

TABLE OF CONTENTS

1.

Executive Summary	ii
1. Policy Formulation Process	1
2. Introduction.....	2
3. Vision Statement.....	2
4. Tourism - A Global and Regional Perspective.....	3
5. Overview of Tourism in Barbados.....	8
6. Why Tourism?.....	13
7. Opportunities and Challenges in Barbados' Tourism Development.....	18
8. Approach to Tourism Development - Towards a New Tourism	20
9. Critical Issues in Barbados' Tourism Development.....	24
10. Barbados' National Tourism Policy Statement	30
Broad Policy Objective	30
10.1 Awareness	31
10.2 Human Resources	32
10.3 Organisational Structure	33
10.4 Standards.....	34
10.5 Contribution to the Economy.....	35
10.6 Investment.....	36
10.7 Marketing.....	37
10.8 Community Involvement	38
10.9 Services	39
10.10 Accommodation	40
10.11 The Built Environment	41
10.12 The Natural Environment	42
10.13 Cultural Heritage.....	43
10.14 Land Use	44
10.15 Intersectoral Linkages.....	45
10.16 Technology.....	46
10.17 Safety and Security	47
10.18 Airlift.....	48
10.19 Cruise Tourism.....	49
11. Role of Stakeholders.....	50
Appendices & Figures	
Figure 1	Organisation of Tourism in Barbados
Appendix 1	Tourism Stakeholders Consultation – Organisations Attending
Appendix 2	Targets 2001-2010

Executive Summary

This document provides a broad policy framework which should guide the sustainable development of the tourism industry in Barbados in the short to medium term. This policy **differs from a distinct plan in that it sets forth broad guidelines for the furtherance of the industry; while the plan that will follow will present specifications to be conducted within the stated policy.** The guidelines presented here represent the culmination of wide public discussion and consultation among tourism stakeholders, including the public and private sectors, non-governmental organisations, local community groups, trade associations and unions.

The discussion on tourism and its role in sustainable, socio-economic development continues to be of great importance at the local, regional and international levels in all sectors: public, private and civil society. The emphasis on sustainable development in this document comes from a recognition that many of the practices of local tourism stakeholders in the past were either not economically, socially or environmentally sustainable. Consequently, the conclusion has been drawn that these practices must be altered if Barbados is to have a real and sustained future in tourism.

The vision for tourism in Barbados in the medium to long-term can effectively be captured in the following assertion made by His Excellency Sir Clifford Husbands during his Speech from the Throne on February 16, 1999 “ My Government will create the conditions for the sustained and sustainable growth of the Barbadian economy, principally by accelerating our nation’s transformation into a high quality export service economy, with a fully developed tourism and hospitality industry as its chief engine of growth”. Consequently, this paper seeks to develop a greater awareness of the role that tourism has played to date and must continue to play in the social and economic development of Barbados. It will provide tourism stakeholders with specific guidelines for the sustainable development of the industry while encouraging both Barbadians and visitors alike to take full advantage of available opportunities to invest in the future of the industry and by extension the country’s overall development.

This document provides an overview of tourism development from a local and regional perspective. In particular, it examines the structure of tourism in Barbados, identifies and discusses the emerging new global challenges facing the tourism industry; including trade liberalisation, the growing role of information technology, increased competition, the increasing role of the local community impacting on the sector, the need for effective sustained partnerships among all sectors, the need for greater overall awareness of the industry, and the importance of preservation and conservation of the built and natural environment.

In examining why Barbados should pursue a tourism-led development strategy, this paper clearly outlines and demonstrates the effectiveness of tourism in promoting economic, social and cultural development as well as environmental conservation. The concept of “responsible tourism” is examined and proposed as the guiding principle for tourism development in Barbados. The term implies a proactive approach by all industry partners to develop, market and manage the industry in the most responsible manner so as to create a sustained competitive advantage.

Since the tourism industry is possibly the most dynamic and competitive of the productive sectors on which our nation is dependent, there is a crucial need to employ the use of appropriate research on the industry focusing specifically on the different issues which have the ability to impact on the industry either positively or negatively.

Tourism Planners and policy makers must also make use of available management tools to analyse Barbados' performance to continue to position and reposition our product where we can compete most effectively. This paper proposes that Barbados should be positioned as an upmarket, quality destination that focuses on the brand elements of **“friendliness”, “cleanliness” and the provision of a safe and secure environment** and offering the highest possible value for money.

This ideal is well within the reach of Barbados as a destination, but will depend on a commitment by all tourism stakeholders to ensure the same. This document provides that set of guiding principles and critical success factors identified to date which will be necessary to ensure the sustainability of tourism in Barbados. It assumes, inter alia, that Barbados will continue to be a “high quality” tourism destination, that Government will pursue a services-led development strategy, that the private sector will become more knowledgeable to take advantage of the concessions and other benefits provided to them by Government and that workers' representatives and employers will collaborate in a cordial labour relations environment for their mutual benefit and for the development of Barbados as a whole.

The elements of participation, collaboration and conservation are evident throughout the Barbados National Tourism Policy which has as its broad policy objective:

To pursue sustainable tourism development through improvement and optimal use of our land, human resources and services, and through the conservation and managed use of our cultural, built and natural heritage, in order to ensure a product of the highest quality whilst improving the life and economic development of the people of Barbados.

The specific objectives outlined in the policy focus on issues which stakeholders identify as those which are critical to the sustainable development of the tourism industry. The policy has therefore formulated guidelines which could be used to develop strategies for each of the areas of Awareness, Human Resources, Organisational Structure, Standards, Contribution to the Economy, Investment, Marketing, Community Involvement, Services, Accommodation, the Built and Natural Environments, Cultural Heritage, Land Use, Intersectoral Linkages, Safety and Security, Airlift and Cruise Tourism.

The need for participation and collaboration by all stakeholders is constantly stressed throughout the document. The all-embracing nature of tourism makes it imperative that strong partnerships be developed and retained between and within the public and private sectors, labour unions and civil society. This process has already begun, and has borne fruit as evidenced by the information presented in this document.

Local communities are becoming increasingly vocal with regard to national tourism development policies that will impact on them. Furthermore, most regional and international development agencies now require social and environmental impact assessments as conditions precedent to the awarding of aid for development projects and are most careful to examine the impact on and involvement of local communities in such projects. Additionally, this paper outlines the roles of the various stakeholders in the sustainable tourism development process in Barbados.

This document attempts to offer a most comprehensive approach to the analysis of tourism development in Barbados. Additionally, it articulates a holistic approach to the management of the local tourism industry. It has sought to identify all of the challenges and issues which must be addressed in order to achieve sustainability. However, since these challenges and issues are also independently important, all strategies which are presented in this document are equally important to the well being of the tourism industry.

1. The Policy Formulation Process

A national tourism policy is an expression of how the vision for developing tourism in a destination can be realised. It sets the overall framework or parameters for tourism development for the particular area. A policy differs from a plan in that a plan sets forth the specific activities to be conducted within the ambit of the stated policy. Ideally, plan formation follows the development and acceptance of the policy. An integral component of any tourism plan will be the monitoring and evaluation mechanisms for such a plan. These mechanisms will, of course, have to be built into the plan itself.

The draft tourism policy for Barbados represents the first attempt at developing a policy for tourism in a participatory manner. The Tourism Advisory Council (TAC) was given responsibility for developing the first draft that was reviewed by the Ministry of Tourism and revised in collaboration with the TAC. The process of developing the policy is as important as the policy itself. Consequently, the document was then widely circulated to all tourism and related organisations and individuals in the public sector, private sector and civil society. Relevant regional and international organisations with offices in Barbados were also invited to comment. The document was further revised, incorporating the submissions received and used as a base document for a national tourism policy forum involving the stakeholders to whom the first draft of the document was sent. The document was once again revised based on input from the forum and submitted to Cabinet for comment and permission to publish for public discussion. Approval was granted to publish the policy document as a discussion paper.

Maximum participation of all stakeholders was the ideal in the policy formulation process. Consequently, three (3) stakeholder consultations were held in September 2000, during which the document was again reviewed and revised. These included a national tourism forum on September 5 at the Garfield Sobers Gymnasium which was attended by more than one hundred persons. A list of some of the organisations represented at the forum is at Appendix 1.

This exercise was followed by the publication of the amended document in the Nation and Advocate newspapers for public review and comments. Moreover, two public meetings were held during the month of November 2000, at which approximately two hundred and fifty persons from a wide cross-section of the Barbadian public discussed issues emanating from the policy document. Subsequently, a special radio programme, utilising recorded output of these meetings, was aired by Voice of Barbados affording the wider public the opportunity to become aware of the process that was taking place.

Some of the comments and suggestions from the various fora were used to amend this document which is intended to be a blueprint for tourism development in Barbados.

2. Introduction

It is well documented that tourism is the world's largest and fastest growing industry. It is a powerful tool that has the potential to contribute positively to the economic and social advancement of developing countries in addition to acting as a catalyst for environmental conservation. However, while tourism has this potential, it can also lead to negative consequences that can have serious implications for the achievement of sustainable development.

The discussion on tourism and its role in sustainable development continues to assume greater prominence at the local, regional and international levels in all sectors: public, private and civil society. Much evidence of this can be found in the range of declarations, papers, work programmes and other documents produced by various organisations. Many of these documents call for tourism to act as a vehicle for the promotion of sustainable development through, inter alia, better planning, management, monitoring and the involvement of all stakeholders at the various levels of the tourism development process.

Tourism currently plays the lead role in the economy of Barbados and, therefore, has the potential to be Barbados' major vehicle for sustainable development. Indeed, the industry has recognised that it has to change its methods of doing business if it is to remain competitive and be sustainable in the long term. Therefore, since the early 90s, industry practitioners have been examining the sector in a more holistic manner. There is consensus within the industry that there is a need for a 'new' tourism for Barbados. This new thrust would promote the development of sustainable tourism through product diversification while ensuring commitment to the most practical use of human and other resources.

This policy document is being developed against the backdrop and on the basis that

- i. Barbados will continue to be one of the leading Caribbean tourism destinations,
- ii. the characteristics of our target markets will remain the same,
- iii. Barbados will maintain a stable political and social climate;
- iv. the physical environment will be protected and conserved, including measures to mitigate against the negative impacts of climate change, and
- v. tourism will remain the chief engine of economic growth in the medium to long term.

