ADVANCING SUSTAINABLE TOURISM

A REGIONAL SUSTAINABLE TOURISM SITUATION ANALYSIS:

CARIBBEAN

ACKNOWLEDGEMENTS

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

APD	Airline Passenger Duty	DOT	Department of Tourism	STC	Sustainable Tourism Conference
AUSAID	Australian Agency for International Development	DFID	Department for International Development	STTC	Sustainable Tourism Technical Committee
BAICO	British America Insurance Company	DRM	Disaster Risk Management	TVS	Total Visitor Satisfaction
BMC	Borrowing Member Country	ECDG	Eastern Caribbean Donor Group	UK	United Kingdom
CARICOM	Caribbean Community	EDF	European Development Fund	UNAIDS	UNAIDSJoint United Nations Programme on HIV/AIDS
CARCU	Caribbean Regional Coordinating Unit	EU	European Union		
CAST	Caribbean Alliance for Sustainable Tourism	GDP	Gross Domestic Product	UNDP	United Nations Development Programme
		GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit		
CC	Climate change			UNEP-DTIE	United Nations Environment Programme's Division of Technology, Industry and Economics
CCCCC	Caribbean Community Climate Change Centre	HA	Hospitality Assured		
		HR	Human resources		
CDB	Caribbean Development Bank	HIV/AIDS	Human Immunodeficiency Virus/Acquired Immune Deficient Syndrome	UNFCCC	United Nations Framework Convention on Climate Change
CDEMA	Caribbean Disaster Emergency Management Agency				
				UNWTO	United Nations World Tourism Organisation
CDM	Comprehensive Disaster Management	ICZM	Integrated Coastal Zone Management		
CEMES	Centre for Resource Management and Environmental Studies	IDB	Inter-American Development Bank	USAID	United States Agency for International Development
		MSME	Medium, Small and Micro Enterprises		
CHENACT	Caribbean Hotel Energy Efficiency Action Programme	ME&R NTO	Monitoring, Evaluation and Reporting	VAT	Value Added Tax
		OAS	National Tourism Organisation	WHTI	Western Hemisphere Travel Initiative
CHTA	Caribbean Hotel and Tourism Association	OCT	Organisation of American States	WTTC	World Travel and Tourism Council
		OECS	Overseas Country and Territory Organisation of Eastern Caribbean States	WB	World Bank
CIDA	Canadian International Development Agency				
CLICO	Colonial Life Insurance Company	OECD	Organisation for Economic Cooperation and Development		
CHTA	Caribbean Hotel and Tourism Association	ROLAC	Regional Office for Latin America and the Caribbean		
CMC	Caribbean Media Corporation				
CREDP	Caribbean Renewable Energy Development Programme	SCP	Sustainable Consumption and Production		
CTO	Caribbean Tourism Organisation	SEF	Smart Energy Fund		
CWWA	Caribbean Water and Wastewater Association				

ABBREVIATIONS AND ACRONYMS

EXECUTIVE SUMMARY

The Caribbean economy is highly dependent on the tourism industry, and the protection of the natural and cultural attractions on which it depends, is critical. To address this concern, this study was conducted to provide a progress report on sustainable tourism in the Caribbean region. It reports on the sustainable tourism priorities of Caribbean Tourism Organisation (CTO) member countries to identify country needs, priorities, barriers and opportunities, as well as current funding and the types of projects funded in the region.

Similar exercises are being undertaken by UNEP in a number of other regions.

KEY FINDINGS

The greatest barriers to the sustainable development of tourism identified by the study include a lack of information on funding opportunities and a lack of access to low-interest finance. Government engagement with sustainability is also a key issue.

Particular opportunities for mainstreaming sustainability into the tourism sector are an enabling policy environment, effective mechanisms for resource protection and conservation; systems to monitor sustainable tourism development and to address climate change mitigation and adaptation. Tourism education and training programmes can assist with the attainment of sustainable tourism goals and in some countries specific programmes contribute to developing sustainable livelihoods around tourism. Respondents also identified consultative and participatory processes in relation to sustainable tourism, locally and regionally.

High priorities in the region include marketing, policy implementation, transportation, safety and security, inter-sectoral linkages and human resource development. In order to strengthen sustainable tourism development in the region, chief requirements are greater support and commitment; improved partnerships and stakeholder involvement, increased public awareness of sustainable tourism, greater enforcement of laws and regulations that support sustainable development; and better human resources development.

A number of regional and international agencies provide development assistance – bilateral and multi-lateral – to the region. However, many of the agencies do not provide direct investment in the tourism sector.

KEY
RECOMMENDATIONS

The report recommends a re-evaluation of the Regional Sustainable Tourism Policy Framework to move it from policy to practice across the region. The CTO is encouraged to strengthen the reporting mechanism of its member countries through the development of an Online Reporting Mechanism, allowing member countries to provide updates and feedback on sustainable tourism initiatives and priorities and ensuring that member states follow reporting requirements. It is also important to strengthen regional sustainable tourism coordination and collaboration between member countries, as well as development bodies, to develop a knowledge baseline for the progress of sustainable tourism practice across the region. A strategic plan of action must be developed in each country detailing sustainable tourism priorities, roles and responsibilities, implementation programme, sources of funding and expected outcomes.

Financial, tax, and investment incentives for resource efficiency and conservation are also required to encourage and strengthen sustainable tourism development. Water resource management is also a key issue, requiring a transparent regional strategy. There is an on-going need to build capacity in the areas of disaster management, climate change mitigation, and integrated climate resilience strategy. It is also vital to ensure member countries are able to easily and effectively access information about funding opportunities to support sustainable tourism initiatives, focusing in particular on developing sustainable tourism policies and plans where these are lacking; measurable indicators of progress and success; capacity building for monitoring and reporting; and promotion of sustainable tourism guidelines for implementers and investors.

