

**Development of a Strategic Business
Management Model for**

the Sustainable Development
of Heritage Tourism Products in the Caribbean



Caribbean Tourism Organization



Caribbean Regional Sustainable Tourism
Development Programme



European Commission

CARIBBEAN™

The Caribbean Regional Sustainable Tourism Development Programme

This manual is an output of the Caribbean Regional Sustainable Tourism Development Programme (CRSTDP), which is a five-year (2003-2008) programme funded by the 8th European Development Fund (EDF). The overall objective of the Programme is to contribute to economic growth and poverty alleviation in the 15 member countries that make up the Caribbean Forum of African, Caribbean and Pacific states (CARIFORUM) through increased competitiveness and sustainability of the Caribbean tourism sector. CARIFORUM comprises Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, the Dominican Republic, Jamaica, Grenada, Guyana, Haiti, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, and Trinidad and Tobago.

The Caribbean Tourism Organization

The Caribbean Tourism Organization (CTO), with headquarters in Barbados and marketing operations in New York, London and Toronto, is the Caribbean's tourism development agency and comprises 32 member governments and a myriad of private sector organisations and companies. The CTO's mission is to provide, to and through its members, the services and information needed for the development of sustainable tourism for the economic and social benefit of the Caribbean people. The organisation provides specialised support and technical assistance to member countries in the areas of marketing, human resource development, research, information management and sustainable tourism development.

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Acronyms

ACP	African, Caribbean and Pacific
AWNC	Asa Wright Nature Centre
BDS\$	Barbados Dollar
BTA	Barbados Tourism Authority
CANARI	Caribbean Natural Resources Institute
CARICOM	Caribbean Community
CARIFORUM	Caribbean Forum of ACP states
CDB	Caribbean Development Bank
CDC	Carnival Development Committee (now defunct)
CEO	Chief Executive Officer
CND\$	Canadian Dollar
CRSTDP	Caribbean Regional Sustainable Tourism Development Programme
COPE	Council of Presidents of the Environment
CTO	Caribbean Tourism Organization
CXC	Caribbean Examinations Council
DFC	Dominican Festival Commission
EC\$	East Caribbean Dollar
EDF	European Development Fund
EFQM	European Foundation for Quality Management
EU	European Union
NCBA	National Carnival Bandleaders' Association
NCC	National Carnival Commission
NGO	Non-Governmental Organisation
OAS	Organization of American States
OECD	Organisation for Economic Co-operation and Development
PEST	Political, Economic, Social and Technical Analysis
SIG	Special Interest Group
SME	Small and Medium-sized Enterprise
TDC	Tourism Development Company, Trinidad and Tobago
TOWS	Threats, Opportunities, Weaknesses, and Strengths Matrix
TUCO	Trinbago Unified Calypso Organisation
UDC	Urban Development Corporation, Jamaica
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	World Tourism Organization
US\$	United States Dollar
WCMF	World Creole Music Festival

Acknowledgements

This study was assisted by many personnel of the Caribbean Tourism Organization (CTO) and by the consultants to the Caribbean Regional Sustainable Tourism Development Programme (CRSTDP) at CTO, whose hospitality and support was appreciated.

Special thanks are due to Ian Salter (CRSTDP, Sustainable Tourism Policy Development Consultant), and Mareba Scott (Sustainable Tourism Product Specialist) and Vincent Vanderpool-Wallace (Secretary General and Chief Executive Officer) at CTO for their guidance. I am also grateful to those who facilitated field research: Tina Williams (Ministry of Tourism, Jamaica), Carrole Guntley (Ministry of Tourism, Jamaica), and Stanley Sidoel (Ministry of Culture, Suriname).

I am particularly indebted to the managers and staff of the organisations featured in the case studies that gave generously of their time, information, and photographs and reviewed case studies prior to publication.

A wide range of tourism organisations and heritage operators also facilitated the research. Without their support this manual would not have been possible.

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Introduction



Pedro St. James, rope making- Cayman Islands

Few regions in the world display such an extensive variety of cultural and natural diversity in such a small and interconnected geographic area as the Caribbean. Heritage is of central importance to any country in three ways: firstly, it has an intrinsic value for national identity, which is often a society's fundamental reason for conserving, interpreting and educating about its heritage; secondly, heritage represents an outlet for recreational activities providing an additional driving force in the creation of heritage offers such as parks and museums; and thirdly, heritage is increasingly sought after as part of the national tourist product offer.

The Caribbean is more dependent on tourism to sustain livelihoods than any other region of the world. Globalisation has left most Caribbean small island

nations with limited alternative economic options, and tourism has now emerged as the largest employer and the foremost export sector in the region over the past decade. The Caribbean Tourism Organization's (CTO) member countries have only 1% of the world's population yet attract 3% of global tourism arrivals and expenditure each year. According to the Caribbean Tourism Organization (CTO), the Caribbean received 22.5 million stay-over arrivals, 19.8 million cruise passenger visits and about US\$21.5 billion in expenditure in 2005. In recent years, the heritage tourism sector has emerged as a key strategic asset in the Caribbean, enabling countries to tap into their cultural wealth and marketing and enhancing the competitiveness of Caribbean destinations.

One challenge that many Caribbean countries now face is how to reconcile the need for a diverse product portfolio of visitor attractions and "things to do" that builds on the country's unique selling points, whilst at the same time taking into account the rights of their citizens to gain access to their heritage, respecting the need for income generating activities and ensuring the integrity of these assets. There have thus been calls for greater investment across the region in sustainable heritage management. Implementing such an approach requires a strategy of market segmentation and niche marketing. It also involves increased investment in the arts, culture and heritage management as well as a strategic approach to bringing marginalised groups into the mainstream of the tourism sector.

CTO has a mandate to promote sustainable tourism in the Caribbean and disseminate good practices to its membership. The purpose of this manual is to provide the reader with a series of case studies to illustrate the varied approaches used to meet the challenge of heritage tourism development across the Caribbean, and the benefits that it can bring. These experiences are extrapolated into a strategic business management model that provides a guideline for CTO member countries and other interest groups to enhance the quality and viability of their heritage tourism offer, whilst ensuring that the natural and cultural heritage is preserved for the generations to come.



Old Havana- Cuba

Objectives and Methodology

Tourism is an extremely competitive business and it's vital that destinations continue to improve their offer based on an understanding of economic performance, their interactions with other sectors of society and their environmental impacts. In this way it will be possible to create a product that will stand the test of time based on the triple bottom-line of sustainability (economic, environmental and social). This publication is intended for all those who are interested in, or involved in the development of heritage tourism offers for commercial purposes, be they small and medium-sized enterprises (SMEs), specialised interest groups, site administrators, non-governmental organisations (NGOs), local and national authorities or tourism professionals. By putting forward a strategic business management model for the more sustainable development of heritage tourism products in the Caribbean, the intention is to give the sector a useful framework that can help generate added value in such a competitive market. The main objectives of the assignment were to:



- (1) Assess the existing and potential impact of heritage tourism in the Caribbean tourism sector, to identify the challenges and opportunities and assess the strengths and weaknesses associated with this sub-sector of Caribbean tourism;
- (2) Evaluate the performance of selected heritage tourism products/sites to identify critical success factors, best practices and pitfalls which stakeholders should be aware of; and
- (3) Make recommendations and map out a strategic business management model to strengthen the capacity of enterprises and agencies in Caribbean tourism.



The duration of the assignment was three person-months and the main bulk of the research was undertaken in the period between May 2007 and August 2007. The methodology was comprised of:

1. Literature Review

Relevant published and unpublished documents were reviewed to develop acceptable working definition(s), identify critical factors, lessons learnt and compile good practices.

2. Call for Submissions

A template to identify case studies of heritage tourism development was developed and sent to CTO contact points in its member countries in May 2007 by email, fax and post. A total of 12 responses were received, indicating approximately 50 potential case studies of heritage tourism. Responses were assessed in consultation with the CTO and by additional follow-up (email,

telephone) and a list of heritage tourism products/sites to be subject to field visits, and thereby be included in the manual as case studies, was drawn-up.

3. Selection of Case Studies of Good Practice

Case studies were selected for further investigation in the form of a field visit on the basis of objective criteria. Initiatives were selected if they demonstrated most of the following:

- Focus on one of the four heritage tourism types identified in the desk top study: natural heritage, built heritage, indigenous and traditional knowledge, and popular culture
- Reflect the diversity of governance structures: either publicly owned and managed, or a private enterprise, including NGO-run
- Have been in operation for a minimum of 5 years and have good record keeping
- Permit access to financial records and possess sufficient documentation to profile the case study
- Be seen as a success story in terms of its importance for the country

The selection of the case studies was filtered by the Caribbean Regional Sustainable Tourism Development Programme (CRSTDP) requirement that verification visits were limited to CARIFORUM countries. A further constraint on the selection of the case studies was the limitations of the resources (time and finances) at the disposal of the Heritage Tourism Consultant.

4. Field Visits and Stakeholder Interviews

Verification visits were thereafter made in the region over a six week period, to ensure that field realities were consistent with the information provided. Field visits were undertaken in Trinidad and Tobago, Jamaica, Suriname and Barbados. Case studies were furthermore developed for heritage tourism products in Dominica and St. Kitts and Nevis, using primary information previously compiled by the Heritage Tourism Consultant. Data was collected at the community level using key informant interviews based on a semi-rigid interview template, and direct observations. Where practical, the Heritage Tourism Consultant participated in the tourism activity, and digital photographs were taken to illustrate the case studies. Site visits were combined with interviews with key stakeholders including government agencies, non-governmental organisations (NGOs) and tourism companies.



Plaza de la Catedral- Cuba

Report Structure

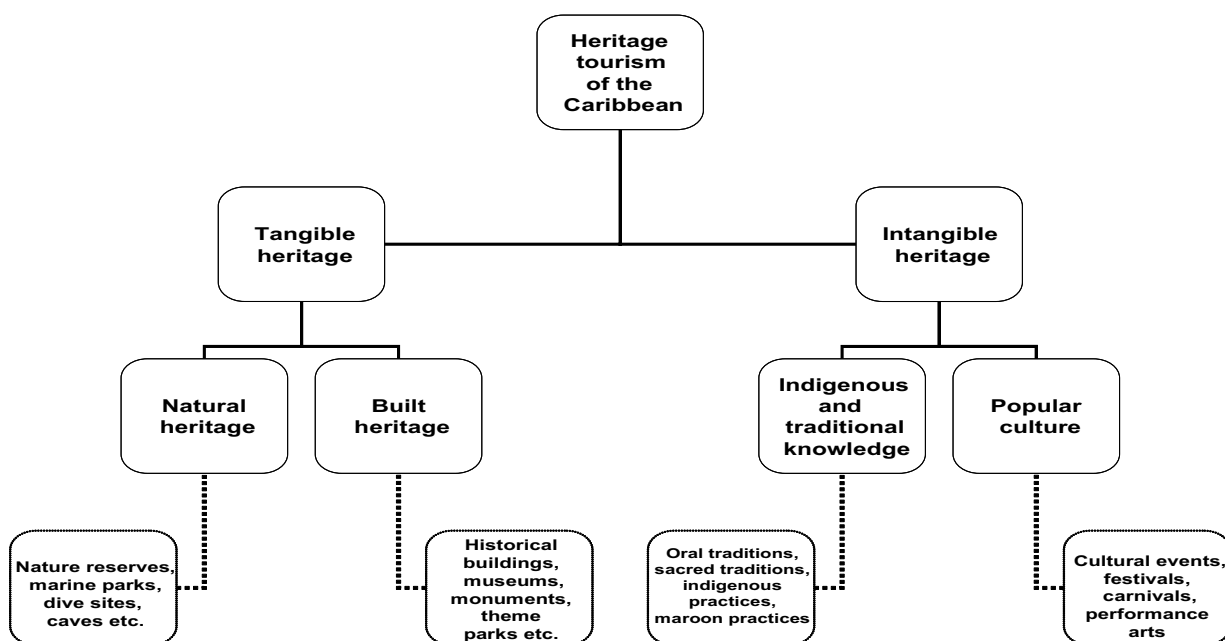
This report is comprised of three interlinking sections. The first section provides the reader with an introduction to definitions of heritage tourism and its market potential. The second section presents ten case studies of good practices for heritage tourism development taken from across the Caribbean, categorised according to type and described in relation to governance, visitation, financing, marketing, branding and stakeholder relations. Each category of heritage is then analysed using the TOWS (Threats, Opportunities, Weaknesses and Strengths) matrix. The third section goes on to present a strategic business management model for the sustainable development of heritage tourism.

What is Heritage Tourism and What are the Trends?

The term heritage tourism is subject to much confusion and varied interpretation. Heritage tourism is often viewed as being synonymous with cultural tourism, historical tourism, arts tourism, nature tourism or attractions-related tourism. A review of the literature on heritage tourism suggests that a large proportion of the studies focus on tangible or built heritage (e.g. historic sites, public arts, monuments, museums, natural attractions, archaeological sites). An area that is often neglected is that of intangible heritage which includes the performing arts, festivals, and popular culture forms¹.

This observation is of particular significance to the countries of the Caribbean in that many of the heritage sites are monuments of the colonial era, for example, forts, plantation houses and sugar mills. The heritage of the indigenous and transplanted populations is often rendered invisible in historic buildings and monuments but is embodied in the region's intangible heritage (popular songs, visual arts, live performance) that affirms social identity and recall psychic memory.

Figure 1: Typology of Heritage Tourism of the Caribbean



Within the framework of this project, the heritage tourism of the Caribbean is categorised into two principal areas as illustrated in Figure 1: **tangible heritage**, which includes natural and built spaces and landscapes; and **intangible heritage**, which is embodied in cultural expressions such as indigenous and traditional knowledge and popular culture forms.

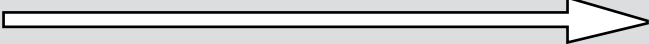
An analysis of the global tourism trends suggests that there is much scope for growth in the heritage tourism sub-sector. Changes in the tastes and demographics of international travellers are such that there is greater demand for authenticity in the tourism experience². This is exemplified in the shift away from high-impact mass tourism towards more environment-friendly and community-oriented travel options such as eco-tourism, adventure-tourism as well as cultural and heritage tourism. It is also widely recognized that tourists today are looking for more than just “sun, sand, sea and sex”.



Left: The exterior of Pedro St. James- Cayman Islands. Right: A Pedro St. James tour guide

One of the key challenges associated with this sector is the difficulty of measuring the size and dimension of sub-sectors like heritage tourism. The development of statistics is hampered by a lack of precision in the definition of categories such as cultural tourism, ethnic tourism, special interest tourism, arts tourism and eco-tourism. As a consequence it is often difficult to assess what share of visitors can be classified specifically as heritage tourists. It is suggested that heritage tourists should be classified according to their motives for travel as well as their actual experience. From this standpoint it is recommended that heritage tourism should be viewed as a sliding scale from the “purposeful heritage visitor” to the “incidental heritage visitor” as portrayed in Figure 2.

Figure 2: The Sliding Scale of Cultural Tourism

				
The Purposeful Tourist	The Sightseeing Tourist	The Serendipitous Tourist	The Casual Tourist	The Incidental Tourist
The person who travels specifically for the cultural experience and is highly knowledgeable, informed and seeks a deep cultural experience.	The person who travels for cultural tourism but is not an enthusiast and seeks an enriching experience.	The traveller for whom cultural tourism is not a stated objective but who ends up enjoying the experience.	The tourist who identified cultural tourism as a weak motive but seeks a rewarding experience.	The tourist for whom cultural tourism is not an objective but happens to have a rewarding experience.

Source: Adapted from McKercher & Du Cross (2002)³

Cultural tourism, which may be considered as the oldest segment in tourism, is now viewed as an important innovation and a new source for competitive advantage in the global tourism industry. The World Tourism Organization (UNWTO) estimated that 37% of all trips have a cultural element. Studies of cultural tourism in Europe indicate that cultural tourism has been a well-defined segment of the market since the early 1990s⁴. The contribution of the arts to the UK tourism economy was estimated to be 41% of overseas tourist spending. Furthermore, it has also been estimated that arts-related tourists stay 75% longer and spend 64% more per trip⁵. In New York, it was estimated that approximately 40% of overseas visitors are cultural tourists, in what is measured to be a US\$2.5 billion industry⁶. As in the case of the UK, cultural tourists who visit New York tend to stay longer, spend more and have a keen interest in the arts, live performances and festivals. In a recent study of heritage tourism it is argued that heritage tourism generates higher returns than other segments of the industry:



A group tour of Pedro St. James- Cayman Islands

The heritage tourism segment represents one of the highest yield tourism groups, ahead of both traditional mass markets and other niche tourism audiences such as arts. Heritage tourists spend 38% more per day, and stay 34% longer than traditional tourists and spend 20% more and stay 22% longer than arts oriented tourists⁷.

The demographic profile for heritage tourists suggests that they are aging baby-boomers interested in the kind of travel that captures identity experiences. This is an expanding market segment with significant purchasing power. Table 1 provides a profile of the eco-tourist that is considered here to be comparable to the heritage tourist. This is principally an analysis of the stereotypical heritage visitor from Organisation for Economic Co-operation and Development (OECD) countries. From the standpoint of the Caribbean, recent research estimates that up to 75% of adults that visited the region engaged in some form of cultural activity or event.

Table 1: Eco-Tourist Profiles

The experienced ecotourism traveller:	General consumers interested in ecotourism vacations:	General consumers and experienced ecotourism travellers seek:
Is between 25 and 34 years of age	Primarily between 25 and 45 years	Scenery/nature (45%)
Primarily couples 44%, with 25% being families	Primarily couples, with 33% being families	Casual walking/hiking/trekking rate highest as activities
Very highly educated – 82% being university graduates	Generally well educated	Multiple activities

Table 1: Eco-Tourist Profiles *cont'd*

The experienced ecotourism traveller:	General consumers interested in ecotourism vacations:	General consumers and experienced ecotourism travellers seek:
Prefer summer travel but has Some interest in winter travel	Prefer summer travel	Mid-range Accommodation
45% willing to spend over US\$1500 per person on an ecotourism vacation	38% willing to spend US\$1500 per person on an ecotourism vacation	
50% belong to nature related organisations	11% belong to nature related organisations	
72% read nature related Magazines	61% read nature related Magazines	

Source: CANARI (1999)⁸

Diasporic tourism is another source market for the tourism industry. Like remittances it has had stable growth over the years and is less susceptible to cyclical and political shocks. There is very little research on this area as this type of tourist is often neglected in tourism studies. Research indicates that in the case of the Dominican Republic diasporic tourism may account for as much as 40% of visitors⁹. In Guyana, it is estimated that diasporic tourists could account for as much as 30% of total tourist revenue¹⁰.

There is also a link between diasporic tourism and cultural tourism. Diasporic tourists account for the bulk of visitors for carnivals and other arts and music festivals in the region. These festivals account for a rising share of tourism earnings in the respective territories. The Trinidad and Tobago Carnival is the most notable case. Diasporic visitors account for as much as 70% of the visitors and the visitor expenditures and arrivals have doubled in the period 1998 – 2001 to account for approximately 12% of the annual tourism revenues¹¹.

In the Caribbean region, the growth of regional tourism also needs to be taken into account. With the expansion of airlift and ferry services within the region there has been a sizable increase in travel, particularly from the middle and professional classes. It was estimated in the late 1990s that regional tourism is one of the fastest growing components of Caribbean tourism¹². This trend is clearly evident in the consumption of festival tourism. In the case of the St. Lucia Jazz Festival, 39% of the patrons are from the Caribbean, of which close to 40% are from the neighbouring islands of Martinique and Guadeloupe. Dominica's World Creole



**The interior of Pedro St. James-
Cayman Islands**

Music Festival has a similar visitor profile with a large percentage of the patrons coming from the French Departments. Caribbean nationals account for 25% of visitor arrivals for the Barbados Crop-Over Festival, while 12 – 15% of the visitors to the Trinidad and Tobago Carnival come from within the region. Caribbean visitors regularly account for 30% of visitors to St. Kitts during the month of the St. Kitts Music Festival, which is almost double the yearly average¹³.

Heritage tourism investments are largely focused on tangible heritage forms such as built heritage and natural or cultural landscapes. Intangible heritage, for example, the folk and traditional knowledge as well as popular culture, is under-represented in heritage investments and promotions. In the Caribbean most of the heritage tourism sites are colonial institutions, for example, forts, plantation houses and sugar mills.

A survey of heritage tourism sites in the Caribbean has classified the attractions into four areas¹⁴:

1. Natural Attractions: Refers to sites which showcase natural phenomena, forest and other nature reserves, caves, botanic gardens, marine parks, waterfalls, volcanoes, and exotic, endemic and endangered species etc.
2. Cultural/Heritage Attractions: Refers to displays of the cultural norms of a destination for example local festivals, art exhibitions, drama etc. and/or attractions which relate to the history of the country, e.g. monuments, colonial buildings, indigenous sites/villages, archaeological sites.
3. Manmade Attractions: Refers to physical structures such as monuments, colonial buildings, theme parks, sporting facilities, gaming facilities etc.
4. Events: Refers to arranged and coordinated activities over a limited space of time. Examples include sporting events such as cricket tournaments and marathons, as well as cultural events such as the national carnivals.

The key findings from the survey are captured in the following section under the issues of (i) ownership, (ii) visitation levels, (iii) provision of facilities and services, and (iv) employment levels.

Table 2: Ownership by Category of Attraction (in percentages)

	NGO	Private	Public	Not Stated	Total
Natural	4.5	26.5	65.0	4.0	100
Cultural/Heritage	10.4	34.9	51.6	3.1	100
Manmade	8.4	39.3	50.6	1.7	100
Events	6.3	46.9	43.8	3.1	100

Source: CTO (2000)¹⁵

A majority (59%) of the reporting attractions in the region were government owned, while 33% were owned/operated by private persons or agencies, and 8% by NGOs. It has been argued that privately owned attractions are more successful than those owned by government. Using visits to attractions as a proxy for performance, it is evident from the data collected so far, that the situation is different in every destination, and in some cases, dependent on the type of attraction.

Table 3: Visitation by Category of Attraction (in percentages)

Visits	Natural	Culture/ Heritage	Manmade	Events	Total no. of attractions
1,500-5,000	48.8	58.8	49.7	56.3	164
5,001-10,000	11.2	10.1	6.7	12.5	30
10,000-50,000	22.4	14.2	21.5	25.0	58
50,000-100,000	5.9	14.2	8.1	-	24
100,001-500,000	11.2	2.0	-	1.0	24
500,001+	0.6	0.7	-	-	2
Total	100	100	100	100	304

Source: CTO (2000) ¹⁶**Table 4: Facilities Available in Attractions by Ownership (in percentages)**

Facilities	NGO	Private	Public	Not Stated	Total no. of attractions
Bar	4.2	50.3	44.8	0.7	143
Shops	4.7	51.2	42.5	1.6	127
Information Desk	7.7	28.0	63.1	1.2	168
Guides/Attendants	7.2	34.8	55.6	2.7	223
Rest Room	5.7	40.1	52.9	1.3	227
Other (not specified)	6.0	43.3	43.3	7.5	67

Source: CTO (2000) ¹⁷

Most attractions report low visitation levels. In all four categories visitor levels of 5,000 and under accounted for an average of approximately 53% of all visits. The next highest level of visitation (19%) is in the segment 10,000 -50,000, which includes events of marginally greater levels of visitation.

Private and public attractions provide a wider range of facilities and services when compared with those operated by NGOs. Private agencies tend to invest in revenue generating services such as bars and shops while the sites operated by public agencies provide more amenity-based services like information desks, guides/attendants, and restrooms.

Table 5: Employment in Attractions by Ownership (in percentages)

Employees	NGO	Private	Public	Not Stated	Total no. of attractions
1-10	7.4	27.7	63.5	1.4	148
11-20	7.3	61.0	31.7	-	41
21-30	-	52.9	47.1	-	17
31-40	-	50.0	50.0	-	3
41-50	-	25.0	75.0	-	3
51+	-	53.8	46.2	-	13

Source: CTO (2000)¹⁸

Attractions in the Caribbean create diverse employment opportunities for residents. A majority (61%) of attractions in the database indicated that they retain a staff function. Table 5 indicates that employment levels tend to be higher in privately owned attractions than among public and NGO owned attractions.

Political, Economic, Social & Technological (PEST) Analysis

Based on the above analysis and background research, the PEST Analysis is used to summarise some of the typical issues influencing the development of heritage tourism products in the region, before the ten case studies are detailed in the second section of this report.