3. Vision Statement

The tourism industry, as the main catalyst for economic development in Barbados, will be the primary vehicle for ensuring that Barbados is transformed into a high quality export service economy.

The sector will continue to offer an attractive and practical mix of tourism product which will ensure that Barbadians at all levels are in a position to benefit from the tourism industry while enhancing our economic, social, cultural and physical environments.

4. Tourism - A Global and Regional Perspective

Travel and tourism is the world's largest industry. The World Tourism Organization has estimated world-wide receipts from international tourism at US\$ 455 billion in 1999. The USA with US\$ 74.4 billion earned 16.4 percent of total receipts. In 1999, receipts from tourism amounted to more than US\$ 1 billion for 59 out of 200 countries and territories

The tourism industry is, for many countries, particularly in the Caribbean, the largest single sector of the economy. The WTO estimates that tourism is the main source of foreign exchange for 38 percent of all countries. It is also the largest generator of employment and the largest user of human, physical, cultural and natural resources for many countries.

Tourism has grown rapidly since 1950 aided by higher disposable incomes, increased leisure time, higher education levels and improved technologies to facilitate easier travel and better communication. The tourists themselves have also changed, becoming more environmentally aware and wishing to learn more about the communities in which they vacation. Generally, there has been a growing emphasis on leisure travel as frequent short breaks become the norm in mature economies and as middle-income wealth is created in emerging economies. Barbados should, therefore, implement measures to ensure it is poised to embrace the new travel environment.

4.1 Global and Regional Performance

World tourist arrivals grew annually at 4.7 percent from 25 million in 1945 to 664.4 million in 1999 and continue to grow while world tourism revenues have been growing at 13 % per annum since 1980.

The Caribbean Tourism Organisation (CTO) has indicated that from 1980 to 1997, stayover arrivals in the Caribbean grew by 195.4 percent. By 1999, approximately 20.3 million tourists and 12.1 million cruise passengers were visiting the Caribbean annually. Approximately 42 percent of the world's cruise ships are also deployed in the Caribbean. Although this percentage is down from 51 percent in 1991, total arrivals to the Caribbean continue to increase since cruise ships are becoming much larger, with some ships carrying as many as 4,000 passengers. It is believed that cruise passenger arrivals in the Caribbean will also continue to grow steadily over the next ten years.

4.2 Challenges

Caribbean countries must adopt effective regional and national policies, plans and strategies to confront the serious challenges which have been facing the region. These include competition from traditional tourist generating regions, many of which have always been, in essence, tourist destinations, but have now chosen to be more aggressive in their marketing strategies. Additionally, there are several new emerging destinations. Furthermore, the quality of our tourism product has to be maintained in such a manner as to meet the needs of our visitors while preserving the integrity of our resource base as well as ensuring host population acceptance of our tourism development efforts.

We must be cognizant of the effects that globalisation and the rules and regulations of the World

Trade Organisation will have on our tourism industry and the way we approach the development of tourism in Barbados. The growing importance of information technology to the travel industry is one which requires earnest attention. It is key to the economic survival of the industry and is central to any new distribution channels, especially those going directly to customers.

4.2.1 Increased Competition

The World Tourism Organisation has reported that Europe and the Americas are still the main tourist-receiving regions capturing 59 percent and 19 percent respectively. However, the East Asia and Pacific region is the fastest growing region and accounted for a 15 percent share of the world market in 1999 in spite of small declines in 1997 and 1998 due to the financial crisis. A record total of 97.2 million international tourists visited the Asia/Pacific region in 1999 as compared with the 394.1 million who visited Europe and the 122.9 million who visited the Americas.

The increased performance of these regions present a challenge for the Caribbean. It should be noted that nearly half of the world's population lives within a five-hour flight from Hong Kong, and in China, 34 airports were under construction in 1996. To handle the growing number of passengers in Asia and elsewhere, aircraft manufacturers world-wide are concentrating on planes with larger capacity rather than higher, supersonic speeds.

4.2.2 Product Enhancement

The tourism product includes air, ground and sea transportation, accommodation, natural and man-made attractions, infrastructure and services used by visitors during their stay at a destination. New types of tourism have emerged to meet the changing needs of tourists including ecotourism, adventure tourism, sports tourism, conference and incentive tourism and the accompanying segmentation of markets. In recent times, multi-destination packages have also grown in popularity.

Caribbean governments must continue to develop strategies to ensure that the product is competitive and of a high quality. In order to achieve these goals, there is need for continuous enhancement, diversification, the development of standards and the integration of conservation practices throughout the tourism industry.

4.2.3 Resource Requirements

Regional governments are further challenged to find the financial resources to maintain, develop and augment the tourism product without compromising the very environment on which the product is based.

Just as destinations compete for visitors they compete for investment. CTO estimates that the number of rooms in the Caribbean increased from 83,774 in 1980 to 183,557 in 1996, representing 357,114 beds out of a world total of 22.5 million. The number of rooms in the Caribbean increased by an average of 6,236 rooms per year. The total number of rooms in Barbados is now just over 6,000. Much of the new accommodation has been built in the

Dominican Republic, Cuba and Jamaica which have recorded 31,929; 19,352 and 11,892 rooms respectively.

CTO further estimates that this region will require an additional 120,000 rooms between 2000 and 2010; and that there will be need for extensive refurbishment of accommodation since in 1993 about 63 percent of the rooms in the region were already over 15 years old. There is also clearly a need for improvement and additions to the attractions, infrastructure and services as there is for enhanced human resource development in the Caribbean. Since these improvements will require an estimated US \$5 billion annually, the Caribbean must, of necessity, create a climate which is more conducive to local and foreign investment.

4.2.4 Resource Conservation

Every effort must also be made to conserve our natural and cultural heritage. It is recognised that sustainable tourism can be a catalyst for conservation and improvement of the natural environment and culture. Collaboration among all stakeholders – public and private sector, non-governmental organisations, communities, trade associations – is necessary if effective resource conservation is to take place. Conservation initiatives such as Agenda 21 for the Travel and Tourism Industry, the Green Globe Programme of the World Travel and Tourism Council (WTTC), the International Hotels Initiative, the Caribbean Hotel Association's programmes (CHA) through its Caribbean Action for Sustainable Tourism (CAST), the CTO's Strategic Plan for Sustainable Tourism and the Association of Caribbean States' (ACS) proposal to make the Caribbean the first sustainable tourism zone, have laid a foundation that can be built upon by all Caribbean countries.

4.2.5 Information Technology

The correct use of information technology has become indispensable in lowering the cost of business processes, such as inventory management, scheduling, creating state-of-the-art infrastructure and customer service. Improved technology is helping companies meet the demands of their clients in a timely and efficient manner and providing end users with new options at more competitive prices.

In the travel industry, the constant improvement of information technology is a key competitive weapon for both companies and government agencies. As a case in point, customs and immigration in Europe, the United States and elsewhere around the world have become highly automated, enabling the ports of entry in these countries to handle large volume of travelers in shorter periods of time.

Data and voice transmissions have also become more efficient through digitalization, wireless communication and higher bandwidth networks which result in easier and faster access to information across all networks. Caribbean governments need to continue to take advantage of these resources to market the region as a premier destination for visitors and investors, and to source information on visitor trends, new issues in the tourism industry and market research which would assist greatly in the formulation of policies and plans.

The use of new technologies such as the Smartcard, presently used in Automatic Banking Machines, is also expected to become more prevalent in tourism operations worldwide in the

future. Additionally a comprehensive revamping of tourism facilities utilising the appropriate technologies will result in an industry which is more user-friendly and efficient.

The growing use of information technology, which is constantly improving, should also see a change in the role of the industry's distribution channels which will impact significantly on the tourism industries in the Caribbean. The role of the travel agent has already been affected by the increasing use of electronic reservations by consumers, with more emphasis being placed on advice and planning of the total trip. Travel agents are now offering a fuller range of services including the facilitation of bookings and payments for hotels, attractions and car rental services, and the provision of ancillary services such as home protection for the traveler.

The total product of a destination will increasingly come under scrutiny as the service provided by travel agents becomes more consumer-friendly and comprehensive. There will also be a necessity to pay greater attention to a total quality product by proven and tested international standards, and the provision of accurate, timely and detailed information on the product and the destination as a whole to be accessed by travel agents, consumers and investors.

4.2.6 Globalisation and Trade Liberalisation

The General Agreement on Trade in Services (GATS), administered by the World Trade Organisation, presents many opportunities and challenges for Caribbean tourism planners. GATS seeks primarily to promote economic integration and technical co-operation among all countries, the expansion of the service trade and greater access to trade opportunities by developing countries.

The main feature of the GATS is the four modes of supply regulating trade in services: namely, cross-border supply, consumption abroad, establishment of a commercial presence and movement of natural persons. Of these, consumption abroad defines the tourism industry and commercial presence and movement of natural persons have long been main features of the tourism industry. International hotel chains have over the years established a presence in many tourist destinations and have insisted on moving at least their top level management staff. Furthermore, with the growth in internet and wide spread availability of telecommunication services, cross-border supply now forms an integral part of operations in the sector. In this sense, tourism can be said to be one of the most WTO-compliant industries. However, there is increasing pressure to have incentives, which form an important aspect of negotiations for new investment in the tourism industry, treated as subsidies. This is bad news for many Caribbean destinations which depend heavily on direct foreign investment to develop their tourism infrastructure.

There is an urgent need to define the region and, hence, strengthen its position as a grouping in international negotiations. This will involve a detailed examination of the various groupings and sub-groupings existing within the Caribbean, particularly the Caribbean Common Market (CARICOM) and the Association of Caribbean States.

In order to facilitate the cross-border supply of human resources, many countries will begin to source skilled and semi-skilled labour from other countries with lower labour costs. Caribbean Governments will, therefore, need to develop measures to guard against the displacement or

disenfranchisement of the local labour force, while ensuring that the imported labour is of a high quality through the implementation of standards for its tourism services and human resources. Adherence to the WTO rules governing trade in goods and services will necessitate the relaxation of all inequitable tariffs that will mitigate against the easy transfer of goods and services and the movement of people for leisure and business. Consideration will, therefore, have to be given to the reduction of duties for imported goods and services, and the removal of exit taxes for residents to promote travel to other countries. In order to maintain tourism's position as the lead economic sector, the Caribbean will have to deliver a quality product at competitive prices.