INTRODUCTION
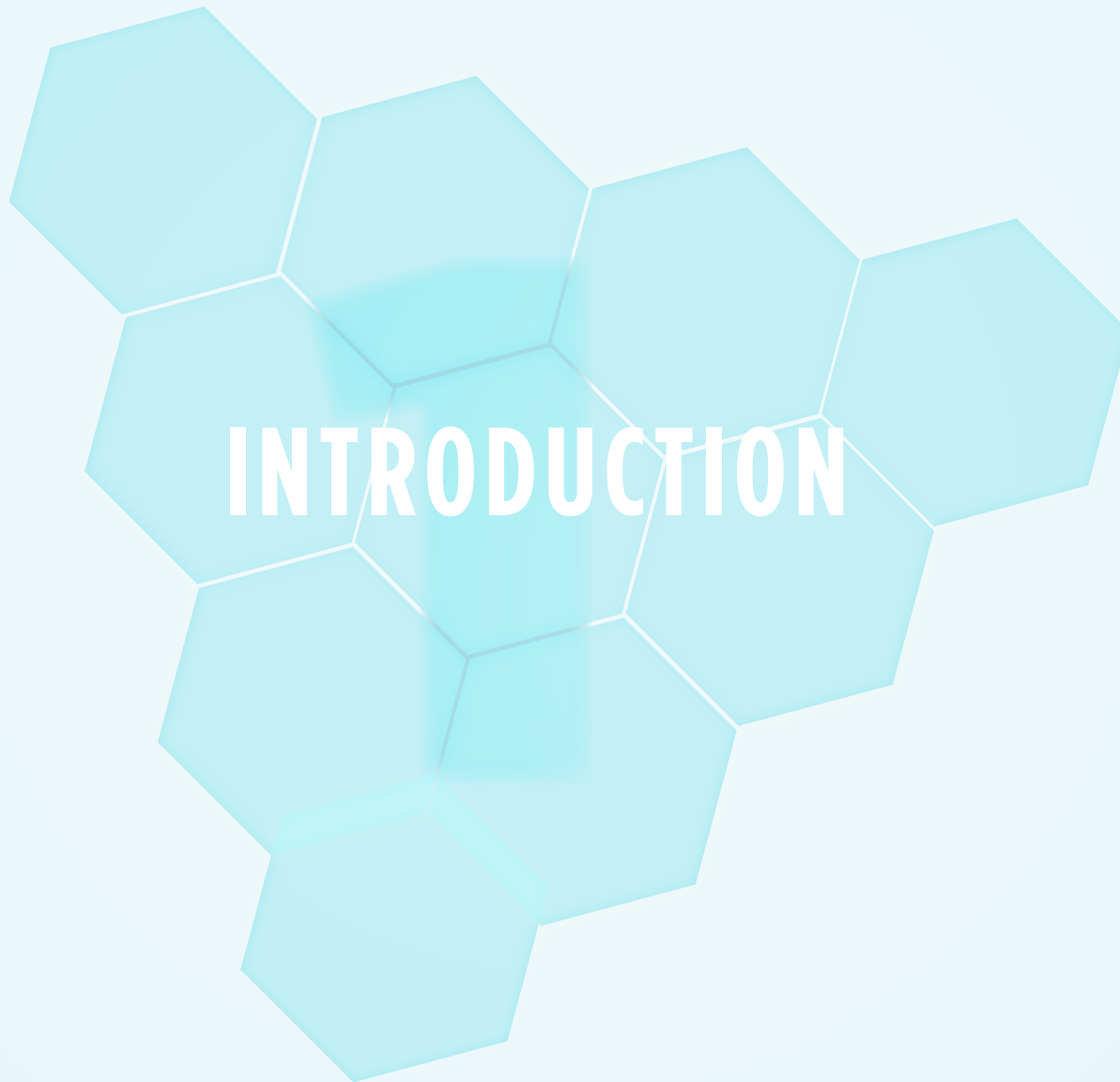
This report describes the sustainable tourism priorities of CTO member countries and evaluates the extent to which sustainable tourism is still high on their respective agendas as evidenced through *inter alia* policy, programming, strong inter-sectoral linkages, entrepreneurial opportunities and access to funding. Critical to the outcome of this assessment is that the Caribbean Tourism Organisation will explore opportunities for collaboration with UN and development agencies including, the United National Environment Programme, to provide technical and related expertise to upscale sustainable tourism action in the areas and CTO member destinations where assistance is needed.

/ 1.1 Objectives

The objectives of the study were therefore:

1. To assess the sustainable tourism priorities of CTO member countries;
2. To identify and assess the barriers to and opportunities for mainstreaming sustainable tourism programming into tourism and related initiatives;
3. To assess the needs of CTO member countries and the mechanisms needed to assist them in advancing towards sustainable tourism goals;
4. To provide recommendations that will assist regional governments and national tourism organisations in their individual and cooperative efforts towards sustainable development.

----

[1] The administration of tourism is handled separately in the Federation of St. Kitts and Nevis. Hence Nevis has not been added as they did not respond.

/ 1.2 Methodology

An online survey was sent to 30 CTO member countries. The variables in the survey were drawn from current published sources and regional and national policy reports. The rationale for surveying all CTO member states rather than a sample was based upon the differences in governance arrangements of clusters of the member countries and by extension, the different realities they may face with respect to sustainable tourism initiatives and challenges. To give legitimacy to the study, the CTO sent correspondence to its Sustainable Tourism Technical Committee (STTC) members, which comprises permanent secretaries and directors of tourism, as they were the ones with the authority, requisite knowledge and responsibility for sustainable tourism policy development and plan implementation in their respective countries.

11 countries (37%) responded to the survey. They were:

Antigua and Barbuda - Ministry of Tourism, Civil Aviation and Culture
Anguilla – Government of Anguilla
The Bahamas – Bahamas Ministry of Tourism
Curacao – Curacao Tourist Board

Dominica – Discover Dominica Authority
Grenada – Ministry of Tourism
Haiti – Ministry of Tourism
Jamaica – Ministry of Tourism and Entertainment
St. Eustatius- St. Eustatius Tourism Development Foundation
St. Kitts – St. Kitts Tourism Authority[1]
Turks and Caicos – Turks and Caicos Tourist Board

The survey data were analysed using Microsoft Excel.

Secondary data sources were also analysed using a thematic approach. These data included reports, tourism master plans, and tourism policy documents that were reviewed to provide corroboration and information on CTO member country policy direction. Desk research was conducted on some of the key donor agencies which are active in the region (IDB, CDB, OAS, CIDA, EU, DFID, WB, AUSAID, USAID) to investigate the available sustainable tourism programming and funding opportunities and the extent to which the regional industry draws upon these funding opportunities.

/ 1.3 Limitations of the Study

While the spread of responses across the major territorial and language groups in the Caribbean is useful, the primary limitation of this study is the relatively low volume of responses from member states across the various political groupings (e.g. dependent, independent states etc.). For example, there responses were received from the larger, smaller and two non-Anglophone Caribbean countries. In view of this, there are limits to the extent to which regional generalisations may be drawn from the study. A higher response rate across all groupings would have provided a better opportunity for generalisation and a more definitive assessment of the sustainable tourism situation in the region.

SITUATION ANALYSIS

/ 2.1 The Operating Context for Tourism in the Caribbean

The World Travel and Tourism Council has rated the Caribbean as the most tourism-dependent region in the world. In 2011 tourism contributed 14% to total regional GDP and accounted for 12% of total employment: both are forecast to rise by 1.7% in 2012. For some Caribbean destinations, tourism is the single most important contributor to livelihoods: as much as 75% of national GDP in Antigua and Barbuda, for example.

In 2011 the region received just over 20 million visitors - an increase of 5% on the previous year. These visitors generated a total of US $23.9 billion in tourism receipts making it one of the single biggest export industries for the region. Visitor spending, however, is relatively flat and will affect the ability of regional governments to invest in sustainable development related projects.

The Caribbean political environment in the last five years has seen changes in government and governance arrangements, as well as on the imperatives to reduce fiscal budgets. The global economic crisis has had dire consequences for Caribbean economies, most of which are characterised by a high reliance

on foreign investment, vulnerability to a range of environmental risks and exogenous events, distance from key source markets, high export concentration, relatively low levels of inter-sectoral linkages, and high expenditure on public administration. Effects include shrinking GDP, increasing debt levels, contraction of foreign direct investment, and halting of capital projects including significant tourism developments, in many Caribbean islands. Caribbean destinations have also been affected by measures such as air passenger duty (APD) tax increases in the UK, and the US Western Hemisphere Travel Initiative.[2]

/ 2.2 Sustainable Tourism and the Role of the Caribbean Tourism Organisation

The high dependence of Caribbean states on tourism as a key economic driver means sustainable tourism practice must be constantly improved, since the region's resources (human, physical, natural) are fundamental to its long-term viability. Should they be compromised through poor environmental practices, reduced funding, poor quality of human capital, employment practices etc. the region's tourism product - and by extension its competitiveness and ability to achieve sustainable development goals - would decline. This becomes even more crucial as new and emerging destinations pursue tourism as an economic development option.

Growing environmental and health risks and crises also have the potential to undermine the sustainable development gains that the region has made. For example, the Caribbean region has been classified as the second most affected region in the world in terms of HIV prevalence—a threat to the human capital on which the Caribbean tourism and hospitality sector relies.

Climate change poses a risk to tourism in the region through direct impacts including more intense hurricanes and storms (such as Ivan, Ike and Tomas in recent years), droughts, sea-level rise and alteration of terrestrial and marine ecosystems (e.g. coral bleaching). Indirect impacts comprise coastal erosion and inundation, infrastructural damage, changes in water availability, food shortages, reduced landscape aesthetics and increasing incidences of vector-borne diseases. All these are likely to affect consumer travel choices (see OECD & UNEP 2011:25). There is thus a direct correlation between climate change effects and the Caribbean's economic survival if CTO member countries do not adopt adaptation and mitigation measures.