1. Political/Legal/Institutional Issues

- Heritage Tourism has gained in salience among most tourism agencies in the Caribbean and several are keen on exploiting its potential to diversify the tourism product, increase the competitiveness and valued-added of the sector and to strengthen destination branding.
- Historically there has been under-investment in both tangible and intangible heritage. Tangible heritage has attracted higher levels of investment than intangible forms from public and private sources.
- Built heritage (e.g. forts and plantation houses) has had higher levels of investment and support both from the public and private sectors and from local and international institutions, particularly where it relates to colonial history.
- National heritage trusts have played a critical role in the preservation of key built assets across the region. Some territories have longer running and more established heritage trusts than others, which in turn are often related to colonial legacies.
- Planning and zoning have become key institutional tools for the conservation of monuments and historical areas listed for their cultural significance.
- Several countries in the region have sites that are listed on the UNESCO World Heritage. These listings have done much to galvanise the importance of built and cultural landscapes to local populations and to generate increased visitation by tourists.
- Natural heritage (e.g. caves and wildlife resorts) has been a key feature of tourist attractions in the Caribbean for some time, displaying high visitation levels and attracting investment for particularly outstanding sites.

- Indigenous and traditional knowledge has had the lowest level of investment because the communities that are the repositories of this form of heritage are often marginalized and disenfranchised groups (e.g. Maroons, Caribs) in the Caribbean.
- Communal land rights issues and land ownership disputes are problematic and restrict access to financing for heritage tourism operators within Maroon and native indigenous communities.
- There is limited protection of intellectual property generated through indigenous and traditional knowledge.
- Caribbean popular culture is globally marketed and recognized but has not been readily incorporated into tourism strategy.
- There has been increased interest and investment in festivals of all sorts in the last decade because of the high visitation levels, economic impact and destination brand values that they generate.
- Copyright and other forms of intellectual property, which are expanding sources of earnings, are readily infringed and therefore stymies investment.

2. Economic and Market Issues

- Heritage Tourism is an expanding share of the global tourism industry as evident in the expansion of cultural and ecological tourism.
- Heritage Tourism is a key asset in delighting and deepening the experience of both cruise ship passengers and stay-over visitors throughout the Caribbean.
- Heritage Tourism expands the domestic value-added of the tourism sector through entrance fees, merchandise sales, local transport and hotel occupancy where it is the key motivation for travel.
- Heritage Tourism aids in the differentiation of the destination and is key to developing a country brand.
- Heritage Tourism is a cost effective means for destination branding, tourism diversification and, cultural industry development.
- Most successful heritage tourism attractions are self-financing and provide a return on investment.
- Heritage Tourism is still largely driven by a supply-oriented approach (if we build it people will come) as opposed to a client-driven or marketing orientation.
- There is limited research on heritage tourists and key market trends.
- The heritage tourists are not a monolithic grouping. There is broad typology of heritage tourists ranging from the “purposeful tourist” to the “incidental tourist”.
- The heritage tourist comes from a range of associated tourism segments, for example, cultural tourists, eco-tourists, stay-over tourists, cruise ship passengers, diasporic tourists, regional tourists, business tourists, educational tourists.
- Private investment in heritage tourism is often considered as having low rates of return or is viewed as being too risky.
- Diasporic and intra-regional tourism are two components of the travel and tourism markets for the Caribbean that are forecast to grow significantly in the future.

3. Social, Cultural and Demographic Factors

- Heritage Tourism encourages investments in the legacy of communities and institutions, which may not have been invested in otherwise.
- Heritage investments are mechanisms for social catharsis and identity formation that bolster the cultural



confidence of Caribbean people and build the international appeal of the destination through media coverage.

- Tangible and intangible heritage attractions are often not viewed as a priority area for public investment and therefore struggle for institutional support and broadcast/exhibition/performance space.
- Heritage tourists tend to be in the 25-65 age group and women are an expanding market share with strong purchasing power. There is also a strong family orientation to this form of tourism.
- Heritage tourism is an important mechanism for diasporic communities to reconnect with their roots.
- Given the cultural and ethnic diversity of Caribbean heritage it has a strong appeal for migrant populations in North America and Europe.
- While there is much commonality in Caribbean heritage there is still enough diversity among countries to generate regional tourism.

4. Technological and Competitiveness Factors

- There is increased competition among Caribbean countries to attract heritage tourists in the region and internationally as exemplified by the increased level of participation of heritage operators in international tourism and cruise ship trade fairs.
- There is a potential for over-investment in heritage tourism and the risk of high levels of duplication within and across countries as the sub-sector expands.
- Print, electronic and digital media are critical assets for marketing and promotion; to build visitation and audiences; and to win public and corporate sponsorship.
- Heritage tourists are generally highly educated and well-travelled and have a strong awareness and knowledge of the particular histories or art forms and therefore have high standards and expect nothing less.
- The growth of the Internet presents new options for social networking, online sales of merchandise, bookings, reservations, marketing and promotion of heritage tourism but this is only being exploited by a few operators.

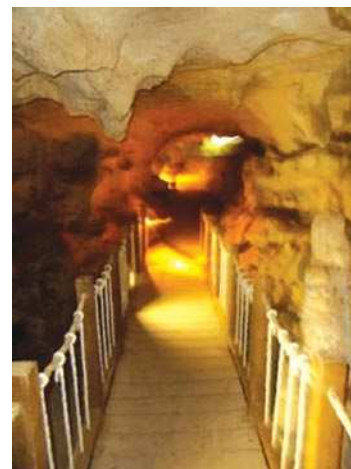
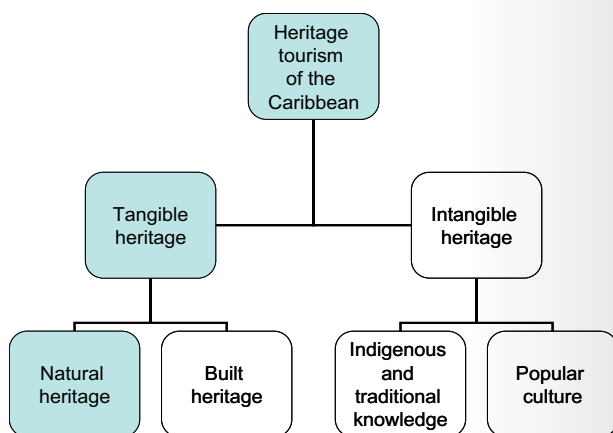
Case Studies:

Natural Heritage



CASE STUDY #1

Green Grotto Caves and Attractions, Jamaica



Above: Green Grotto Cave System

PROFILE

The Green Grotto Caves, formerly known as the Runaway Caves, are located on the North Coast of Jamaica between Ocho Rios and Montego Bay. The Caves are situated on a 25 hectare site. The cave system is 1,525 metres long and 12 metres deep. It is characterized by coastal limestone and features a series of interconnected passageways and chambers, light holes, stalactites and stalagmites, as well as two lakes. The most striking features of the cave system are the rock formations and the small “grotto” lake in the innermost cavern.

The Green Grotto Caves and Attractions offers the visitor a walking guided tour which lasts approximately 45 minutes which is followed by a complimentary drink. The Caves were used as shelter by the Taino Indians, Jamaica’s first inhabitants. The Caves were also used by the Spanish as a hideout from the English in the mid-seventeenth century. In the 18th century the caves were a haven for runaway African slaves. In between the two World Wars the caves were used as a base for smuggling arms to Cuba.

The Caves are also home to six species of bats, three of which are indigenous to Jamaica. The bat colony attracts a number of scholars and post-graduate students from Europe, namely Belgium and Germany and there are proposals to establish a bat monitoring facility for research purposes.

GOVERNANCE STRUCTURE

The Caves have been operated as an attraction since December 1959 when it was owned privately by locals. Green Grotto was acquired by the Urban Development Corporation (UDC) in 1999. The site was upgraded after acquisition and re-opened in April 2000. The UDC also manages other natural sites like the famous Dunns River Falls.

There are 25 persons employed at the Green Grotto Caves: 1 manager, 2 supervisors, 6 customer representatives, 8 tour guides, 3 sanitation officers, 3 landscape staff, 1 maintenance staff and 1 first aid staff.

Given the increased demand of visitors, the company plans to expand employment by 12 – 15 persons.

A customer survey is conducted on a routine and on-going basis. One of its main goals is to provide an assessment of the performance of the tour guides. The information generated is used for human resource management and quality control. The tour guides are viewed as front line staff and are considered as the key marketing agents for the site. Green Grotto currently enjoys a satisfaction rate of 95% but management's goal is to achieve 98%.

The tour guides are well-trained and tours consist of a maximum of 20 persons. The manager conducts most of the training and plans the tour guide schedules. In order to be considered for the job, guides need to have a minimum of 5 CXC subjects, through some of the guides presently employed have associate degrees. The guides work a five-day week and enjoy a competitive salary with health benefits, a pension plan and group life insurance. Green Grotto Caves and Attractions is viewed as an "employer of choice", as reflected by the low staff turnover rate.

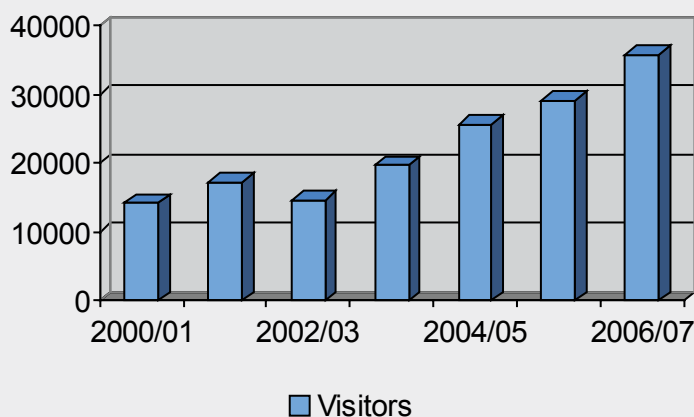


Green Grotto Caves Visitor Centre

VISITATION

The Green Grotto Caves is one of Jamaica's top natural heritage sites. Visitation levels have grown appreciably since 2000 when the Caves re-opened under new management. In 2000 visitor levels were just over 14,000 and have grown steadily throughout the decade. The number of visitors for the last fiscal year stands at almost 36,000, a 250% increase over the period. Visitor levels were already at 18,228 for the period April to July 2007 representing more than half of 2006 visitation in the space of only four months. The peak months for visitation are mid-May to end of August and in December.

Figure 3: Visitor Numbers, 2000/01 – 2006/07



The customer survey shows that over 45% of the visitors are professionals in fields like finance, law, education, science and technology. Cruise ship passengers and other structured tours are a major component of the visitation, accounting for approximately 50% of the visitors to the site. The major cruise-lines from which visitors are sourced are Royal Caribbean, Princess, Aida Aura, and Norwegian lines. These visitors pay US\$15.00 for adults and children pay US\$7.00. Walk-in visitors that are non-residents pay US\$20.00, while children under 12 years old pay US\$10.00. Residents pay US\$10.00 for adults and US\$4.00 for children. There is also a differential rate for schoolchildren of US\$2.00 for secondary and US\$5.00 for tertiary level students. The ticket price includes beverage refreshment.



Green Grotto Trail

FINANCES

Entrance fees are the primary source of income. The operation ran a deficit until fiscal year 2005/06 which was subsidized by the parent company UDC.

In terms of recurrent expenditures, the key items are administration and staffing which account for approximately 70%, and publicity and marketing accounting for 25%. UDC has incurred major capital expenditures since acquiring the site: the upgrade of the site and facilities in time for the reopening in late 1999 cost US\$230,000, in 2000 US\$70,000 was spent on the new toilet facility, and in 2005/06 US\$830,000 was spent on upgrading the cave structure and the walkway lighting. For the 2007/08 season, US\$500,000 has been

allocated for new ticketing and administrative offices as well as a facility for fishing on one of the natural lakes on the western section of the property. A proposal also has been made to invest in a campsite and log cabins, which would generate a new source of income. These investments have been internally financed by UDC.

MARKETING

The marketing strategy for Green Grotto is multi-faceted. The key marketing asset that Green Grotto enjoys is its location on the North Coast road between the two tourism cities of Montego Bay and Ocho Rios. This area of Jamaica has the highest concentration of large hotels and several new resorts are under construction.

To attract stay-over and cruise ship passengers the organisation produces brochures and posters for distribution and display at the major hotels and on cruise ships. The various tour operators also utilize these items. The marketing strategy also involves an advertising and promotional strategy focused on the international trade magazines as well as local and national press. The latter element of the strategy is often timed to coincide with major events or festivals like Reggae Sumfest or Jamaica Jazz and Blues Festival, which take place on the North Coast of Jamaica. The aim is to attract cultural and festival tourists who are seeking daytime activities or family-oriented outings. Green Grotto has invested in a new inter-active website, with the intention of using it to compliment the other promotional materials.

Branding the site has been a key imperative of the organisation. Green Grotto Caves is the only show cave in Jamaica and can be considered to be a unique offering on the North Coast of Jamaica. It is also considered as a soft adventure attraction. Its key advantage relates to the importance of the cultural landscape in terms

of the various ways different groups or communities have used the site historically. In this sense it offers some insight into Jamaican and Caribbean history and serves as an educational heritage site.

An environmental policy is central to the marketing strategy in addition to serving the core need of ecological sustainability. The key features of the policy relate to resource conservation, for example, minimizing the use of water, energy, and chemical agents along with reducing the generation of solid and liquid waste. The other elements of the policy focus on the training of staff and the education of visitors, tourists and the general population on the conservation aspect of the sites and to build greater awareness of wider environmental goals.

A certification process supports these conservation strategies. In 2003, the Green Grotto Caves were the first attraction and caves in the world to have gained Green Globe certification, and management estimate that the Green Globe certification accounts for or attracts approximately 25% of the visitors, mostly foreigners¹⁹. The Caves also have received the Environmental Ambassador Award (2004) and Ms. Fabia Lamm, the General Manager, has been the recipient of the Environmental Champion of the Year Trophy in 2003 and 2004.

STAKEHOLDER RELATIONS

The Green Grotto works with a number of community groups and youth organisations in the area. For example, the police youth group gets passes to the facility and complimentary tours. Green Grotto also assists community groups with the organisation of events.

Green Grotto hosts an annual environmental fair for schools in the St. Ann area. Primary and secondary schools are targeted. Each school must have an environmental club that deals with alternative uses of energy and recycling, for example. Fifteen schools participated in the last fair.

The Green Grotto is certified by the Jamaica Tourist Board and is often included in the country's international tourism promotional tours.

KEY LESSONS

- International certification (e.g. Green Globe) has helped to build environmental standards as well as generate strong marketing capital.
- Financial support from the parent company was critical during deficit period. The organisation is poised for self-sustained growth now that the visitation levels have grown.
- Trained and motivated staff (The Green Team) is a key asset in terms of achieving high customer satisfaction. The customer surveys are an important management tool for quality control and to monitor the performance of the tour guides.
- Low staff turnover is a good indicator of satisfaction among internal stakeholders.
- The romancing and mythologizing of the history of the site is an under-exploited resource.
- Scholarly research is key to maintaining the authenticity of the site and can assist in building new story lines.

CONTACT DETAILS

Name of interviewee: Ms. Fabia Lamm

Position in organisation: General Manager

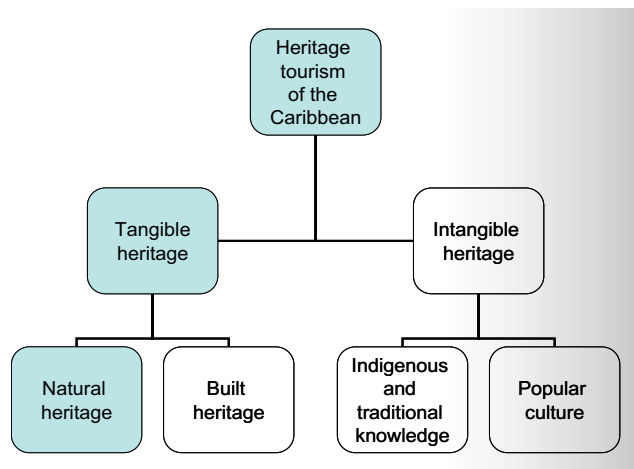
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CASE STUDY #2

Asa Wright Nature Centre and Lodge, Trinidad



Above: Asa Wright Nature Centre and Lodge

PROFILE

Located at 1,200 feet in the mountains of Trinidad's Northern Range, seven miles north of the town of Arima, the Asa Wright Nature Centre (AWNC) is a world-class natural history destination for students of tropical ecology and is of particular interest to ornithologists. Comprising nearly 1,500 acres of mainly forested land in the Arima and Aripo Valleys of the Northern Range, the AWNC's properties will be retained under forest cover in all perpetuity, in order to protect the community watershed and to provide important wildlife habitat.

The Centre's main facilities (main house, lodge, restaurant, and shop) are located on a former cocoa-coffee-citrus plantation, previously known as the Spring Hill Estate. This estate has now been partly reclaimed by secondary forest, surrounded by impressive rainforest, where some original climax forest on the steeper slopes have a canopy of 100-150 feet. The whole effect is one of being deep in the tropical rainforest.

GOVERNANCE STRUCTURE

The AWNC is a "Not-for-Profit" Trust established in 1967 by a group of naturalists to "protect part of the Arima Valley in a natural state and to create a conservation and study area for the protection of wildlife and for the enjoyment of all." It was one of the first nature centres to be established in the Caribbean. In short, the Centre's main mission is to conserve the biodiversity and to offer visitors a chance to study the species that are resident.

The Centre was started by non-residents with a grant of US\$75,000. The Centre operates a Lodge or Hotel, which is the main source of income, and ornithologists constitute the key target market.

The Centre's Board is comprised of 21 persons, half of which are from the US, UK and Canada. The Chair is always a local resident and the CEO reports to the Board. The Lodge is run by a Hotel Manager who in turn reports to the CEO. There are 75 members of staff of which 13 are security staff.

There are three committees that evolve from the Board, with the first two meeting on a monthly basis:

- Land use and Planning Committee
- Financial and Human Resources Committee
- Education and Research Committee

VISITATION

The main group of visitors to the Centre consists of ornithologists. They account for 75-80% of the visitors/tourists. The majority (approximately 70%) of these visitors are over 50 years old and are retired professionals (e.g. scientists and biologists). They can be defined as purposeful tourists in that they are highly knowledgeable about the environment. Another group of visitors are eco-tourists who are not keen ornithologists, per se, but are interested in sightseeing in an environmentally protected area. These two groups account for most of the stay-overs at the lodge. The Centre also attracts a number of local and diasporic visitors who come on day visits. The latter normally visit the Centre with family and friends and can be considered as casual tourists. The bulk of visitors are English-speaking.

Stay-over tourists on pre-arranged tours account for 75 – 80% of the income of the Centre. They come principally in the November to April period when it is winter in the Northern hemisphere. During the spring, summer and fall this clientele prefer to pursue their hobby closer to home.

Close to 70% of the tour market comes from the US. The main US agent is Caligo Ventures Inc., which specialises in bird watching and ecotourism tours, and is based in Key West, Florida. Caligo has been the US agent for the Centre for the past 20 years. Another US based tour operator of importance for AWNC is Mot Mot Tours.

AWNC currently has no agent in Europe or the UK, however, these are rapidly developing markets and the UK clientele now accounts for some 25% of the market. These tourists are more price sensitive than the US clientele, however, with the appreciation of the UK Pound Sterling this situation has been improving.

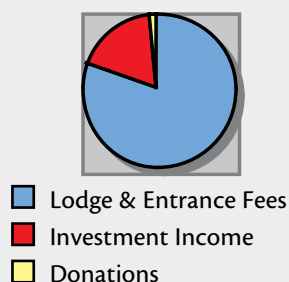
FINANCES

The major source of earnings comes from the operation of the lodge and from entrance fees. Together they account for approximately 80% of the income. In 2006 total earnings were US\$655,000. An important source of income that has emerged in recent years is investment income gained from mutual funds, foreign stocks and bonds (largest share), and local stocks. This source generated US\$120,000 and accounted for 18% of total earnings. The Centre earned US\$9,500 from donations in 2006.

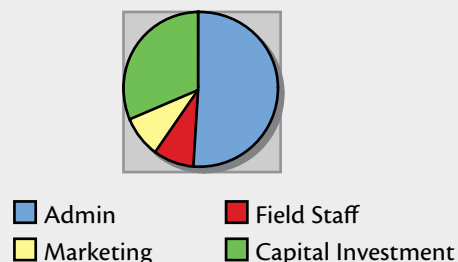
The key expenditures are within administration (58%), with expenditure on field staff at approximately 10%. The same level of expenditure was made on publicity and marketing. Capital investment in 2006 was a major expenditure and accounted for 35% of total expenditures. The Centre generated a surplus of US\$96,000 in 2006.

Figure 4: Key Sources of Income and Key Expenditures

Key Sources of Income



Key Expenditures



MARKETING

AWNC has a marketing budget of US\$48,000. The main marketing strategy is through the tour companies: Caligo Ventures Inc. and Mot Mot Tours. Word of mouth and referrals are also key elements of the strategy. This essentially runs on the reputation of the Centre, hence the importance of ensuring quality visits and employing quality staff and providing professional training. Success in this area is exemplified by the 25% repeat visitors ratio.

The Centre has attended the annual British Birdwatching Fair in the UK for the last 12 years, and it is a key element of their marketing strategy. All the major birding organisations are represented at the fair as well as the ornithology community. The Centre also advertises in Bird Life, the top international magazine for ornithologists.



AWNC has integrated online booking capability into its website for its lodge facility, with visitors able to complete and submit room reservation request forms online. Most of the business generated through this channel is repeater visitors, i.e. people who participated in organised tours to AWNC on their first visit and who now plan their own stay at the Centre. A total of 12% of AWNC's clients are sourced through website bookings.

AWNC prioritises its branding activities, through a focus on quality and consistent service to a discerning clientele who are knowledgeable about birding. The Centre's development strategy is client-driven, with each guest being given a client survey. These initiatives have borne fruit, with a survey by

The Audubon Society recognising AWNC as one of the top ten bird watching sites in the world, and the Centre has been the recipient of several prestigious national, regional and international awards including:

- The Caribbean Conservation Association award for "outstanding contributions to the conservation of tropical Wildlife" (1992).
- The Green Leaf Award, which is conferred annually by Trinidad and Tobago's Environmental Management Authority to individuals and organisations that have made a significant contribution to environmental conservation in the country (2000).
- ISLANDS magazine Ecotourism Award winner (1998).
- AUDUBON magazine selected the Centre as one of just nine eco-lodges worldwide considered to be "The World's Ultimate Outposts" (1999).
- The President of the Republic of Trinidad and Tobago presented AWNC with the Hummingbird Gold Medal for its community service in the field of environmental conservation (1993).

STAKEHOLDER RELATIONS

The national Tourism Development Company (TDC) does not provide direct financial support to the Centre but provides indirect support via its international and national marketing campaigns. TDC has instigated a marketing campaign entitled "Stay at Home" which is contributing to a rise in local visitors. The Centre is a member of the Trinidad and Tobago Bird Trust and the local Council of Presidents of the Environment (COPE).

KEY LESSONS

A strategic analysis suggests that the AWNC is well-positioned to exploit emerging opportunities while minimizing potential threats. The distinctive organisational competence and relative strengths of the AWNC are evident in a number of key ways:

- The key market for AWNC is ornithologists or purposeful tourists. Meeting and exceeding the needs and expectations of this target group is an important requirement to remain as a market leader. Word of mouth promotion from such a target group is invaluable.
- Environmental and ecological standards need to be continuously updated and invested in to satisfy the demands of the purposeful tourist.
- Expansion and diversification of income sources is critical to achieving the required business results on a sustained basis. The growth of investment income is an example of the ways in which heritage tourism operators can finance new investments.
- Attracting and retaining highly trained and motivated staff is a critical success factor. An indicator of success would be low staff turnover.
- Web-based reservations for the Lodge have the potential to reach new audiences and cut out the middleman, thereby improving revenue margins.
- Scholarly research activities help build the reputation of the AWNC and sustain the authenticity factor, which is critical to marketing and branding.



