business Association has recognized that over 60% of its members do not have an online presence. Through the new Tech Smart Programme 2013 – 2016, the Small Business Association is providing free website access to 50 entrepreneurs, and hope to have 100% of its members online by 2015 (Barbados Advocate, 2013). Through the TMP, it is proposed that an integrated online advertising and sales network be developed for art, handicraft and value-added products made in Barbados via a collective website at *buybajan.com* (refer Action 2.1p-2). Links would be made to existing and future local websites featuring locally made products. Web lists will feature business contact details (an active email address will be required), in addition to product sample photos. The site could be an extension of the *visitbarbados.org* site and connect consumers and potential visitors with sales products in a similar manner to that in which hotel services are promoted. Artisans and producers will be independently responsible for their sales and product delivery.

The development of a Barbados Shopping Guide for distinct commercial areas such as Bridgetown would afford commercial entities the opportunity to promote merchandise at ports of entry and increase recognition and sales for their products. The Guide would feature coupons and specials whereby visitors receiving discounts would recognize increased value for money for their purchases as long as sales or product promotions are accessed through the Guide (refer to Action 2.1p-1).

The following Actions recommended to promote Shopping Tourism are in support of Strategic Imperative 2 on **'Enhance the Visitor Experience'** and corresponding Strategy 2.1 which states: *"Focus product development, including service delivery, as well as marketing and promotional efforts on the priority niche markets to increase visitor numbers and spending"*.

2.1p-1 Develop a Barbados Shopping Guide**2.1p-2 Develop an Online Advertising Network for Local Products****2.1p-3 Organize a Bridgetown Street Fair**

Full descriptions of the Actions are presented below.

Actions Recommended to Promote Shopping Tourism**2.1p-1 Develop a Barbados Shopping Guide****Description:**

Develop an annual free Shopping Guide dedicated to a given location (e.g. Bridgetown or Holetown) for distribution at ports of entry or by approved tourism stakeholders. The shopping guides will specifically feature promotions, sales and savings.

Expected Outcomes:

- The Barbados Shopping Guide would afford commercial entities the opportunity to promote merchandise at ports of entry and increase recognition and sales for their products
- The Guide would feature coupons and specials. Visitors receiving discounts would recognize increased value for money for their purchases where sales or product promotions are accessed through the Guide
- Town maps featuring Bridgetown, Holetown, Speightstown and Oistins would highlight outlet locations advertising in the guide. Small businesses operating in one locale, e.g. Temple Yard, Swan Street, could collectively promote their area and merchandise
- Visitors would have a concise, travel friendly reference primarily for shopping
- Major attractions could also be marketed in the Guide

Guidelines for Implementation:

This annual Shopping Guide would encompass the following:

- Collection of content from advertisers and timely submission to the publishing house
- Money saving coupons and special offers from merchants
- Shopping area maps for the zone covered by the Shopping Guide
- Nearby attractions / malls and associated layouts
- Taxi rates/average travel times and walking distances
- Summary of shopping opportunities in towns other than the one in which the given brochure is promoted, e.g. Holetown, Speightstown, Oistins
- Guide would be sized at 4"x 6" for easy distribution and carrying by users
- Guides would be collated and released during the same month each year
- Shopping Guides may also be distributed by local information ambassadors travelling nationwide to attractions, schools etc. to promote tourism activities

Recommended Implementation Agency:

Barbados Tourism Authority

Priority / Implementation Timeframe:

Medium/Medium Term: Planning period would entail engaging enough participating stakeholders