5. Overview of Tourism in Barbados

5.1 Background

Barbados is one of the most mature Caribbean tourism destinations. Large-scale tourism development dates back to the late 50s and early 60s, but colonial ties to Britain had made it a popular destination for wealthy British nationals for many years before World War II. However, the absence of a strong tourism planning and policy framework, in the early stages of its development, has contributed to a range of environmental and social challenges that can be attributed, if only partially, to tourism development. Nevertheless, tourism continues to be the major foreign exchange earner, providing direct and indirect employment for thousands and serving as a catalyst for growth and development in other sectors.

5.2 Organisational Structure

Barbados' tourism industry is managed by a combination of public, private and non-governmental organisations (see Figure 1), which meet regularly in a variety of formal and ad hoc groupings. Policy formulation, planning, management and monitoring of the industry are, therefore, the shared responsibility of a range of stakeholders.

The Ministry of Tourism is the principal public sector agency and is responsible for spearheading policy formulation and plan development, conducting research and facilitating and monitoring of product development activities.

Other public sector agencies are as follows:

- The Barbados Tourism Authority - a statutory corporation which falls under the Ministry of Tourism with, inter alia, responsibility for marketing.
- The Tourism Advisory Council - an advisory body comprising public, private, non-governmental organisations and individuals. It advises the Minister on any tourism or related matter which it deems fit as well as undertakes specific assignments given by the Minister.
- The Barbados Tourism Investment Inc. - a limited liability company, with Government as its sole shareholder, responsible for tourism investment promotion and development in Barbados.
- The Needhams Point Development Inc. - a limited liability company with Government, at the moment, as its sole shareholder. It is mainly responsible for overseeing the development of Needhams Point as a Tourism Resort Area and the redevelopment of the Hilton Hotel.
- The Barbados Conference Services Ltd (BCSL) - a limited liability company with Government as its sole shareholder. BCSL's main responsibility is the management of the Sherbourne Conference Centre. Horizon Event Planners was established to provide meeting planning services.

In the private sector, the two primary agencies are:

- The Barbados Hotel and Tourism Association - a trade organisation representing the interests of the industry; and
- The Tourism Development Corporation - a non-profit organisation funded entirely by private sector companies and sponsors. These entities contribute two percent of pre-tax profits and can claim 150 percent of this amount against their taxable income. Their funds are used to assist in product development and promotional activities for the sector.

Many non-governmental organisations have been involved in tourism development including the Barbados National Trust and the Barbados Museum and Historical Society. These organisations have been working primarily on the conservation of built, cultural and architectural heritage and, to a lesser extent, on the natural heritage. The Pinelands Creative Workshop, a community-based organisation, has also been involved in poverty alleviation using tourism as one vehicle.

Other agencies that are closely related and play major roles in tourism development are the National Conservation Commission, the Ministry of Environment, the National Cultural Foundation, the Town Planning Department and the Ministry of Finance and Economic Affairs.

5.3 Product

The tourism product must be considered as the total vacation experience, starting when the consumer travels to Barbados and including the accommodation and transport facilities used, the activities in which he/she participates, the services used, the infrastructure, the level of safety and security that exists and the quality of the built, human, socio-cultural and natural environment.

Barbados' product is based on the human, built, natural, cultural and social resource base of the island. While Barbados, like most tropical island destinations, is known because of the primary natural attributes of its climate and coastal environment, the other components, particularly its people and built, cultural and natural heritage elements are of critical importance. Barbados' product is diverse in quality and quantity and includes an accommodation complement of 6,315 rooms, scores of restaurants and other food and beverage facilities, nature attractions including underground caves and marine parks, historic sites, festivals, golf courses and a range of other activities.

The new legal and regulatory framework and policy being developed for tourism are designed to, inter alia, facilitate planners and operators in the industry to incrementally improve all of our properties, facilities and systems to sell Barbados as a high quality destination, not only to visit but to invest in.

5.4 Involvement of Local Communities

Increasingly, planners and policy makers are recognising the role that local communities must play in the planning, development and operation of tourism if the industry is to be successful. Furthermore, local communities are becoming more aware of their rights and are prepared to express their views in the media and through public demonstrations.

Many international funding agencies now include the involvement/treatment of and impact on local communities as one of the conditions precedent to the award of funds for projects. Hence, social impact assessments are now a requirement for many tourism and other development projects.

5.4.1 Factors that Limit the Meaningful Involvement of Communities in the Tourism Industry

- Lack of information and awareness
- Lack of know-how and training
- Lack of finance
- Lack of interest on the part of some existing establishments to build partnerships with local communities
- Lack of incentives to reward private enterprise that build or develop local capacity and create jobs through community linkages

5.4.2 Concerns of Local Communities

The concerns and anxieties of these previously neglected groups need to be understood and adequately addressed in building a successful tourism industry in Barbados.

Some of these concerns focus on the following issues:

- Tourism is a business where only the wealthy in the society benefit.
- The majority of our people have never been meaningfully exposed to the industry.
- There is much suspicion and mistrust regarding major players in the industry.
- Lack of knowledge and understanding of what tourism really is and how it works.
- Lack of training opportunities for local communities.
- Inability to access adequate financing to take advantage of entrepreneurial opportunities provided by the sector.
- Lack of involvement by most Barbadians in the planning, decision making, investment, development and promotion of the industry.
- Negative attitudes exist within the industry towards community tourism products which are often viewed with skepticism and regarded as inferior within the formal sector.
- Lack of market access – local communities lack access to the lucrative tourism markets.
- Barriers to entry caused by very large organisations and corporate structures which control the market.

5.5 Recent Performance

5.5.1 Tourist Arrivals

In 2000, Barbados received a total of 545,027 tourist visits. This figure represents a 5.9 percent increase in tourist arrivals for 2000 over 1999. This is also the eighth consecutive year that tourist arrivals have increased and is the longest period of sustained growth in tourist arrivals since 1975. It is worthy of note that this increase was achieved while Sandy Lane and Hilton, two major hotels, were not in operation due to reconstruction.

The UK, with an increase of 11.2 percent in tourist arrivals for 2000 over 1999, continued to dominate, accounting for 41.4 percent of total tourist arrivals in 2000. This increase is even more remarkable considering that it follows a record performance in 1999 when there were 202,712 UK visitors, representing some 39.2 percent of all tourist arrivals.

Arrivals from the USA increased by 7.8 percent. This was the second consecutive increase recorded by this market since 1995. Canada with 14.1 percent has increased moderately, while arrivals from Germany and Other Europe have declined by 15.6 percent over 1999.

5.5.2 Cruise Passenger Arrivals

An increase of 23.3 percent in cruise passenger arrivals was recorded for 2000 over 1999. This comes after two consecutive years of decreases and is 3.0 percent more than in 1997 when the highest level of cruise passenger arrivals was recorded.

The number of ship calls increased from 406 in 1999 to 484 in 2000. This reversed a downward trend in cruise activity in Barbados.

While it is expected that there will be a decrease in the number of ships calling at Barbados in 2001, larger ships will ensure that total berths will not decline.

5.5.3 Regional Perspective

Among the member countries of the Caribbean Tourism Organisation (CTO) with more than 200,000 tourist arrivals a year, Cozumel (Mexico) with 16.8 percent recorded the highest increase in 1999. Cancun (Mexico), with 2,818,326 arrivals, accounted for the greatest share of the market at 13.9 percent, followed by the Dominican Republic which commanded a market share of 13.0 percent. Barbados recorded a market share of 2.5 percent, while Jamaica and St. Lucia recorded shares of 6.1 and 1.3 percent, respectively.

Cancun continued to lead other Caribbean countries in the U.S. market with a market share of 16.3; with the Dominican Republic, Jamaica and St. Lucia recording market shares of 6.1, 9.2 and 0.9 percent respectively. Barbados was able to record a meagre market share of 1.1 percent. However, Barbados outperformed other Caribbean destinations in the U.K. market with a share of 19.0 percent, as compared to Cancun with 9.9 percent, Dominican Republic with 10.4, Jamaica with 11.7 and St. Lucia with 6.6 percent.

There was generally a less than robust regional performance. Only Cozumel (Mexico), the DR, the USVI, Belize and Cuba recorded double digit increases. Five countries, with more than

200,000 arrivals per year, recorded decreases in 1999. Puerto Rico, with a decrease of 7.6 percent, showed the largest decrease in 1999.

Between 1993 and 1999, annual growth in arrivals to Barbados was generally lower than growth to the region as a whole. Notable exceptions were in 1994 and 1998.

5.5.4 Contribution to the Economy

In its review of the economy for 1999, the Central Bank of Barbados indicated that real Gross Domestic Product increased by 3.1 percent. The Bank opined that this growth was spurred by new investment, particularly in the tourism sector.

According to the CTO's Barbados Stayover Visitor Survey for the quarter July to September 1999, total expenditure per stayover visitor increased from US\$98.53 to US\$120.01. The US tourists were the biggest spenders with an average daily expenditure per person of US\$140.16. The next highest were the Europeans with a rate of US\$122.31 per person.

In addition to the direct receipts by operators in the travel and tourism sector and tax revenues by the various agencies of government, significant construction activity in the tourism sector would have stimulated growth in a number of other sectors and directly and indirectly contributed to the low level of unemployment recorded for 1999. However, employment in the industry itself fell off as a result of the closure, for re-construction, of two major hotels.

Visitor expenditure was US\$493.5 million in 1990 and reached US\$0.7 billion by the end of 1999. This reflects an increase of over 41.8 percent in only nine years. According to the Central Bank of Barbados, over 70 percent of our foreign exchange was earned by tourism in 1999.

6. Why Tourism?

Tourism currently plays the major role in the economy of Barbados and is identified as the industry that will contribute towards the continued economic prosperity for the country, launch the country into further social development, and act as a catalyst for the conservation of the physical environment. Therefore, tourism as the main thrust of government's developmental strategy will enable Barbados to expand beyond its present horizons to ensure its position as a developed nation within a new and radically transformed global economy.

6.1 TOURISM AS A MECHANISM FOR ECONOMIC DEVELOPMENT

6.1.1 Tourism is a significant employment generator

The tourism industry is labour intensive since it is essentially a service industry. It comprises several segments; the principal ones being transportation, accommodation, food and beverage and activities. Given the diversification of the industry, each of these sub-sectors has many job opportunities and career paths. These range from accountants and aquatic specialists to museum guides and marketing officers; from travel writers and event planners to hostesses and engineers. Many skills are required during the construction phase of a tourism project and immediately upon completion additional skills are required for the operations phase.