CONTACT DETAILS

Name of interviewee: Dr. Howard Nelson

Position in organisation: Chief Executive Officer

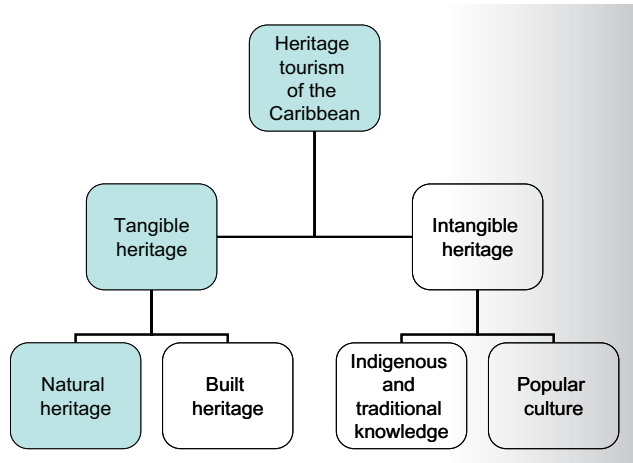
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CASE STUDY #3

Harrison's Cave, Barbados

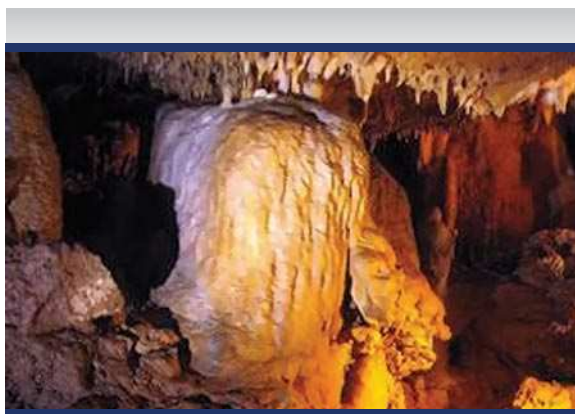


Above: Harrison's Cave formations

PROFILE

The economic and tourism potential of Harrison's Cave was not realised until 1970 when the Barbados National Trust commissioned the speleologist, Ole Sorensen to map and survey the caves. Work on the caves started four years later drawing on expertise in the fields of natural sciences, the arts, and geology. The developmental works required the digging of tunnels, improving lighting and diverting of underground streams.

Harrison's Cave is the number one tourist attraction in Barbados and with 190,000 visitors per year, it is one of the most popular tourist attractions in the Caribbean. Harrison's Cave is a limestone formation comprised of caverns and subterranean passages with stalactites and stalagmites, lakes, streams and waterfalls. After a short video presentation, visitors are given a 45 minute, one mile long, underground tour of the extensive system of caves in electrical trams.



Harrison's Cave formations

Opened as a show cave in the 1970s, Harrison's Cave is the only 'drive-in' cave in the Caribbean, and one of only three offering this experience in the world. The area surrounding the cave contains a number of nature-oriented attractions such as the Flower Forest, Highland Outdoor Tours, and the Barbados National Trust's (BNT) Welchman Hall Gully. Nearby natural features include Cole's Cave, the remaining natural passages of Harrison's Cave, and three major gullies which are dominated by natural vegetation. The entire area has been designated as the Harrison's Cave Zone. This policy came into existence in 1984 and was amended on 2nd January, 2001 (see Box 1).

Harrison's Cave Zone
• There shall be no new development within the restricted area except it is associated with Harrison's Cave • The practice of Class 1 agriculture is strictly prohibited • There shall be no change of use • There shall be no subdivision of land which results in the creation of vacant lots • Existing buildings will be allowed improvements subject to the special conditions for sewerage disposal now enforced in Zone 1 Areas e.g. disposal through an approved septic tank and approved filter bed containing gravel and activated carbon before disposal into a soak-away no more than 4.5m (15'0") deep • There shall be no increase in the capacity of any building e.g. a single family house cannot be upgraded to a two family unit

The Visitor's Centre, which was designed to fit in with the natural limestone bedrock, provides a refreshment area and handicraft shops, along with an exhibit of Amerindian artefacts that have been excavated from various sites around the island.

GOVERNANCE STRUCTURE

The Cave is run and operated by Caves of Barbados Limited, a state-owned limited liability company. Although a wholly-owned government agency the Caves of Barbados does not get a subvention. The organisation is self-financing but enjoys government support and backing. For example, the offices are provided for by the government. The organisation employs 84 persons with 10 working in administration.

The Government of Barbados has recently undertaken a long-term investment programme for the redevelopment of Harrison's Cave. The facility has been closed since July 2006 for redevelopment of the cave system and the training of its staff, though it was temporarily reopened in 2007 to the general public in conjunction with the Cricket World Cup, which was hosted by the West Indies.

The redevelopment has been financed by a loan of US\$16.9 million from the Caribbean Development Bank (CDB). The loan is granted under the guarantee of the Government of Barbados. The programme of work includes:

- A short-term refurbishment Programme
- A series of Feasibility Studies
- A Detailed Design Phase for Harrison's Cave
- A Capital Works Programme



Stalactites & Stalagmites



Harrison's Cave Visitor Centre

The goals of the redevelopment are (i) to expand the viewing area of the cave and the surface facilities to accommodate a larger number of visitors, (ii) to improve the visitor experience, and (iii) to increase revenue generation and employment opportunities. The redevelopment will also help to safeguard the cave's fragile environment, address over-capacity issues, and enhance and diversify the tourism product of the Cave and its surrounding region. According to Rosene Reid, Technical Officer and Project Coordinator with the Government's Natural Heritage Department (formerly the Environmental Special Projects Unit), "Harrison's Cave's redevelopment will not only reinvigorate the attraction but will also benefit community residents, enhance the protection of the fragile environment of Harrison's Cave, and be the centre piece of our nature tourism expansion into the central highlands of Barbados"²⁰.

The development works are expected to take five years and will include a new reception centre, ticketing and restaurant area. Gully trails will be included linking Welchman Hall, Harris Gully and Jack-In-The-Box-Gully. The key modifications to the

Harrison's Cave will include new lighting controls and improved ventilation.

Another key component is the continuing community participation programme. Following on from the good experiences derived during the feasibility phase, there will be opportunities for local residents to tour and experience the new facilities and interpretative programmes.

The Consultant, Axy's Environmental Consulting (Barbados) Inc. was retained for the design phase and the Government's Environmental Special Projects Unit, which holds primary responsibility for the restoration, development and expansion of Harrison's Cave, managed the 2nd phase of work. This component involves a number of baseline studies and community initiatives that included:

- Mapping and assessments of Harrison's Cave and Cole's Cave, including structural integrity determination of water quality and water flows in the cave systems
- Documentation of wildlife and vegetation communities in Harrison's Cave Zone
- Assessment of existing human impacts and human safety
- Surveys of residents in the surrounding communities
- Inventory and mapping of local infrastructure
- Review of the existing visitor facilities and management at Harrison's Cave
- Evaluation of the existing interpretative and educational programs at Harrison's Cave
- Ongoing community consultation initiatives
- Implementation of several community-based pilot projects

In June 2007, a delegation of 22 persons from Barbados visited Calgary, Canada to conduct a two-week tour of some of Alberta's premier tourism attractions and interpretive centres as part of a fact-finding mission. The group spent a week at the Columbia Icefield, operated by Brewster Transportation, followed by another week of tours to attractions such as Head-Smashed-In Buffalo Jump, the Royal Tyrell Museum of Palaeontology, the Frank Slide, Banff National Park and Calgary's Heritage Park²¹.

VISITATION

The Caves have been attracting over 190,000 visitors for several years. In 2007, the Zagat Survey of 169 top restaurants, bars, nightclubs, attractions and golf courses across the Island identified Harrison's Cave as the most popular attraction in Barbados. The survey is based on the opinions and expertise of nearly 1,500 natives and frequent visitors.

The facility is a major attraction for stay-over visitors and cruise ship passengers, with the latter group exceeding the stay-over passengers in terms of visitation levels.

FINANCES

The operating budget is approximately US\$2.5 million. The principal source of income is from entrance fees (75%). The restaurant, shop and events provide the other sources of income. Salaries account for 65% of expenditures. The other key expenditures are marketing (12%) and operations (23%).

Entrance fees are differentiated for nationals as opposed to visitors. The latter paid US\$20.00 for adults and US\$10.00 for children. The former paid US\$15.00 for adults and US\$7.50 for children. There is some pre-sale of tickets to cruise ship passengers, which includes lunch for the price of US\$20.00.

The facility had reached its maximum carrying capacity of 1,200 – 1,500 per day for some years hence the rationale for redevelopment. Visitors are carried through the caverns on seven trams, each of which holds 32 persons and include facilities for the disabled. The journey of one mile lasts 45 minutes.



Harrison's Cave Visitor Centre

MARKETING

Key features of the marketing strategy include participation at international trade fairs (e.g. the World Travel Market in London, the Florida Caribbean Cruise Association, and Sea Trade in Miami), promotions on board cruise ships (e.g. Princess, Norwegian, Carnival, Holland, Royal Caribbean) and forging relations with local tour operators (e.g. Foster and Ince, Goddard Tour Destinations, West Indian Tours) that service both cruise ship and stay-over visitors. The local population and stay-over visitors are also targeted through advertisements in the local press and tourism magazines as was tested for the Cricket World Cup.

The regional tourist market is another area for expansion through "road show" visits to countries like Trinidad and Tobago, Jamaica and St. Vincent and the Grenadines. The latter group is estimated to constitute about 5% of total visitors. The new reservation system that will be introduced in the near future will be better able to identify nationalities in ticketing.

After the redevelopment is complete the aim is to develop a more aggressive marketing approach. With the new facilities the organisation will be targeting a wider array of visitors including conference tourists and wedding planners. The aim is to advertise in magazines like *Bride Magazine* and to target UK newspapers like the *Daily Mirror* and the *Daily Telegraph*. The website which is under construction is also to be upgraded to provide additional marketing support.

STAKEHOLDER RELATIONS

Harrison's Cave enjoys good relations with the Barbados Tourism Authority (BTA). The key benefit comes through savings from participating in international trade fairs. The BTA is able to negotiate lower costs for airlines and hotels. The BTA also operates as a wholesaler or sales agents at trade fairs that are not attended by the organisation. A fundamental feature of the redevelopment plans has been community outreach and involvement. With the expansion to create the Harrison's Cave Zone, several surveys and consultations have been done with communities and other stakeholders. Community pilot projects have also been implemented.

KEY LESSONS

- Harrison's Cave is a unique natural attraction with a well-structured tour experience that caters to a broad demographic appeal.
- International certification (e.g. Zagat Survey) builds media impact.
- The redevelopment of natural heritage sites often requires high capital investments.
- The loan from the CDB illustrates that heritage tourism is a viable sector for concessional financing.
- Government financial backing was required to access the loan.
- Targeted marketing is required to generate large and diverse visitation levels.
- Having well-trained tour guides and managing carrying capacity are critical for sustained visitation.

CONTACT DETAILS

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Position in organisation: Marketing Manager

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TOWS Matrix for Natural Heritage Sites: Caribbean Case Studies

	Sub-sector Strengths • World renowned sites. • Easy access to site. • Strong conservationist capabilities. • Client-driven strategy. • Well-trained staff and tour guides. • High repeat visitation. • Low turnover of staff. • Scholarly research. • International standards certification.	Sub-sector Weaknesses • Weak negotiating power with tour operators. • Low entrance fees. • Shortage of investment capital. • Fixed income streams.
	Strategic Options and Direction	
External Threats • Poor environmental standards in the country. • High cost of capital investment relative to potential earnings. • Limited support from national government agencies.	S-T 1. Pursue international recognition of site (e.g. UNESCO World Heritage Listing). 2. Expand environmental lobby through conservationist association. 3. Utilize surpluses and donations to build investment fund for reinvestment.	W-T 1. Target international organisations, national governments and corporate community to contribute to environmental fund. 2. Invest in eco-lodging as additional source of income. 3. Strengthen marketing through the Internet
External Opportunities • Growth in eco-tourism. • Expansion of the tourism sector. • Greater awareness of environmental issues among tourists and the local population.	S-O 1. Market natural heritage sites as effective destination branding. 2. Lobby for increased marketing and institutional support from national tourism agencies.	W-O 1. Raise entrance fees and improve negotiating power with tour operators. 2. Develop sound business plans that show the internal rate of return. 3. Document, measure and publish macro-economic impact of sector to show share of market. 4. Maintain ecological standards and do not exceed carrying capacity. 5. Build brand value of heritage assets.

Notes:

S-T: Strengths in the sector that can be used to minimize existing or emerging threats.

W-T: The strategies needed to minimize or overcome sectoral weaknesses and cope with threats.

S-O: Strengths in the sector that can be used to capitalize or build upon existing or emerging opportunities.

W-O: The strategies needed to overcome sectoral weaknesses if existing or emerging opportunities are to be exploited.

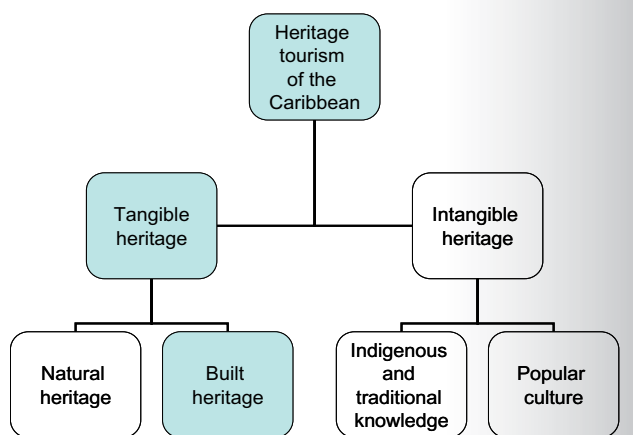
Case Studies:

Built Heritage



CASE STUDY #4

The Brimstone Hill Fortress National Park Society, St. Kitts and Nevis



Above: Brimstone Hill Fortress

PROFILE

Brimstone Hill Fortress is an 18th century military complex located on the South Western coast of St. Kitts. The hill on which Brimstone Hill Fortress is built is of geological significance and supports a rich biodiversity relative to its size. The surrounding land and seascapes enhance its attraction. The hill and the fortress area are part of a National Park covering 38 acres. The hill is an up-thrust of volcanic rock rising to 752 feet. A paved road leading from the Island's main road leads to the top of the hill where the former military parade grounds are now used as a car park. The complex consists of a series of discontinuous masonry walls, at various levels, four defensive bastions, a miscellany of barracks, magazines, water catchments, cisterns and ruins, and a citadel on one of the twin summits. The many parts of the military complex are connected by branches of the military road.

Brimstone Hill, the property of the State, was leased in 1965 to the newly founded Society for the Restoration of Brimstone Hill. In 1985 the Government, through the National Conservation and Environment Protection Act, declared Brimstone Hill to be a National Park, and empowered the Society "to make and enforce Regulations for (its) management and administration." The Brimstone Hill Fortress National Park was inscribed on UNESCO's World Heritage List in 1999.

GOVERNANCE STRUCTURE

The Brimstone Hill Fortress National Park is managed by a voluntary membership organisation, registered as a not-for-profit company. The Council of Management, made up of elected representatives of the members of the National Park and two Government nominees, makes all policy decisions. The administrative functions are based in Basseterre, including the CEO and the Administrative Officer, whilst the day-to-day operations are handled by the Park Manager who is based at the National Park. The objectives of the management include:

- The preservation, restoration and interpretation of the Fortress

- The protection of the integrity of the park
- The presentation of the site as a visitor attraction and place of information on the country's history and heritage

The core objectives of Brimstone Hill are based upon expert studies commissioned by the Society: the earliest, a 'Feasibility Study' of 1983; the most recent, 'A Guide to the Repair of Historic Structures in the Caribbean', 2007.

The initial capital for the monument came from a variety of sources including British development funds and membership subscriptions, as well as in-kind contributions such as the personnel (human) resources of the Government (Public Works Department, Prisons), use of equipment provided by local land owners (tractors etc.); and services provided by the mercantile/professional communities.

The staff comprises twenty persons (see below). Concessionaires operate a canteen that sells hot and cold beverages and drinks, and an audio tour. A private firm provides security services.

Staff Structure (No. of staff)
Management – 3
Administration – 2
Supervisory – 2
Service staff – 5
Field Staff – 8

VISITATION

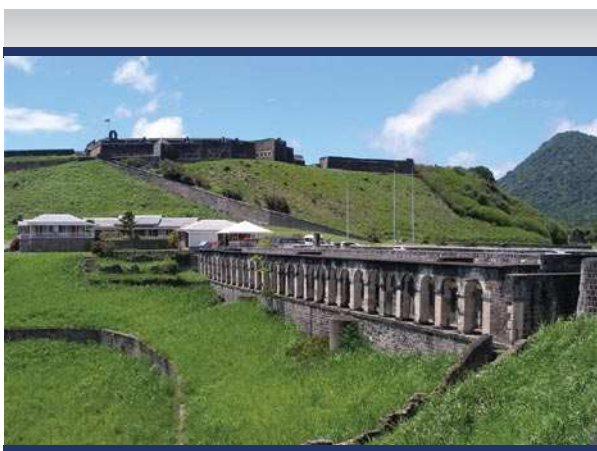
Between 50,000 to 65,000 paying visitors, over 80% of them foreign, arrive every year. Revenues from admissions, combined with shop profits, rental fees for banquets and license fees for vhf antenna sites, enable Brimstone Hill to remain a viable operation – and even to assist other efforts in cultural promotion and education.

The visitor carrying capacity is established to be 500 persons and 50 vehicles per day. At times of intense visitation, the flow of traffic is controlled by staff equipped with hand-held radios. More than 40,000 'tourists' each pay US\$8 to visit every year. There are concessionary rates for citizens, residents and organised groups of locals and Caribbean nationals. School children with their teachers are free.

Each visitor is given an information brochure; and an audio guide may be rented. Both are available in four languages. Within easy walking distance of the Parade is the Visitors Centre where a video introduction to the history and development of the Fortress can be viewed. The adjacent Gift Shop stocks a wide range of merchandise. Local and Caribbean products make up two-thirds of the inventory.

Table 6: Visitation Levels, 2004 - 2006²²

Jan-Dec	2004	%	2005	%	2006	%
Foreign	40,349	59%	25,709	53%	27,685	56%
Tours	17,162	25%	13,556	28%	12,359	25%
Local	8,036	12%	6,725	14%	6,668	13%
Groups	2,610	4%	2,283	5%	2,707	5%
Total	68,157	100%	48,273	100%	49,419	100%
Complimentary	3,323		2,920		3,615	



The ramparts of Brimstone Hill Fortress

FINANCES

The Society has generated surpluses on its operations all but once during the past 20 years. It receives no subventions but does not pay income taxes and electricity rates and is allowed duty concessions on the importation of materials and equipment. US\$700,000 in accumulated funds have been set aside as a hedge against natural or social disasters and as seed funding for potentially major projects in the future.

Strategic planning has been an important feature of the approach to financial management practiced at Brimstone Hill. In 1997 a strategic plan was developed, and a Draft Strategic Plan 2006-

2011 is currently under consideration by the Council with most items to 2008 already approved or modified. Historically, entrance fees have been the key source of income although the share of entrance fees in the overall income has dropped in the last year from 76% to 66%. This change is largely due to the increased earnings from cell tower fees, which has raised its share from 3% of income to approximately 13%. The interest accrued from invested funds is the other key source of income ranging from 12% to 15% over the period reviewed.

Table 7: Key Sources of Income, 2004 – 2006 (EC\$)

	2004	%	2005	%	2006	%
Entrance/User fees	\$689,707	73.23%	\$919,189	76.74%	\$786,051	66.31%
Government investment	***		***		***	
Business Sponsorship	none		none		none	
Donations	\$8,891	0.94%	\$2,041	0.17%	\$1,187	0.10%
Merchandising Shop	\$51,765	5.50%	\$41,606	3.47%	\$39,199	3.31%
Concessionaires	\$8,000	0.85%	\$12,288	1.03%	\$13,603	1.15%
Cell Site Fees	none		\$35,889	3.00%	\$150,475	12.69%
Banquets & Receptions	\$22,518	2.39%	\$19,900	1.66%	\$21,843	1.84%
Membership	\$4,500	0.48%	\$6,112	0.51%	\$6,555	0.55%
Interest	\$144,856	15.38%	\$154,142	12.87%	\$160,981	13.58%
Miscellaneous	\$11,587	1.23%	\$6,531	0.55%	\$5,500	0.46%
Total Income (EC\$)	\$941,824		\$1,197,798		\$1,185,394	

*** NB (i) Electricity is supplied by the Government at no cost.

(ii) The Society does not pay taxes (except for shop purchases/licenses and levies on behalf of staff).

Table 8 shows that the key expenditures are administration and staffing, which together account for some 70% of total expenditure. Staffing costs ranged from 54 to 59% over the period. The other major recurrent expenditures are publicity/marketing (5 – 8%), facilities/ground maintenance (5%) and depreciation costs (5 – 7%). Strategic investments in the archaeology and museum projects are reflected in various years.

Table 8: Key Expenditures, 2004 – 2006 (EC\$)

	2004	%	2005	%	2006	%
Administration	\$89,346	10.64%	\$99,301	9.94%	\$102,413	11.09%
Staffing (salaries & wages)	\$496,536	59.11%	\$537,332	53.78%	\$538,054	58.27%
Publicity/Marketing	\$48,590	5.78%	\$81,273	8.13%	\$70,030	7.58%
Facilities/Grounds Maintenance	\$41,111	4.89%	\$47,299	4.73%	\$49,870	5.40%
Capital investment		0.00%	\$37,825	3.79%		0.00%
Depreciation	\$60,776	7.23%	\$55,239	5.53%	\$64,969	7.04%
Archaeology Project		0.00%	\$24,429	2.45%	\$15,449	1.67%
Museum Project	\$73,394	8.74%	\$9,459	0.95%	\$2,426	0.26%
Outreach	\$18,943	2.26%	\$15,339	1.54%	\$24,791	2.68%
Other Miscellaneous	\$11,341	1.35%	\$91,577	9.17%	\$55,419	6.00%
Total Expenditure (EC\$)	\$840,037		\$999,073		\$923,421	

N.B. There are some 50 account heads for expenses and 15 for income, necessitating the consolidation of several amounts to fit the schedule above.

MARKETING

As a well maintained and interpreted historical and monumental heritage site in a distinctive natural and cultural setting; Brimstone Hill Fortress National Park is considered to be the premier heritage tourism site on the island. Tour operators advertise and sell tour packages to Brimstone Hill as one attraction among several attractions and activities.

The key marketing strategies employed are networking with tour operators, the local Tourism Authority, the hotels and other tourism stakeholders. The key areas for advertisement are in local magazines (e.g. the annual visitor magazine published by the hotel and tourism association) and radio as well as regional (LIAT & WINAIR flight magazines) and international publications (e.g. Cruising Guide Magazine). The Internet plays a supporting role by providing general information and links with other sites.

Taxi drivers are a key ally in marketing the Hill to stay-over visitors. The organization offers incentives and a lottery to the taxi drivers. They have been paid US\$20,000 in prizes and incentives since 2003.

Customer surveys were only conducted in the period 1997 to 1999. The results indicate a moderate to high approval rating. The introduction of the optional Audio Tour, which is available in four languages, the enhancement of the museum and the upgrade of the guided tours are to some measure responses to the recommendations from the visitor survey.

STAKEHOLDER RELATIONS

Over the past several years, the Society has made significant contributions to community, social and economic development. It contributes to the participation of the Ministry of Tourism at promotional conferences. Since 2000, US\$32,000 has been disbursed in small grants to NGOs, Community groups and associations in the areas of intangible cultural heritage and history. For nine consecutive years the Society has hosted free Emancipation concerts at Brimstone Hill. In 2006 the Annual History and Heritage week of Activities, initiated by the Society, and including other partners, was inaugurated. The D. Lloyd Matheson Trust was established in 1997 in memory of a past President of the Society. The Fund was established to “assist the publication of books and other educational materials; help NGO and Community initiatives in cultural development; and present awards to outstanding contributors in the fields for education, conservation, culture and heritage.” Two grants have been awarded to date.

Regionally, the Society is a founding member of the Caribbean Conservation Association and the Museums Association of the Caribbean and has been represented on their boards in various capacities including that of president.