<p>Target Users: Visitors, and to a lesser extent locals who will be more familiar with their immediate shopping environs</p>
<p>Who Benefits:</p> <ul style="list-style-type: none"> • Enterprises, events and attractions across Barbados which are promoted by the Shopping Guide • Retailers participating in the Guide booklet
<p>Risks: Lack of adequate advertisers or participants</p>
<p>Estimated Costs:</p> <ul style="list-style-type: none"> • Estimated at BDS\$5.00 per Shopping Guide utilizing bulk printing, dependent on number of pages and print style • Quantities would need to be assessed for each location
<p>Source of Funds: Advertiser's fees</p>
<p>Revenue Generation Potential: Overall enhancement of visitor spending through direct promotion of products and services</p>
<p>Further Development Work Required:</p> <ul style="list-style-type: none"> • Sourcing advertisers • Planning content, including maps
<p>Other Considerations: The St. Thomas, USVI Shopping Guide provides a good example of this application; linkage with Cultural Heritage and Attractions</p>

2.1p-2 Develop an Online Advertising Network for Local Products

Description:

Develop an integrated online advertising network for art, handicraft and value-added products made in Barbados. Links would be made to local websites featuring locally made products. Web lists will feature entrepreneurs / small business contact details with active email addresses, in addition to product sample photos. The site would be an extension of the visitbarbados.org site and connect consumers and potential visitors with sales products in a similar manner to that in which hotel services are promoted. Artisans and producers will be independently responsible for their sales and product delivery.

Expected Outcomes:

- Increased opportunities for advertising and sales for local artisans and producers
- Highlighting local promotions (e.g. see Figure 3.40)



Figure 3.40. Examples of advertising by the BMA.

Guidelines for Implementation:

- Develop a list of contributing suppliers, a web page format and a sales structure with the BIDC, Barbados Manufacturer's Association, Barbados Agricultural Development & Marketing Corporation, and the Small Business Association
- Collect advertising content from local artisans, producers and marketers
- Develop pricing strategies along with suppliers for wholesale or retail offerings to bulk or individual purchasers respectively
- Design and launch the website

Challenges With Implementation:

Meeting supply and demand for products

Recommended Implementation Agency:

BIDC (in collaboration with the Barbados Agricultural Development and Marketing Corporation and BMA)

Priority / Implementation Timeframe:

Medium/Long term: Planning would commence in publicizing the service to potential local small businesses, artisans, and manufacturers

Target Users:

Locals, visitors, and persons overseas wishing to connect to local manufacturers and craft producers

Who Benefits:

Independent artisans and producers needing an international, regional and local marketing forum

Risks:

Lack of advertisers or participants

Estimated Costs:

- Website Development- estimated at BDS\$50,000. Please note that costs will vary according to the number of items and businesses to be featured
- Annual website update – estimated at BDS\$5,000

Source Of Funds:

- BIDC investment in project
- Registration fee to be paid by featured merchants, producers and service providers

Revenue Generation Potential:

Overall enhancement of visitor spending through direct promotion of products

Further Development Work Required:

- Sourcing registrants and advertisers
- Planning content including maps

Other Considerations: Linkages with Diaspora, Conference Tourism (refer also to the website www.mylocalcaribbean.com, a St. Kitts based enterprise demonstrating this concept)

2.1p-3 Organize a Bridgetown Street Fair

Description:

To host a street fair along Broad Street stretching from Heroes Square to Jubilee Gardens (see Figure 3.41). During this *Bridgetown Street Fair*, Broad Street would be open to pedestrian traffic only. The event would feature vendor's tents (uniformly designed and presented, displaying traditional, local fare and food) along the length of Broad street, and musical performances in Jubilee Gardens and Heroes Square. In order to eliminate disruption of regular commercial activities and traffic cycles, the event could be held on Sundays or holidays, at least bi-annually. Stores and commercial outlets would be open during the Fair to stimulate city business activity.



Figure 41. Heroes Square (left); Broad Street (middle); Jubilee Gardens (right).

If the Fair were to be held on Independence Day, following that day's morning parade that includes the march of the military personnel and Zouave band to Government headquarters, the afternoon activities would include open-air concerts, performances by local instrumental bands, and main street commercial activities within the core of Bridgetown. The Fair would also feature individuals dressed up in period costumes.