The CTO was established "to provide to and through its membership, the services and information necessary for the development of sustainable tourism, for the social and economic benefit of the people of the Caribbean". Its "Regional Sustainable Tourism Policy Framework (2008)"[3] was established with the purpose of enabling the Caribbean tourism sector to be viable, of high quality and beneficial to the people of the region while embracing the spirit of regional cooperation. It recommends six priority areas that Caribbean governments should focus upon: tourism management capacity, marketing, transportation, environment, linkages and health, and safety and security.

The CTO itself provides policy leadership and is involved in a number of projects which support tourism development. These include marketing and promotion, advocacy, air transport, human resource development, education and training, and research. Specifically in relation to sustainable tourism, it also focuses on promoting good practices; building capacity through knowledge transfer; and providing implementation support to a number of regional projects such as those relating to disaster risk management and climate change.

---

[2] See: www.caribbeanhotelassociation.com

[3] Developed through the Caribbean Regional Sustainable Tourism Development Programme (CRSTDP) funded by the European Commission under the 8th European Development Fund.

BARRIERS TO THE IMPLEMENTATION OF SUSTAINABLE TOURISM INITIATIVES

Countries were asked to rank seven barriers to the implementation of sustainable tourism initiatives, in terms of 'high', 'medium' and 'low' importance. Responses as shown in table 1 and figure 1 revealed that the greatest barriers to implementation are a "lack of information on funding opportunities" and a "lack of access to low-interest finance."

Six respondents ranked the "low priority given to sustainability issues by the national Government" as a medium-level concern. It should be observed that these respondents represented a diverse spread of territories – Anglophone, Dutch, Independent states, British Overseas Territories, and both large and small countries. These perspectives on implementation barriers suggest that across the region, national sustainable tourism development agendas may often be subordinated to other pressing and urgent issues.

Regarded as the least challenging to implementation, were issues pertaining to a "lack of clear objectives" and a "lack of public awareness" programmes to the sustainable tourism initiatives strengthen of relevant ministries and departments.

Figure 1: *High, medium and low barriers to the implementation of sustainable tourism initiatives (n=11)*

Lack of Information on Funding Opportunities
Lack of Public Awareness
Low interest in Sustainable Issues by Government
Lack of Collaboration among Stakeholders
Lack of Understanding aboubt Sustainable Tourism
Lack of Clear Objectives
Lack of Access to Low-interest Finance

0 1 2 3 4 5 6 7 8 9 10
Number of countries

● High Barrier   ● Medium Barrier   ● Low Barrier
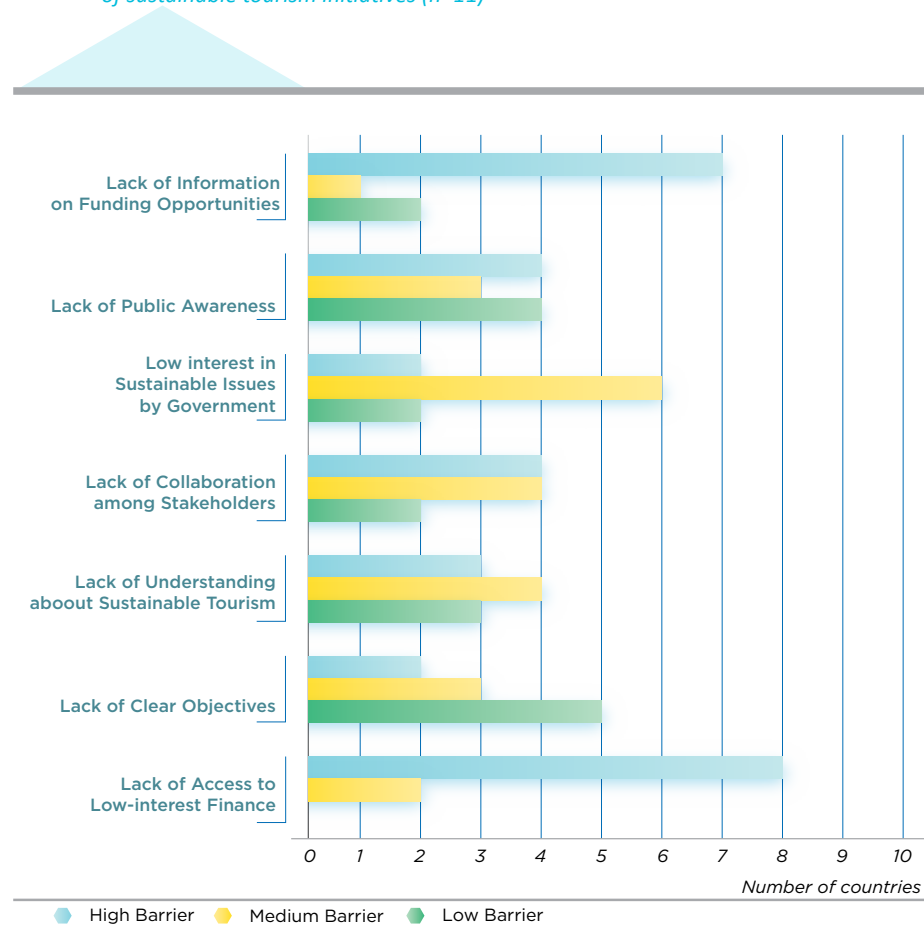
COUNTRY	Lack of Access to Low-interest Finance	LLack of Clear Objectives	Lack of Understanding about Sustainable Tourism	Lack of Collaboration among Stakeholders	Low Priority given to Sustainable Issues by National Government	Lack of Public Awareness	Lack of Information on Funding Opportunities
Anguilla		LOW	LOW	HIGH	MEDIUM	LOW	
Antigua and Barbuda	HIGH	HIGH	HIGH	HIGH	HIGH	LOW	HIGH
The Bahamas	HIGH	LOW	HIGH	LOW	MEDIUM	LOW	HIGH
Curacao	MEDIUM	MEDIUM	HIGH	MEDIUM	MEDIUM	HIGH	HIGH
Dominica	HIGH	MEDIUM	MEDIUM	LOW	MEDIUM	MEDIUM	HIGH
Grenada	MEDIUM	HIGH	MEDIUM	HIGH	LOW	LOW	HIGH
Haiti	HIGH	LOW	LOW	MEDIUM	HIGH	HIGH	HIGH
Jamaica	HIGH	LOW	LOW	MEDIUM	MEDIUM	HIGH	LOW
St. Eustatius	HIGH	MEDIUM	MEDIUM	MEDIUM	MEDIUM	MEDIUM	HIGH
St. Kitts	HIGH	LOW	MEDIUM	HIGH	LOW	HIGH	MEDIUM
Turks and Caicos Islands	HIGH					MEDIUM	LOW

Table 1: *Barriers to tourism ministries / departments implementing sustainable tourism initiatives (rankings)*

Other barriers emerged from information provided by the respondents elsewhere in the survey. For example, only four countries provide incentives for water conservation. Additionally, climate change impacts such as reduced rainfall mean any lack of water resources management will act as a barrier to sustainability.

To determine why certain initiatives such as energy / water conservation, coastal management and marine protection, preservation of natural and cultural resources and tourism development standards and regulations were not in place or not incentivised, the respondents were asked to identify any contributory local constraints. Those cited related firstly to available finances and secondly to limited human resource capacity. For example, Anguilla stated that there is a lack of public financing for the development of sites that have been listed as areas of historic, cultural or natural interest. Turks and Caicos Islands also indicated that there were financial constraints limiting full execution of their activities. British Overseas Countries and Territories are also being required to significantly cut their public spending.