Other community outreach activities include:

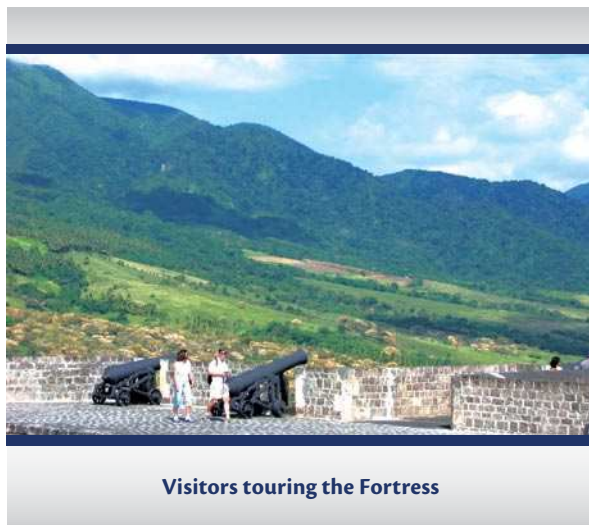
- Membership – includes quarterly newsletter and free entrance for members and two guests
- Picnics/group visits – special nominal rate
- Free school visits
- Staff members are all nationals/residents, most from communities close to the Hill
- Encouraging local artists and crafts persons to make gift items to sell in the gift shop

In the earlier years (1960s-1980s) the Ministry of Tourism promoted Brimstone Hill as the premier tourism attraction on the island. Today it continues to promote Brimstone Hill, but as one of several attractions and activities, sometimes in collaboration with the Society, and for which the Society contributes in kind as well as financially. The organisation is also a member of the following organisations, which helps to enhance the profile and facilitate networking and advocacy at the local and regional levels:

- St. Kitts & Nevis Hotel and Tourism Association
- Caribbean Conservation Association
- Museums Association of the Caribbean

The main success stories from the operation of the organisation have been the sustainable management of a site, which is the property of the State, entrusted by legislation to a non-governmental membership organisation. One of the key success indicators is related to the financial performance. Operational expenses are met by earned income revenues, which have been sufficient to provide for a healthy reserve. The key factors that have contributed to the success are:

- Respect of Government over the course of successive Administrations



Visitors touring the Fortress

- Committed and visionary leadership from Presidents and the elected Council
- Professional and competent management and dedicated staff at all levels
- General support of the community

KEY LESSONS

- International certification and the UNESCO world heritage listing have generated significant marketing capital for the site as well as destination branding for the country.
- Sound management and good governance are key attributes to the sites success as a heritage tourism attraction.
- Strategic business and financial planning continues to inform the organisation's mission, vision, actions and tactics.
- The provision of incentives to taxi drivers to generate walk-in or drive-in traffic is a cost effective marketing strategy.
- The diversification of income streams has strengthened the role of the organisation in the wider community.



A cannon

CONTACT DETAILS

Name of interviewees: Mr. Larry Armony & Mrs. Kathleen Orchard

Positions in organisation: General Manager & Administrative Officer

Address: P.O. Box 588, Taylor's Range, Basseterre, St. Kitts

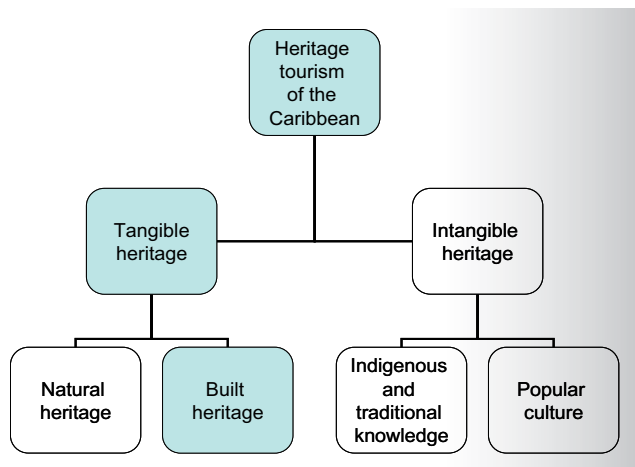
Tel.: (869) 465 2609

Email: brimstonehill@sisterisles.kn

Website: www.brimstonehillfortress.org

CASE STUDY #5

The Barbados Museum and Historical Society, Barbados



Above: The Barbados Museum

PROFILE

The Barbados Museum and Historical Society is a prestigious organisation and a lead institution in the culture sector, nationally and regionally, specifically in the museum sector. The museum, with its seven galleries, is housed in historic buildings that were originally used as the military prison at St. Ann's Garrison. The mandate of the organisation is to collect, document and conserve evidence of Barbados' cultural, historical and environmental heritage; and to interpret and preserve this evidence for all sectors of society.

A petition by a group of advocates who saw the need to record the history of the island and viewed the collection of Rev. N. B. Watson as a valuable foundation for the development of a museum and historical society for Barbados, led to the Act of Incorporation of the Barbados Museum & Historical Society, granted by the Legislature on May 31, 1933.

Since 1933 the Barbados Museum and Historical Society has acquired artefacts that reveal the culture, heritage, and natural history of Barbados. The collection is now in excess of 250,000 objects that span various disciplines, encompassing artefacts, eco-facts and specimens from Barbados and around the world. The Museum also has an academic journal, which is possibly one of the oldest and longest running academic publications in the region.

Archaeological artefacts, period furniture, natural history specimens, maps, paintings and prints, ephemera, Barbadian craft and domestic ware are but some of the collections allowing for varied interpretations whether in a permanent or temporary exhibit. The exhibitions tell the history of Barbados, and the collections, the history of the World.

In 1989 a new administration building was completed as part of a capital works project funded by the Government of Barbados. It was named the Jack Dear Wing in honour of the late President of the Museum, Sir J.S.B. Dear. The building houses the Society's main curatorial and administrative offices.

GOVERNANCE STRUCTURE

The Museum is a non-profit, non-governmental organisation with a membership of over one thousand individuals and companies. A fourteen member Council and the Director are responsible for its policies and operation. Nine council members are elected annually from the membership of the Museum; the remaining five are appointed by Government. The operations are managed by a Director and there is a head of department for each department (Curatorial, Development, Education, Finance, Library & Marketing).

The Society has, for the last two decades, played an important role in advocating the need for legislation to protect and preserve Barbados' cultural heritage. The Museum has advocated and given advice to Government on the development of Antiquities Legislation, which will aid in the protection of Barbados' cultural heritage.

There are 24 employees:

Staff Structure (No. of staff)
7 Management
1 Administrative Assistant – Accounts
1 Administration Officer
3 Marketing Dept.
1 Registrar
2 Curators
5 Maintenance Staff
4 Security guards (full-time) and a few part-time

VISITATION

The Museum attracts around 15,000 visitors annually. Foreign visitors have declined from 64% to 49% while local visitors have grown by 15 percentage points in the last three years. Most of the tourists can be viewed as sightseeing tourists (60%). The other key categories are purposeful tourists (20%), incidental (10%) and serendipitous (8%). Cultural tourists and special interest tourists dominate the visitation at 48% and 40%, respectively (see tables below).

Table 9: Foreign and Local Visitors, 2004 – 2006

	2004	%	2005	%	2006	%
Foreign	9,970	64	8,244	58	7,510	49
Local	5,594	36	5,871	42	7,749	51
Total	15,564	100	14,115	100	15,259	100

Table 10: Typology of Tourist by Motive

Typology	The Purposeful Tourist	The Sightseeing Tourist	The Serendipitous Tourist	The Casual Tourist	The Incidental Tourist
Description	The person who travels specifically for the cultural experience and is highly knowledgeable, informed and seeks a deep cultural experience	The person who travels for cultural tourism but is not an enthusiast and seeks an enriching experience	The traveller for whom cultural tourism is not a stated objective but who ends up enjoying the experience	The tourist who identified cultural tourism as a weak motive but seeks a rewarding experience	The tourist for whom cultural tourism is not an objective but happens to have a rewarding experience
Share (%)	20	60	8	2	10

Table 11: Tourists by Type

Typology	Cultural Tourists	Local Tourists	Regional Tourists	Diasporic Tourists	Cruise Ship	Special Interest
Share (%)	48	2	1	4	5	40

FINANCES

A grant or government subvention accounts for on average 90% of total income. The remaining sources of earned income are small in relative terms. They include entrance fees, membership subscriptions, merchandize sales from the Museum shop and rental of Museum grounds. The Shop made larger amounts of bulk sales to specific groups in 2005.

In addition the Museum has, in recent years, generated revenue from consultancy and advisory services in a variety of related areas, both at national and regional levels. Research and reproduction fees also form a small part of the annual income. More recently the Museum provided training services to both the Caribbean Community and the local heritage tourism sector. Professional fees vary according to the value of the projects.

Table 12: Sources of Income (BDS\$)

	2004	%	2005	%	2006	%
Entrance/User fees	26,366		33,608		34,065	
Government investment	855,421	94.4	850,370	90.1	750,139	88.7
Business Sponsorship	12,908		5,188		9,810	

Table 12: Sources of Income (BDS\$) *cont'd*

	2004	%	2005	%	2006	%
Merchandising	8,569		19,407		7,894	
Membership fees	10,577		11,825		10,090	
Publications	3,461		13,660		11,176	
Professional fees, Library fees, interest, venue rental, reproduction fees	20,343		9,415		22,503	
Total Income (BDS\$)	937,645		943,473		845,677	

According to Table 13, staffing costs are the main expenditure accounting for on average 50% of total expenditures. Administration expenses are around one-quarter of expenditures and are next in importance. Depreciation has declined marginally from 18.8% to 16% in the period. Facilities and grounds maintenance averages about 3.5%. Publicity/marketing expenditure has remained static in recent years hovering around 2%. Travel and entertainment is normally below 1%. Total expenditures have exceeded income in the last two years on account of a drop in government investment and a rise in staffing costs.

Table 13: Key Expenditures (BDS\$)

	2004	%	2005	%	2006	%
Administration	212,541	24.2	267,078	26.8	211,793	22.5
Staffing (salaries & wages)	438,640	50.1	459,046	46.2	525,660	55.9
Publicity/Marketing	21,268	2.4	22,029	2.2	20,328	2.1
Facilities/Grounds Maintenance	32,223	3.6	39,932	4.0	26,206	2.7
Depreciation	165,032	18.8	189,327	19.0	150,588	16.0
Travel & Entertainment	5,164	0.5	16,270	1.6	4,268	0.4
Total Expenditure (BDS\$)	874,872	100	993,682	100	938,843	100

MARKETING

Marketing and public relations are currently geared towards creating maximum visibility. Marketing research and competitor analysis are major priority areas for this activity. Advertising is placed in local publications like *Ins & Outs of Barbados*, *Barbados in a Nutshell*, *Barbados Holiday Guide*, *In Paradise Magazine*, *Island Life*, and internationally in German and Italian magazines for example.

The Internet is beginning to play a larger role as the Organisation develops specific online strategies. Opportunities to integrate e-commerce capabilities into the website are being explored in order to market merchandise and publications. The Organisation has advertised on *AccessBarbados.com*, and is seeking to advertise on other websites such as *TotallyBarbados.com*. Overseas tour operators are crucial for the development of the incentive group market, and ground tour operators also bring important bulk business through large groups of visitors, particularly as they have direct relationships with cruise lines.

The visitor feedback is generally very positive. Countries of origin are identified for each visitor and most visitors come from the UK. Most visitors are in the 36-49 age range, and the ratio of males/females is almost

50:50. Research shows that guidebooks are the most used media source for finding out about the museum. The Museum's media presence has been growing in recent years due to more intensive public relations. Changing of the 20-year old core exhibits in the near future will also regenerate interest in the museum.

STAKEHOLDER RELATIONS

The level of community interest has declined in recent times although local visitors are on the rise. There continues to be strong interest from schools. Efforts are underway to address the issue of declining foreign visitors. The Education Officer is responsible for interacting with the community – monthly or weekly school visits, bus tours for locals, 8 public lectures per year. The Museum puts on the Our Fine Craft Festival, which involves about 50 crafts people who have an opportunity to promote and sell their work. Curators develop special exhibitions, which the public can see for free (about four per year), with most supplies and staff sourced locally.

The Museum is approached regularly by the Barbados Tourism Authority to participate in a variety of special promotions for diverse markets. The gains from these



Exterior of the Barbados Museum



A Museum artefact

promotions have not yet been born. The BTA also places the Museum on the itineraries of international journalists and travel agents. The Museum belongs to the sole local industry association – Barbados National Committee for ICOM (International Council of Museums). The Museum has also been a lead institution in the development of other museums and exhibitions around the island, stressing adherence to high standards as a common factor.

KEY LESSONS

- The Museum has been able to sustain and build upon some of the organisational structures from the colonial period.
- Local membership and involvement have been critical to sustaining the museum. Declining membership poses a threat.
- Over-dependence on government funding can stymie marketing focus.
- Undiversified income is risky.
- Professional and consultancy services are an area for income growth.
- The museum offerings need to be packaged to attract cruise ship passengers and tour operators.

CONTACT DETAILS

Name of interviewee: Christine Skeete

Position in organisation: Marketing Officer

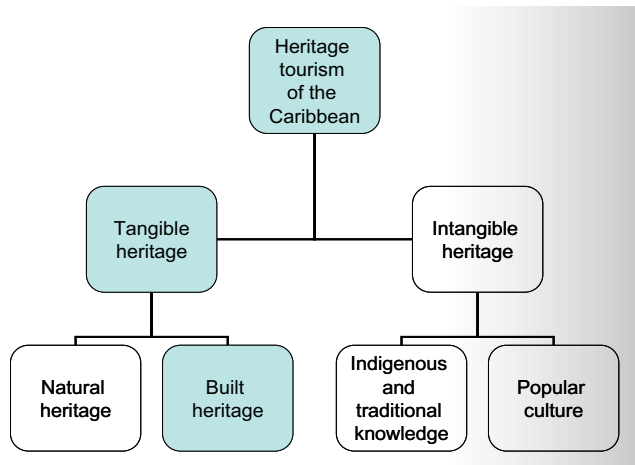
Address: St. Ann's Garrison, St. Michael, Barbados BB14038

Telephone: 1-246-427-0201/ 1-246-436-1956 Fax: (246) 436 1956

Email: musepr@barbmuse.org.bb Website: www.barbmuse.org.bb

CASE STUDY #6

The Bob Marley Museum, Jamaica



Above: The Bob Marley Statue

PROFILE

The Bob Marley Museum in Kingston, Jamaica is dedicated to the reggae musician of the same name. The Bob Marley Museum houses an 80-seat theatre; a gallery of Marley memorabilia; a library with the latest books on Bob Marley, reggae music, and more; a gift shop selling T-shirts, posters and CDs as well as unique African arts and crafts; and the Queen of Sheba restaurant which offers Jamaican cuisine. It is located at 56 Hope Road, Kingston 6, and is Bob Marley's former place of residence. It was home to the Tuff Gong record label and record manufacturing plant, which was founded by The Wailers in 1970. In 1976, it was the site of a failed assassination attempt on Bob Marley.

The Museum was started in 1986, five years after the death of Bob Marley. The objectives of the Museum were to protect, enhance and promote the legacy of Marley. Rita Marley converted the compound with the earnings from the 'Catch A Fire' album. All of the investments into the museum have come from within the family.

GOVERNANCE STRUCTURE

The Bob Marley Museum falls under the Robert Marley Foundation, which is actively involved in the planning and implementation of various activities including art exhibitions, film festivals, workshops for cultural development, talent shows and much more. One of the major events is the "Bob Marley Week" which is hosted in collaboration with the Jamaica Tourist Board and Jamaica Cultural Development Council.

In recent years the Museum has hired a professional manager to enhance the visitor experience and improve the financial performance of the organisation. A business plan has been developed in the last year as part of this process of upgrading the organisation.

The General Manager reports to the Board of Directors, which is made up entirely of family members. The staff consists of one manager, 2 supervisors, 2 gift shop personnel, 5 tour guides, 2 field staff, 2 cleaners and one accounts clerk.

The Queen of Sheba restaurant is operated by an independent organisation that pays a rental fee for the use of the space.

VISITATION

The Bob Marley Museum is the most visited attraction in Kingston and a flagship of heritage tourism. As the premier tourism site in Kingston, the Museum does not have to offer the tour companies (e.g. Caribic and Jamaica Tours) special discount rates.

In 2006 there were 31,101 visitors, an increase of 15% on 2005 levels. The vast majority of visitors are adult (70%), with children (22%) and students (8%) making up the remainder. The majority of adult visitors (90%) are foreigners or non-nationals. It is estimated that 70-80% of the overseas visitors come from hotels on the North Coast and are day trippers to Kingston. About 10% of the overseas visitors are diasporic or regional tourists. They often bring along, or are invited by, local residents. There are some visitors from the South Coast hotels but they are in the minority. Cruise ship passengers are not a factor because the ships dock on the North Coast principally and the journey to Kingston is too long for the turn-around cycle.

The maximum size of a tour group is 20 persons. On average 12 – 15 tours are done per day.

European and Japanese tourists tend to know more about Bob Marley and actively seek out the museum in comparison with North American tourists. The museum also benefits from business tourism as often when dignitaries or Heads of State visit the country the museum is one of the sites that they want to experience.

FINANCES

The main source of income is from entrance fees, which account for 90% of the total earnings. The Gift Shop contributes 8% and the rental of the restaurant provides another 2%. Total earnings were US\$280,000 for the last fiscal year 2006, which was a 20% increase over 2005.

The fee structure is US\$10.00 for adults, US\$5.00 for children and US\$1.00 for school children.

The key expenditures are salaries and wages, which account for 86% of expenditures while marketing constitutes 4% and facilities and maintenance 10%. The year 2006 involved some additional refurbishment costs, which explains the higher than usual share for maintenance. The gift shop was remodelled, repairs were done to the roof and maintenance of the grounds was a major expenditure.

MARKETING

The Museum has historically depended on the international legacy and the iconic status of Bob Marley to market the Organisation. In so many ways, the iconic legacy of Bob Marley means that the Museum does not have to conduct intensive marketing activities, however, promotional activities are undertaken, for example distributing brochures to hotels in the Kingston area and on the North Coast to help direct traffic to the Museum. The website also plays an important role in marketing the Museum.

In many ways the tour operators, taxi drivers, the tourism agencies and the local population are the marketing agents for the Museum. The Museum is also centrally located in the New Kingston area along one of the major thoroughfares and is easily accessible by public transport.

Branding is considered to be a critical element of the marketing effort. The Bob Marley image is recognised as being one of the most utilised, if not pirated, images in the world. The Robert Marley Foundation handles licensing of the Bob Marley image and other intellectual property matters.

STAKEHOLDER RELATIONS

The Museum and its facilities are generally well-known in the local community but is still taken for granted to some extent. This is reflected in part by the low level of local visitation. Many Jamaicans have never visited the Museum. There is a view that class prejudice and other strictures still apply to Jamaican popular culture.

The Museum offers discounted prices to schools to boost local visitation. The Museum and its grounds are also often used by the Jamaican music and entertainment industry for promotional launches and other signature



Above: A group tour of the Bob Marley Museum. Right: The Bob Marley Museum Ticket Office

events. The tourism agencies also use it for promotional tours of visiting journalists and travel agents.

The Museum is a member of the Jamaica Hotel and Tourist Association though lobbying and advocacy through this organisation is viewed as challenging given the predominance of hotels in the membership.

One of the key issues is potential competition from other museums. In Ocho Rios on the North Coast, right next to the cruise ship complex, there is Island Village, a shopping complex that features a number of up-market shops including “Reggae Explosion: The Ultimate Reggae Hall of Fame”. The latter incorporates a store that sells reggae memorabilia and a cinema that shows reggae films.

In addition, there have been in the last few years discussions about establishing a reggae museum in Kingston that would feature the largest collection of Bob Marley memorabilia which is reputed to be owned by the American, Roger Steffans, an archivist and author of “World of Reggae: Featuring Bob Marley Treasures from Roger Steffans Reggae Archives”. The acquisition of the Steffans archive by Jamaican entrepreneurs is still apparently under discussion.

The view is that the Bob Marley Museum is unique and can trade on its authenticity in that this is “where he lived, played his music, played his football” and it is “very much like how he left it”.

KEY LESSONS

- Strong brand identity based on the Marley name generates high and growing visitation levels.
- Intangible heritage can be mythologized and packaged as a tourism experience.
- An effective combination of globalised popular culture and heritage tourism.
- Product and place authenticity are the key drawing cards for tourists.
- The application of professional visitor-centred management can improve the tourism product and visitation levels.
- Popular culture has strong destination branding features.

CONTACT DETAILS

Name of interviewee: Jacqueline Lynch-Stewart

Position in Organisation: General Manager

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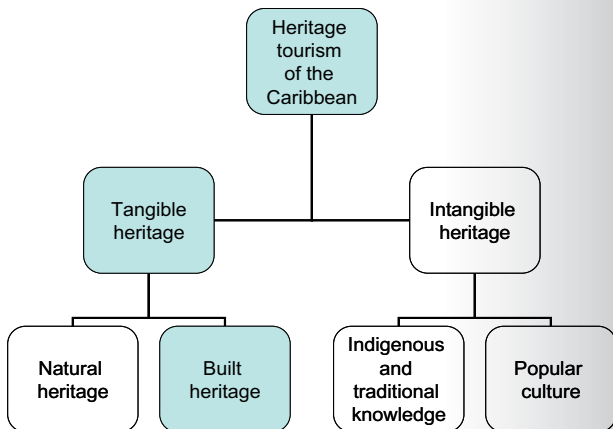
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CASE STUDY #7

Rose Hall Great House, Jamaica



Above: The Rose Hall Great House

PROFILE

The Rose Hall Great House is one of the signature built heritage tourism attractions in Jamaica. It has a legendary and iconic story that separates it from other Great Houses around the region.

The Great House, built in 1770 at the cost of £30,000 by John Palmer and his wife Rosa, is located on the hills of the former Rose Hall Sugar Estate, approximately ten kilometers from Montego Bay, St. James. After the couple passed away in 1790, the property changed hands several times before it was acquired by John Rose Palmer, the grand nephew of John Palmer. In 1820, John Rose Palmer married, Annie, a beautiful but feisty English girl, reputed to have had “black magic” powers unbeknownst to her husband. It is here that the legend begins.

Annie Palmer has been dubbed “The White Witch of Rose Hall” on account of the misdeeds and the cruelty she meted out to her husbands and slaves. Annie is purported to have done away with John Rose Palmer, two other unsuspecting husbands and countless lovers during her reign as mistress of the plantation. In 1831 Annie was mysteriously found dead in her bedroom. There are claims that her ghost still inhabits the Great House. All of these happenings make for an intriguing story with all the elements of an engaging novel: a beautiful heroine, unrequited love, black magic and revenge – all set in a gracious old plantation tucked amid the green hills of Jamaica.

Rose Hall Great House is a very popular visitor attraction for these reasons. The Great House, which is of Georgian architecture, is built of cut stone on the first two levels and stucco on the third and uppermost level. The main approach to the second level of the building consists of a cut stone symmetrical grand staircase that leads to a veranda on the seaward side of the building. The building is completed with sash windows, keystone, quoins and a hip roof.

In 1965 the lands of the former plantation was purchased from the Jamaican government by wealthy



Rose Hall Great House merchandise

American entrepreneur, Mr. John Rollins. Included in the purchase was the Great House, which was restored at a cost of US\$ 2.5 million and opened for business in 1971. Visitors are provided with a guided tour of the Great House and visit the tomb of Annie Palmer. In the Great House is a gift shop and a drinks and snack bar where visitors are serenaded by a local musician.

GOVERNANCE STRUCTURE

The Rose Hall Great House is a central and important part of a large resort community that spans 2,000 acres and incorporates several up-market hotels and golf courses as well as shopping complexes

on the North Coast of Jamaica. The investment company, Rose Hall Developments Limited, owns and manages the Rose Hall Great House.

The Rose Hall Great House has a staff of 17 persons. There is one manager and an assistant manager, 2 groundsmen, 1 bartender, 3 cashiers, 8 tour guides and 1 musician.

VISITATION

The Rose Hall Great House attracts on average 40-50,000 visitors annually. This level of visitation has been stable for several years. The top periods for visits are January to April which is the peak winter season and June and July which is the vacation period for locals and the diasporic tourists. About 5,000 school children visit annually. Comment cards are part of the feedback mechanism but the results are not fully collated nor used as a management tool so more detailed statistics are not possible.

FINANCES

Over 90% of the income for the Great House comes from the entrance fees, which are US\$20.00 for adults and US\$10.00 for children. The tour companies (Caribbean Cruise and Shipping, World Tours and Great Vacations), which bring cruise ship passengers, get a discount price of US\$10.00 that has been in force since 1971. These passengers also receive a complimentary drink (fruit or rum punch) that is valued at US\$4.00. Consequently, cruise ship passengers account for 10% of the earnings but a higher percentage of the visitation. Souvenirs and other memorabilia are sold in the gift shop and on the website, however, these account for a small share of earnings.