The importance of the tourism industry to Barbados is reflected in the contribution it makes as an important generator of employment. In 1999, tourism in Barbados directly employed approximately 12.3 thousand persons, representing about 10% of the country's labour force. An additional 12 thousand persons were also indirectly employed by the industry.

6.1.2 Tourism is the leading foreign exchange earner

In Barbados, visitor expenditure amounted to Bds\$987 million in 1990 and reached over \$1.3 billion by the end of 1999. This reflects an increase of over 31.8% in nine (9) years. According to the Central Bank of Barbados, over 70% of our foreign exchange was earned by tourism in 1999.

This strong performance by the tourism industry is in marked contrast to the downward trend, over the same period, in foreign exchange earnings from the country's main visible exports such as sugar, agricultural and manufactured goods. For example, the value of sugar exports fell from \$71.9 million in 1990 to \$57.5 million in 1999 - a decrease of approximately 20%. Similarly, the value of agricultural and manufactured exports has been seriously affected by factors such as a decline in world-market demand and the challenges of trade liberalisation.

In this context, the role of tourism as a source of foreign exchange to meet the demands of a developing economy is crucial.

6.1.3 Tourism is a major contributor to Gross Domestic Product (GDP)

Tourism makes a substantial contribution to the country's GDP. In 1999, tourism's share of GDP stood at \$464.5 million and total visitor expenditure for that same period was approximately \$1,354 million. For 1999, tourism's share of GDP was 11.2 percent.

6.1.4 Tourism encourages inter-industry linkages

Tourism is a powerful stimulus for other sectors of the economy, through its potential for inter-industry linkages.

In the past, there was a failure to maximise the tremendous benefits to be gained from using local and even regional goods and services in the tourist industry. As a consequence, food and most finished goods required by hotels to satisfy tourist demand were mainly imported. This resulted in considerable leakage of foreign exchange.

Today there is increasing sensitivity in the tourist industry that locally produced goods and services should be used and the dependence on imports reduced. This process would lessen the country's dependence on outside factors, stimulate the local economy and encourage a greater sense of pride and self-determination in our people.

6.2 TOURISM AS A TOOL FOR SOCIAL AND CULTURAL DEVELOPMENT

6.2.1 Tourism promotes social interaction and harmony

Tourism can play a vital role in the process of integration not only at the level of the community and the region but also globally. Tourism allows us to fulfil ourselves universally and to establish bonds and contacts throughout the world and can therefore be an agent for peace.

Tourism can also integrate cultures and, in turn, give a stronger sense of national being and pride. In order to ensure that tourism gives more than it takes, efforts must be made to increase the involvement of local communities in the planning process and facilitate their investment in its growth and development.

In the process to sustainably develop tourism in Barbados, it is necessary to forge our own concept of tourism; one that respects our norms and sovereignty. Tourism today is creative, imaginative and expressive of what we are and of what we want to be. Therefore, future tourism development in Barbados must have the fullest participation that it can engender among all sectors and classes in the society.

We are cognisant that tourism has several social impacts on a destination: some negative, some positive. The challenge will, therefore, be to minimise the social problems while promoting and strengthening the benefits.

6.2.2 Tourism promotes cultural development

Tourism today is one of the driving forces behind the promotion of cultural events and the emergence of many indigenous cultural groups. Tourism has certainly helped to promote local art, song, music, handicraft, dance, dress and culinary arts. It has provided a means of demonstrating to the visitor the special characteristics which distinguish Barbados from other destinations. Thus, the tourism product is enhanced by an added cultural dimension.

However, among the negative impacts attributed to tourism have been its contribution to the disappearance of a country's culture, and the commercialisation and the mass production of that culture for consumption by foreign audiences, leading to a loss of its authentic value.

6.2.3 Tourism is a means of reinforcing awareness and respect for Barbados

Tourism awareness programmes are primarily aimed at sensitising the local population about the tourism industry. Public attitudes to tourism will become more positive as the residents perceive that their interests; economic and social, are being served rather than exploited by tourism.

Education about the industry ensures that the local population will become more familiar with Barbados' tourism product, its history, culture, folklore, people and its built and natural environment. This awareness reinforces a strong sense of pride in the resident population for things Barbadian and, thus, cultivates a healthy attitude towards the development of the industry.

6.2.4 Tourism creates opportunities for entrepreneurial activity

Tourism stimulates an informal economic belt, where those who possess varying skills and creative abilities have the opportunity to earn an income from selling or providing services to tourists. At present, the taxi-drivers, craft and fruit vendors, hair braiders and beach vendors are a major feature of Barbadian tourism.

Apart from the opportunities provided in the informal sector, there are other business opportunities available within the industry: operating small hotels and guesthouses, providing entertainment, transportation and laundry services, establishing catering facilities where local cuisine is prepared, are just a few examples.

6.2.5 Tourism brings development to rural areas

Tourism allows people from the rural areas to share in the benefits of tourism development, whether economic or social. One of the economic advantages of promoting tourism in rural areas is that most of the economic benefits of employment and income are received directly by the resident population who own and/or operate the tourist facilities and services. It also brings improved road and communications networks and other infrastructural developments to these areas.

Moreover, in developing tourism in rural areas, Barbados is able to promote a rural tourism product that caters to the tourist whose interest lies beyond the traditional sun, sea and sand product and who seeks to embrace a greater visitor experience through learning about indigenous life and folk culture.

6.3 TOURISM AS A CATALYST FOR ENVIRONMENTAL CONSERVATION

6.3.1 Tourism contributes towards environmental conservation

Critical to the success of the tourism industry, and consequently the social and economic development of Barbados, is the care and conservation of our natural environment. Tourism helps to justify the need and pay for the conservation of our beaches, our caves, our parks, our botanical gardens and our gullies; not only because they are major attractions for our visitors, but more importantly, because they are our country's greatest natural assets.

Tourism operators, who depend on a healthy reef for their activity, assist in educating the public about the importance of protecting our reefs and often lobby for their protection against unscrupulous operators and uncaring users. Furthermore, most nature-based sites would not be available to the public and many left to deteriorate were it not for their development and conservation for tourism purposes. The Adopt-A-Beach project and the annual Coastal Clean-up, spearheaded in Barbados by the Ministry of Tourism, are examples of this. The Professional Association of Dive Operators (PADO) has often assisted the Ministry of Tourism in the clean up of our reefs.

It is recognised that if tourism is developed in a responsible manner and is properly managed it allows for the protection of our natural resources. It also allows us to present a healthy, quality nature product to the tourist clientele who support and practise an environmentally safe and sustainable form of tourism.

6.4 RESPONSIBLE TOURISM

6.4.1 Key Elements

“Responsible tourism” must be the guiding principle for tourism development in Barbados. The term implies a proactive approach by all industry partners to develop, market and manage the industry in the most responsible manner so as to create a competitive advantage. Responsible tourism implies responsibility to the natural environment through the promotion of balanced and sustainable tourism and a focus on the development of environmentally positive tourism activity. Responsible tourism also implies the responsibility of Government and the business sector to involve local communities that are in close proximity to the tourism plant and attractions through the development of meaningful economic linkages. Additionally, it implies responsibility to respect investment in and development of local culture and to protect them from over commercialization and over exploitation.

It also implies the responsibility of local communities to become actively involved in the industry, to practice sustainable development in all of its forms and to ensure the safety and security of visitors. Responsibility to visitors through ensuring their safety, security and health is another consequence of responsible tourism. The term also implies the responsibility of both employers and employees in the industry not only to each other but to the consumer as well. Responsible trade union practices as well as responsible employment practices must be one of the hallmarks of the new tourism thrust in Barbados. Responsible tourism also implies responsible Government as well as responsibility on the part of the tourists themselves to observe the norms and practices by which we live in Barbados, particularly with respect to our environment and our culture.

6.4.2 Effects of Irresponsible Tourism

If responsible tourism is not practised and the industry's direction not carefully planned, this can lead to a number of negative effects on the sector. These include:

- environmental degradation;
- skewing of job creation to antisocial type employment activities;
- seasonality and unemployment during off peak periods;
- leakage of foreign exchange earnings;
- increased urban/rural polarization;
- concentration of tourism wealth in the hands of a few at the expense of the population as a whole; and
- the exploitation of local cultures and communities.

7. Opportunities and Challenges in Barbados' Tourism Development

In formulating policies and plans for tourism development, it is important to understand the different factors (opportunities, constraints, challenges) that can, and often do, have major influences on the tourism industry.

Several factors have influenced Barbados' tourism industry. Outlined below are the strengths, weaknesses, opportunities and threats that must be addressed:

7.1 Strengths

- Diverse product - sports, entertainment etc.
- Major foreign exchange earner
- Wide range of accommodation facilities
- Easily accessible accommodation
- Excellent ground transportation - both private and public
- Geography including climate
- Year-round activities
- Public/Private partnerships in all areas of tourism development
- Excellent infrastructure and utilities
- Tourism and Hospitality training at vocational and tertiary levels
- Stable political climate
- Fixed currency
- Mature destination
- Established tourism institutions and organisations

7.2 Weaknesses

- Relatively high operating costs
- Insufficient focus on service
- Little or no participation by local communities in planning and development
- Ineffective marketing of Barbados' tourism product
- Inadequate access to some activities and beaches
- Unacceptable incidence of garbage pollution in some areas
- Accommodation plant is physically run down in some areas
- No clearly stated national vision for tourism
- Lack of adequate research capability
- Inadequately trained workforce in some aspects of the industry
- Limited national focus on intra-regional tourism
- Inadequate foreign language skills in the workforce
- Inadequate and insufficient use of technology in tourism development
- General lack of awareness and understanding of the tourism industry and its contribution to national development
- Inappropriate base for inter-sectoral linkages

- Inadequate number of 'brand name' hotels
- Low return on investment
- Unattractive investment climate

7.3 Opportunities

- Diversity offered by Caribbean islands geographical location
- Changes in travellers' needs world-wide
- Diversification of markets
- Globalisation of trade
- Development of stronger inter-sectoral linkages with the productive and services sectors
- Intra-regional market
- Growing interest in heritage and ancestral linkages to Africa
- Development of work exchange programmes with other destinations
- Further development of bi-lateral and regional marketing initiatives
- Introduction of an enhanced legislative and regulatory framework
- Continued training of labour force

7.4 Threats

- Emergence of new destinations - Asia, Pacific
- Enhanced marketing by traditional destinations
- Globalisation of trade
- Natural disasters - primarily hurricanes
- Dependence on foreign owned airlines
- Climate change
- Increased levels of crime
- Insufficient allocation of resources to aid in crime prevention and law enforcement
- Vertical and horizontal integration in operating structures in the industry
- Increased dependence on and the development of tourism in many of Barbados' major source markets
- Negative attitudes and behaviour of some Barbadians

8. Approach to Tourism Development – Towards a New Tourism

8.1 Development Philosophy

The underlying philosophy of our new approach to tourism development in Barbados may be expressed in two words - **Participation and Collaboration**. It is recognised that unless our people are at the centre of our efforts, the industry will not perform optimally. Additionally, unless effective and functional collaboration exists between all stakeholders, the industry will not continue to be successful and will eventually stagnate.