OPPORTUNITIES FOR MAINSTREAMING SUSTAINABILITY INTO THE TOURISM SECTOR

The survey also asked the respondents about a number of possible opportunities for mainstreaming sustainability into the tourism sector. Responses demonstrated the following opportunities in the region:

/ 4.1   Enabling Policy Environment

When asked to identify the existence of national policies which were conducive to sustainable tourism development and activities, eight respondents (73%) were able to identify a number of sustainable tourism policies, legislation, strategic or master plans currently in place (either relating to overall sustainable tourism development, or to policies and strategies in areas such as protected areas, climate change, agriculture, cultural heritage, health and sustainable rural development). Antigua and Barbuda, however, is currently formulating a Sustainable Tourism Development Plan and of note is the Anguilla Sustainable Tourism Master Plan (2010-2020), which draws upon the Regional Sustainable Tourism Policy Framework. While Jamaica's Master Plan for Sustainable Tourism Development (2002) was developed prior to the Regional Tourism Policy Framework, its policies reflect the recommendations of the Framework.

The data suggests that there is a high degree of awareness of the importance of an enabling policy framework to achieve sustainable tourism targets. It also indicates that countries are taking actions to develop guidelines and establish goals that reflect the interconnectivity of tourism with other sectors, as well as the ways in which the tourism sector can be developed to derive social, economic, and environmental benefits.

/ 4.2 Mechanisms and Incentives for Resource Protection and Conservation

Eight of the respondents have put legislation and/or policies in place to preserve their natural and cultural heritage and nine have instruments that focus on biodiversity conservation. This suggests that respondents have recognised the value of natural and cultural resources for both locals and visitors, or that they are complying with the requirements of international conventions and preserving the resources upon which the sector relies. For example, Grenada has established a National Marine Protected Area Management Committee under the Division of Fisheries, in which the Ministry of Tourism is a member. In relation to community development, for example, Jamaica has prepared a draft Community Based Tourism Policy. These initiatives all have positive implications for the promotion of sustainable livelihoods and the safeguarding of natural and cultural heritage.

Six countries indicated that there are incentives available to encourage energy efficiency in the sector. One example is the Smart Energy Fund (SEF) developed by the Government of Barbados and capitalised through a loan from the IDB. It provides financial and technical support to renewable energy (RE) and energy efficiency (EE) projects in Barbados. The fund provides grants to businesses for funding pre-investment studies, assessing the technical and financial viability of these projects. Small entrepreneurs in this emerging industry provide technical expertise, by conducting ener-

gy audits and other studies necessary for businesses wishing to assess the fund. (http://www.energy.gov.bb/web/energy-smart-fund).

By using market-based incentives to promote the use of energy efficient appliances and practices in their tourism sector, regional Governments are helping businesses to meet green standards, reduce operational costs in the long run, and minimize the sector's carbon footprint.

/ 4.3 Monitoring Systems

Respondents were asked to list the systems in place that monitor sustainable tourism development in their countries. Seven respondents identified a number of existing mechanisms. For example, Antigua and Barbuda has a Development Control Authority, Dominica has a Quality Assurance Unit as part of their Discover Dominica Authority, and St. Kitts has a Product Standards Department under the St. Kitts Tourism Authority. These agencies are responsible for monitoring the implementation of developiment planning standards (i.e. Antigua & Barbuda), and in the case of the other islands, the development and monitoring of standards in the tourism supply chain (e.g. attractions, accommodation, goods and services, etc.).

Five countries indicated that they have Integrated Coastal Zone Management (ICZM) systems – a rather low number considering the coastal nature of the tourism product. The majority of the respondents have national disaster management systems in place, reflecting the effectiveness of the regional disaster

network and mechanism. St. Kitts and the Turks and Caicos Islands both indicated that they participated in projects led by the Caribbean Disaster Emergency Management Agency (CDEMA). Countries also make use of tools and initiatives such as hazard mapping, national awareness programmes, and workshops on disaster management. However, five countries identified disaster management as a medium priority; and four considered it a high priority. Surprisingly, Haiti identified disaster management as a low priority.

Policies, plans or legislation in areas including sustainable tourism, biodiversity conservation, water conservation, energy use and waste management and other thematic areas were developed through regional projects of CARICOM or their specialised agencies, or through themed donor agency interventions. Clearly, the challenge for member countries is in transcending the aid-funded projects to mainstreaming these programmes as on-going day-to-day functions and actions in ministries and departments.

/ 4.4 Climate Change Mitigation and Adaptation in the Tourism Sector

The issue of climate change was accorded 'high' to 'medium' priority. Six countries identified initiatives that their country had developed, and/or regional programmes in which they had participated that centred on climate change adaptation and mitigation in the tourism sector. Of the four countries which do not currently have systems, St. Eustatius reported that it is in the process of organising its first ever informa-

tive conference on climate change that would raise awareness among locals and island representatives; while Jamaica's Ministry of Tourism is developing climate change initiatives in collaboration with its newly formed Ministry of Water, Land, Environment and Climate Change. As part of the CARICOM mechanism, the region has recently agreed on its strategic climate adaptation and mitigation framework and implementation priorities, coordinated by the Caribbean Community Climate Change Centre in Belize.

/ 4.5   Tourism Education and Training

Six respondents indicated that there were local education and/or training programmes currently available, which assist with the attainment of sustainable tourism goals. Haiti indicated that there were none, as the delivery of basic education is still a challenge for the country; however, they do attempt to raise tourism awareness among the population. Four countries have tertiary level institutions offering tourism courses. Also, some ministries/agencies provide training, and in some instances certification, to tourism service providers.

/ 4.6   Sustainable Livelihoods

Responding countries were asked to provide examples of their institutional strengthening and capacity building programmes in the areas of finance, training and/or mentoring schemes, and marketing and promotion opportunities that supports sustainable livelihoods within indigenous and local communities. Eight of the respondents have training programmes; seven have mentoring schemes in place; while six pointed out that marketing and promotional opportunities exist.

For example, Dominica has developed a heritage training programme based on crafts and the activities of the island's indigenous Kalinago community; and has also initiated a mentoring programme where internships are provided at the Discover Dominica Authority for students completing their Associate Degree. In terms of marketing and promotion, the Turks and Caicos Islands have initiated a new excursion programme centred on culture and heritage entitled "Explore Our Sister Isles" which give residents across the island chain opportunities to participate in tourism. The Grenada Development Bank (a Government owned entity) offers soft loans to small business operators; while in Antigua and Barbuda, there is a dedicated officer at the Ministry of Tourism who interacts with residents interested in participating in tourism development.

The data therefore suggests that training, raising the levels of awareness and using tourism as a developmental tool to assist communities is a part of the agenda of regional governments.

/ 4.7   Consultative, Participatory and Collaborative Processes

All eleven countries described consultative and participatory processes, which allow tourism stakeholders to be engaged in sustainable tourism discussions and participate in the planning and development of the sector. The most popular, and likely effective, means of communication and involvement is through conferences, seminars and/or workshops, stakeholder consultations or face-to-face encounters.

The data shows that linkages between tourism and other economic sectors exist in the respondent countries, particularly between tourism and agriculture. The majority of the collaborations occur between tourism ministries/departments and the Ministry of Agriculture and local hotel and tourism associations. These types of linkages include a focus on marketing and promotional activities (ranked a high priority by ten countries); as well as support for local agricultural products and an interest in agro-tourism as a viable niche market. For instance, Haiti has an Agro-tourism Development Project in the country's tourism priority areas; and in Jamaica there is the Rural Enterprise Development Initiative (REDI) Programme. Programmes to link additional income opportunities with existing tourism initiatives include for example craft businesses alongside the Curacao liqueur factory and a programme run by the Ministry of Tourism in the Bahamas to encourage hotels to use local produce.

These initiatives all have positive implications for the promotion of sustainable livelihoods and the safeguarding of natural and cultural heritage.

