



# **A New Dawn for Cruise Tourism in Barbados**

**Final Report  
February 2019**



## Table of Contents

	Page
Abbreviations & Acronyms	5
Executive Summary	6
<b>1.0 Context</b>	
1.1 Thumb-nail sketch of cruise industry	13
1.2 Establishment of the National Cruise Development Commission (NCDC)	14
1.3 The Commission's vision and envisaged results	14
1.4 The Commission's approach	16
<b>2.0 Cruise Tourism – Situational Analysis</b>	
2.1 Current global trends	18
2.2 Caribbean remains dominant cruise destination	19
2.3 Cruise passenger spend' in Barbados disappoints	22
2.4 Cruise tourism's economic impact	24
2.5 Essential and transformational interventions needed to overcome the principal challenges confronting cruise tourism in Barbados	26
<b>3.0 Barbados' Key Infrastructures Below Par</b>	
3.1 Port experience of cruise passengers visiting Barbados must be enhanced	29
3.2 'Pilot project' re cruise ships berthing on the West Coast should be expedited	36
3.3 GAIA needs to plan for the increasing air-to-sea demand	38
3.4 Visitor centres, information kiosks & public toilets needed	39
3.5 Roads, sidewalks, & overall physical environment must be addressed	40
3.6 Transport vehicles must be subject to minimum standards	41
<b>4.0 It is time to restore Pelican Village, Bridgetown, &amp; Oistins</b>	
4.1 A New lease on life for Pelican Craft Centre	42
4.2 Historic Bridgetown and its Garrison present a great marketing opportunity	45
4.3 Bridgetown re-imagined	47
4.4 Time to save the Oistins ' <i>goose</i> ' or risk losing the ' <i>golden egg</i> '	54
<b>5.0 Strategic approaches to cruise development</b>	
5.1 Barbados' Cruise development strategy should prioritize homeporting	57
5.2 The European market beckons & Barbados should respond	59

5.3 Barbados should explore mechanisms for growing Summer cruise traffic	60
5.4 Training should be a priority, including certification of tour guides	61

## **6.0 Barbados Must Unveil Hidden Tourism ‘Gems’**

6.1 Barbados, as a cruise destination, must deliver in three key areas	62
6.2 Paradigm Shift Needed	62
6.3 Partnerships are invaluable for cruise tourism	63
6.4 Perspectives of three visiting tourism strategic partners	64

## **7.0 Institutional Considerations**

7.1 Principal public sector tourism stakeholders in Barbados’ cruise sector	65
7.2 Cruise division or comparable entity must become a genuine facilitator	66
7.3 Regulatory requirements are enmeshed in bureaucratic obfuscation	68

## **8.0 Random thoughts about possible visitor attractions**

8.1 Bajan tales from the crypt - the mystery of the Chase Vault	69
8.2 Mermaids Tavern & the Charter of Barbados	69
8.3 Barbados and the story of “Rumbullion”	70
8.4 Other tales from beneath the earth or high above it	71

### **Comment**

A wake-up call is no longer enough, it is time for action	71
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## **Appendix 1**

<b>A Summary of Objectives and Recommended Actions</b>	<b>73</b>
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<b>References</b>	<b>83</b>
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### **Tables**

Table 1: Cruise Line Deployments by Region <sup>1</sup> (% of available Lower Berths)	20
Table 2: Economic contribution of cruise tourism, by destination, 2017/18 cruise	21
Table 3: Spending by Transit & Homeporting passengers (\$US), 2017/18 cruise year	23
Table 4: Economic contribution of cruise tourism, by destination, 2017/18 cruise year <sup>2</sup>	25
Table 5: Av. Onshore Exp. (\$US) from a <i>Transit Call</i> by a 4,000 Passenger Cruise Ship	58
Table 6: Av. Onshore Exp. (\$US) from a <i>Homeport Call</i> by a 4,000 Passenger Cruise Ship	59

<sup>1</sup> CLIA, 2018

<sup>2</sup> Adapted from the BRIA Oct. 2018 study.