Barbados is perceived in its major tourism source markets as an upmarket destination. The accommodation product in Barbados is characterised by upmarket properties on the West Coast and budget properties on the South Coast.

In order for tourism in Barbados to be economically sustainable, we need to position our product to cater to a clientele that is relatively cost conscious but is willing to pay more for perceived higher quality or better service. However, to be successful, this would necessitate the guarantee of value for money at all levels of product and service delivery in Barbados and an overall national commitment to the provision of a quality destination that focuses on **friendliness, cleanliness, and safety and security**.

There is also a need to constantly seek out means and put measures in place to increase foreign exchange earnings per visitor, while at the same time increasing its retention by providing a wide range of high-quality products and services.

8.2. The Branding of Barbados

As tourism practitioners we are cognisant that the clear recognition of a global Barbados brand will enhance our potential for national success. The need to identify the elements of a global brand for our country and market these elements consistently and globally will, in our estimation, create an ideal platform for optimum tourism performance. This is particularly relevant with respect to tourism and tourism development given the nature of the sector's activities.

We will therefore continue to work with our partners at both public and private levels, to both identify and confirm the elements of a Barbados brand and to put mechanisms in place for its sustained marketing, as one of our key initiatives for optimising tourism success and development.

At a holistic level, the element identified to date which we believe most characterises that ideal is excellence in all spheres of national activity. In our opinion this is what Barbados is best known for; “the country where everything works.” This is the notion that we will work with our partners in the coming years, along with continued research efforts to focus and re-energise the brand.

8.3 Guiding Principles

The establishment of the new approach to tourism development is based on the following guiding principles:

- Barbados will continue to be a high quality tourism destination.
- Government will pursue a services-led development strategy with tourism as the lead sector.
- Government will provide the enabling framework for the industry to flourish.
- In view of the catalytic role that tourism plays in the development of the economy, there will be increased collaboration between operators in the tourism industry and other sectors of the economy to promote inter-sectoral linkages.
- The Ministry of Tourism will collaborate more effectively with other public sector agencies including the Ministries of Finance and Economic Affairs, Education and Culture, Health, Home Affairs and Environment to ensure the provision of a quality destination that focuses on the brand elements of friendliness, cleanliness and safety and security.
- Operators in the private sector will increase their efforts to access concessions and other benefits provided by government, recognise the rights of workers, and respond to the dynamics of the tourism industry and improve quality and delivery of services.
- Efforts will be made by all stakeholders to maximise foreign exchange earnings and increase employment.
- The unions will continue to encourage appropriate service attitudes among workers while seeking to promote their interest and development.
- Non-governmental agencies will continue to facilitate and regulate tourism development through investment, lobbying, and public education and awareness.
- Local communities will be made aware of and benefit from proceeds from the tourism industry while being integrated into the planning process.

8.4 Critical Success Factors

The new tourism policy for Barbados which is emerging focuses on the following critical success factors:

- participation and involvement of stakeholders, particularly local communities and previously neglected groups, at all levels of the tourism development process
- partnerships within and between the public and private sectors and civil society as well as the enhancement of linkages
- an integrated approach to policy formulation and planning at the ministerial, sectoral and national levels
- preservation and conservation of natural, cultural heritage and community resources as prerequisites for quality tourism

- creation of a favourable investment climate to encourage both foreign and local investment
- human resources development including building public awareness and training aimed at delivering quality tourism experiences
- maintenance of a safe and positive social environment
- continued but improved efforts at collaboration at the sub-regional and regional levels
- enhancement and diversification of the tourism product
- development and promotion of tourism not only as a pleasure vacation activity but also as a technologically equipped and efficient business
- continued strengthening of our tourism institutions
- creation of a more effective environment for awareness and education of tourism including its contribution to the sustainable development of Barbados
- creation of a faster more user friendly administrative and regulatory environment
- Creation of an aggressive and effective marketing and promotion strategy
- Creation of appropriate responsive institutional structures
- Creation of a supportive infrastructure for tourism

8.5 Targets

The targets provided in this document take into consideration trends in the various indicators. However, they are influenced to some extent by changes that are expected to take place as a result of the various strategies being proposed and programmes either underway or planned for the next nine years. The targets are included at Appendix 2.

The underlying principle in the development of the targets is that efforts will be made to increase the average expenditure per visitor while increasing the total number of both cruise and stayover arrivals. An increase in average expenditure per visitor is expected to be achieved by increasing the overall quality of the room stock in Barbados, the availability of more fine dining restaurants, the number of attractions, and the average amount that each visitor spends on shopping. This is expected to result in a 100.0 percent increase in total visitor expenditure by 2010.

It is anticipated that the room stock will increase to about 9,500 by 2010. Hilton Hotel is expected to be ready by 2003 while other developments at the Pier Head and Paradise Beach are expected to increase the number of brand name hotels to six over the next nine years. Planned villa developments will also increase the stock of quality rooms available to visitors in Barbados over the next few years.

Efforts will be made to increase airlines and airlift from both traditional and non-traditional markets. There is a need to increase the number of US airlines servicing Barbados out of traditional as well as non-traditional tourist markets. Efforts will be made to increase the number

of US carriers servicing Barbados to at least three by 2010. Airlift out of key European cities will also be increased to regain market share out of Europe.

A marketing budget of about three percent of tourist expenditure per year will be required to grow stayover and cruise arrivals to the levels projected over the next nine years. This marketing budget is expected to be supported by the marketing expected from the global network of the brand name hotels and airlines expected to be in operation in Barbados.

A continued increase in cruise berths, and consequently cruise arrivals, is also expected over the next nine years. Planned developments at the Bridgetown Port, including the construction of an additional pier and home porting, along with larger ships leaving the dockyards will result in an increase in the number of cruise berths available to Barbados.

Direct employment in tourism in Barbados will increase over the next nine years as more rooms are built, home porting is developed, more cruise ships and cruise passengers arrive and more attractions are built in Barbados. Increased services offered to support a more sophisticated tourism industry and goods to meet the growth in the tourism sector will also result in more jobs in other supporting sectors.

9. Critical Issues in Barbados' Tourism Development

The following issues have been identified by stakeholders as critical to the sustainability of the industry, and form the basis of the policy.

9.1 Awareness

The tourism industry impacts on all the resources of the country: its people, its culture, its natural resources, its infrastructure, and contributes significantly as a foreign exchange earner and employment generator. It is, therefore, important that all Barbadians are sensitised to the importance of the industry to the economy, the role that each citizen can play in sustainable tourism development and the benefits to be accrued from the industry.

9.2 Human Resources

Human resources required in the tourism industry are varied, ranging from those involved in the formulation and implementation of plans for the development of the industry to persons involved in the hotel, catering, travel and attraction sub-sectors. The need for a standardised level of quality in all of these areas is important if Barbados is to remain competitive in the constantly changing global tourism market.

The provision of appropriate and effective training programmes at all levels is, therefore, imperative in ensuring that Barbados possesses a cadre of creative, capable and well-qualified personnel in the industry.

9.3 Organisational Structure

The success of the tourism industry depends on a well-organised and firm institutional framework. This framework does not only comprise those government agencies which have responsibility for tourism but also those government entities whose activities impact on tourism, the private sector, non-governmental organisations and community-based organisations.

Government has a major role to play in ensuring that there is effective communication and constant collaboration between all of these entities that form part of this structure within the tourism industry.

9.4 Standards

Government recognises that the long-term sustainability of tourism in Barbados depends on delivering a product and service of the highest quality. The key challenge is to acquire the commitment of all stakeholders to sustainable tourism through the development, upgrading and implementation of standards and guidelines. The government is, therefore, committed to ensuring that standards are applied to all tourism activities and that Barbados remains a destination which can effectively compete in the global market.

9.5 Contribution to the Economy

Tourism has the potential to make significant contributions to every area of national development. The national development of a country can be measured, in part, by a number of economic variables. These include full employment, major investments in the public and private sectors, development and expansion of the domestic market, increased inter-sectoral linkages, foreign exchange earnings and domestic income and the enhancement of the social and physical infrastructures.

9.6 Investment

Investment, both local and foreign, is an essential element in ensuring that we continuously enhance our existing tourism product, whether roads, ports, hotels, restaurants or attractions. Furthermore, investment is vital in the development of new products and services if Barbados is to maintain its position as a destination offering a diverse range of products.

Consequently, a new legal, fiscal and regulatory framework is currently being developed to encourage further development of the tourism industry in Barbados. This framework recognises the need to diversify our tourism product to cater to new and emerging product types and market niches and give Barbadians, particularly communities, a greater share in the benefits to be derived from the growth and development of tourism in Barbados.

In addition to providing a regimen of fiscal incentives for initial investment in the industry, the new framework will incorporate measures to continuously enhance our product and provide a set of standards to ensure the long term viability of the industry.

This Policy also promotes the establishment of a specific agency to promote tourism investment in Barbados.

9.7 Marketing

Barbados has emerged as a premier Caribbean destination with tourism leading all other sectors of the economy. In the past Barbados was marketed as a sun, sea and sand destination; however, with more attention being paid to product development, Barbados has developed an image as a safe, hospitable destination offering a diverse tourism product which focuses primarily on its natural and cultural heritage. The maintenance of this image can only be achieved with aggressive and focused marketing and continuous review of our marketing plans, bearing in mind the dynamic changes in the global arena.