In terms of regional collaboration, just over half of the respondents are collaborating with other Caribbean nations. The reasons given for pursuing these collaborations was that they were CTO-led, information was requested by another country, countries banded together to support the same initiative, and in the case of Grenada and St. Vincent and the Grenadines, there is a shared yachting space. These collaborations were deemed to be successful because of the sharing of common goals and challenges, good communication and timely assistance, as well as mutual respect and trust.

5 NEEDS AND PRIORITIES

Issues that were identified as medium priority amongst the respondents included social and environmental sustainability issues such as HIV/AIDS, climate change and disaster management. Given that the region is the most tourism dependent in the world and the second most affected by HIV/AIDS, and also given the potential impact of climate change upon destination competitiveness, respondents felt that greater attention should be afforded to these issues since they can cause severe negative impacts upon the region's human and natural resources upon which tourism depends. Beach access emerged as a low priority for many of the countries in the sample.

COUNTRY	Disaster Management	HIV/AIDS	Climate Change	Beach Access	Marketing	Policy Implementation	Intersectoral Linkages	Safety and Security	Transportation (air and cruise)	Human Resource Development
Anguilla	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH
Antigua and Barbuda	MEDIUM	LOW	MEDIUM	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	LOW
The Bahamas	HIGH	MEDIUM	HIGH	MEDIUM	HIGH	HIGH	MEDIUM	HIGH	HIGH	HIGH
Curacao	MEDIUM	MEDIUM	HIGH	HIGH	HIGH	HIGH	MEDIUM	HIGH	MEDIUM	MEDIUM
Dominica	MEDIUM	LOW	MEDIUM	LOW	HIGH	HIGH	HIGH	HIGH	HIGH	MEDIUM
Grenada	HIGH	MEDIUM	MEDIUM	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH
Haiti	LOW	LOW	MEDIUM	LOW	HIGH	HIGH	LOW	HIGH	MEDIUM	HIGH
Jamaica	MEDIUM	MEDIUM	HIGH	LOW	HIGH	HIGH	HIGH	MEDIUM	HIGH	HIGH
St. Eustatius	MEDIUM	MEDIUM	MEDIUM	LOW	HIGH	HIGH	HIGH	LOW	HIGH	MEDIUM
St. Kitts	HIGH	MEDIUM	HIGH	LOW	MEDIUM	MEDIUM	MEDIUM	MEDIUM	HIGH	HIGH
Turks and Caicos Islands					HIGH				MEDIUM	LOW

Table 2: *Countries' sustainable tourism priorities*

## / 5.1 Sustainable Tourism Priorities of Member States

To determine countries' 'sustainable tourism' priorities, respondents were provided with a list of issues, and asked to rank them as either of high, medium or low-priority (see table 2 and figure 2). The 'high priority' ranking was attributed by 54% of respondents to marketing, policy implementation, transportation, safety and security, inter-sectoral linkages and human resource development. Tourism ministries and national tourism organisations continue to focus on maintaining or increasing their market share of the travel and tourism industry, hence marketing remains a high priority. In addition, respondents understand policy implementation to be a crucial component of sustainable tourism action, and therefore ranked it as a high priority.

Figure 2: *Tourism ministries / departments' high, medium and low sustainable tourism priorities (n=11)*
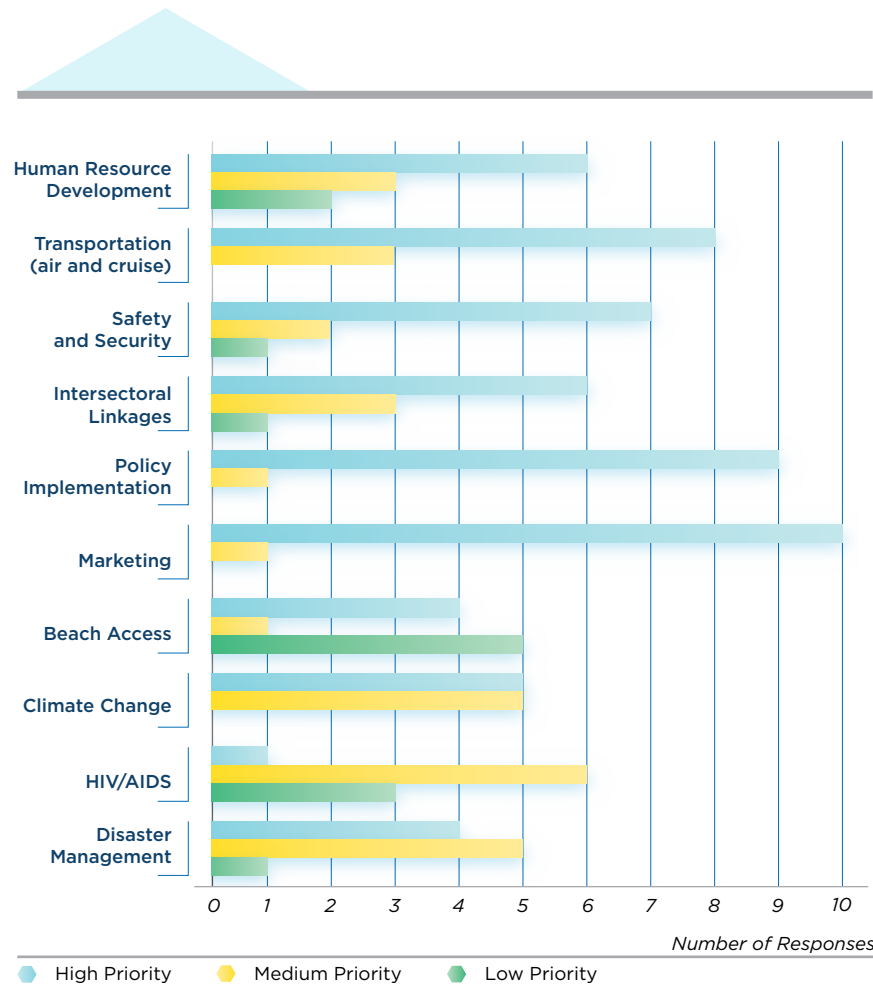
/ 5.2 Needs: Requirements for Strengthening Sustainable Tourism Development

Member countries were asked to identify what they considered to be the top five requirements needed in order for their destinations to progress to a higher level of sustainable tourism development. As shown in Table 3, survey respondents suggest that the actions that would best advance their destinations to higher levels of sustainable tourism development include:

1 *Greater support and commitment from their governments/improved partnerships and stakeholder involvement;*

2 *Increased public awareness of sustainable tourism/ greater enforcement of laws and regulations that support sustainable development/human resources development;*

3 *Increased investment and financing;*

4 *Development of sustainable tourism policies/improved marketing/product enhancement and development;*

5 *Improved airlift.*

Ironically, limited financing, which was previously rated as the greatest barrier to the implementation of sustainable tourism initiatives was only the third most frequent response. Issues such as development of climate change strategies, implementation of sustainable tourism policies, incentives for green initiatives, improved airlift and safety and security (which were identified as being a high priority of tourism ministries/departments) were ranked lower.