## **Abbreviations & Acronyms**

BCTI	Bridgetown Cruise Terminal Inc.
BIDC	Barbados Investment & Development Corporation
BPI	Barbados Port Inc.
BREA	Business Research & Economic Advisors
BSO	Business Support Organisations
BTII	Barbados Tourism Investments Inc.
BTMI	Barbados Tourism Marketing Inc.
BTPA	Barbados Tourism Product Authority
CBI	Centre for the promotion of imports from developing countries
C&LA	Caribbean and Latin America
CLIA	Cruise Lines International Association
DMC	Destination Management Companies
FCCA	Florida-Caribbean Cruise Association
GVC	Global Value Chains
GDP	Gross Domestic Product
ILO	International Labor Organization
IT	Information Technology
MCS	Ministry of Culture and Sports
MEB	Ministry of the Environment & National Beautification
MMB	Ministry of Maritime Affairs & the Blue Economy
MTI	Ministry of Tourism and International Transport
MTW	Ministry of Transport, Works and Maintenance
PA	Public Address
PSV	Public Service Vehicles
SME	Small and Medium-sized Enterprise
USVI	US Virgin Islands
WTTC	World Travel & Tourism Council

## Executive Summary

### Context & Situational Analysis

**Current global trends:** Cruise tourism is one of the fastest growing segments in the travel and tourism industry. The global cruise market grew from 1.4 million passengers in 1980 to 25.8 million in 2017. The cruise sector continues to build capacity with sixty-five (65) new cruise ships expected to be delivered over the ten-year period from beginning 2016 to end of 2025. The USA continues to be the principal market for cruise passengers, but the fastest growing markets are in Asia and Europe.

**Caribbean remains dominant cruise destination:** Worldwide, the combined Caribbean and Latin American region continues to be the dominant cruise destination, accounting for 35.4% of the global cruise sector deployment. During the 2017/2018 cruise year (May 2017 – April 2018), cruise tourism generated nearly US\$3.4 billion in direct expenditures and created 79,000 jobs in the thirty-six (36) cruise destinations in the Caribbean, Mexico, and Central and South America.

**Cruise Passenger ‘spend’ in Barbados disappoints:** Cruise passenger spend in Barbados has been below expectations in recent years. Average spend per ‘transit’ cruise passenger for 2017/18 was only US\$64.05 or 15.6% below the US\$75.85 recorded in 2014/15. Homeporting (air-to-sea), on the other hand, has been performing well and recorded solid growth in both the number of homeporters and their average per passenger spend, which rose dramatically from US\$85.94 per passenger in 2014/15 to US\$144.78 in 2017/18.

**Principal challenges confronting cruise tourism in Barbados:** Some of the conditions and challenges, contributing to the underperformance of the cruise sector in Barbados, include:

1. An aging and aesthetically limited Port infrastructure;
2. An uncompetitive and unappealing shopping environment;
3. A limited number of tourism attractions and the absence of new products;
4. Too much consolidation of cruise sector-related representation and product distribution;
5. Limited implementation of strategic objectives by government institutions; and
6. The need for Barbadian SMEs to raise their game.

Meanwhile, the two defining trends, with respect to Barbados’ cruise tourism sector in recent years, have been:

- 1) The island is receiving more cruise passengers, but they are spending less money; and
- 2) Barbados’ overall cruise sector competitiveness and performance have been deteriorating vis-à-vis other regional cruise destinations.

**Establishment of the National Cruise Development Commission:** It is against the background of an underperforming cruise tourism sector that the Cabinet of Barbados decided, to establish a

National Cruise Development Commission with a mandate, “*to identify immediate workable solutions to the challenges currently facing the cruise sector in Barbados*”. A key outcome for the Commission would be “*A sustainable increase in the cruise industry-related economic benefits for Barbados*”, which would be built on a number of intermediate outcomes.