Barbados' marketing strategy is based on a collaborative approach involving partnerships between the Barbados Tourism Authority and the various distribution channels in the marketplace. In addition, a new e-business strategy is being developed to allow for more direct access to the consumer.

Additionally, this policy proposes the development of a joint public/private sector marketing agency that operates with a commercial orientation and reduces duplication of the marketing effort while ensuring a unified approach to the promotion of Barbados in the marketplace.

9.8 Community Involvement

Government has identified sustainable tourism as the guiding principle for successful tourism development. The tourism industry is essentially a service-oriented sector and one which relies heavily on our human, natural and cultural resources. Communities should, therefore, be encouraged to be involved in all areas of tourism development and the visitor experience to ensure that the service which we provide to our visitors is of the highest quality, and our local resources are conserved and protected.

9.9 Services

The all-embracing nature of tourism implies that every service which is offered in the economy impacts on tourism, whether it be national services such as health and sanitation or professional services such as marketing, legal and financial services.

It is imperative that the services being offered are of the highest level and are consistently providing customer satisfaction. Hence, there is the need to have in place standards which dictate the level of quality service which is expected of each of these service providers.

9.10 Accommodation

Accommodation is an extremely significant part of the tourism product in any destination. Barbados offers a range of room stock from luxury to economy class in its hotels, guesthouses and apartments. Currently, there is a high level of investment in the construction and the refurbishment of luxury villas and hotels. Given the competitive nature of the market, it is imperative that the facilities offered to the visitor are of the highest internationally accepted standards.

9.11 The Built Environment

The built environment comprises all monuments, sites and buildings which form part of the physical landscape of Barbados. It is a significant component of our cultural heritage and of our tourism product offering to both tourists and cruise ship passengers. As part of Barbados' cultural patrimony, measures should be taken to preserve and protect this very valuable and fragile resource.

9.12 The Natural Environment

A well-planned and managed tourism industry ensures that the natural environment is not degraded, but that it is preserved and protected. This is particularly in light of the natural environment's appeal as an important factor in attracting visitors to Barbados and as such, its importance as an invaluable component of Barbados' tourism product.

In the past tourism projects of all types, particularly hotel development along the coast, occurred with little consideration to the negative environmental impacts that they could have on these coastal areas. This resulted in the pollution of coastal waters, destruction of the reefs, erosion of shorelines and damage of marine flora and fauna. Furthermore, little value was placed on the protection of the natural environment as a means of developing additional nature-based

attractions and activities, which feature indigenous and endemic flora and fauna.

9.13 Cultural Heritage

Barbados' cultural heritage encompasses its built heritage, i.e. plantation houses and chattel houses, folklore, food, dialect, sporting activities, especially cricket, the performing, visual and literary arts, monuments and historic sites. Much has been done to develop this cultural heritage component which features prominently as part of the tourism product offering. Hence any development of the cultural heritage tourism product must be undertaken in a responsible manner. Strategies should be formulated to establish adequate legislation, to ensure the protection, preservation and interpretation of our cultural heritage resources.

9.14 Land Use

Tourism's importance to the economy of Barbados coupled with the multi-faceted nature of the industry dictates that large areas of land will be utilised. It is, therefore, imperative that all physical development for tourism purposes be well planned in order to preserve and protect the environment while ensuring that it remains attractive to Barbadians and visitors. All developers and tourism stakeholders must be made aware of the importance of the role of the National Physical Development Plan as well as the details of other related plans developed by government.

This Policy encourages the allocation of land specifically for tourism purposes in keeping with our broad national objectives, particularly employment and foreign exchange generation and retention.

9.15 Intersectoral Linkages

The tourism industry, because of its very nature, provides enormous potential for the creation of linkages with other sectors of the economy, including agriculture, manufacturing and services. It is recognised that the greater the linkages between sectors, the greater the economic returns to the country. Tourism service providers should, therefore, be encouraged to utilise local goods and services in their operations, while at the same time, other sectors and in general, all Barbadians should be encouraged to produce quality goods and services which can be used in the tourism industry.

9.16 Technology

The use of emerging technologies, especially in relation to the Internet and related technology in the tourism industry, has grown from just being primarily a research tool to one which is now used by tourism administrators and technicians, and one which is more consumer-friendly. Technology now allows for on-line marketing, sourcing of information on destinations, and the booking of total packages in a matter of minutes.

The development of a comprehensive e-business strategy would, therefore, need to be part of any overall plan for tourism. This strategy would include the provision of on-line information on all aspects of the tourism product, investment opportunities and tourism statistics. This information should be presented in a user-friendly web page with links to other related sites, and should be accessible to tourism players including local tourism operators, travel agents and tour operators in the target markets, international tourism intelligence agencies, and consumers. It is imperative, therefore, that Barbados takes full advantage of these new resources in order to ensure its competitiveness in this global environment.

9.17 Safety and Security

The tourism industry is the major source of income for Barbados and it is imperative that any threat to the sustainability of the industry be firmly addressed and tackled. Crime, harassment, and other forms of anti-social behaviour, along with hazardous and unhealthy facilities are some of the major threats to the development of the industry. Such problems frustrate our efforts at maintaining Barbados' image as a safe, clean and hospitable destination. The development of community awareness programmes coupled with the strengthening of the capability of our security forces, and the adherence to the highest standards of occupational safety and traffic management are, therefore, essential to our tourism development.

9.18 Airlift

Transportation forms an integral part of the tourism industry and international transport is the single most important factor leading to the growth and development of tourism in the twentieth century. Vertical and horizontal integration in the travel and tourism industry continues to threaten the sustainability of tourism in Barbados and the Caribbean region unless we are able to position ourselves to receive some of the benefits that will accrue to our competitors from more developed destinations. This policy encourages a national airline policy that recognises the importance of consolidation of regional air carriers and alliances with successful and recognised international carriers and further proposes that Barbados promotes an environment that encourages this ideal.

In addition, this policy encourages the sponsoring of specific initiatives and the investment of specific financial resources to realise airlift particularly in the development of emerging markets as well as revitalising markets that have become depressed.

9.19 Cruise Tourism

Cruise tourism in Barbados increased from 156,461 in 1980 to 533,278 in 2000 or by 240.8 percent in the last twenty years. The forecast is that it will continue to grow in the short to medium term as more and larger ships leave dockyards worldwide. However, there is a concern that Barbados does not benefit even from this phenomenal growth as much as it could; particularly, when coupled with the effect that cruise may have on stayover tourism which from all indications provides an overall better net effect to the society and to the country.

The strategy being proposed for cruise tourism in Barbados, therefore, seeks to increase the net economic benefits from cruise tourism while reducing congestion both at the port and on island. For this sector to be sustained, we must also focus on determining the carrying capacity of the country for this specific activity as well as encouraging wider participation from the cruise industry in the social and economic development of the Barbadian society.

10. Barbados National Tourism Policy Statement

Government recognises the need to provide a clear vision of the direction in which the industry is heading and identify the policies, strategies and development focus necessary to improve Barbados' competitiveness in the tourism industry. This policy provides a long-term vision for Barbados' tourism industry and along with the appropriate incentives, provides a framework which will enhance and reinforce the image of Barbados as a premier quality tourism destination.

Broad Policy Objective

To pursue sustainable tourism development through improvement and optimal use of human resources, services and technology, and through the conservation and managed use of our socio-cultural, built and natural resources, in order to ensure a product of the highest quality whilst enhancing the quality of life of our people and furthering the economic development of Barbados.

10.1 AWARENESS

Specific Objective

To encourage the development, implementation and monitoring of tourism awareness programmes for all Barbadians and visitors.

- 1.1 Foster patriotism and develop behavioural programmes aimed at improving attitudes whilst encouraging warmth and friendliness among Barbadians and visitors alike.
- 1.2 Conduct an ongoing national multimedia programme using appropriate media to sensitise Barbadians to the issues that affect the tourism industry.
- 1.3 Foster a climate of empowerment in which each individual is seen as a manager of the tourism product.
- 1.4 Develop an on-going educational programme on the importance of tourism to the economic survival of the island.
- 1.5 Collaborate in the development of appropriate capacity building and awareness programmes for communities and agencies involved in community mobilisation and development.
- 1.6 Facilitate in collaboration with relevant agencies, the development of awareness and education programmes which focus on the twin relationship between environmental conservation and tourism development.
- 1.7 Strengthen the existing awareness and education programme in communities and schools to further sensitise Barbadians to their cultural heritage.
- 1.8 Ensure wider public awareness of the planning system and project proposals submitted for consideration as they relate to the tourism sector.
- 1.9 Develop awareness programmes to sensitise Barbadians to the benefits to be derived from engaging in the provision of tourism ancillary products and services.

10.2 HUMAN RESOURCES

Specific Objective

To enhance the quality of the visitor experience by improving the interaction between visitor and host.

Strategy/Action - Guidelines

- 2.1 Implement initiatives designed to enhance the skills, knowledge and attitudes of Barbadians of all ages, particularly those involved in the tourism sector.
- 2.2 Foster the principles of continuous quality improvement in the public and private sectors especially in tourism related agencies.
- 2.3 Develop and facilitate a wide range of education, training and development systems for the tourism sector.
- 2.4 Continue to work with the Royal Barbados Police Force and other agencies in the reduction of crime and harassment nationally and in the tourism sector. Provide tourism related training for the staff of the Royal Barbados Police Force and other security agencies, and encourage special policing policies for tourist areas.
- 2.5 Establish and maintain databases of suitably qualified and skilled personnel and institutions which offer tourism training programmes.
- 2.6 Encourage the development of fair and equitable compensation systems that are directly tied to employee and organisational performance.
- 2.7 Develop foreign language skills within the community and among persons intimately involved with the industry.
- 2.8 Collaborate in the identification of training needs and in staff assessments in order to enhance productivity and maintain a competitive edge.
- 2.9 Develop a culture of enfranchisement and proprietorship by encouraging employees to invest in the tourist industry.
- 2.10 Enhance our collaborative efforts with the Ministry of Education in order to rationalise tourism education in schools and in other educational institutions.
- 2.11 Create fiscal incentives to foster the development of human resource programmes in the areas of small business development, apprenticeship programmes and self employment.