The key areas of expenditures are in administration and staffing. Historically, both items together account for between 80% and 90% of total expenditures. In 2005 the roof of the Great House was replaced at significant cost but, apart from this, maintenance costs are not very high. Not much is spent on traditional modes of marketing and promotion because the Great House is viewed as being able to sell itself, though a small amount is used for brochures that are distributed to hotels and tour operators. However, the real marketing strategy resides in the provision of a commission of US\$3.00 to taxi drivers for every adult visitor that they bring to the Great House. The taxi drivers are paid on site, and it's estimated that they bring in some 80% of the walk-in visitors.

MARKETING

The main market for Rose Hall Great House is stay-over visitors to the island, and efforts are made to raise awareness and interest by distributing brochures to hotels and tour operators. The Great House management has introduced the provision of a commission to taxi drivers who bring tourists to the site, and this has proven to be a very effective means of bringing in visitors. In many respects it has been the organisation's ability over time to romance the Annie Palmer story, which has given it the iconic status that it now enjoys. The term "White Witch" has great market value as exemplified by the recent launch of a new golf course in the Rose Hall area that bears this name.

The location of the Great House just off the North Coast road about 10 km from Montego Bay is also a key marketing asset. In addition, it is very close to several of the high-end hotels in the area. More importantly, the Rose Hall Development Company is a shareholder in several of the top resort hotels in close proximity to the Great House and therefore has direct access to this target market.

STAKEHOLDER RELATIONS

The Great House is involved in some community outreach to school children, church groups and the elderly in the area and reduced entrance fees are given to these visitors. The Great House also attends trade fairs with the Ministry of Tourism. Based upon its corporate network, strategic location, and iconic status the Great House has an independent position and is not as reliant on external agents as is the case for other heritage sites.

KEY LESSONS

- Romancing the history and story lines are an effective means of branding the attraction and the destination.
- Developing negotiating leverage with tour operators is vital for income growth.
- Incentives for taxi drivers generate alternative walk-in or drive-in traffic from stay-over guests.
- Diversifying income sources through venue rentals and merchandising are real options for plantation houses.



CONTACT DETAILS

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TOWS Matrix for Built Heritage Sites

	<i>Sub-sector Strengths</i> • Iconic built sites. • Attractions with a story. • Appeals to wide range of audiences. • Aesthetic buildings and grounds. • Strong curatorial capabilities. • Private sector, market-driven strategy.	<i>Sub-sector Weaknesses</i> • Weak negotiating power with tour operators. • Low entrance fees. • Shortage of investment capital • Fixed income streams.
	<i>Strategic Options and Direction</i>	
<i>External Threats</i> • Increasing competition from new heritage sites. • High cost of capital investment relative to potential earnings.	S-T 1. Upgrade branding strategy. 2. Expand income streams (e.g. venue rental, merchandising). 3. Utilize surpluses for reinvestment in conservation.	W-T 1. Develop attractions association to increase bargaining power. 2. Continually assess cost of operations. 3. Strengthen marketing through the Internet.
<i>External Opportunities</i> • Growth in cultural tourism. • Expansion of the tourism sector. • Greater interest in conservation of historic sites.	S-O 1. Market built heritage sites as effective destination branding. 2. Lobby for increased marketing and institutional support from national tourism agencies.	W-O 1. Develop sound business plans that show the internal rate of return. 2. Document, measure and publish macro-economic impact of sector to show share of market. 3. Maintain conservation standards and do not exceed carrying capacity. 4. Build brand value of heritage assets.

Notes:

S-T: Strengths in the sector that can be used to minimize existing or emerging threats.

W-T: The strategies needed to minimize or overcome sectoral weaknesses and cope with threats.

S-O: Strengths in the sector that can be used to capitalize or build upon existing or emerging opportunities.

W-O: The strategies needed to overcome sectoral weaknesses if existing or emerging opportunities are to be exploited.

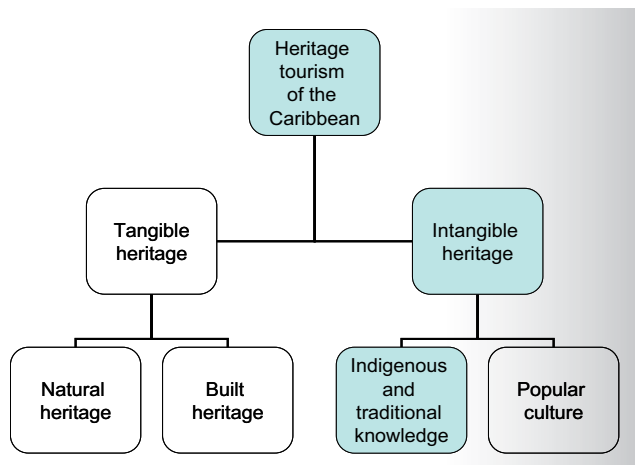
Case Studies:

Indigenous and Traditional Knowledge



CASE STUDY #8

Arinze Tours – Santigron Maroon Tour, Suriname



Above: The Santigron community

PROFILE

The village of Santigron is one of Suriname's Maroon villages, where descendants of 18th Century run-away African slaves now live. Santigron is to be found on the banks of the Saramacca River and is approximately 80 kilometers by road from Paramaribo. Santigron is the most accessible of the Maroon villages as most villages are several days trip into the interior of the country by air, boat and land.

When compared with other countries that have Maroon communities, the Suriname context has allowed for a higher retention of pre-colonial African traditions and practices. In this respect, Suriname's Maroon communities are one of the best sustained example of living African heritage in the Americas.

Arinze Tours is one of the main tour companies that focuses on the Maroon Community. The tour allows the visitor to get acquainted with the Maroon culture through a walking tour of the village, and through the villagers' display of wood-carving craft and traditional dancing. The woodcarving techniques of the Maroons are some of the best to be found in the Americas. Tour packages of this sort are critical to the realisation of the heritage tourism product. According to the Suriname Tourism Development Plan:

The availability of those packages is a key factor because unless the primary attractions, facilities, services, etc. are packaged in an appropriate way for the distribution channels (tour operators, travel agents), there can be no product for sale in the market²³.

Arinze Tours started operations in 1993 having evolved from another company, Madeira Enterprises, whose main focus was on the sale and distribution of handicrafts produced by the Maroon communities, and to some extent also operated guided tours.

GOVERNANCE STRUCTURE

Arinze Tours started out with two owners but is now run as a sole company. The key objectives of the company are commercial development of Maroon handicraft and tourism, job creation within the Maroon community, income generation and exposure of the Maroon community to the Surinamese community and the wider world.

The company was initially funded through self-financing and also through a grant scheme operated within the EU-funded Suriname Integrated Tourism Development Programme. Through this initiative, the company was able to access US\$14,000: US\$5,000 as a grant and the remainder as a loan. Similar financing was given to 10 other Surinamese companies. The company employs three persons: two office assistants and the manager/owner, Mr. George Lazo. The company owns one small tour van, which is used for most tours. Additional drivers and buses are hired as needed.

VISITATION

There is no formal system of data collection on visitation levels. Though Arinze Tours is the main tour operator to the Santigron Maroon Community there are several other tour operators which book this tour and then sub-contract to Arinze Tours. Tourists can thus either book their tour directly with Arinze Tours or via one of the 50 other tour operators that then contract Arinze Tours' services.

Most visitors can be defined as "purposeful tourists" or "sightseeing tourists". The former are those who know about the Maroon communities and want to share in the experience. For example, Santigron has been able to attract educational tourists in the form of Dutch students who are doing research on Maroon culture and society. The positive experience of students has generated interest and visitation from the parents of students and other family members. Overall it is estimated that 5% of the visitors are diasporic tourists.



A dwelling at Santigron

FINANCES

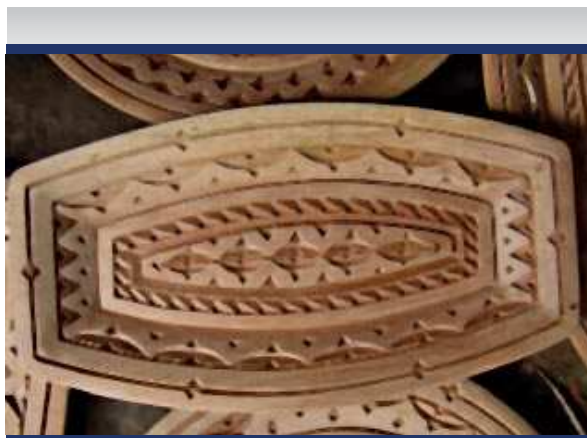
The key source of income is from tour fees. Arinze Tours conducts on average three tours per week with 15 persons per tour. The three tours that Arinze Tours offers are to Santigron (Maroon Village), the Upper Surinamese River (Maroon Village) and to Brownsberg (Nature Reserve). The fee per person and per trip is outlined in the following table.

Table 14: Tour Fees (US\$)

Tour	Type	Tour Fee (US\$)
Santigron	Maroon Village (1 or 2 days)	73 or 140 (with overnight)
Upper Surinamese River	Maroon Village (3 day tour)	255 total
Brownsberg	Nature Reserve (1, 2 or 3 days)	80 per day

Some investment has gone into creating lodging for visitors to overnight and so create an additional income stream, though greater investment is required to expand the facilities for visitors. Investment is however stymied by the fact that title to property for collateral purposes is problematic for Maroon communities on account of communal ownership of lands.

The key expenditures are in the area of administration and staffing. Approximately 80% of total expenditures is allocated to these areas. The other areas of expenditure are publicity, marketing and vehicle maintenance. A licence to operate as a tour company comprises the other major cost.



Handicraft from the Santigrón community

MARKETING

The key marketing strategy of Arinze Tours is the placement of brochures and flyers at hotels and in other tour companies. The website is another way that tourists find out about Arinze Tours. However, the Internet does not drive business. During the peak tourism season, radio and television advertisements are used to promote the tours.

Arinze has participated in overseas trade fairs. In 1996 under a CTO/EU scheme, Arinze participated in trade fairs in Berlin, Milan and Paris. There are plans to participate in the Utrecht Trade Fair, which is held every January in the Netherlands.

The tours are branded as ecological, pro-poor tourism contributing to the social welfare of the Maroon. Because the Maroon communities are marginalised peoples the main challenge for the tour operators lies in protecting the rights of the people from exploitation by visitors. For example, taking photos is a sensitive issue among the Maroon communities, which has to be balanced with the impulses of the tourists.

STAKEHOLDER RELATIONS

Arinze Tours is a member of the Maroon Industries Association. The Association has 18 members and the owner of Arinze Tours is the president. The Association operates essentially as a lobby group on behalf of the Maroon community. Having a good relationship with the Maroon communities is a key asset. Mr. Lazo is from the Maroon community of Santigrón himself, and several of his family members still live there. In this sense familial contact makes for a more authentic experience for the visitor.

There has been a virtual explosion of tour operators in Suriname. At last count there were over fifty registered tour companies, many of them small operators, offering much the same products and services. A critical element of stakeholder relations is the need for collaboration among these operators. Any tour requires a minimum group size (i.e. 8 to 16 persons) and therefore without good networks and communication many tours can be cancelled at short notice due to insufficient numbers. This is a problem that was highlighted in the Suriname Tourism Development Plan of 1998.

Arinze Tours and several of the more established operators essentially depend on the small travel agencies/tour operators to generate business. In effect they function like brokers. However, there is a view that there are too many operators and that the market is likely to face some consolidation in the near future.

KEY LESSONS

- Managing the spread of modernity is critical to maintaining the integrity and authenticity of heritage.
- Property rights under traditional or communal framework do not allow for collateral funding.
- Heritage tourism is problematic in a context where the traditional communities are marginalized.
- Merchandising and intellectual property commercialization are areas for expansion.

CONTACT DETAILS

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TOWS Matrix for Indigenous and Traditional Knowledge

	Sub-sector Strengths • Unique ethno-cultural sites, artefacts, and crafts. • Traditional knowledge and practices. • Attractions with a history. • Appeals to cultural, educational, diasporic tourism. • Community, market-driven strategy.	Sub-sector Weaknesses • Weak negotiating power with tour operators. • Low visitation. • Shortage of investment capital. • Fixed income streams.
Strategic Options and Direction		
External Threats • Encroaching modernity and erasure of traditional ways of life. • Marginalization and poverty of communities.	S-T 1. Update traditional practices and structures while maintaining integrity. 2. Develop craft trade. 3. Strengthen intellectual property protection.	W-T 1. Promote community-run tours. 2. Target premium markets. 3. Manage visitation levels. 4. Lobby for changes in property laws to access credit. 5. Strengthen marketing through the Internet.
External Opportunities • Growth in cultural tourism • Expansion of the tourism sector. • Greater interest in preservation of traditional knowledge.	S-O 1. Market indigenous and traditional heritage sites as effective destination branding. 2. Lobby for increased marketing and institutional support from national tourism agencies.	W-O 1. Develop sound business plans that show the internal rate of return. 2. Document, measure and publish macro-economic impact of sector to show share of market. 3. Maintain preservation standards and do not exceed carrying capacity. 4. Build brand value of heritage assets.

Notes:

S-T: Strengths in the sector that can be used to minimize existing or emerging threats.

W-T: The strategies needed to minimize or overcome sectoral weaknesses and cope with threats.

S-O: Strengths in the sector that can be used to capitalize or build upon existing or emerging opportunities.

W-O: The strategies needed to overcome sectoral weaknesses if existing or emerging opportunities are to be exploited.

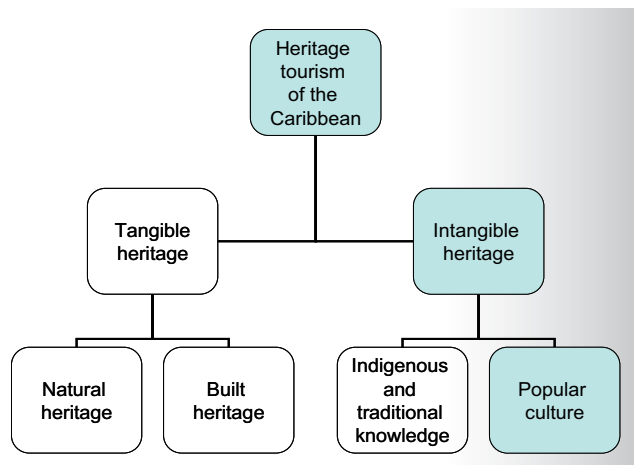
Case Studies:

Popular Culture



CASE STUDY #9

Trinidad and Tobago Carnival



Above: Carnival Queen

PROFILE

The Trinidad and Tobago Carnival is one of the largest and most well known festivals in the Americas along with the famous Rio Carnival in Brazil and the Mardi Gras in New Orleans. Trinidad and Tobago also boasts of having one of the festivals with the highest level of local participation. It is estimated that over 10% of the population is directly involved in terms of “playing mas” and performing on Carnival Tuesday. The capital city of Port of Spain is the main centre of carnival celebrations but the carnival is also to be found in fifty towns and villages.

The cultural industries in Trinidad and Tobago are inter-twined with the festival. The carnival is traditionally associated with Calypso, Steelpan and Masquerade but even genres of music like parang and chutney now pivot around the carnival. On account of the Carnival these artforms have developed export markets. The Carnival indirectly creates thousands of jobs in a host of ancillary industries: telecoms (e.g. cell phone rentals), ground transportation, auto rentals, catering, tour operations, book publishing, advertising, handicraft sales and the clothing industry are just some of the sectors that attribute an upsurge in business to the carnival season.

Trinidad and Tobago’s Carnival has generated many offspring and inspired the structure of several carnivals throughout the Caribbean region (e.g. Jamaica, Barbados, St. Vincent and St. Lucia). The carnival also has been exported outside the region and is to be found in over seventy Diasporic Caribbean Carnivals, making it the world’s most globalised festival. The globalization of the Trinidad and Tobago Carnival is directly related to the spread and expansion of a Caribbean diaspora in the North Atlantic countries. Almost every major city in the United States, Canada and England has a Caribbean-style carnival that is, in large part, modelled after the one found in Trinidad.

These carnivals have grown rapidly since the early 1990s and are now the largest street festivals and generators of economic activity in their respective locations (see Table 15). The ‘Notting Hill Carnival’ attracts

over 2 million people over two days and generates over £93 million in visitor and audience expenditures. Similarly, the “Labour Day Carnival” in New York earns US\$300 million while the “Caribana Festival” in Toronto generates CND\$200 million.

Table 15: Economic Impact of Diasporic Caribbean Carnivals

Carnivals	Estimated Attendance	Expenditures
Toronto – Caribana	1 million	CND\$ 200 million
New York – Labour Day	3.5 million	US\$ 300 million
London – Notting Hill	2 million	£93 million

GOVERNANCE STRUCTURE

The Trinidad and Tobago Carnival is managed through the National Carnival Commission (NCC), which acts as the main organiser and facilitator for the national festival. The NCC is empowered as a Statutory Body under the 1991 Act and reports to the Ministry of Culture. According to its mandate the NCC is supposed to efficiently manage, organise and market the Carnival such that it is a viable and profitable commercial, social and cultural enterprise. The NCC is also required to support the operations of the Special Interest Groups (SIGs), Pan Trinbago, Trinbago Unified Calypso Organisation (TUCO), and the National Carnival Bandleaders’ Association (NCBA). The SIGs have since 1998 been given greater autonomy and control over the various carnival events.



The ‘Midnight Robber’, Carnival

The NCC is the successor to the Carnival Development Committee (CDC) which was established in 1956. From its inception, the CDC was assigned to the Ministry of Culture and operated as an ad hoc Committee with the Minister appointing its membership. The NCC inherited many aspects of the management systems and the organisational structure of the CDC, the management structure and the allocation of human resources have since been reorganised on an ad hoc basis. Over the years, the human resources associated with the Carnival have not received the upgrading necessary to keep pace with the increasing demands of a rapidly expanding festival. The organisation of the Carnival has also suffered from the general perception that cultural products and services are only important for recreation, social catharsis, cultural identity and as a political safety valve, and not for the industrial development or the economic well being of the society.

One of the consequences of this is that the Carnival has been perceived as a free good thus allowing for a great deal of free riding. The Carnival generates an increase in economic activity and foreign exchange earnings for the national economy but the organising and creative units retain very little of the profits. For instance,

it is estimated that the Carnival generates a sizeable income for hotels, restaurants, bars, airlines, ground transportation, fete promoters, beverage producers and the Government through taxation. Among the artistic creators, the only ones that appear to make a sizeable profit from their activities are the large masquerade bands, the top calypsonians or soca artistes and the music bands.

VISITATION

Trinidad and Tobago has three distinct tourism seasons (Carnival, July/August vacation period and Christmas). The carnival season, which runs from the beginning of January until Ash Wednesday, generates the largest inflow of visitors, for example, February is the month with the largest number of arrivals, including the highest number of hotel, private and guesthouse visits.

The largest number of visitors comes from the United States. They account for around 50% of the total number of visitor arrivals during the Carnival period most of whom are from diasporic Caribbean communities in states like New York and Florida. The UK, Canada, the Caribbean and the rest of Europe are the next largest sources of carnival visitors in order of magnitude. Foreign nationals, many of whom are from the diasporic Caribbean community, account for over 70 per cent of arrivals and are a rising share of carnival visitors.

Over the last decade carnival arrivals have grown from 27,000 (1997) to around 42,000 (2006), outpacing the growth in annual visitor arrivals. For example, tourist arrivals in the month of February consistently account

for over 12.0% of total annual arrivals. With regard to visitor expenditure, it is estimated that in the same period 1997 – 2006 Carnival visitor expenditure tripled from US\$10 million in 1997 to approximately US\$30 million. This impressive growth is driven by the expansion of cultural, diasporic and regional tourism. The Carnival also generates travel to Tobago as well as impacting on the yachting sector, sports and eco-tourism.

FINANCES

A method for measuring the economic contribution and impact of festival tourism is to examine the ratio of public funding to visitor expenditure. The available data encompasses the years 1997 to 2001 (Table



Carnival Masqueraders



Carnival Masqueraders

16). In 1997, the state funding, or government subvention amounted to US\$2.7 million. Visitor expenditures for that year's carnival came to US\$10.3 million, thereby giving a benefit-to-cost ratio of 3.8: 1. The year 1998 saw a reduction in state funding, but an expansion in visitor expenditure to US\$14.2 million gave a return of 7.8: 1. The benefit-to-cost ratio peaked at 9.5 in 1999 due to a 29% increase in visitor expenditures and a relatively low budget. The years 2000 and 2001 saw a decline in the benefit-to-cost ratio because of a significant increase in the festival budget relative to the visitor expenditures.

**Table 16: Economic Impact Assessment,
1997 – 2001**

	1997	1998	1999	2000	2001
Budget US\$m	2.7	1.8	1.9	4.4	5.2
Carnival Visitor Exp. US\$m	10.3	14.2	18.3	17.8	21.5
Benefit-to-Cost Ratio	3.8:1	7.8:1	9.5:1	4.1:1	4.1:1

Source: Nurse (2006)²⁴

Based on this benefit-to-cost analysis, it can be concluded that the carnival season provides a healthy return on investment for the Trinidad and Tobago economy. In terms of tourism expenditure there has been a significant increase over the years, with visitor expenditures more than doubling between 1997 and 2001. The hotel and airline industries are the main beneficiaries in that they enjoy excess demand, advanced bookings and premium rates. The benefits also accrue to a wider grouping in the hospitality sector as there is a marked increase in overnight stays in guesthouses and other kinds of accommodation during the carnival period.

The carnival industry generates income and employment in a number of ancillary sectors through backward and forward linkages. Backward linkages arise when the target sector (tourism) demands inputs from other sectors, for example the carnival sector demands inputs from the food and beverage sector, and the arts and crafts sectors.

MARKETING

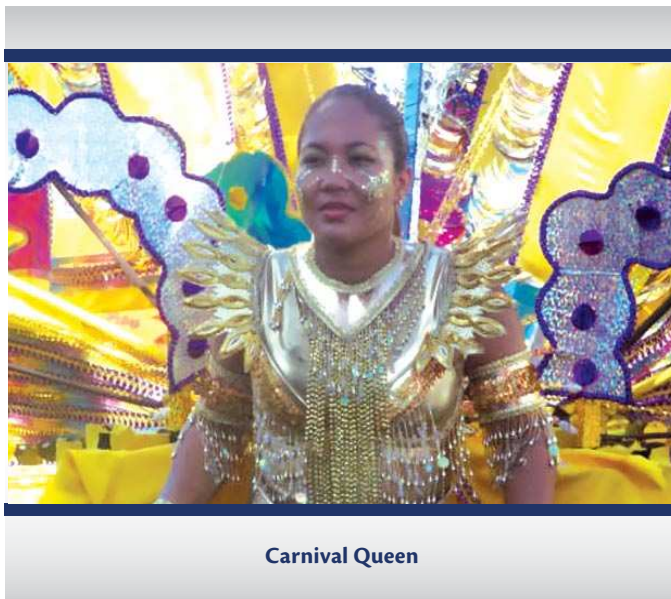
The replication of Trinidad and Tobago's Carnival overseas is another important indicator of the economic potential of the industry. It is currently estimated that there at least fifty Trinidad-style carnivals in North America, England and the Caribbean. In each respective site they are the largest festival or event in terms of attendance and the generation of economic activity. In spite of the economic impact of the globalised carnival industry, there is an absence of a clear strategy with respect to the possibilities of exploiting the specialty character and the merchandising potential of the cultural products and services generated by the Carnival industry.

STAKEHOLDER RELATIONS

The organisers and facilitators of the Carnival have not traditionally gained financially from the festival. As a result, the NCC and the special interests groups (Pan Trinbago, TUCO and NCBA) tend to suffer from a low financial capacity. Pan Trinbago is the exception in that they levy a 10% charge on the prize monies and other

monetary awards that their membership earns in Carnival. TUCO and the NCBA do not have a similar arrangement and are therefore more dependent on the NCC for financial assistance.

These financial problems also occur because the Carnival organisers and artistic creators have not adopted enough of an entrepreneurial approach to the festival. For this reason the Carnival tends to find itself in a position of resource-dependency upon state authorities or corporate sponsorship. The financial contributions are then generally viewed as subsidies rather than investments in the Carnival Arts process.



Carnival Queen

KEY LESSONS

- Festivals attract diasporic and regional tourists as well as cultural tourists from mainstream markets.
- Media impact generates strong brand identity.
- Unique artforms are the key driver of market expansion.
- Strategic management and marketing are essential for product development and aesthetic differentiation.
- The globalization of the festival to metropolitan centres has widened the market but also created potential competitors.
- Festivals have strong destination branding qualities.
- Popular culture has a pervasive effect on the tourism and wider economy.