Performances during the Fair would feature the historical aspects of the city; UNESCO World Heritage places of interest within the zone would be open for visits, including Parliament Museum, Nidhe Israel Synagogue and Museum, St. Michael's Cathedral, and St. Mary's Church. The event would last into the evening and culminate subsequent to the lighting of the city at sunset (see Figure 3.42).



Figure 3.42. Example of a Bridgetown façade that is lit up for Independence Day celebrations.

Expected Outcomes:

- Increased commercial activity for Bridgetown businesses and vendors during the event
- Increased visitor and local awareness of the heritage of the city
- Expanded entertainment performance opportunities
- Additional activities in the city
- Promoting the appeal of Bridgetown as a visitor attraction

Guidelines for Implementation:

- Identify those businesses and entrepreneurs willing to participate in the event
- Identify sponsors and advertisers willing to partner with the organizers
- Businesses along Broad Street would be given first priority for the setting up of tents along the main street for the sale of goods. Remaining space would be allocated on a “first-come first-serve basis”.
- A Park ‘n Ride service would be available at nearby sites such as Queen’s Park
- Collaborate with the Ministry of Culture, BTA, Urban Development Commission, Barbados Police Force, Ministry of Transport and Works, and the SSA in ensuring efficient planning and execution
- Transportation and tours may also be planned via proposed water taxis from locations such as Speightstown, Oistins, and Holetown (refer to Report II, Section 1.2)
- Transportation from the Port and other areas outside of Bridgetown can be provided by vehicles including local rickshaws (see Figure 3.43), historic Jitneys, Rocklyn buses, and solar buses, such as the one operated by the BCCI
- Site clean up immediately following the Fair will be important to maintain high standards of cleanliness in the environs
- Adequate security arrangements by the Barbados Police Force should be secured



Figure 3.43. Local rickshaw (left); Jitney (middle); miniature replicas of a Rocklyn bus (right).

Challenges With Implementation:

- Securing funding and sponsors for concerts and performances
- Having the maximum number of businesses in the city, particularly on Broad Street, open on the selected fair days, especially those that fall on holidays and Sundays
- Ensuring adequate security is in place to safeguard all patrons
- Coordination of the event between vendors, store operators, and attraction operators

Recommended Implementation Agency:

The BCCI (in collaboration with the BMA and proposed Barbados Festival Arts Association – refer Action 2.1j-9, Section 3.2.2.2).

Priority / Implementation Timeframe:

Medium /Medium Term: To allow for comprehensive planning with relevant stakeholders and organizations

Target Users:

- Vendors and businesses / retail shops in Bridgetown
- Locals
- Cruise passengers
- Stay-over visitors

Who Benefits:

- All business persons trading during the street Fair
- Creative stakeholders promoting their talents
- Visitors and locals attending the Fair

Risks:

- Non-participation by stakeholders
- Lack of support from locals and city businesses

Estimated Costs:

- Costs for staging a performance will be borne by each performing or exhibiting group in association with their individual sponsors
- Staging of the event, inclusive of marketing and promotion, is estimated at approximately BDS\$150,000

Source of Funds:

- BCCI and private sector sponsors
- BTA for marketing
- TDC
- Advertisers and event sponsors whose products are promoted at the event
- Vendor booth registration fees

Revenue Generation Potential:

- Increased product sales during the events
- Increased patronage of retail outlets in the city during Fair days
- Indirect revenues can be gained through word-of-mouth promotion of Barbados as a vibrant destination and corresponding increases in visitors

Further Development Work Required:

- Activity planning with stakeholder groups
- Marketing planning
- Engaging advertisers and sponsors

Other Considerations: Linkages with Community Tourism, Marketing ICTs and New Media, Cultural Heritage and Attractions