10.3 ORGANISATIONAL STRUCTURE

Specific Objective

To provide an appropriate formal and informal framework to achieve the goals and objectives of the tourism industry.

Strategy/Action - Guidelines

- 3.1 Collaborate with the social partners in fostering the development of an organisational framework and culture that enhance productivity and competitiveness.
- 3.2 Develop an industry-wide organisational framework which allows a focussed approach to tourism through shared strategic planning.
- 3.3 Encourage an organisational culture which is responsive to customer needs through implementation of customer charters.
- 3.4 Develop mechanisms for obtaining comments and feedback from the general public on tourism matters.
- 3.5 Develop a collaborative framework for private-public sector partnership in the marketing of Barbados.
- 3.6 Consult/involve the community in all areas of the tourism development process.
- 3.7 Widen and deepen the involvement of social partners in the planning for and management and operation of the tourism sector.
- 3.8 Enhance the institutional capability of the Ministry of Tourism to allow it to have oversight for all areas of Tourism Development including research, marketing, human resource development, product development, inter-sectoral linkages, and the development and monitoring of industry agreed standards.
- 3.9 Strengthen the capacity of Barbados' tourism marketing institutions to deliver the required performance in order to meet the demands of the international market place.

10.4 STANDARDS

Specific Objective

To encourage the development, promotion and enforcement of world class standards in the tourism industry.

Strategy/Action - Guidelines

- 4.1 Collaborate with relevant agencies and the sector in developing, continuously improving, promoting and enforcing standards for all components of the tourism product.
- 4.2 Review regional and international environmental standards/guidelines with a view to incorporating environmental conservation measures into existing and proposed standards.
- 4.3 Adopt operational standards notably in the areas of hygiene and safety in line with international norms and market requirements.
- 4.4 Support the implementation of a Building Code which would articulate standards to ensure the safety of all users of tourism facilities.
- 4.5 Encourage the development of adequate training and certification programmes for all tourism workers.
- 4.6 Facilitate the development and implementation of an effective national crisis communication programme.
- 4.7 Encourage the highest customer care standards in all sub-sectors of the tourism industry.

10.5 CONTRIBUTION TO THE ECONOMY

Specific Objective

To maximise the tourism sector's financial and economic contribution to the growth and development of the Barbados economy.

Strategy/Action - Guidelines

- 5.1 Maximise the generation of foreign exchange earnings and employment opportunities through, inter alia, the development of linkages with the other productive and social sectors in the economy.
- 5.2 Support the promotion, marketing and use of indigenous products and services that have the potential to add value to the tourism product.
- 5.3 Support the establishment and operation of an appropriate duty free shopping regime for Barbados.
- 5.4 Collaborate with the relevant public and private sector agencies in improving both air and sea transportation access to Barbados.
- 5.5 Collaborate with the relevant public and private sector agencies in improving the country's infrastructure and its corresponding ground transportation system.
- 5.6 Facilitate the conduct of on-going economic impact assessments of Barbados' tourism industry.
- 5.7 Develop mechanisms for the more efficient and effective financing of the marketing function.

10.6 INVESTMENT

Specific Objective

To support the creation and maintenance of an enabling investment climate for the tourism industry in Barbados.

Strategy/Action - Guidelines

- 6.1 Encourage the development and implementation of an appropriate legal, regulatory and educational framework to facilitate increased investment in the tourism sector in Barbados.
- 6.2 Establish an investment framework that is more investor friendly, transparent and productive.
- 6.3 Establish the requisite institutional arrangements which should govern the administration of tourism investment activities in Barbados, including the creation of an appropriate mechanism to facilitate the investment process.
- 6.4 Provide incentives for greater use of equity financing.
- 6.5 Market the investment opportunities available to potential investors.
- 6.6 Support the establishment of mechanisms through which small entrepreneurs can exploit available opportunities in the tourism industry.
- 6.7 Support the growth and improvement of Barbados' tourism product by encouraging investment, emphasising the importance of quality products.
- 6.8 Promote joint ventures between the public and private sectors.
- 6.9 Encourage developers to contribute to the social and physical development of local communities.
- 6.10 Encourage new development in the tourism ancillary sectors.
- 6.11 Encourage Barbadian investors to expand regionally and extra-regionally.
- 6.12 Create a distinct entity to market tourism investment.

10.7 MARKETING

Specific Objective

To develop a vibrant and globally competitive marketing capability driven by market research and information technology and responsive to the developing new global order.

Strategy/Action - Guidelines

- 7.1 Create a joint public and private sector marketing agency operating with a strict commercial reference.
- 7.2 Facilitate investment by environmentally friendly hotel brands that would extend the awareness of Barbados in the marketplace.
- 7.3 Formulate a plan for comprehensive product renewal, selective expansion and new market development to encourage a higher rate of growth in tourism earnings.
- 7.4 Develop a strategic plan, including appropriate research, to exploit opportunities as well as avoid pitfalls created by the new global order; in particular, vertical and transnational integration, consolidation of airlines and the distribution channels of international tourism.
- 7.5 Conduct more extensive market research in order to review the brand elements of Barbados' tourism industry that would enhance the positioning and the promotion of its diverse product offering.
- 7.6 Create effective fiscal policy to ensure that Barbados remains competitive and offers value for money.
- 7.7 Showcase Barbados' unique cultural heritage, including local products, in our marketing efforts.

10.8 COMMUNITY INVOLVEMENT

Specific Objective

To encourage and facilitate the involvement of communities in all stages of the tourism development process.

Strategy/Action - Guidelines

- 8.1 Develop and monitor action plans for deepening the involvement of ‘communities’ in tourism by inter alia ensuring community consultation in all tourism and tourism-related developments.
- 8.2 Develop mechanisms, in consultation with relevant agencies, to sensitise communities on the scope and impact of tourism and the opportunities in the sector.
- 8.3 Create a strategy in collaboration with other government agencies to ensure that communities are consulted throughout the project cycle of tourism related developments which may impact on them.
- 8.4 Identify appropriate sources of funding for financing community tourism efforts.
- 8.5 Arrange in collaboration with existing agencies, programmes to develop basic business skills and provide financing in order to facilitate growth of community-based tourism related business.
- 8.6 Determine the carrying capacity of communities and the effect and impact of tourism on communities through the conduct of social impact assessments.
- 8.7 Provide fiscal incentives to encourage the development of sustainable community tourism programmes which incorporate indigenous natural resources and cultural heritage.

10.9 SERVICES

Specific Objective

To develop, support and enhance a range of economically viable, wholesome and self-sustaining services in order to provide a rewarding and high quality visitor experience.

Strategy/Action - Guidelines

- 9.1 Encourage and facilitate the continuous development of businesses which add value to the tourism product.
- 9.2 Establish a mechanism to aid in the development of local entrepreneurship in the expanding services sector.
- 9.3 Determine the impact of tourism related services on the natural, socio-cultural and economic environment.
- 9.4 Implement industry agreed standards and develop strategies to achieve world leadership for the tourism services sector.

10.10 ACCOMMODATION

Specific Objective

To improve the existing environment in order to ensure that the accommodation sector can be more profitable, competitive and sustainable.

Strategy/Action - Guidelines

- 10.1 Encourage ongoing consultations among all categories of the accommodation sector focussed on informing policy and developing support mechanisms for the sector.
- 10.2 Develop and enact legislation, in consultation with stakeholders, in order to ensure the continuous upgrading of the accommodation sector and the delivery of the highest quality product.
- 10.3 Revisit the Hotel Registration and Classification Regulations, in consultation with stakeholders, with a view to implementing standards in line with international norms and market requirements.
- 10.4 Develop and implement an enhanced regime of incentives to attract the desired investments in the accommodation sector.
- 10.5 Encourage training and re-training of human resources to ensure excellence in the delivery of services within the sector.

10.11 THE BUILT ENVIRONMENT

Specific Objective

To encourage the management and development of the built environment in such a way as to ensure its conservation and enhancement.

Strategy/Action - Guidelines

- 11.1 Collaborate with all relevant public and private sector and non-governmental organisations in preparing an inventory of the important elements of the Barbadian built environment, particularly our historic buildings, sites, conservation areas and archaeologically significant areas.
- 11.2 Support the proposal that Town and Country Planning legislation be strengthened to incorporate ‘Conservation Areas’, and procedures for their listing and enhancement.
- 11.3 Support the proposal for the increase of penalties for the demolition of listed buildings of architectural or historic significance.
- 11.4 Encourage the development of an appropriate regime of direct and indirect incentives to facilitate the preservation of the architectural heritage including listed buildings.
- 11.5 Encourage through appropriate incentives, the use of environmentally friendly technologies and indigenous materials and products.
- 11.6 Support the conduct of risk assessments against disasters such as fire, flood and hurricane and the development of appropriate mitigation strategies (including preventative maintenance) and the formulation of disaster management plans.
- 11.7 Collaborate with the Town and Country Planning Office and other relevant agencies to promote the designation of specific areas for the development of tourism.

10.12 THE NATURAL ENVIRONMENT

Specific Objective

To promote sustainable tourism development through the protection, conservation and development of the natural environment within its carrying capacity and through education and awareness of, and respect for, our unique natural heritage.

Strategy/Action - Guidelines

- 12.1 Encourage collaboration between relevant agencies in compiling an inventory of the natural resources of Barbados.
- 12.2 Determine the carrying capacity and encourage the development of a mechanism for the economic valuation of the natural resource base, sites and supporting infrastructure which form Barbados' tourism product.
- 12.3 Collaborate with the relevant agencies in the formulation of appropriate legislation, regulatory framework and incentives to support an optimal level of development whilst conserving the natural environment.
- 12.4 Encourage the provision of appropriate incentives for the sustainable development of 'environmentally sound' tourism projects including fiscal incentives for businesses that protect and enhance the quality of the natural environment.
- 12.5 Support and encourage the development and management of special conservation areas.
- 12.6 Facilitate the conduct of an assessment of the impact of the tourism industry on the natural environment.
- 12.7 Encourage the protection of the limited natural resource base and promote the philosophy of carrying capacity in the tourism development process, including marketing.

10.13 CULTURAL HERITAGE

Specific Objective

To invest in the conservation, development and marketing of our cultural heritage while encouraging the preservation of its integrity.