Actions to be Taken	Frequency of Response
Greater support and commitment by government	⬡ ⬡ ⬡ ⬡ ⬡ ⬡
Improved partnerships and stakeholder involvement	⬡ ⬡ ⬡ ⬡ ⬡ ⬡
Increased public awareness of sustainable tourism	⬡ ⬡ ⬡ ⬡ ⬡
Enforcement of laws and regulations that support sustainable development	⬡ ⬡ ⬡ ⬡ ⬡
Human resources development	⬡ ⬡ ⬡ ⬡ ⬡
Increased investment and financing	⬡ ⬡ ⬡ ⬡
Development of sustainable tourism policies	⬡ ⬡ ⬡
Improved marketing	⬡ ⬡ ⬡
Product enhancement and development	⬡ ⬡ ⬡
Improved airlift	⬡ ⬡
A comprehensive national strategy to address climate change	⬡
Enhancement of sustainable livelihoods	⬡
Implementation of sustainable tourism policies	⬡
Improved safety and security	⬡
Incentives for green initiatives	⬡
Monitoring criteria for sustainable tourism development	⬡
More information on funding opportunities	⬡

Table 3: *List of actions to progress destinations to a higher level of sustainable tourism development*

The survey also revealed the key areas where technical assistance is most needed:

- *Development or review of new or existing 3-5 year tourism strategic and action plans based on national tourism development priorities and considering national development, socio-economic and environmental objectives. These should clearly define institutional roles and responsibilities, sources and types of available funding and the expected outcomes.*
- *Continued training and capacity building for tourism workers especially in disaster management, climate change mitigation and integrated multi-hazard management.*

FUNDING OPPORTUNITIES IN THE REGION FOR SUSTAINABLE TOURISM INITIATIVES

A number of regional and international agencies provide development assistance – bilateral and multi-lateral – to the region. Overall, many of the agencies do not provide direct investment in the tourism sector. Rather the support, while substantial, is indirect via a number of related areas. The majority of the respondents have benefited from funding opportunities facilitated by the European Commission. Examples of key funders, their focus and examples of projects supported are set out in Table 4 in the appendix. They cover a wide range of initiatives including infrastructure such as air and road transport, capacity building and planning, marketing and promotion, climate change mitigation and adaptation, public-private partnerships, corruption and crime reduction and disaster resilience.

In spite of the high level of development agency involvement, ten of the eleven respondents were of the view that insufficient information about funding opportunities to support sustainable tourism initiatives was available; one respondent was unsure. Most respondents felt that a dedicated CTO webpage that all members could access, would improve information dissemination.

In addition, Dominica suggested developing a list of funding organisations specific to: 1) product development; 2) marketing; 3) capacity building; and 4) safety and security (including crime management in the tourism sector). However, while financing might be available for product development, it is unlikely that these funding agencies would be willing to finance marketing initiatives.

Overall, therefore, financing for tourism in the Caribbean while not always direct is still strong, and as Figure 3 shows, all of these areas impact on the tourism industry and its sustainability. The funding can take various forms including loans and grants. The latter would obviously be preferred, but as the data indicates, the major concern is with access to information about the various sources of funds. Considering that access to funds is also often on a competitive basis, enhancing project proposal and grant writing skills through capacity building exercises would be beneficial for member countries, especially NGOs, CBOs. Governance structures and constraints in relation to the OCTs can also limit sustainable development progress and enhance high risk perceptions on the part of potential investors. Additionally, the use of GDP per capita by such funding agencies can reduce accessibility of some countries to available funds once they are perceived as being "developed" due to high GDP/capita. Sustainable financing mechanisms need to be developed to ensure long term continuity of initiatives started using finite donor resources.
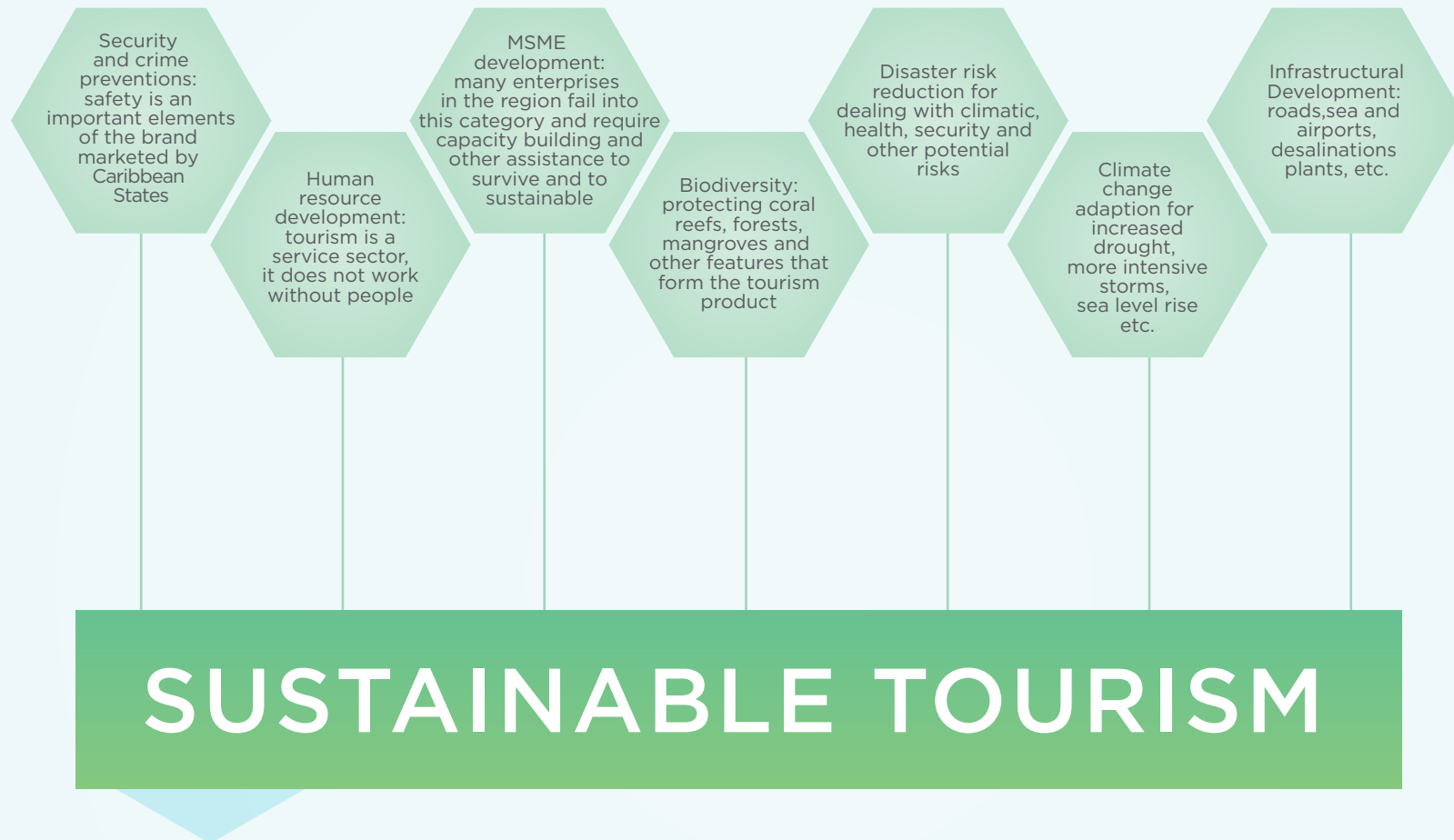
Figure 3: *Relationship between areas of funding and sustainable tourism*

Security and crime preventions: safety is an important elements of the brand marketed by Caribbean States

Human resource development: tourism is a service sector, it does not work without people

MSME development: many enterprises in the region fail into this category and require capacity building and other assistance to survive and to sustainable

Biodiversity: protecting coral reefs, forests, mangroves and other features that form the tourism product

Disaster risk reduction for dealing with climatic, health, security and other potential risks

Climate change adaption for increased drought, more intensive storms, sea level rise etc.

Infrastructural Development: roads, sea and airports, desalinations plants, etc.

SUSTAINABLE TOURISM

Given the centrality of tourism as the main economic driver in Caribbean economies, more direct investment into sustainable tourism initiatives would be a positive way of directly supporting the economic growth of the region. In this regard, some of the priority areas for attention have emerged from this study, and recommendations are made below for leveraging more financial and technical support to address these needs.

CONCLUSION

The survey reveals the shortcomings of regional sustainable tourism portfolios, a need for a deeper cooperation of the three main stakeholder groups: governments, private sector and civil society, and a recommitment to sustainable tourism to move the agenda of sustainable tourism development significantly forward in the region. What the survey does not reveal is the extent to which countries successfully mainstream sustainability into their industry operations and the requirement for measuring these results and outcomes against national goals.