List of Acronyms

ABC	Aruba, Bonaire and Curacao
ABCH	Adams-Barrow-Cummins Highway
ABTA	Association of British Travel Agents
APD	Air Passenger Duty
APIS	Advanced Passenger Information System
BAC	Barbados Arts Council
BAS	Barbados Agricultural Society
BCC	Barbados Craft Council
BCC	Barbados Community College
BCCI	Barbados Chamber of Commerce and Industry
BCD	Barbados Council for the Disabled
BCG	Barbados Coast Guard
BDF	Barbados Defence Force
BDS	Barbados Dollars
BEF	Barbados Entrepreneurship Foundation
BFA	Barbados Football Association
BHF	Barbados Hockey Federation
BHTA	Barbados Hotel and Tourism Association
BID	Business Improvement District
BIDC	Barbados Investment and Development Corporation
BMA	Barbados Manufacturers Association
BMHS	Barbados Museum and Historical Society
BNSI	Barbados National Standards Institute
BPI	Barbados Port Inc.
BREA	Business Research and Economic Advisors
BRIC	Brazil, Russia, India, China
BRSA	Barbados Road Safety Association
BRTA	Barbados Road Tennis Association
BSA	Barbados Sailing Association
BSAF	Barbados Summer Arts Festival
BTA	Barbados Tourism Authority
BTB	Barbados Transport Board
BTII	Barbados Tourism Investment Inc.
BWA	Barbados Water Authority
CAA	Civil Aviation Authority
CAGR	Compound Annual Growth Rate
CARICOM	Caribbean Community
CBB	Central Bank of Barbados
CBC	Canadian Broadcasting Corporation
CBT	Community-based Tourism
CCCCC	Caribbean Community Climate Change Centre
CCL	Carnival Cruise Lines
CCLEC	Caribbean Customs & Law Enforcement Council
CCMF	Caribbean Centre for Money and Finance
CDB	Caribbean Development Bank
CDEMA	Caribbean Disaster and Emergency Management Agency
CERMES	Centre for Resource Management and Environmental Studies
CHENACT	Caribbean Hotel Energy Efficiency Action Programme
CLIA	Cruise Lines International Association
CLOBI	Cricket Legends of Barbados Inc.
COO	Chief Operations Officer

COSCAP	Copyright Society of Composers, Authors and Publishers
COTED	Council of Trade and Economic Development (of CARICOM)
CPACC	Caribbean Planning for Adaptation to Global Climate Change Project
CPL	Caribbean Premier League
CRMP	Coastal Risk Assessment and Management Programme
CRT	Centre for Responsible Tourism
CSO	Civil Society Organization
CSWA	Caribbean Spa and Wellness Association
CTO	Caribbean Tourism Organization
CZMU	Coastal Zone Management Unit
DC	Dual Carriageway
DEM	Department of Emergency Management
DG	Director General
Dlx	Delux
Dlx+	Delux Plus
DMC	Destination Management Company
DOH	Duncan O'Neal Highway
EBH	Ermie Bourne Highway
EBIT	Earnings Before Interest and Taxes
ECA	Environmental Control Area
ECC	European Cruise Council (now CLIA Europe)
ECLAC	Economic Commission for Latin America and the Caribbean
Econ	Economy
Est.	Estimated
EU27	27 Members of the European Union
FAA	US Federal Aviation Administration
FAB	Fully Accessible Barbados
FCCA	Florida Caribbean Cruise Association
FIFA	Fédération Internationale de Football Association
GAIA	Grantley Adams International Airport
GCCA	Global Climate Change Alliance
GHG	Greenhouse gases
GIS	Government Information Service
GOB	Government of Barbados
GP	Geographic Positioning
GPW	G.P. Wild (International) Limited
HCTI	Holetown Chamber of Trade Inc.
HM Gov	Her Majesty's Government
HNIC	Hockey Night in Canada
HRH	His Royal Highness
IADB	Inter-American Development Bank
IAEG	Inter-Agency Executive Group
IASA	International Aviation Safety Assessment Programme
IATA	International Air Transport Association
ICAO	International Civil Aviation Organization
ICC	International Cricket Council
ICT	Information and Communications Technology
IFEA	International Festivals and Events Association
IFI	International Financial Institution
IICA	Inter-American Institute for Cooperation in Agriculture
IIED	International Institute for Environment and Development
Inc.	Incorporated
IOM	International One Meter (Boats)
IPCC	Intergovernmental Panel on Climate Change