Strategy/Action - Guidelines

- 13.1 Create an inventory of cultural heritage sites, monuments, landscapes and cultural patrimony, including architecture, oral history, folk traditions, visual, literary and performing arts, archaeological resources and our collective memory.
- 13.2 Facilitate through specific investment, tax concessions and other incentives and relevant legislation; the growth, development and improvement of our cultural heritage.
- 13.3 Collaborate with the National Cultural Foundation and other relevant agencies as well as all Barbadians to provide co-ordinated and ongoing research into all aspects of our cultural heritage.
- 13.4 Facilitate the establishment of legislation to protect the cultural patrimony of Barbados: its architecture, landscape, archaeological resources, oral history, visual, literary and performing arts, folk traditions and collective memory.
- 13.5 Conduct research into our cultural heritage and its intersectoral linkages to show their significance to the national tourism product in terms of
 - economic impact of festivals and cultural industries,
 - technology and intellectual property rights of artistes,
 - standards and services,
 - culinary arts, and
 - community involvement.
- 13.6 Provide co-ordinated and on-going support to artistes and cultural heritage institutions in the effective marketing of Barbadian culture.

10.14 LAND USE

Specific Objective

To ensure that all tourism development adheres to national land use policies as outlined in the National Physical Development Plan and other relevant policy documents.

Strategy/Action - Guidelines

- 14.1 Encourage the allocation of land specifically for tourism development.
- 14.2 Support a policy that promotes the allocation of land to uses that accord with our broad national development objectives.
- 14.3 Encourage collaboration among relevant agencies in the assessment of tourism related projects.
- 14.4 Establish a National Park management structure with a focus on public education and awareness and to promote sustainable tourism development in the Scotland District area.
- 14.5 Protect and enhance the national system of Parks and Open Spaces and empower local communities to assist in the upkeep of these areas including the establishment of a trail network in support of nature-based and heritage tourism.
- 14.6 Ensure all public beach access is maintained and enhanced and encourage private/public sector partnerships in the maintenance of these networks of coastal areas.
- 14.7 Encourage management of golf course developments in a sustainable manner within a policy framework having regard to such issues as water supply, use of chemicals, soil stability, impact on agriculture among others.

10.15 INTERSECTORAL LINKAGES

Specific Objective

To develop and maintain linkages between the tourism sector and other sectors of the economy to reduce economic leakages and spread the benefits of tourism development.

Strategy/Action - Guidelines

- 15.1 Conduct on-going research on the demand patterns of visitors and the potential for intersectoral linkages.
- 15.2 Develop an appropriate framework to facilitate the linking of industries that complement tourism development.
- 15.3 Create a regimen of fiscal incentives which encourage tourism operators to utilise goods and services from other sectors.
- 15.4 Co-ordinate consultation and collaboration between operators in the tourism sector and other sectors of the economy.
- 15.5 Encourage the promotion of indigenous products and services by creating appropriate opportunities for the production and marketing of these products.
- 15.6 Facilitate the development of niche markets that utilise goods and services from other sectors, including health, education, culture and sports.
- 15.7 Enhance the Country Team approach to ensure that overseas offices promote Barbados as the premier location for tourism investment and business.

10.16 TECHNOLOGY

Specific Objective

To encourage the acquisition and use of technology to enhance the collection, analysis and dissemination of tourism related data, facilitate access to on-line distribution channels and provide an energy efficient and client friendly product.

Strategy/Action - Guidelines

- 16.1 Encourage the use of appropriate technology to improve the collection of quality, pertinent and timely data that facilitate efficient planning and decision making particularly as it relates to marketing and investment.
- 16.2 Facilitate the acquisition and use of technology to revamp all tourism facilities in order to provide, inter alia, client-friendly and environmentally sound systems, modern and efficient safety and security measures, reservations systems, access to the Internet, and Revenue Management Systems.
- 16.3 Support the review of the existing telecommunications policy which would lead to reductions in cost, ensuring easier access to available technology.
- 16.4 Monitor the Internet and related technology especially as they relate to on-line marketing and sale of the destination, to keep abreast of changing visitor trends.
- 16.5 Encourage and support the development of appropriate training and retraining of all personnel in the use of technology.

10.17 SAFETY AND SECURITY

Specific Objective

To create and implement a sustainable development programme that fosters a totally safe and secure environment.

Strategy/Action - Guidelines

- 17.1 Collaborate with the relevant agencies to review all existing traffic management regulations in order to ensure that effective measures are in place to promote the safety of all road users.
- 17.2 Facilitate the effective management of natural and man-made disasters in the tourism sector through contingency plans and simulation exercises.
- 17.3 Encourage meaningful and effective partnership among the security forces and social partners for the efficient management and control of crime, harassment and other undesirable behaviour.
- 17.4 Collaborate with the relevant agencies with a view to improving legislation dealing with crime, harassment and other undesirable behaviour.
- 17.5 Support the improvement of human, technological and physical resources of the security forces.
- 17.6 Support efforts to develop and implement action programmes among various agencies and groups with a view to countering the subculture of violence and illegal drug use.
- 17.7 Support the development of a legal and institutional framework to deter crimes against visitors including the creation of a Tourism Police Task Force, more severe penalties for crimes against visitors and trial in absentia.

10.18 AIRLIFT

Specific Objective

To develop an appropriate mix of scheduled and non-scheduled flights from traditional and emerging markets that meets the varied and changing demands of the country's travel and tourism industry.

Strategy/Action - Guidelines

- 18.1 Support the development of a regional airline policy that promotes consolidation of regional air carriers leading to reductions in operating costs and a more reliable but less costly service.
- 18.2 Provide seat subsidies in declining traditional and emerging markets that match our product profile to stimulate their growth and development.
- 18.3 Utilise the extensive marketing networks of airlines to create greater awareness of Barbados in both traditional and emerging markets.
- 18.4 Encourage strategic alliances with air carriers serving Barbados that recognise our mutual dependence on the growth and development of tourism in Barbados.
- 18.5 Encourage the further development of appropriate air service agreements that provide adequate airlift to traditional and emerging markets.
- 18.6 Support the development of strategically placed hubs in the region that facilitate the promotion of trouble-free travel both regionally and extra-regionally.
- 18.7 Facilitate the use of technology that permits the development of a distribution network that matches last minute airline seats to available rooms in accommodation establishments.
- 18.8 Continuously upgrade our airport facilities to cater to the increasing need for timely and reliable service.

10.19 CRUISE TOURISM

Specific Objective

To optimise the contribution of cruise tourism to the Barbadian economy while ensuring that growth is sustainable.

Strategy/Action - Guidelines

- 19.1 Identify and pursue opportunities for expanding the economic benefits that can be derived from cruise tourism and develop an action plan for capitalising on such opportunities.
- 19.2 Encourage home porting as a means of increasing the benefits from cruise tourism while reducing congestion both in the port and on island.
- 19.3 Determine, monitor and evaluate the impact of cruise tourism on the natural, social and cultural environment in order to ensure the conservation of our resource base.
- 19.4 Continuously assess the carrying capacity of the existing attractions and services used by the cruise visitor, and develop mechanisms for the management of these sites on a sustainable basis.
- 19.5 Encourage the enhancement of existing attractions and facilities and the development of new ones.
- 19.6 Establish and manage strong relationships with the cruise industry to ensure mutually beneficial outcomes.
- 19.7 Develop appropriate programmes which effectively convert cruise passengers to long stay visitors.
- 19.8 Create a more congenial and beneficial environment for the complimentary existence of both cruise and stayover tourism.

11. Role of the Stakeholders

11.1 Role of Government

- Establish policies and plans within which tourism development can take place in a sustainable manner.
- Provide a legislative regime that will in turn create a business-friendly environment in order to attract local and foreign investment.
- Provide a regulatory framework which outlines standards for all aspects of the tourism industry.
- Encourage the participation of all stakeholders in the formulation of policy and planning.
- Market and promote the tourism product both locally and overseas.
- Facilitate product development to enhance Barbados' product offering.
- Conduct appropriate primary and secondary research into all areas of tourism.
- Monitor all developments related to tourism to ensure the sustainability of the industry.

11.2 Role of the Private Sector

- Develop measures to ensure that the tourism plant and the accompanying services provided are of the highest quality and meet industry-wide standards.
- Manage the tourism plant efficiently in order to ensure its profitability.
- Market and promote the tourism product both locally and overseas.
- Collaborate with Government in the formulation of policies and plans which affect the tourism industry.
- Monitor all tourism policies and plans to ensure that the tourism industry remains both competitive and profitable.

11.3 Role of Non-Governmental Organisations

- Collaborate with Government in the formulation of policies and plans which affect the tourism industry.
- Assist Government in the creation of measures, including awareness activities, to ensure the environmental conservation of the cultural and natural heritage product.
- Assist Government in the development and execution of tourism awareness programmes.
- Promote the involvement of communities and the youth in tourism development.
- Monitor all tourism policies and plans to ensure that developments in the tourism industry are in consonance with acceptable conservation practices and standards.

11.4 Role of Communities

- Take advantage of opportunities to participate in the decision-making process.
- Exploit the potential of resources within their communities for purposes of small business development geared for the tourism industry.
- Participate in activities aimed at natural and cultural heritage conservation.
- Collaborate with Government and the private sector, where necessary, in the planning and execution of tourism-related projects within their communities.
- Participate in training and awareness programmes which would enhance their ability to play a positive role in tourism development.
- Monitor all tourism policies and plans to ensure that communities are not disenfranchised, and that the local resources and skills in the community are fully optimised.

11.5 Role of the Youth

- Participate in tourism training and awareness programmes.
- Take advantage of specially designed tourism programmes for the youth.
- Exploit all avenues for participation in the tourism industry.
- Investigate possible career opportunities in tourism.
- Engage in environmental conservation and awareness activities administered by NGOs and youth and community groups.

11.6 Role of the Unions

- Collaborate with government in the formulation of policies and plans which affect the tourism industry.
- Develop training programmes for its members to ensure that they are fully sensitised to the role of tourism and the benefits to be gained.
- Monitor tourism policies and plans to ensure that provisions are made for tourism workers to be equipped to maximise opportunities in the tourism industry.
- Encourage tourism workers to take advantage of all opportunities available in the tourism industry to enhance their social and economic well being.
- Participate in activities which promote environmental conservation in the tourism industry.
- Collaborate closely with government to ensure that occupational health and safety standards are met in all tourism operations.