CONTACT DETAILS

Name of interviewee: Clarence Moore

Position in organisation: CEO

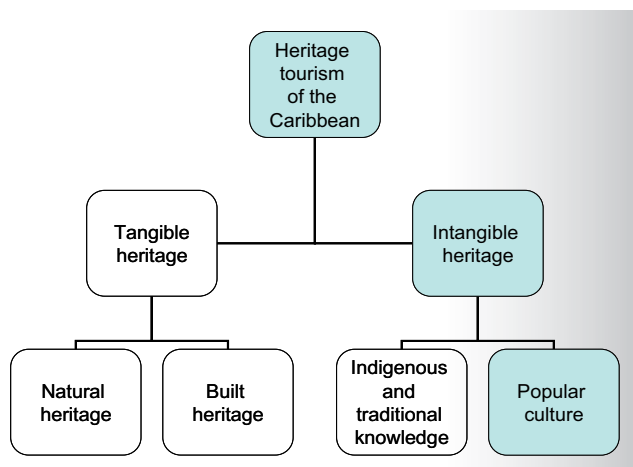
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CASE STUDY #10

World Creole Music Festival, Dominica



Above: World Creole Music Festival (WCMF) logo

PROFILE

In the mid-1990s, Dominica recognised the economic potential of diversifying its tourism product to include festivals. In 1996 the Dominica Festival Commission (DFC) was established, initially to develop four major festivals – Mas Dominik (Carnival), National Expo, Domfesta and World Creole Music Festival; and to assist with the development of several national special events to create a festival tourism sub-sector²⁵.

The World Creole Music Festival (WCMF) is usually held on the last weekend of October as the culmination of “Semaine Créole” (Creole Week) – an annual celebration of Creole life, culture and heritage in Dominica. The Festival is held at one outdoor venue, and comprises three nights of performances by a wide array of Creole music bands and artistes from various parts of the world. As such, the festival can be classified as an international indigenous music festival.

Dominica has a year-round calendar of festivals and events, each of which can be characterised as unique and representing a mix of local culture, heritage and music. Of the festivals, Mas Dominik (Carnival) and the World Creole Music Festival are considered to have strong festival tourism capabilities, while Domfesta is still in its embryonic stages as a tourism product.

The WCMF was started by the DFC in 1997 as a tourism special event aimed at diversifying Dominica’s tourism product. As such, the festival seeks to increase international exposure of Dominica; to promote Dominica as a unique destination; and to improve visitor arrivals during Dominica’s Independence celebrations. In addition, the festival aims at providing a world-class platform for Creole musicians and artists, particularly those from Dominica; to consolidate the global Creole music market; and to foster unity among Creole people in the wider region. From its inception, the Festival has been marketed as a premier international music festival and is now regarded as a major event on the Caribbean festival calendar.

GOVERNANCE STRUCTURE

The Dominica Festival Commission (DFC) is a permanent governmental agency that has the sole responsibility for developing, managing, marketing and organising the World Creole Music Festival. Mas Dominik is the only other major festival for which the DFC is responsible.

DFC's Board comprises a fairly balanced representation of public and private sector interests, as well as the Executive Director of the DFC.

The DFC relies heavily on the staff of other governmental agencies to run the Festival, since there are essentially only three employees assigned to the DFC - the Executive Director, an Administrative Assistant and a Temporary Assistant. While it is expected that the Festival's Executive Director's mandate would be to formulate the Festival's strategy, and spearhead the implementation of that strategy, the current post seems more operational/logistical in nature, and therefore does not allow for the requisite strategic management process for the Festival to be planned and executed. In total, two full-time employees and 20 part-time/temporary employees attend to the running of the Festival, and approximately 10 volunteers assist every year.

The DFC also receives some support from the Dominica Port Authority, the Ministry of Education, the Public Works Department, the Water and Sewerage Department and the Protective Services, though in very specific areas (this is discussed further under Finances). Consultants are not generally hired for the planning or for the execution of the Festival; however, for the 2003 World Creole Music Festival, expertise was drawn from the St. Lucia Jazz Festival to assist with the execution of the Festival.

VISITATION

Based on an economic impact study conducted in 2003, 57% of the festival attendees were visitors and 43% were returning nationals. Most visitors (69%) came by sea as opposed to air (48.5%). This corresponds with the fact that a large share of visitors comes from neighbouring OECS islands and from Guadeloupe and Martinique that are easily accessible by ferry. 88.5% of the festival attendees timed their travel to coincide with the WCMF and 45% were attending the festival for the first time.

Festival visitors are predominantly male (55.5%) and in the age group 30 – 39 for sea travellers as compared to the age group 40 – 49 for air travellers. Participation levels in other activities, for example, sightseeing or visiting attractions, was low. 83% of visitors stated that they would return for the next WCMF and 94.5% stated that they would recommend the festival to others.

Average expenditure per day is US\$60 for both sea and air travellers. When it comes to length of stay there is a marked difference in behaviour. Air travellers tend to stay longer, on average 8 days, as opposed to sea travellers who stay 5 days (average length of stay for both groups is 6.83 days). This accounts for the difference in total expenditure per person for the trip. Sea travellers spent on average US\$200 on the trip while air travellers spent US\$380. Air travellers spent more of their monies on accommodation and transport relative



to sea travellers. A greater share was spent on food and WCMF events by sea travellers.

Analysis of visitor arrival statistics for the period of the 2003 festival shows that 2,294 people came primarily for the WCMF (this data is not broken down by point of entry). The arrivals for 2003 represented a growth of 40% on 2002 arrivals, and 2002 arrivals represented a 7.8% decline compared to 2001.

Table 17: WCMF Arrivals, 2001 – 2003

2001	% Change	2002	% Change	2003	% Change
1,778	n.a.	1,639	(7.8)	2,294	40.0

Based on arrivals for 2003 (2,294) and the average length of stay (6.83 days) and the average daily expenditure (US\$60) it is estimated that the total expenditure by WCMF visitors amounted to US\$890,000. The main areas of expenditure were accommodation 27% (US\$240,300), food 16% (US\$142,400), transport 12.5% (US\$111,250), festival activities 10% (US\$89,000) and sightseeing 9.5% (US\$84,550).

The performance of the WCMF compares favourably with similar type festivals held in territories the size of Dominica. For example, the St. Kitts Music Festival generated 1,164 arrivals in 2002 and 2,562 in 2003. An economic impact assessment of the 2003 St. Kitts Music Festival put visitor expenditures at US\$1.15 million. Of this 26% (US\$0.3 million) was spent in the hotel and accommodation sector and a further 20% (US\$0.23 million) was spent on festival related activities and merchandise. The remainder of US\$0.62 million (55%) was spent on the wider economy including meals, transportation and shopping²⁶.

FINANCES

Generally, the Dominica Festival Commission derives its income from three main sources: government investment, earned income and corporate sponsorship. Earned income has consistently been the largest source of income for the Festival since 2000. On average the earned income from ticket sales has accounted for 50% of total income, Government investment has consistently been around 15 – 20% of the total budget and declining when compared with ticket sales. This indicates that the Festival is becoming less dependent on government investment for its operation.

A further breakdown of government investment shows that the major share of this comprises an annual government subvention from the Ministry of Tourism. This accounts for approximately 75% of total government investment. The remaining share was almost equally divided between the provision of capital and in-kind services by other governmental agencies.

Sponsorship levels have been steadily increased since the year 2000, representing approximately 20 – 30% of total income. In 2002, this had more than doubled and accounted for 40% of total income. The rise in sponsorship illustrates growing private sector support for the Festival and also reflects the Festival's ability to attract high levels of sponsorship, in spite of the relatively small size of the local private sector.

The Festival's operating expenditure is mainly attributed to festival expenses, which averages over 85% of total expenditure. The main cost in festival expenses tend to be programme expenses, which represented over half of festival expenses. The second highest share of festival expenses are travel and accommodation expenses at approximately 25 – 30%, this is followed by complimentary tickets, which represents about 10% of festival expenses.

MARKETING

WCMF was designed specifically to attract tourists to Dominica. It is billed as “3 nights of pulsating rhythms and styles” to draw enthusiasts of all forms of indigenous music, particularly those of Creole music, to Dominica. Thus, the main target markets for the Festival are: the Dominican diaspora; the Francophone Caribbean; the English-speaking Caribbean, particularly the OECS and Barbados; and residents of Dominica. Of the estimated audience size of 20 – 25,000 patrons for the 3 nights of Festival, it is estimated that approximately 70% are visitors.

Overall, it would seem that the marketing strategy for the Festival has been hinged on developing media partnerships to secure promotion and publicity of the Festival, festival event coverage, and sponsorship. This strategy has spurred the commitment of the local media to provide coverage of the Festival’s events, and has also brought a number of foreign media agencies to the Festival over the years to cover the festival performances, interview artists as well as tour the eco-tourism and heritage sites of Dominica.

Every year, a significant proportion of the marketing and promotion for the Festival is done outside of Dominica prior to the Festival through its tourism offices in New York, London and Paris to attract the international mainstream markets as well as the diaspora, while in the past the National Development Corporation of Dominica took responsibility for the Caribbean markets and the local market. Dominica’s tourism offices abroad are used to tap into the various advertising media such as travel/vacation and music festival-oriented Internet sites that would appeal to festival goers.

Apart from the use of foreign media, the Festival effectively utilizes its website www.festivalmusiquecreoledominique.com as an electronic media kit to promote the Festival. The website also houses some archival information on the Festival from previous years.

STAKEHOLDER RELATIONS

WCMF is a competitive festival in the Caribbean context. The genre of music that the festival promotes is ideally suited to the country’s geographic and cultural position. In this sense the festival taps into Dominica’s core competency and enjoys market leadership in this particular niche. The analysis suggests that the festival is far from maximizing on its inherent potential and that the organisers should seek to enhance the image and quality of the festival without losing its focus. A key element of the proposed strategy is an improvement in stakeholder relations as well as improvement in festival management skills.

KEY LESSONS

- Indigenous music with regional and global appeal can facilitate heritage tourism.
- Regional tourism is an expanding market facilitated by accessible and affordable ferry services.
- “Creole” is a specialized niche that Dominica has branded and secured through the festival.
- Festivals have strong destination branding qualities.
- Popular culture has a pervasive effect on the tourism and wider economy.

CONTACT DETAILS

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TOWS Matrix for Popular Culture

	<i>Sub-sector Strengths</i> • World-renowned artforms and artists. • Deep historical and community roots. • High level of community involvement. • High economic impact. • Appeals to cultural, diasporic, regional tourism. • Strong commercial value. • Multiple income streams.	<i>Sub-sector Weaknesses</i> • Limited investment in popular arts development and training. • Weak industrial, trade and export facilitation. • Sporadic documentation and economic measurement. • Un-coordinated marketing.
	<i>Strategic Options and Direction</i>	
<i>External Threats</i> • Increasing competition from festivals in the region. • Erosion and homogenization of artforms. • The free-rider problem. • Copyright infringement.	<i>S-T</i> 1. Establish regional festival association. 2. Preserve and update traditional forms through youth involvement. 3. Institute a visitor levy that is allocated to a development fund. 4. Strengthen intellectual property protection.	<i>W-T</i> 1. Invest in popular arts development. 2. Harmonize government policies. 3. Establish continuous mapping and documentation processes. 4. Strengthen marketing through the Internet.
<i>External Opportunities</i> • Growth in cultural and festival tourism. • Expansion of the tourism sector. • Increased commercialization of the cultural industries.	<i>S-O</i> 1. Market popular culture for effective destination branding. 2. Lobby for increased marketing and institutional support from national tourism agencies. 3. Deepen the level of domestic value-added through industrial upgrading.	<i>W-O</i> 1. Develop sound business plans that show the internal rate of return. 2. Document, measure and publish macro-economic impact of sector to show share of market. 3. Promote cultural industry exports. 4. Build brand value of popular arts.

Notes:

S-T: Strengths in the sector that can be used to minimize existing or emerging threats.

W-T: The strategies needed to minimize or overcome sectoral weaknesses and cope with threats.

S-O: Strengths in the sector that can be used to capitalize or build upon existing or emerging opportunities.

W-O: The strategies needed to overcome sectoral weaknesses if existing or emerging opportunities are to be exploited.

Analysis of Case Studies of Heritage Tourism Development in the Caribbean

There is little doubt that heritage tourism is an expanding area of focus and investment throughout the region. While there is much similarity across countries based upon historical legacies of European colonialism, African slavery, Asian indentureship and virtual extermination of the native indigenous populations, there is significant diversity in the cultural landscape on account of varied traditions in the respective territories. In effect, what needs to be noted is that each country has its own strengths in the mix of heritage tourism experiences and attractions, as shown in the table below which provides an assessment of the relative strengths of the various territories involved in the study.

Table 18: Assessment of the Relative Strengths of Selected Case Study Countries

Country	Natural Heritage	Built Heritage	Indigenous & Traditional Knowledge	Popular Culture
Barbados	XXX	XXX	X	XX
Jamaica	XX	XXX	XX	XXX
Trinidad & Tobago	XXX	X	X	XXX
Suriname	XXX	XXX	XXX	X
St. Kitts & Nevis	X	XXX	XX	XX
Dominica	XX	X	XXX	XXX

LEGEND: XXX = significant presence, XX = less significant presence, X = limited presence

Thus, natural and built heritage are the key strengths of Barbados whereas Jamaica is relatively strong in most areas, particularly built heritage and popular culture. Trinidad and Tobago has strong capabilities in natural heritage and popular culture when compared to Suriname whose strength is in indigenous and traditional knowledge, natural heritage and built heritage. Built heritage is the core attraction in St. Kitts and Nevis while indigenous and traditional knowledge, popular culture and natural heritage are the key market drivers in Dominica.

The following review and analysis of the case studies is intended to give the reader some perspective on their strategic value at three levels: the micro-strategic level of the firm or heritage operator; the macro-strategic level that involves the institutional environment and relations with stakeholders; and the level of brand value, for example, intellectual property and destination branding.

Table 19: Summary and Review of Case Studies

Case Studies	Heritage Type/ Ownership	Micro-Strategic Impact	Macro-Strategic Impact	Destination Brand Value
1. Green Grotto Caves, Jamaica	Natural/ Subsidiary of Public Corporation	The key earnings are from entrance fees which fully cover operating costs. The organisation is self-financing and the internal rate of return has improved under good management.	The visitation level is medium to high and makes an important contribution to local value-added in the North Coast tourist economy.	The historical significance and the story of the place are significant but generally under-played. The brand value can be easily expanded.
2. Asa Wright Nature Centre, Trinidad & Tobago	Natural/ NGO	Key sources of income from lodging and entrance fees. Revenues cover operating costs and are reinvested. Investments in financial markets have paid off and are used for reinvestment.	No estimated economic impact but makes a tangible ecological impact on the conservation of the Arima Valley and generally on environmental policy and public awareness.	An outstanding and iconic attraction of world repute. A key asset that is largely under-utilized in country brand.
3. Harrison's Cave, Barbados	Natural/ Gov't Agency	Earnings from entrance fees fully cover operating costs. Internal rate of return is high enough to justify US\$16m loan from CDB for upgrade and redevelopment.	This attraction has the highest visitation level in the country and so makes an important impact on local value-added and enriching the visitor experience.	A key and iconic asset that is heavily utilized in the country brand. Redevelopment likely to strengthen brand value.
4. Brimstone Hill Fort, St Kitts & Nevis	Built/ Gov't owned, NGO operated	The key earnings are from entrance fees and events. The Fort generates a surplus that is reinvested and invested in financial markets.	On account of the high visitation levels the Fort makes an important contribution to local value-added.	As a UNESCO World Heritage site the Fort has generated strong brand value for the country.

Case Studies	Heritage Type/ Ownership	Micro-Strategic Impact	Macro-Strategic Impact	Destination Brand Value
5. Barbados Museum and Historical Society, Barbados	Built/ NGO	The main source of income is gov't subvention which has been declining. This signals the need to increase earned income which is under 10%.	The museum has low visitation levels but has a strong collection that tells the history of Barbados and the Caribbean. The museum also has expertise, which is hired by other agencies.	The museum is driven more by its curatorial function than by marketing imperatives but given its location and beautiful facilities it can build a stronger brand identity.
6. Bob Marley Museum, Jamaica	Built/ Private	The principal source of earnings is from entrance fees. There is much scope given the cache of the Bob Marley name for new income streams from merchandising and Internet/ecommerce distribution systems.	The museum enjoys the highest level of visitation in the Kingston area when compared with other attractions. Given its prime location the museum is able to attract sightseeing tourists as well as business and diplomatic tourists.	The brand value of Bob Marley to the country of Jamaica is inestimable but viewed as very significant. However, the brand is very diffuse and management of licenses and intellectual property rights relating to Bob Marley's music and associated products continues to be a challenge for the Robert Marley Foundation, which has the overall responsibility for their integrity.
7. Rose Hall Great House, Jamaica	Built/ Private	The key source of income is from entrance fees. Prices are discounted for cruise ship passengers and entrance fees have remained at the same level for more than a decade.	The Great House is the top attraction on the North Coast and makes a contribution to the local value-added as well as the quality of the visitor experience.	The Great House and the story behind it has generated much brand value.

Case Studies	Heritage Type/ Ownership	Micro-Strategic Impact	Macro-Strategic Impact	Destination Brand Value
8. Santigron Maroon Tour, Suriname	Tradition Knowledge/ Private	Arinze Tours is one of the tour operators that specializes in the Santigron Maroon tour. Its principal source of income is from tour fees. Arinze is pursuing investment in setting up a lodge for overnight visitors and to expand income.	The Maroon tours are a key feature of the Suriname heritage tourism product that makes it distinctive within the region. The marginalization of the Maroon community as well as encroaching modernity present challenges to heritage tourism development.	The brand value of the Maroon community is high and not being fully exploited. There is a lot of potential synergy with the handicraft products.
9. Trinidad & Tobago Carnival	Popular Culture/ Gov't	The NCC is largely reliant on the subvention from Gov't to fund the management of the festival. Other sources of income come from events hosted at the facilities, which are currently under redevelopment.	The festival attracts the largest number of visitors in the region (over 45,000) and generates a significant economic impact on the economy directly (US\$30m) and indirectly through cultural industry exports.	The festival is the key driver of tourism and attracts cultural, diasporic, and regional tourists. It is the key tourism product that differentiates and brands the country.
10. World Creole Music Festival, Dominica	Popular Culture/ Gov't	The DFC generates over 50% of its finances through earned income, mainly ticket sales. Corporate sponsorship accounts for another 20 – 30% with government investment contributing the rest. The latter is a declining share of the total earnings.	The festival is the largest drawing card in the tourism sector. Arrivals by air and sea from regional markets, such as OECS territories and the Francophone DOMs, are the key target markets.	The festival has generated strong brand identification and media impact for Dominica. The "Creole" brand differentiates and secures Dominica's investment in the festival.

A Strategic Business Management Model for Heritage Tourism Products in the Caribbean

Unlike other businesses, there are few barriers to entry into the heritage-based tourism market. Almost anyone can attempt to gain access by offering some part of their history or their land to tourists. This means that the offer is often very dissipated and not always linked to tourism demand. “Tourism is fundamentally a demand-driven activity that is influenced more by market forces rather than governments that try to control or manage it”²⁷. Consequently, there is a risk that the cultural heritage market will grow faster than the numbers of interested tourists. This brings with it the real chance of failure, even in this ever-expanding sector, if all aspects of the development process are not carefully considered²⁸.

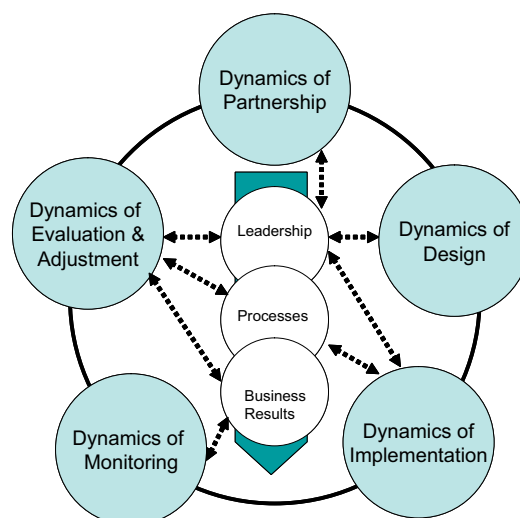
The aim of this section is to present a hands-on strategic business management model, based on the experiences of the foregoing Caribbean case studies, which interested parties can use as a guide to planning, designing, implementing, monitoring and following-up on the development of sustainable heritage tourism products in the Caribbean, no matter what form of tangible or intangible heritage they choose to grow.

Some of the key attributes for heritage tourism are:

- ✓ Sites and experience must be known beyond the local community
- ✓ Attractions should provide experiences that can be consumed
- ✓ Interesting and unique sites and experiences must be offered
- ✓ Attractions need to be robust and manage carrying capacity

The model presented in the following pages is based on the key lessons learned from the case studies, and has its roots in the “Plan, Do, Check and Act Cycle” evolved by the American economist Deming and adopted in post-war Japan, as well as in the European Foundation for Quality Management’s (EFQM) Excellence Model²⁹. The model itself is adapted from the Integrated Quality Management (IQM) approach developed by the European Commission on the basis of experiences from coastal, urban and rural tourist destinations in Europe. As its name suggests, IQM takes a holistic approach to quality management, recognising that quality is the combined result of the successful interaction of many different processes. The concept has been adapted here to fit the facility rather than the destination level, and to reflect Caribbean experiences.

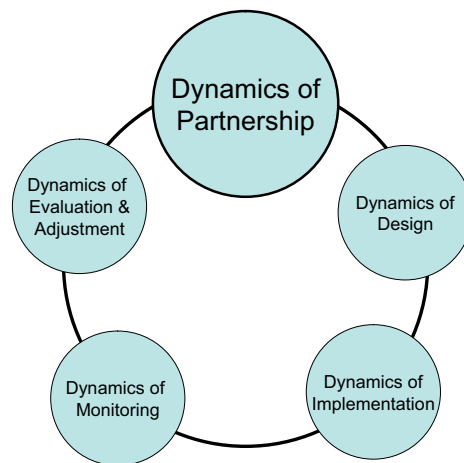
Figure 5. Strategic Business Management Model for Heritage Tourism Offers in the Caribbean



The model is a “pearl chain” where each pearl contains an essential stage of a strategic approach to business management. The three critical elements of any enterprise: Leadership, Processes and Business Results are positioned in the centre of the pearl chain. Each pearl relates to one or more of these business elements. Finally, the pearl chain is unbroken, symbolising that this is a continuous feedback loop that facilitates a process of continuous improvement in the drive towards maximising quality for the consumer and for the operator.

Dynamics of Partnership

It is generally accepted that modern enterprises do not exist in a vacuum but instead function as an intrinsic part of the society around them. Within the society, various stakeholders exist which may be either directly or indirectly influenced by, or have an influence on, the enterprise. Before start-up even, careful consideration therefore needs to be given to who the stakeholders are, how they may influence the project and how to ensure that they are involved if necessary. Of equal importance, the enterprise needs to build on the original contacts made in the partnership phase over the long term by networking.



A business' stakeholders will vary depending on the type and location of the operation but typically will include:

- **Public authorities and other similar bodies** – These stakeholders are responsible for the infrastructure and utilities that are essential for establishing a heritage tourism product, and often own cultural heritage sites of national importance. Significantly they have a mandate to drive economic development and may therefore provide tax incentives and access to soft loans to new enterprises, as well as managing land use regulations and planning applications for use of land.
 - o Though the Brimstone Hill Fortress National Park is the property of the state, its management is entrusted to a voluntary membership organisation, registered as a not-for-profit company. The Council of Management, made up of elected representatives of the members and two Government nominees makes all policy decisions.
 - o The Dominica Festival Committee (DFC) is a permanent governmental agency that has sole responsibility for the organisational aspects of the World Creole Music Festival. To this end it is aided by kind contributions and support from other public authorities, for example the Dominica Port Authority, the Public Works Department and the Water and Sewerage Department.
- **Financial partners** – These stakeholders include banks, investment agencies, grant funds etc.,

which are a vital source of cash injections. If they buy in to the development idea, they may provide capital at lower interest rates for construction works, and for the purchase of necessary equipment in return for securities in the fixed capital.