It is clear from the above analysis of the sustainable tourism situational survey in the Caribbean, and the list of the stated "highest priorities" of respondents, that the definition of sustainable tourism needs to be reemphasized and reexplained in relation to the CTO's recommended definition developed and agreed to by consensus, during consultations on the Regional Policy Framework in 2008. Whilst "marketing, policy implementation, transportation, safety and security, inter-sectoral linkages and human resource development" may be regarded as national and regional tourism industry priorities, these do not directly speak to the fundamentals of "sustainable tourism".

Sustainable tourism provides a balanced approach to development that encompasses economic, socio-cultural and environmental dimensions. Such an approach requires detailed planning with all relevant stakeholders and the setting of priorities and objectives that are translated into nation-wide action plans, with defined roles, responsibilities and time frames for the major actors. There are many sustainability tools and approaches that destinations may adopt (e.g. ecotourism, certification, ICZM, CDM, Sustainable Consumption and Production, Green Economy, etc).

Furthermore, the tourism operating environment, which is now plagued with elevated operational risks related to the prevailing climate, environmental and socio-economic crises, requires that destinations pursue more urgent, multi-faceted approaches. Such approaches must also reflect the urgent needs of small island developing states of the Caribbean, struggling with a rapidly degrading natural resource base, high national debt and declining tourism revenues. In these operating conditions, tourism sustainability must now be driven by policy priorities promoting integrated management solutions e.g. sustainable consumption and production, resource efficiency and tourism supply chain management, among others.

Greater attention must now rest upon the contribution of all relevant tourism stakeholders to the accomplishment of national goals and objectives, through more coordinated actions and with demonstrable measures of success.

RECOMMENDATIONS

The recommendations below, based on the findings of this research, aim to ensure that the regional industry remains competitive and viable through individual and cooperative initiatives and that the tourism sector can deliver on the region's economic, social and environmental objectives.

/ Strengthen Regional Sustainable Tourism Coordination and Collaboration:

1. Re-evaluate the Relevance of the Regional Sustainable Tourism Policy Framework: The Policy Framework, developed in 2008, forms the basis of a regional sustainable tourism programme for members to adopt based on their country's needs and resources. While a few countries (Anguilla, Cayman Islands, Jamaica) have referenced this document and used it as one of the bases for the development of their own national tourism policies, others have not explicitly done so. The voluntary nature of the Policy Framework also makes monitoring difficult. An evaluation is therefore timely given the many changes impacting upon sustainable tourism progress. This evaluation should consider *inter alia*, the relevance of the policy, its use and application by members and a mechanism for monitoring outcomes. If necessary, countries should formulate an agreement with the CTO to ensure that the Policy Framework progresses from policy to practice, with an added requirement for biannual reporting on outcomes.

2. Develop a Mechanism for Continuous Sustainable Tourism Reporting: The CTO is encouraged to develop and strengthen the reporting mechanism of its member countries through the development of an Online Reporting Mechanism. This should allow member countries to provide updates and feedback on sustainable tourism ini-

tiatives and priorities. Online reporting provides an integrated electronic service for members to lodge updates concerning their sustainable tourism achievements and progress. It could also highlight activities, scheduling, methods, partners and the challenges in undertaking sustainable tourism initiatives. In this way, the CTO would be able to track, measure and monitor member countries' progress and assess their changing priorities. This level of monitoring can also assist with more focused themes for the annual Sustainable Tourism conferences. It is recommended that reporting be done every two years. The success of this Mechanism, however, is highly dependent upon member states being diligent and attentive to the requirements for reporting.

3. Strengthen Regional Sustainable Tourism Coordination and Collaboration: The CTO's leadership role in regional tourism coordination is unequalled and enduring. It is therefore encouraged to utilize the Open Source collaboration concept to facilitate and promote intra- and inter-country collaboration between tourism and other sector stakeholders. This networking tool enables easier communication paths and the development of interactive communities to share ideas on approaches and solutions. Accordingly, it should facilitate a high degree of interaction and assistance in problem solving where all member countries own the outcome and can develop, comment on or assist with a sustainable tourism or related initiative. Sharing can be related

to product development, funding opportunities, innovations, procedure, etc. and would allow for multi-stakeholder input. The result should be a compilation of the best ideas and innovations emerging that are useful for building a knowledge baseline for the progress of sustainable tourism practice across the region.

4. **Consolidate Strategic Planning and Action:** The survey data suggests that member countries are implementing many sustainable tourism projects despite identifiable challenges. What is unclear is the extent to which these projects are part of and contributing to clearly articulated national sustainable tourism programmes. It is therefore recommended that member countries either update and amend current strategies, or each develop a (3-5 year) strategic action plan that specifies their sustainable tourism priorities, roles and responsibilities, and that consolidates the implementation programme, sources of funding (donors, budgetary, grants, sponsorships, counterpart funding) and expected outcomes. The strategic plan approach is also intended to provide a programme of focused action in keeping with broader national socio-economic and environmental goals. Successes should be reported through the recommended online reporting system and/or at CTO's annual conferences.

5. **Provide Incentives for Resource Efficiency in the Tourism Sector:** Regional governments need to continue to employ or introduce mone-

tary incentives, such as tax breaks, VAT rebates, concessions, etc. to encourage better resource management and efficiency across the regional tourism industry. This is particularly relevant for existing tourism businesses (e.g. hotels, restaurants, attractions, amenities etc.), which may be considering retrofitting for improved resource efficiency. For example, for water or energy conservation, information on incentives offered should ideally be developed in partnership between the ministries/departments of tourism (MoTs, DoTs) and national hotel and tourism associations, so that the membership of the latter is involved in and hence are motivated to participate in these schemes in significant numbers. Furthermore, investment incentives provided to new hotel, resort or tourism-related development (e.g. infrastructure, facilities, recreation) should be tied to conditions that require such developments to adopt measurable low carbon/low impact designs and performance targets.

Instruments should also be developed to deliver funding or access to funding for small-scale tourism and hospitality organisations with specific criteria articulated for resource conservation. It is further recommended that financial institutions should promote the mainstreaming of resource management through conditionalities attached to their investment and lending instruments, and thus encourage compliance by a wider range of public- and private sector organisations. For instance, as part of the loan requirement, businesses must implement a resource conservation

program comprising energy, water and waste management at a minimum, including use of readily available technological solutions e.g. solar or photovoltaic panels, energy compliant appliances, flow restrictors, recycling bins etc.

6. Prioritize Water Resources Management in the Tourism Sector: This is a critical issue for all countries in the region. Currently the Centre for Resource Management and Environmental Studies (CERMES) of the University of the West Indies (UWI), in association with USAID and Australia Aid (AusAID), are preparing online teaching modules in climate change for practitioners in various sectors, including tourism. In addition to this upcoming training opportunity, CTO and CERMES should forge closer collaboration with the Caribbean Water and Wastewater Association (CWWA) and national water resources agencies for a regional strategy that prioritizes water conservation in the tourism sector. This strategy would be developed transparently and bring together tourism practitioners, water resources managers and private sector agencies as well as policy makers to present and discuss viable options and incentives for water conservation. Funding could likely be sourced from the climate change allocations of the development assistance agencies.

7. Institutional Strengthening and Capacity Building: The survey demonstrates an on-going interest among respondents to build capacity in the areas of disaster management, climate change

mitigation, and integrated multi-hazard management. While the findings are encouraging, the agency for responsibility – CDEMA – argues that there is need for increased focus in these areas especially in the tourism sector. The recommendation is for CTO as the lead agency to continue to work with CDEMA and the CCCCC to improve knowledge and action in the area of CDM, climate change adaptation and mitigation and ICZM through workshops, publications, information sharing, conferences etc. Specifically, the training now needs to go beyond single sector-focused capacity building in CDM, ICZM, preparedness and response, towards more proactive and integrated approaches that consider all these methods as part of a strategy for climate resilience.