**Commission’s approach:** The Commission has been evaluating and reflecting on the entire cruise passenger experience. Members of the Commission have been meeting with key stakeholders (individuals and organisations); have undertaken site visits to both sea & air ports; have convened Town Hall Meetings; have made visits to and done assessments of a variety of attractions; and have assessed the challenges, which are having negative impacts on a number of the attractions.

## **Barbados’ Key Infrastructures Below Par**

**Port experience of cruise passengers visiting Barbados must be enhanced:** The need for major expansion of the existing Bridgetown Port or the construction of a new dedicated Cruise Terminal has been embraced by all cruise sector stakeholders and has been under serious consideration for a number of years. Nevertheless, given the uncertainty surrounding Sugar Point *et al*, this Report will proceed on the basis that Barbados is at least three years removed from the operationalization of any new Port or Cruise Terminal. In the circumstances, the actions discussed below are intended to enhance the performance of the Port, with respect to the handling of cruise ships and passengers, in the short to medium term.

First, the *shore-side welcome* - both the built and personal aspects - need a major upgrade. Barbados was ranked 29<sup>th</sup> of the 36 C&LA destinations with respect to the quality of the initial shore-side welcome.

**Secondly**, there is a need for *Improved Signage* throughout the Port.

**Thirdly**, the Port needs to have appropriate arrangements for the safe *movement of cruise passengers* in the Port. Adequate transportation, including for the differently-abled, should be available to move passengers from the distant berths to the Cruise Terminal.

**Fourthly**, the Port would benefit from the maximization of *branding/marketing opportunities*, including strategically-placed “*Welcome to Barbados*” signs and related images.

**Fifthly**, the area reserved for tour buses and taxis to pick-up cruise passengers needs proper organization and the introduction of systems to improve the dispatch of tours.

**Port entrance & exit** – The process seems unnecessarily slow and prone to bottlenecks. The problem seems to revolve around the capacity to deploy an adequate number of Customs officers in a timely manner.

**‘Pilot project’ re cruise ships berthing on the West Coast should be expedited :** In recent years, there have been discussions with interested cruise lines about the possibility of anchoring smaller cruise ships offshore at Holetown/Speightstown and using tenders to transport the passengers ashore. This would make attractions in the north of the island more readily accessible

by cruise passengers. Progress in advancing the technical aspects of this initiative has been rather limited.

**Visitor centres, information kiosks & public toilets needed:** Consideration should be given to the positioning of a few purpose-built visitor centres along key routes. These facilities would include an information kiosk; space for vendors (preferably from the surrounding area) of Barbadian arts and craft; and properly maintained toilet facilities.

**Road infrastructure, verges & overall physical environment in poor condition:** The road infrastructure is in desperate need of serious maintenance. Road surfaces, sidewalks, and verges are all in unsatisfactory condition. The prevalence of uncollected garbage and overflowing trash bins add to the impression of a country where maintenance has been forgotten.

## **It is Time to Restore Pelican Village, Bridgetown, & Oistins**

**A New Lease on Life for Pelican Craft Centre:** The Pelican Craft Centre is floundering under the burden of numerous shortcomings. A number of stimulating initiatives are proposed, including:

- (1) **Installation of new management**, public or private sector;
- (2) **Timely maintenance** and refurbishment to make the complex more presentable.
- (3) **Signage** – Introduce a new series of bold, attention-getting, and unambiguous signs
- (4) **Advertising** – The management of Pelican Craft Centre should execute an online marketing campaign as well as local TV and radio advertising.
- (5) **Entertainment** – When cruise ships are in Port, organize colourful entertainment packages around the gazebo area and on the lawn beside Princess Alice Highway.
- (6) **Open market** – The lawn beside Princess Alice Highway and the areas around the gazebo and along the artist wall should be used as an “open air craft market”.
- (7) **Customer experiences** – Arrange interactive craft demonstrations, in areas such as: wood & straw work, jewelry design, leather craft, glass blowing, pottery making etc.
- (8) **Product development** – Craft vendors in Barbados, with the help of the BIDC Design Center, need to pay more attention to new product design with a view towards developing a range of “*Authentic Barbadian souvenirs*”.