- o The Caribbean Development Bank provided a loan of US\$16.9 million, guaranteed by the Government of Barbados, for the recent upgrade of Harrison's Cave heritage attraction in Barbados.
- o Arinze Tours of Suriname was able to benefit from funding provided by the EU-financed Suriname Integrated Tourism Development Project, one third of which was provided as a grant and the remainder as a loan. Ten other Surinamese companies also benefited from this offer.
- **Primary, secondary and tertiary education and research institutions** – Developing a heritage product brings with it the responsibility of interpreting the heritage and making it available for current and future generations of national citizens. By welcoming primary and secondary schools, sites can help child learning processes, and by cooperating where possible with tertiary and research institutions, the site can gain access to information and innovation.
 - o Green Grotto Caves hosts an annual environmental fair for schools in the St. Anns area where it is located. This targets primary and secondary schools and, in order to take part, each school must have an environmental club that deals with issues such as alternative uses of energy and recycling.
 - o Arinze Tours of Suriname has been able to tap into the "voluntourism" market by assisting universities conduct research in their sphere of operation. This in turn has created further interest among other stakeholders, such as students' families, leading to increased visitation.
- **National and regional Non-Governmental Organisations (NGOs)** – This stakeholder grouping includes environmental watchdogs as well as interest groups related to a specific sector, for example the passing on of artisanal skills to new generations. These bodies often constitute a wealth of valuable information on the different forms of heritage in a country and can be involved through the partnership process in the provision of expertise for the design and interpretation of heritage tourism products. Significantly, the regional and international NGOs may provide a niche market that relevant heritage tourism products can tap into.
 - o The Asa Wright Nature Centre has a tradition of collaborating with environmental groups and targets the bird watcher community in its marketing, furthermore it has been recognised for its excellence by the international Audubon Society.
 - o The Brimstone Hill Fortress, managed by a voluntary membership organisation and registered as a not-for-profit company, was inscribed on UNESCO's World Heritage List in 1999
- **National tourism industry** – This stakeholder grouping includes other tourist attractions, travel agents, destination management companies, travel and national media and cruise ship operators. It can help to generate both national and international interest in the new product being developed and to secure a sound customer base.
 - o Harrison's Cave enjoys good relations with the Barbados Tourism Authority (BTA) and as BTA is able to negotiate lower costs for airlines and hotels, Harrison's Cave is able to benefit from cost savings associated with participation at international trade fairs.
 - o Rose Hall Great House offers a special discount rate (in force since 1971) to the tour companies that provide special tours for cruise ship passengers.
- **Local residents and the wider community** – These stakeholders include residents living in close proximity to a development and who are likely to be affected by increased vehicular traffic and other activity. It is thus important that their concerns and ideas are consulted in the partnership

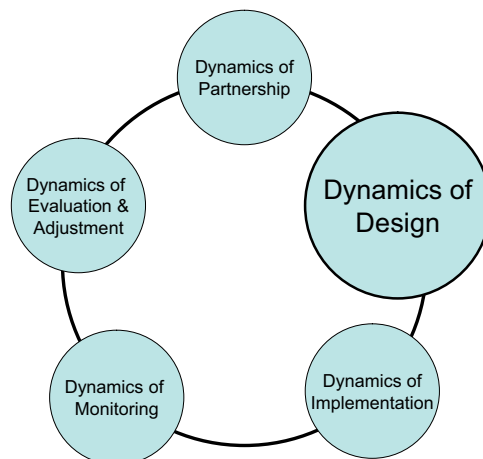
development phase. In addition to providing staff, there may be other opportunities to benefit the residents for example by exploring cooperation with local artisans, craft workers and musicians as well as from other creative trades in the heritage offer. At the national level, citizens can be a source of visitation in the off-season, helping to counter the effects of seasonality.

- o In lieu of the Harrison's Cave Zone redevelopment project, several surveys and consultations were undertaken with local communities and other stakeholders to get an insight into their opinions on the redevelopment.
- o Green Grotto Caves works with a number of community groups and youth organisations in the area. For example, the police youth group gets passes to the facility and complimentary tours. Green Grotto Caves also assists community groups with the organisation of events.

The essential activity in the partnership phase is to evolve a basic conceptual plan for the enterprise, and to sound this out among potential partners. By entering into a constructive dialogue with stakeholders it will be possible to gauge their interest in, and therefore the feasibility of, the concept being proposed. At this stage, the plan does not need to be written down but can be further enunciated in the Design phase.

Dynamics of Design

During the Design phase, the initial concept developed in the Partnership phase based on contacts with stakeholders, is cemented into a concrete **Strategic Plan** after the implementation of the **Situational Analysis**. As heritage can't be artificially produced – it exists because of historical, cultural and geographical factors – product developers have to, by and large, work with what they have got.



Nonetheless, as a European Commission report on natural and cultural heritage identified, there are a series of key success factors for this form of tourism³⁰. Here, those success factors are adapted into questions that can be taken into consideration during the Design phase before entering into the development of the strategic plan, as exemplified using the Caribbean case studies:

1. **Is the heritage being developed significant?** The importance of the cultural or natural heritage is a decisive factor. It will be more challenging to develop a sustainable product based on a theme with a low heritage value. Having a significant feature is a major asset and will have a pull effect on tourists, making marketing easier. The Bob Marley Museum in Jamaica is a unique attraction recognising the international importance of an artist who became the symbol of a movement and a generation. Other heritage products may be of sufficient significance that once developed they become a reason

to visit the destination in their own right, for example the annual Trinidad Carnival that attracts in excess of 40,000 international visitors.

2. **Is the heritage being developed distinctive?** Sometimes it is not enough just to rely on the significance of the heritage alone. It is also vital to have a distinctive product that has a unique selling point, which allows it to stand out from the competition. The Rose Hall Great House attraction is a well-restored plantation house, but it is one of many in Jamaica. The product stands out because it has a story to tell – that of Annie Palmer, the British plantation owner, who is said to still haunt the manor to this day, and which holds a particular fascination for tourists and residents alike.
3. **What is the site access like?** Good site access is vital. Distance, journey time and anticipated difficulty of getting there play a major role in tourists' decisions to visit a site or not. If the site is off the beaten track then signage will be vital to help visitors locate the heritage offer. As an alternative strategy, Rose Hall Great House and Brimstone Hill Fortress both operate an incentives system whereby taxi drivers are paid a small commission for visitors that they bring, thus overcoming any anticipated problems of access by tourists and also reducing the need for parking facilities. It also allows for word of mouth marketing by knowledgeable locals who have strong influence on visitors' choice of attractions to visit.
4. **Can we benefit from clustering?** Heritage tourism offers are often scattered across a country, and there may be benefits to be gained by seeking to pool resources with other heritage tourism providers. This may help to generate the critical mass necessary to pull tourists, and make them stay longer in the area.
5. **What are the linkages to other economic sectors?** Tourism has many links to other areas of economic activity, and these should be exploited as much as possible in order to spread the benefits of tourism to the wider community. Examples include sale of locally produced handicrafts, local and national food delicacies and beverages and performances by local musicians and other performing arts.
6. **How do we ensure a quality approach?** Quality needs to be brought into all aspects of the product design. An integrated quality approach focusing on all the points of contact with the visitor will reap dividends. Green Grotto Caves for example is one of the first attractions on an international level to be awarded the Green Globe environmental quality seal.
7. **What can be done to counter the effects of seasonality?** The Caribbean tourist season exhibits peaks and troughs in visitor arrivals but these have been reduced over the past decade. Although those tourists that seek out the heritage offer are less likely to be influenced by the weather, tending to take shorter and more frequent holiday breaks, it is wise to plan for the effects of seasonality. This can be countered by getting involved in high profile events. Encouraging visits by residents can also ensure turnover during the off-season, for example by offering a reduced ticket price for resident visitors.

The main activities in the Design Phase are the:

1. Development of the **Situational Analysis**
2. Development of the **Strategic Plan**

The case studies in this project have all worked in some form or other with these activities, which experience shows are fundamental to developing a successful tourism product.

The Situational Analysis

The objective of the Situational Analysis is to generate a sound foundation for decision making in terms of what the heritage is, how it will be packaged and how the different partners that may be involved will stand to

gain. In other words “is the tourism worth developing?”. Without this thorough background there is a real risk that larger projects especially may get bogged down by unforeseen obstacles, resulting in a weakened product or, in the worst case, in failure and the loss of financial investment.

Experience from around the world shows that common causes for failure in the heritage sector include: a lack of consideration of the need for an infrastructure to support the product, an over-estimation of the tourism potential, lack of market research to determine who would be interested in this type of tourism, conflicts, and lack of cooperation with other sectors³¹.

It is sad to see the honest mistakes that well-meaning people have made by over-inflating the perceived tourism value of an asset when, indeed, it has limited appeal. Valuable resources have been wasted developing infrastructure and services to cater to anticipated tourist use that has not eventuated³².

The development of the Situational Analysis will help to counter this and determine whether it is worth going ahead with the commercial enterprise. It is also a useful exercise to re-consult the Situational Analysis throughout the development phases of the pearl chain cycle.

The Situational Analysis should ideally contain the following basic information: an inventory of tangible and intangible heritage, a stakeholder analysis, an infrastructure analysis, a review of the legal policy context and finally a breakdown of tourist demand, though the exact content of the Situational Analysis will vary somewhat depending on the type of heritage tourism product being developed. In order to guide users of this report, guidance is provided in Appendix 2 on how to develop the Situational Analysis.

Based on the Situational Analysis, the heritage developer will then be in a position to critically, and rationally assess whether there is present and potential capacity to develop the heritage offer based on the significance and distinctiveness of the heritage, the opinions of the stakeholders, the tourism infrastructure in place, the legal and policy context and finally the extent of the tourist demand. If the answer is positive, and it pays to be brutally honest about the financial investment required to overcome any obstacles identified, then the next step is to develop the Strategic Plan, which puts the concept down on paper.

The Strategic Plan

The objective of the Strategic Plan is to formalise the development being proposed based on the Partnership Phase and the Situational Analysis. It is a vital document, which can be used to give the project a concrete identity and to promote interest in the proposed development. Appendix 3 to this report provides the reader with a full break down of the issues to be addressed in the Strategic Plan, and the sort of questions that need to be considered during its development.

The Strategic Plan should ideally contain the following basic information, though again this will vary somewhat depending on the type of heritage tourism product being developed:

1. The objective
2. Proposed facilities and offerings
3. Carrying capacity
4. Quality
5. Marketing and promotion
6. Pricing and packaging
7. Organisational structure
8. Funding
9. Monitoring, feedback and evaluation

Branding is a critical feature of the planning and implementation phases, and needs to be considered in the planning of the marketing and promotion of the product because it aids in the differentiation of the heritage product and the consolidation of the experience in the minds of visitors. Some of the key tactics for branding heritage tourism are:

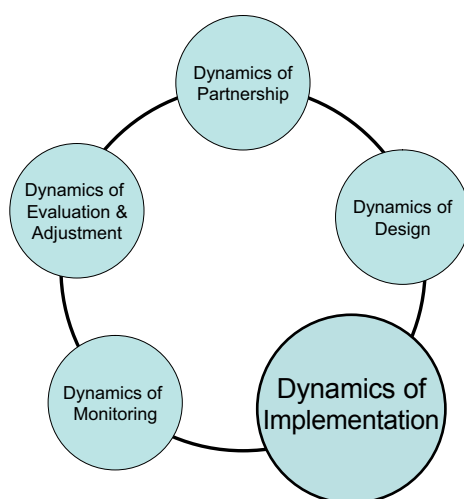
- Mythologize the asset
- Build a story around the asset
- Emphasize the otherness
- Show a direct link from the past to the present
- Make it triumphant
- Make it a spectacle
- Make it a fantasy
- Make it fun, light and entertaining
- Consider certification and standards (e.g. Green Globe, UNESCO World Heritage listing)
- Build visitor and stakeholder value
- Build brand recognition (e.g. destination branding, media value)

Improving Access to Financing

Although nature and heritage tourism as a concept is relatively new to the Caribbean, some of the region's natural and historic sites, as well as cultural events, already attract thousands of foreign and local visitors. The successes achieved in the development of nature and heritage tourism projects by some NGOs and private sector companies at commercial bank rates confirm the viability of some of these ventures. The financial community and the governments of Caribbean nations should join these initiatives in order to promote growth in this promising area of economic activity³³. Appendix 4 provides recommendations to the key stakeholders of heritage tourism development based on the review of various heritage attractions and interviews with government officials and Caribbean and international financial intermediaries.

Dynamics of Implementation

The Implementation phase sees the actual development of the heritage offer based on the foundation provided by the Strategic Plan.



The main activities in the Implementation phase are likely to be:

- ✓ Attracting external funding if necessary
- ✓ Preparing the product/site/attraction for opening

- ✓ Conducting human resource training
- ✓ Ensuring compliance with national regulations (fire, hygiene, disaster etc)
- ✓ Developing signage and information materials for the interpretation of the heritage on offer

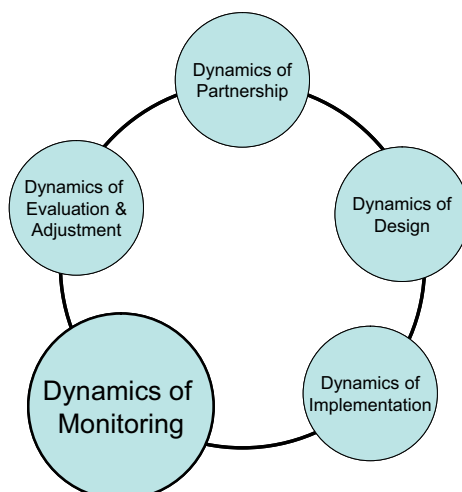
A key tool for the Implementation Phase is the Business Plan. The Business Plan is an absolute necessity for attracting external funding, for example from financial institutions, and also for providing the financial framework for the operation. An example of the basic elements of the Business Plan is provided in Appendix 5 to this report. One important aspect of the Business Plan is the pricing policy – it is vital to set a competitive price that ensures that the profits generated are sufficient to repay investors. A competitive price can be established by benchmarking with other similar providers in the country or in the region (or by using the case studies in this report), to ensure that the operation is not pricing itself out of the market, or alternatively under-charging.

In terms of funding, the case studies analysed in the previous section display a variety of innovative means of attracting the necessary capital. Perhaps a key lesson is that not all funding needs to take the form of financial assistance – several of the case studies representing a variety of different heritage types have benefitted from contributions in kind. For example Brimstone Hill Fortress was able to benefit from the supply of heavy equipment from local landowners during the site preparation process, as well as from the human resources supplied by the Public Works Department and prisons.

The heritage offer also needs to have an effective approach to communication, especially with those key stakeholders identified during the Partnership phase. Examples of communication approaches include the generation of a Newsletter that can be emailed to partners on a regular basis, as well as Press Releases for major events (such as the opening and theme days) and developments. It's also a good idea to keep a record of press coverage of the heritage offer, so that successful communication in the past can be duplicated. Increasingly the Internet is being used as a communication tool, for example, not only does WCMF's website provide users with basic information on the programme and artistes, it also provides information tool kits for download by members of the media.

Dynamics of Monitoring

Tourism is a dynamic and ever changing industry heavily dependent on a number of factors outside the control of those involved. It is inevitable therefore that any tourism product will evolve over time. It is thus vital to have a dedicated monitoring programme in place, making it possible to react to any issues early enough before they become problems, and to create a dynamic product that is capable of adapting to market opportunities and changing preferences. Unfortunately, this element is all too often forgotten or given insufficient resources³⁴.



The monitoring areas and the regularity of the monitoring process should ideally be set by management in the Strategic Plan. It is vital that management establishes a culture of keeping records. Most of the information needed can be gathered through the Visitor Survey, for example given to visitors when they leave the site, and which they can either complete before departure and hand over to staff, or hand over to the accommodation facility where they are staying. Alternatively, a questionnaire technique can be used, in which visitors are interviewed whilst on site. A breakdown of essential questions for use in the Visitor Survey is given in Appendix 6 to this report.

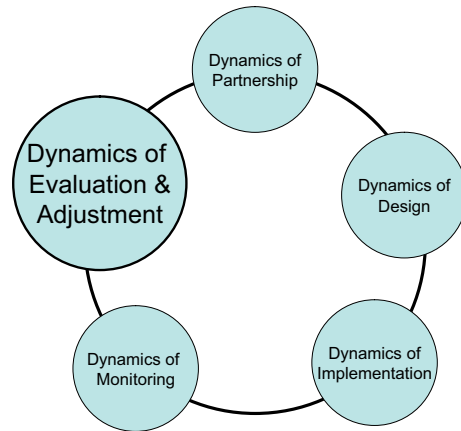
Some attractions elect to post a “suggestions box”, with paper and pen, by the exit so that visitors can make suggestions for improvements. This can be encouraged by offering a prize based on a random selection prize draw. The prize can then either be handed over to the visitor at a special ceremony (if a resident) or posted to the winner (if abroad).

The suggested areas for monitoring are:

- **Measure visitor numbers, record age, origin, sex etc.** – This can be measured on a daily basis, especially if there is an entrance fee for the heritage offer. Recorded over a year, this will identify issues such as monthly fluctuations due to seasonality, as well as the development of the product itself. For example, Dominica’s World Creole Music Festival commissioned an economic impact study from university researchers.³⁵
- **Monitor needs and expectations of tourists** - Did they experience value for money, and what did they like and what did they not like about the experience? For example, Brimstone Hill Fortress carried out a consumer survey over a three year period in the late 1990s, which led to the development of an audio tour in four languages.
- **Employee satisfaction** – The wellbeing and successful function of the employee team is essential for providing visitors with a quality experience. Monitoring employee satisfaction will help to identify problem areas before they become a real challenge. Management may, for example, instigate a regular one-on-one meeting with staff to check their personal developments, and it’s also important to gel the team by holding regular staff meetings.
- **Impact on environment** - Damage to natural and cultural resources is extremely difficult to measure. It also takes time for the impacts of the unsustainable practices to manifest themselves. There is no universal formula for determining the number of visitors that a site can sustain because so much depends on the particular characteristics of the unique sites. Measurement of visitor numbers is essential though in order to be able to determine carrying capacity of a site, and monitoring of visitor satisfaction will also give an important indicator of when they feel that the quality of the experience is being affected by the visitor numbers. The Brimstone Hill Fortress has established that its visitor carrying capacity is 500 persons and 50 vehicles on site at any one time. During peak hours, the flow of traffic is controlled by staff equipped with hand-held radios.
- **Information presented on the product** - Keep press clippings and readers’ letters. Also monitor information on the site disseminated at specific online tourist feedback communities, for example www.mytravel.com

Dynamics of Evaluation and Adjustment

In tourism, there is a constant need to take stock, fine tune and adapt the product on offer to ensure that tourism remains dynamic and well suited to the tourist markets. The management thus needs to ensure that the results of the Monitoring phase are analysed and the lessons drawn from them so that corrections and additions can be made to the offer, for example, by revising the Strategic Plan on an annual basis. It is this continuous repetition that causes the system to operate as a loop.



It is important that the management takes a rational approach to the Evaluation and Adjustment phase – if there are any activities that are underperforming, perhaps due to inadequate resources, then the management needs to take the necessary consequences and stop them instead of continuing to deliver poor quality.

Concluding Remarks

Critical Success Factors, Strategies and Targets

This section takes a step back from the Strategic Business Management Model for the sustainable development of heritage tourism, and aims to provide an outline of the critical success factors along with key strategies and tactics as well as indicators and targets for the sustainable development of heritage tourism. Thirteen success factors along with key tactics and actions are identified to achieve the future desired goals of the broad range of stakeholders that are involved in heritage tourism. Specific indicators and targets for monitoring the implementation of heritage tourism development are also outlined. The strategic objectives are categorized under three broad areas of competence: (1) market leadership; (2) stakeholder interest; and, (3) operational excellence.

Table 20: Market Leadership

Market Leadership		
Market leadership is largely about developing market attractiveness and communicating brand value to heritage tourists and key stakeholders. The key drivers for this are heritage development, cultural industry development, visitor and audience development, aesthetic differentiation and brand destination. The application and integration of these critical success factors is key for developing market leadership in the heritage tourism sector which would redound in expanded and more diversified sources of income, a wider distribution of income among stakeholders and greater brand loyalty for visitors.		
CRITICAL SUCCESS FACTORS	TACTICS and ACTIONS	INDICATORS and TARGETS
1) Heritage Development	- Facilitate continuous investment in conserving the natural environment and preserving the built assets, traditional knowledge and popular cultures. - Invest in heritage development, product and process innovation and the upgrading of the human resources. - Develop timely and thorough operational and business plans.	- Allocate 5-10% of the annual tourism budget for heritage development. - Reinvest share of surpluses for conservation, preservation, and curatorial work, - Execute business plans.
2) Cultural industry development	- Facilitate the growth of cultural industries as key suppliers of merchandise, services and intellectual property to expand the employment and local value-added. - Improve intellectual and copyright protection and collective administration.	- Increased share of locally produced merchandise. - Increased earnings from services and intellectual property.

3) Visitor and audience development	• Improve experience for visitors and audiences, especially in terms of quality of heritage attractions, products, tour guides, venues, security, safety and sanitation facilities. • Improve coordination and collaboration between travel agents, airlines, tour operators, media in terms of scheduling, promoting, and advertisement of heritage tourism attractions and products.	• Repeat visitation. • Good word of mouth advertisement. • Increased hits on websites.
4) Aesthetic differentiation	• Build brand identity and image through effective and cutting edge heritage management, marketing and programming. • Develop alternative and innovative content and events to sustain competitiveness.	• Invest in branding the heritage asset. • Invest in intellectual property branding, for example, trademarks, designs, logos, domain names, etc.
5) Destination Branding	• Create unique destination proposition. • Enhance destination image of host country through savvy marketing and promotions. • Design marketing strategy to ensure widest possible access to print media, terrestrial TV, cable, radio, and Internet.	• Increased brand association among target markets. • Measure brand equity in terms of customer preference and loyalty as well as financial gain.

Table 21: Stakeholder Interests

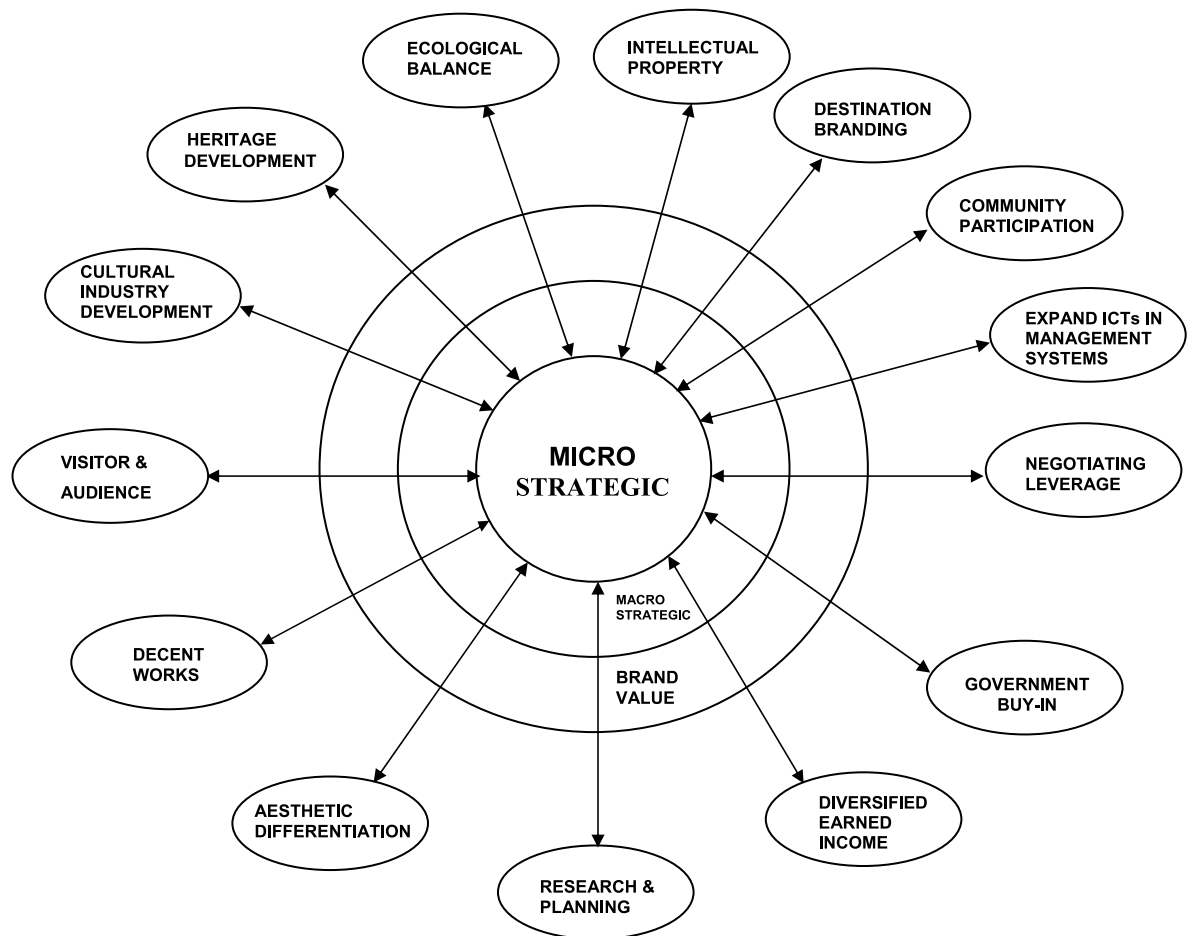
Stakeholder Interests		
Stakeholder interest is enhanced through deeper collaboration among key stakeholders. The key stakeholders for heritage tourism are the travel and tourism sector, the communities, the employees and the governments. The aim is to ensure that each of the key stakeholders appreciate the core values for success and are motivated and empowered to achieve them. For each of these stakeholders it is important that there is buy-in, coordination and shared visioning without which conflict and contestation would arise and so minimize the contribution of the sector.		
CRITICAL SUCCESS FACTORS	TACTICS and ACTIONS	INDICATORS and TARGETS
6) Expand ICTs in Travel and Tourism management systems	• Move beyond websites and online brochures to develop online shopping and reservation systems. • Expand destination management systems to include email management, promotional services for users, client databases, profiles and survey systems.	• Increased Internet bookings. • Repeat visitation through Internet bookings. • Increased merchandise sales via the Internet. • Increased cooperation in Internet marketing among tour operators and heritage suppliers.
7) Strengthen community participation	• Build the integrity and authenticity of the attraction or experience through community buy-in and involvement. • Develop an outreach and public awareness campaign. • Facilitate local access to the heritage attraction or experience.	• Increased local word of mouth advertising. • Increased local hits to the website. • Increased visitation by students and other special interest groups.
8) Decent work	• Build strong work culture that rewards initiative, facilitates delegation of authority and pays a decent wage. • Invest in training of staff and management.	• Low employee turnover. • Increased share of expenditure on training. • Increased level of training of management.
9) Government Buy-in	• Consolidate government involvement in heritage management (e.g. zoning, environmental management, intellectual property protection, destination marketing). • Document and measure the contribution of the heritage tourism to the economy and society so that government can communicate the returns and value-added to key stakeholders and taxpayers.	• Reduced bureaucratic challenges for heritage investment and operations. • Increased investment by governments in heritage assets. • Improved public awareness of contribution of heritage tourism.