Ministries and departments of tourism also need to review the current institutional arrangements that facilitate more comprehensive and integrated management approaches, in order to see how well they are addressing contemporary challenges in this area. There is also a key role for the University of the West Indies in the provision of education and training to strengthen institutional capacities. The UWI through its various campus units and departments (e.g.CERMES, Institute for Sustainable Development, the Department of Management Studies) needs to articulate a clear approach on how it will collaborate with regional tourism stakeholders

8. Financing for Sustainable Tourism: The main issue according to the respondents lies in

accessing information about funding opportunities to support sustainable tourism initiatives. A dedicated CTO webpage that all members can access should be established. Up to date information about financing can be provided to the CTO either directly by the individual agencies or through collaboration with the Eastern Caribbean Donor Group (ECDG). The portfolio of responsibilities of research officers in ministries and departments of tourism should be expanded to include searching for funding opportunities. More direct finance must also be allocated for the accomplishment of sustainable tourism goals and objectives. Areas of critical focus would include: support for countries to develop sustainable tourism policies and plans where they do not currently exist, and which include measureable indicators of progress and success, building capacity for monitoring and reporting these indicators nationally and regionally (through the CTO), and dissemination and use of sustainable tourism guidelines to and among national societies of planners, builders, architects and construction firms, as well as among investment and commercial bankers that finance tourism development.

9. Hosting of a Symposium on Sustainable Tourism: A symposium involving policy-makers and technocrats should be hosted by the CTO to share the findings and recommendations of this report. The symposium should address four issues: 1) The meaning of sustainable tourism so that all member countries work from the same under-

standing; 2) An evaluation of the CTO's Regional Sustainable Tourism Policy Framework; 3) Mechanisms to facilitate continuous action despite changes in governments, permanent secretaries and technical officers and 4) An action plan detailing prioritised actions, responsibilities, collaborations, timelines for implementation and funding agencies. The symposium should take the form of thematic groups so that the priorities are addressed individually with recommendations being aligned to the issues and the member countries' resources. A feedback mechanism (see Recommendation 2) should emerge out of this symposium, so that progress can be monitored.

REFERENCES

Caribbean Hotel and Tourism Association. Advocacy in North America. www.caribbeanhotelassociation.com. Accessed 30 June 2012.

Caribbean Tourism Organisation (2010) The Impact of Air Passenger Duty and Possible Alternatives for the Caribbean. Barbados: CTO. November 2010

Caribbean Tourism Organisation (2012) 59th Report of the Board of Directors, June 7th 2012. The New York Marriot, NY.

Cayman News Service. FCO wants more budget cuts., 23 June, 2012. www.caymannewsservice.com. Accessed on 3 July 2012.

OECD and UNEP (2011) Climate Change and Tourism Policy in OECD Countries. Paris: OECE & UNEP.

United Nations AIDS (2010) Epidemic Update. Global Report. Geneva: United Nations.

United Nations World Tourism Organisation (2012) Tourism Highlights 2012 Edition. Madrid: UNWTO.

 United States Travel Association (2007) Western Hemisphere Travel Initiative, 2007. www.ustravel.org. Accessed on 3 July 2012.

World Bank (2005) Grenada: A nation rebuilding. An assessment of reconstruction and economic recovery one year after Hurricane Ivan. Washington: The World Bank. October, 31.

World Travel and Tourism Council (2012) Travel & Tourism Economic Impact 2012- Caribbean. London: WTTC.

APPENDIX

Table 4: *Funders and examples of projects in the Caribbean region*

Source(s)	Focus	Examples
European Development ment Fund (EDF) – the main instrument for cooperation in financing the development of the OCTs and for regional cooperation	Human resource development Health sector modernisation Safety and security Fiscal and public sector modernisation Macroeconomic budget support	Construction of a new airport in Montserrat following volcanic destruction Development of a new capital city at Little Bay in Montserrat Montserrat Resettlement Project Construction of a culinary arts centre in the British Virgin islands Upgrading air transport and road improvement in Anguilla
The Inter-American Development Bank (IDB) reports that it has provided more than US $1.9 billion in loans to finance 35 tourism projects in the Caribbean.	Poverty alleviation Tourism and conservation management Governance Innovation	2008: US $14,682,000 to the Ministry of Tourism in Belize to undertake a sustainable tourism programme that focused on: (a) investments in overnight tourism destinations to finance studies, final designs and investments in civil works and equipment aimed at improving the quality of the tourism natural and cultural products at consolidated destinations in line with destination management plans developed during programme preparation; (b) institutional strengthening and capacity building for policy, destination planning and management
Caribbean Development ment Bank (CDB) - US $392 million being spent in 2010.	Integrated tourism facilities and support for infrastructure Assistance for medium, small, and micro enterprises (MSME) development	2006-2009: two loans to the Government of Barbados totalling US $29.72 million to assist in financing the redevelopment of the Harrison Cave facilities , Barbados' premier tourism attraction. Project included road safety improvements, replacement of the electric tour trams and enhancements to equipment and operations. Project expected to improve the sustainability of the attraction; increase net foreign exchange earnings and employment opportunities; enhance the local tourism product and the marketability of Barbados as a sustainable tourism destination. Eight interventions in tourism related activities were financed in 2010, including national and regional workshops, direct technical assistance, training attachments and special publications. These interventions sought to address key operational and managerial deficiencies aimed at enhancing the competitiveness of MSME by improving technical know-how.
Agencies such as: **United States Agency for International Development (USAID)** **United Kingdom Department for International Development (DFID)** **Australian Agency for International Development (AUSAID)** **Canadian International Development Agency (CIDA)**	Financial support to address climate change	USAID's funding focuses on capacity building in the region so that practitioners, including those in tourism, can create adaptation measures to respond to the impacts of climate change. These climate change programmes address critical issues for the sector: adaptation measures in coastal zone management and freshwater resource management. The capacity building programs offer climate change education to professionals and those in policy or decision-making positions. They also fund public awareness and education programmes on climate change across the region.

Source(s)	Focus	Examples
Canadian International-al Development Agency in partnership with CDB	Disaster Risk Reduction Tourism security Post disaster recovery Leveraging foreign direct investment	CAD$20,000,000 project: supports community resilience in the face of natural disasters by undertaking demonstration projects (in up to seventeen communities across the Caribbean) that help determine which of the prevention or mitigation measures is most effective.
Organisation of American States (OAS)	Tourism security	Programme to strengthen capacity of public and private tourism sectors to prevent and respond to potential terrorist or other security attacks on tourist and recreational facilities; and to help establish or strengthen public-private partnerships in tourism security. Specialized security training, taking into consideration the realities and needs of individual countries and localities.
DFID	Security	Support provided to the Government of Jamaica in its fight against corruption and crime and help to restore good police/community relations. The programmes will also support Eastern Caribbean States to tackle organized crime by tracking and seizing the criminal profits. This programme will therefore provide indirect support to sustainable tourism through increased security from human threats.
World Bank		In March 2002 approved US $20.9 million in loans and credits to support five Emergency Recovery Projects undertaken by the Organisation of Eastern Caribbean States (OECS) countries of Dominica, Grenada, St. Kitts and Nevis, St. Lucia, and St. Vincent and the Grenadines. The projects were in support of efforts to revitalize tourism, which had fallen off as a result of the events of September 11, 2001. The projects included improvements to airport and seaport security, including civil works, equipment and training.
Various funders	Leverage foreign direct investment	Several of the CDB's BMCs participated in the Shanghai World Expo 2010 whose theme 'Better City, Better Life', represented a central concern of the international community for future policy making, urban strategies and sustainable development. The CDB's involvement facilitated participating BMCs to attract tourism and foreign direct investment

Table 4: *Funders and examples of projects in the Caribbean region*