ISAF	International Sailing Federation
ISO	International Standards Organization
IT	Information Technology
ITD	International Transport Division (of Ministry of Tourism)
JCI	Joint Commissions International
JV	Joint Venture
JRCC	Joint Regional Clearance Centre
LB	Lower Berths
LCC	Low Cost Carrier
LESC	Lloyd Erskine Sandiford Centre
LFI	Local Financing Institution
LOS	Length of Stay
MED	Ministry of Environment and Drainage
MHA	Ministry of Home Affairs
MICE	Meetings Incentives Conferences Events
MOT	Ministry of Tourism
MTI	Ministry of Tourism and International Transport
MSC	Mediterranean Shipping Cruises
MTW	Ministry of Transport and Works
NBSAP	National Biodiversity Strategy and Action Plan
NCC	National Conservation Commission
NCF	National Cultural Foundation
NCL	Norwegian Cruise Line
NFL	National Football League
NGO	Non-Governmental Organization
NHCA	National Heritage Conservation Area
NHL	National Hockey League
NIFCA	National Independence Festival of Creative Arts
NISE	National Initiative for Service Excellence
NOK	Norwegian Kroner
NPDP	National Park Development Plan
NRMU	Natural Resources Management Unit
NSC	National Sports Council
NTHP	National Tourism Host Programme
NTP	National Transport Plan 1996
Nyr	Not Yet Rated
OAS	Organization of American States
ODI	Overseas Development Institute
ODS	Ozone depleting substances
OECS	Organization of Eastern Caribbean States
OEG	Oxford Economics Group
PAH	Princess Alice Highway
Panamax	Cruise ships that do not exceed the current maximum permitted beam of 32.25 metres for ships that wish to transit the Panama Canal
Pax	Passengers
PB	Prescod Boulevard
PCW	Pinelands Creative Workshop
PDP	Physical Development Plan
Post-Panamax	Cruise ships that exceed the current maximum permitted beam of 32.25 metres for ships that wish to transit the Panama Canal
POV	Purpose of Visit
PR	Public Relations
PSA	Passenger Shipping Association (now CLIA UK and Ireland)
PSV	Public Service Vehicle

Q1	First Quarter
Q2	Second Quarter
Q3	Third Quarter
Q4	Fourth Quarter
QR	Quick Response Code
RBPF	Royal Barbados Police Force
RCCL	Royal Caribbean Cruise Lines
RCI	Royal Caribbean International
RMH	Ronald Mapp Highway
ROI	Return on Investment
RSS	Regional Security System
RTA	Road Traffic Act
SBA	Small Business Association
SCCA	Southern Caribbean Cruise Association
SDx	Super Deluxe
SGH	Spring Garden Highway
SITA	Société Internationale de Télécommunications Aéronautiques
SJPP	Samuel JackmanPrescod Polytechnic
SME	Small and Medium-Sized Enterprises
SMI	SMI Infrastructure
SOL	Simpson Oil Limited
Std	Standard
STED	Security Tamper-Evident Bag
STEP	Schools Tourism Education Programme
SWOT	Strengths, Weaknesses, Opportunities, and Threats
TA	Transport Authority
TCDPO	Town and Country Development Planning Office
TDC	Tourism Development Corporation
TESOL	Teaching English to Speakers of Other Languages
TEAM	Tourism Education and Me
TMP	Tourism Master Plan
UK	United Kingdom
UNEP	United Nations Environment Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNFCCC	United Nations Framework Convention on Climate Change
UNWTO	United Nations World Tourism Organization
UWI	University of the West Indies
VAT	Value Added Tax
VMO	Volunteer Managing Organizations
VRO	Volunteer Receiving Organization
VSO	Volunteer Sending Organization
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council
YWAM	Youth With a Mission
ZM	Maxi-Taxi (Barbados)
ZR	Route Taxi (Barbados)

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