Table 22: Operational Excellence

Operational Excellence		
Operational excellence focuses on getting the quality issues right and sustaining the heritage tourism enterprises. Key factors for success are diversifying the sources of income, improving the negotiating leverage of the sector, upgrading the intellectual property protection and promotion and building the research and evidence-based planning. The key challenges that the sector is faced with are a narrow source of income, weak bargaining power, limited awareness of intellectual property and an absence of knowledge for management.		
CRITICAL SUCCESS FACTORS	TACTICS and ACTIONS	INDICATORS and TARGETS
10) Diversify sources of earned income	- Expand earned income from entrance fees, ticketing, merchandise sales, corporate sponsorship, donations, concessionaires and royalties. - Build more focused and strategic sponsorship relationship with the firms in the airline, hotel, broadcasting and entertainment sectors.	- Reduced dependence on entrance fees or government subventions. - Generate sponsorship and in-kind services from key stakeholders. - Capacity to reinvest surpluses for conservation, preservation, and curation of heritage assets.
11) Improve negotiating leverage	- Increase negotiating power with cruise lines, travel agents and tour operators. - Build national and regional heritage tourism association.	- Increased fees paid by cruise passengers and/or increased share of margins - Increased share of total visitor expenditures.
12) Upgrade intellectual property protection & promotion	- Build awareness among heritage operators of the value of intellectual property protection, promotion and exploitation. - Specifically target traditional knowledge and folklore. - Strengthen intellectual property branding.	- Increased training and public education programmes on link between heritage tourism and intellectual property. - Reduced infringement of intellectual property. - Increased licensing and royalty earnings from intellectual property.
13) Research and evidence-based planning	- Document and measure the contribution of the heritage sub-sector. - Measurement facilitates economic and strategic planning. - Communicate the benefits to the key stakeholders.	- Conduct attractions survey, visitor surveys and marketing intelligence. - Publication of data on contribution of heritage to total tourism earnings. - Evaluate contribution of heritage tourism to destination branding.

Figure 6 provides a schematic of the interrelationships between the critical success factors described above and the brand value, macro-strategic and micro-strategic levels.

Figure 6: Schematic of Critical Success Factors



Conclusion

The findings from the research done during the course of this project have been applied into the development of a Strategic Business Management Model for the sustainable development of heritage tourism in the Caribbean, targeted at heritage developers. A series of critical success factors, strategies and targets have also been identified for the broad range of stakeholders of the Caribbean tourism sector.

The research indicates that there are both potential benefits and drawbacks from the development of heritage tourism, as presented below.

The potential benefits of heritage tourism development are:

- Heritage attractions increase local value-added through expanding visitor expenditures (entrance fees, tours, local transport, merchandising etc.)
- Diversification of the tourism experience beyond “sun, sea, sand, sex”
- Differentiation of tourism product
- Spreading tourism geographically beyond the hotel and the beach
- Catalyst for urban & rural development and renewal
- Promotes conservation of natural, built & traditional heritage
- Destination imaging, intellectual property branding and media value
- Breaks with “commodity tourism”
- Builds society’s cultural confidence and image of self-worth

The potential drawbacks of heritage tourism include:

- Potential low returns on high cost investment
- Declining share of local value-added for heritage sites/experiences
- Cruise ships and tour experiences are the main beneficiaries from heritage tourism
- Cruise ships and tour operators have excessive market power relative to attractions
- Free rider problem with key stakeholders, especially for festivals
- Representations of heritage make some histories invisible (e.g. plantation houses, forts)
- Marginalized communities can be further exploited (e.g. Maroons, Caribs)
- Over-investment in tangible heritage and under-investment in intangible heritage

The limited data that there is on the sub-sector shows that though the region has long been involved with this element of tourism there has been no clear strategy until recently, except in a few territories. It also suggests that the offerings and capabilities of territories are very diverse and that there is no one set of prescriptions that would address the myriad of challenges and opportunities that the sector is faced with.

The analysis suggests that the prospects for heritage tourism are strong and that the Caribbean region is well-placed to take advantage of the opportunities once the requisite institutional and entrepreneurial framework is upgraded. There is also recognition that heritage tourism has the potential to address some of the long-standing problems in the sector such as the marginalisation of communities and the fragmentation of the sector that is associated with conventional tourism. This is represented in the increased focus on ecological and pro-poor tourism, which are viewed as more sustainable approaches to tourism.

Appendix 1: Additional Information on Heritage Tourism Management

Caribbean Inscriptions on World Heritage List

As of April 2007, only twelve properties in the Caribbean are inscribed as cultural World Heritage. All these sites retrace historic periods:

Year of inscription	Name of the Site	State Party
2002	Historic Inner City of Paramaribo	Suriname
2000	Archaeological Landscape of the First Coffee Plantations in the South-East of Cuba	Cuba
	Historic Town of St. George and Related Fortifications, Bermuda	United Kingdom
1999	Viñales Valley	Cuba
	Brimstone Hill Fortress National Park	Saint Kitts and Nevis
1997	San Pedro de la Roca Castle, Santiago de Cuba	Cuba
	Historic Area of Willemstad, Inner City and Harbour, Netherlands Antilles	Netherlands
1990	Colonial City of Santo Domingo	Dominican Republic
1988	Trinidad and the Valley of the Ingenios	Cuba
1983	La Fortaleza and San Juan Historic Site in Puerto Rico	United States of America
1982	Old Havana and its Fortifications	Cuba
	National History Park – Citadel, Sans Souci, Ramiers	Haiti

As of April 2007, only six properties in the Caribbean are inscribed as natural World Heritage:

Year of inscription	Name of the Site	State Party
2004	Pitons Management Area	St. Lucia
2001	Alejandro von Humboldt National Park	Cuba
2000	Central Suriname Nature Reserve	Suriname
1999	Desembarco del Granma National Park	Cuba
1997	Morne Trois Pitons National Park	Dominica
1996	Belize Barrier Reef Reserve System	Belize

Since the workshop on Cultural Heritage of the Caribbean and the World Heritage Convention in 1998, some State Parties have received preparatory assistance from the World Heritage Fund for the identification of potential properties or for the preparation of nominations for inscription.

Two natural sites and fifteen cultural sites have been proposed for nomination. These are essentially historical sites:

Year of submission	Name of the Site	State Party	Natural or Cultural
2005	The Scotland District of Barbados	Barbados	N
	The Industrial Heritage of Barbados: The Story of Sugar		C
	Bridgetown and its Garrison		C
	Georgetown's Plantation Structure and Historic Buildings	Guyana	C
2004	St. George's Historic District	Grenada	C
	St. George's Fortified System		C
	Grenadines Islands Group		N
	Historic Centre of Jacmel	Haiti	C
2003	Reef System in the Cuban Caribbean	Cuba	N
	Cienaga de Zapata National Park		N
	Historic Centre of Camagüey		C
	Historic Urban Centre of Cienfuegos		C
	National Schools of Art, Cubanacan		C
2002	Route of the First Colonial Sugar Mills of America	Dominican Republic	C
2001	Jaragua National Park	Dominican Republic	N
	Este National Park		C
	Town of Azua de Compostela		C
	Jacagua, Villa de Santiago de los Caballeros		C
	Montecristi		C
	Archaeological and Historical National Park of the Villa de La Isabela, Puerto Plata		C
	Archaeological and Historical National Park of Pueblo Viejo, La Vega		C
	Historical Centre of Puerto Plata		C
1999	Fountain Cavern	Anguilla	C

Year of submission	Name of the Site	State Party	Natural or Cultural
1998	Historic Area of Basseterre	Saint Kitts and Nevis	C
	Charlestown		C
	Joden Savanne Deposits and the Cassipora Cemetery	Suriname	C
1995	St. George Anglican Cathedral	Guyana	C
	Fort Zeelandia (with the Court of Policy Building)		C
	Town Hall, Georgetown		C
	Shell Beach (Almond Beach) Essequibo Coast		C

Relevant Organisations

Caribbean Tourism Organization (CTO)

CTO provides specialised support and technical assistance to member countries in the areas of marketing, human resource development, research, information management and sustainable tourism development.

One Financial Place, Lower Collymore Rock, St. Michael, Barbados

Tel: (246) 427 5242

Fax: (246) 429 3065

Email: ctobar@caribsurf.com

www.onecaribbean.org

Caribbean Natural Resources Institute (CANARI)

CANARI seeks to create avenues for the equitable participation and effective collaboration of Caribbean communities and institutions in managing the use of natural resources.

Fernandes Industrial Centre, Eastern Main Road, Laventille, Trinidad & Tobago, WI

Tel.: (868) 626 6062

Fax: (868) 626 1788

Email: info@canari.org

www.canari.org

European Commission (EC) Enterprise & Industry DG (Tourism Unit)

The EC Tourism Unit has developed a range of studies of relevance to sustainable cultural heritage development, which can be accessed at the "Studies and Publications" section of its website.

Information & Documentation Centre, BREY 5/150, B-1049, Brussels, Belgium

Tel.: N/A

Fax: +32 2 29 69 930

Email: entr-webmaster@ec.europa.eu

http://ec.europa.eu/enterprise/services/tourism/index_en.htm

International Council on Monuments and Sites (ICOMOS)

ICOMOS is an international non-governmental organisation of professionals, dedicated to the conservation of the world's historic monuments and sites.

49-51, rue de la fédération, 75015 Paris, France

Tel: +33 1 45 67 67 70

Fax: +33 1 45 66 06 22

Email: secretariat@icomos.org

www.icomos.org

The Audubon Society

Audubon's mission is to conserve and restore natural ecosystems, focusing on birds, other wildlife, and their habitats for the benefit of humanity and the earth's biological diversity.

700 Broadway, New York, NY 10003, USA

Phone: (212) 979-3000

Fax: (212) 979-3188

Email: audubonaction@audubon.org

www.audubon.org

UNESCO Cluster Office for the Caribbean

UNESCO works for the conservation of natural and cultural heritage, and administers the World Heritage Convention (1972). It operates the World Heritage List, to which countries can nominate sites of natural and cultural heritage that are of outstanding value to humanity.

The Towers, 25 Dominica Drive, 3rd Floor, Kingston, Jamaica

Tel.: (876) 9297 087

Fax: (876) 9298468

Email: c.champagnie@unesco.org

<http://whc.unesco.org/>

Appendix 2: Key Elements of the Situational Analysis

KEY ELEMENTS OF THE SITUATIONAL ANALYSIS					
Inventory of tangible heritage	An inventory of a heritage offer being developed on the basis of tangible heritage, i.e. natural and built heritage should record a variety of factors including: <table> <tr> <th>Natural Heritage</th><th>Built Heritage</th></tr> <tr> <td> • Site characteristics • Flagship species or habitats • Diversity of ecosystem(s) • Geological features (caves, rivers etc) • Protected areas on site </td><td> • Architectural plans of heritage • Site survey of main constructions • Vernacular buildings on site • Heritage objects (tools, furniture etc) </td></tr> </table> Information may be forthcoming from reports already developed at the national level especially for national monuments or protected areas, though these may need to be updated or complemented with more information. This information will feed into the assessment of the proposed heritage offer's overall significance and distinctiveness. It will also allow the physical state of the different features to be determined and thus the level of investment needed to make the site accessible to tourists.	Natural Heritage	Built Heritage	• Site characteristics • Flagship species or habitats • Diversity of ecosystem(s) • Geological features (caves, rivers etc) • Protected areas on site	• Architectural plans of heritage • Site survey of main constructions • Vernacular buildings on site • Heritage objects (tools, furniture etc)
Natural Heritage	Built Heritage				
• Site characteristics • Flagship species or habitats • Diversity of ecosystem(s) • Geological features (caves, rivers etc) • Protected areas on site	• Architectural plans of heritage • Site survey of main constructions • Vernacular buildings on site • Heritage objects (tools, furniture etc)				
Inventory of intangible heritage	An inventory of a heritage offer being developed on the basis of intangible heritage, i.e. indigenous and traditional knowledge and popular culture should record a variety of factors including: <table> <tr> <th>Indigenous/traditional</th><th>Popular culture</th></tr> <tr> <td> • Gastronomy (local products, recipes, production methods) • Traditions (skills, know-how, customs) • Heritage objects (tools, furniture etc) </td><td> • Level of popularity and uptake at local level • Other events and festivals </td></tr> </table> This will feed into the assessment of the proposed heritage offer's overall significance and distinctiveness.	Indigenous/traditional	Popular culture	• Gastronomy (local products, recipes, production methods) • Traditions (skills, know-how, customs) • Heritage objects (tools, furniture etc)	• Level of popularity and uptake at local level • Other events and festivals
Indigenous/traditional	Popular culture				
• Gastronomy (local products, recipes, production methods) • Traditions (skills, know-how, customs) • Heritage objects (tools, furniture etc)	• Level of popularity and uptake at local level • Other events and festivals				
Stakeholders	Based on the preceding partnership phase, in which all relevant stakeholders were approached and engaged in a dialogue on the concept proposed, analysis should be made of: 1. Level of interest in the proposed heritage offer 2. Principle concerns and fears 3. Capacity to get involved (financial, human resources)				

Infrastructure

An assessment of the tourism infrastructure in the surrounding area that the heritage offer will be influenced by may include a review of the following areas:

- Transportation – ease of access to the heritage offer: condition of road network, proximity to main tourist areas including cruise ship terminals and airport for day visitors.
- Accommodation – what accommodation providers are in the same area as the heritage? These form a potential source of visitors and targeted marketing material should be directed to those establishments.
- Existing attractions – what other attractions are in the same area, and what kind of entry prices do they charge?
- Existing marketing channels – how can the heritage offer be promoted, for example via National Tourist Board website and brochures, incoming tour operators etc.

Legal and policy context

If the heritage offer is established within a national legal and policy framework, it can have a profound effect on the proposed development. It is therefore vital to gauge the level of support at the political level, especially for large developments, and to note the following areas:

- Existing national tourism policy and strategies – how is heritage tourism development prioritised at the national level? What kind of guidance can the National Tourism Organisation provide on the potential market and what kind of marketing options can they provide?
- Operation of tourism establishments – Checks will need to be made of the institutional requirements for operation of tourism establishments: for example licensing and permitting, insurance and emergency procedures.
- Incentives – What kind of incentives is the government able to provide to support tourist attractions, for example, Jamaica's incentives regime has been broadened to include the development of tourist attractions. Are there specific SME initiatives that could be advantageous, for example, small business support schemes, training programmes, soft loans etc.?
- Planning laws and zoning – Planning laws influence the overall image of a place and will therefore have an effect on the type of constructions that can be built and the speed at which this can be done. It is also important to check if a land use zone has been identified for the area where the development is proposed, which will not only influence your project but also what other developments can be permitted at a later date.
- Environmental legislation – Does the national legislation provide a high level of protection for cultural and natural heritage, and how is this implemented? A rigorous legislature can provide a selling point for the product.

Tourist demand

Finally, it is important to understand whether there is sufficient tourist demand for the type of product being offered, or whether there is already market saturation. This can be done by an assessment of current and potential markets. This information is difficult to generate for the local level, but at least some information should be available at the national level:

Current Market Assessment

- How many tourists are there annually?
- When do they come and how long do they stay?
- Where do they come from and how do they get here?
- Where do they stay and what do they do/visit?
- How much money do they spend locally?
- Who are they (age, sex, size of group, profession, main interests, motivations)?
- What were their expectations?
- What did they particularly like/dislike?
- Have they been before, will they come again?

Potential Market Assessment

- What other countries in the region are seen as future markets?
- What is their level of interest in heritage tourism based on tourist profile?

Source: Adapted from: European Commission (2003)³⁶

Appendix 3: Key Elements of the Strategic Plan

KEY ELEMENTS OF THE STRATEGIC PLAN	
1. The objective	What is the objective of the development, and what is the overall target for visitor numbers?
2. Proposed facilities and offerings	When planning the proposed facilities and offerings, it is important to be resourceful - businesses must find imaginative ways to tap into this market to ensure that they have a viable economic product. Questions to ask include: - What is the final product? - What constructions are required? - Will it be necessary to hire expertise? - What are the development phases? - What is the time plan for the development?
3. Carrying capacity	- Based on the inventories, what is the estimated carrying capacity of the site? - How many visitors can be on site or partake in an activity at any one time before negative impacts on the heritage types becomes manifest?
4. Quality	- Personalised service is essential in today's tourism – how will this be engendered? - What are the training requirements for staff? CTO has several training programmes that are of relevance, for example the Tour Guide Training Scheme. - Is it valid to seek national, regional or international recognition for the quality levels achieved? For example, CTO is currently testing the Hospitality Assured programme, which recognises service excellence in tourism establishments, and the Green Globe standard for sustainable tourism can also be applied to attractions^{ak}.
5. Marketing and promotion	- Who are the main markets, and what is the visitor profile of tourists based on the Situational Analysis? - How will the product be promoted, for example the internet, trade fairs, specialised journals and magazines? The Asa Wright Centre in Trinidad participates in the annual British Birdwatching trade fair in the UK with notable success.

6. Pricing and packaging	• What kind of prices will be charged to visitors which can be essential in order to avoid under-pricing or over-pricing. Will there be a differential price between tourists and residents? • How will the heritage offer seek to benefit from packaging arrangements, for example, by being integrated into wildlife trips to the country or by taking part in annual festivals? • How will the culture on offer be interpreted? This is in turn related to the overall image that the management is seeking to give to the offer – educational, authentic, colourful, etc.
7. Organisational structure	• What is the organisational status of the operation going to be – NGO, private company or public/private partnership? • Who are the main partners involved? • Who will be the lead partner if there are more than one? • Will there be a Board to monitor the effectiveness of the day-to-day management of the product and provide recommendations for improvement? • What will be the reporting procedures to the Board to ensure transparency?
8. Funding	• What is the budget for the development? • What external sources of funding will be targeted? • What are the requirements and procedures to access external sources of funding?
9. Monitoring, feedback and adaptation	• What procedures will be put in place to monitor the performance of the heritage offer? • How will the performance be measured and what indicators of success will be used? • How will the lessons learnt from the monitoring and evaluation phase be filtered back into the product? • How often will the Strategic Plan be updated?

Source: Adapted from: European Commission (2003)³⁸

Appendix 4: Finance Recommendations for Specific Participants

A. Governments should:

1. Create environments more conducive to the development of nature and heritage attractions
2. Incorporate general objectives for the development of nature and heritage tourism into their national development plans
3. Apply the “user fee” principle to the full extent the market will allow, with the goal of enabling government-managed nature/heritage attractions to pay for themselves, and permit privately managed attractions to be financially profitable
4. Improve access to credit, and streamline regulatory procedures
5. Negotiate the operational control and business management of nature/heritage sites in return for the investment of management and technical capacity, under lease or other written, formal agreement
6. Award licences for the reproduction of artefacts
7. Mount public education campaigns on respecting nature and heritage attractions, explaining how to protect the attractions and share them with visitors
8. Keep statistics on visitors to nature/heritage sites
9. Promote nature/heritage tourism to their countries

B. The financial and banking community should:

1. Extend grace and repayment periods
2. Send specialized teams to target countries to give workshops on developing nature/heritage attractions to local financial institutions and entrepreneurs
3. Encourage corporations and large asset-holding institutions to invest in nature/heritage tourism development projects

C. Borrowers should:

1. Contribute enough equity up front to assure potential lenders of their commitment to the project and their ability to repay the loan
2. Prepare a thorough financial feasibility study, including a detailed demand analysis and cost estimates
3. Link small development projects for nature/heritage attractions with larger projects (e.g. beach hotels) or other small nature/heritage tourism projects into a cluster project that will be big enough to the investment minimum of development financing institutions
4. Give greater attention to marketing, and consider allying themselves with tour operators for marketing nature/heritage attractions
5. Emphasize the environmental aspects of the project
6. Incorporate the neighbouring community into the design, implementation and operation of the project

D. International assistance agencies should:

1. Provide special lending facilities for the development of nature/heritage attractions
2. Participate in a fund to provide grant money to prepare feasibility studies for nature/heritage attractions
3. Give greater emphasis to the economic rather than the financial rate of return in evaluating these projects
4. Provide technical assistance and training for the preparation and presentation of feasibility studies
5. Maintain a roster of tourism planning professionals, architects, economists, environmental planners and marketing specialists experienced in developing nature/heritage attractions, so that project proposers can seek professional assistance

Source: OAS³⁹

Appendix 5: Key Elements of the Business Plan

KEY ELEMENTS OF THE BUSINESS PLAN

Market:

- What have you got to sell?
- Who would want to buy it?
- How much are they willing to pay?
- How do you find them?
- How do you convince them to buy?
- How much does it cost to reach them?
- How long would it take to get enough customers?

Competition:

- Who else can sell this product or a similar one?
- How much do they charge?
- Why is yours better? How much can you charge?
- How would they react?
- What advantages do you have?
- What advantages do they have?

Resources:

- What resources do you have available?
- How would you use these resources?
- How much would you pay for expenses, personnel, office, equipment etc.?
- How long would it take to get enough customers to cover expenses?
- How much margin of error do you have?
- What is left for you?
- Do you need initial start-up capital?
- Can you get additional capital, loans?
- What do you pay for it? Cost, time, dilution of control?

Management:

- What skills do you have available within your team?
- What additional skills do you need?
- How will you manage the business, are you alone sharing responsibility?
- What staff do you need?
- Can you offer them training or career development prospects?
- How will you tackle seasonality (fidelity schemes, off season promotions, staff etc)?
- How will you assess progress and other visitor feedback?

Financial Plan:

- Project cash flow
- Profit and loss statement
- Assets and liabilities
- Balance sheet

Source: Adapted from European Commission (2003)⁴⁰

Appendix 6: Key Elements of the Visitor Survey

KEY ELEMENTS OF THE VISITOR SURVEY

- Nationality and origin (within same country or from abroad)
- Age/sex
- Occupation
- Income levels (often divided into 4 main brackets)
- Whether travelling in a group, family, couples, individually, etc.
- Length of stay
- Time of holiday (what dates)
- What they visited and did in the area
- Where they stayed
- How they found out about the destination
- What made them choose this destination
- Whether they had been before
- Whether they would come again
- Whether they would recommend to others

Source: Adapted from European Commission (2003)⁴¹

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