**Historic Bridgetown and its Garrison must be promoted more effectively:** Barbados must make a serious effort to promote effectively “*Historic Bridgetown and its Garrison (an UNESCO World Heritage Site)*”. There is considerable scope for the packaging and promotion of “Heritage City Tours”, with stops at an awakened Pelican Craft Centre, Museum of Parliament, Exchange Museum, Jewish Synagogue, a properly-developed Rihanna Drive (a phase 2 project), George Washington House and the tunnels, the changing of the guard (attired in Zouave uniforms) at St. Ann’s Fort, a light Bajan-oriented lunch somewhere on Bay street or around the Careenage, shopping on Broad street, plus additions, such as: a beach, the Screw Dock, Mt. Gay Rum Tour, a drive up to Gun Hill Signal Station etc.

**Bridgetown re-imagined:** Bridgetown needs cleaning-up and reinvigorating in order to bring her back to life and encourage, not only visitors but also Barbadian residents to return to the city after the sun has gone down and the stars have come out.

#### Bridgetown Phase One

- (i) Bridgetown needs a more effective sanitation service (public, private, or a combination);
- (ii) Bridgetown needs attended public toilet facilities;
- (iii) Consideration should be given to the deployment of a few “City Guides” at select locations, when cruise ships are in Port.
- (iv) Shopping experience can be improved for cruise passengers visiting Bridgetown.
- (v) The much talked about ‘free wi-fi’ must be enabled throughout the City.
- (vi) A walking map, both interactive & printed versions, covering the area from the Port exit/Pelican Craft Centre to St. Patrick’s Cathedral, should be introduced.

#### Bridgetown Phase two

For the medium term, the Commission proposes the following:

- Removing vehicular traffic from Broad Street;
- Encouraging the introduction of more water side and open air cafes;
- Introducing a water taxi service – to transport persons between the inner Careenage and upper Bay street, Rockley, and Oistins or Brighton, Holetown and Speightstown;
- Enhancing the Squares and other open spaces around the city with ‘greenery’ and seating;
- Introducing alternative arrangements for housing and more comfortably feeding the City’s homeless.

#### Bridgetown Phase three – Transformational Initiatives

In phase three, some of the proposed transformational initiatives are identified and it is envisaged that they will be developed, refined, and implemented in the years to come.

**Transformation of Bridgetown Fish Market:** A Bridgetown/Pelican Market, designed to combine in one location: A world class fish and meat market; a market for provisions, herbs, spices and various cooking paraphernalia; an entertainment space; and two restaurants.

**Build a Bridgetown Marina:** It is time for Government to encourage, promote, and incentivize the development of a world-class full service marina.

**Make Bridgetown a livable city for young professionals:** The City’s old/unused warehouse space should be refurbished and utilized as accommodation for upwardly-mobile professionals, a high-end boutique hotel, and to present quality experiences/entertainment.

**Re-claim prime real estate from parking lots:** We should discourage parking in the city and use the water-side land for recreational use and/or upmarket housing.

**Restore Bridgetown’s historical buildings:** The restoration of a number of the historic building, which are currently running to ruin within Historic Bridgetown, should be pursued as a long term project - The old Empire Theatre, The abandoned Dale Carnegie Library, The dilapidated Eye Ward building etc.

### **Time to save the Oistins ‘goose’ or risk losing the ‘golden egg’**

The Oistins Bay Garden needs major refurbishment or even a comprehensive rebuilding. The following areas should be specifically targeted for immediate action and should be addressed, even if the extensive rebuild has to be deferred:

- Bathroom facilities must be upgraded;
- The stagnant pool of water that seems to be a permanent fixture should be addressed;
- Rotting boats, abandoned appliances and other debris must be removed from the area;
- Proper stalls must be provided for the craft vendors;
- The Complex’s wooden tables and chairs should be restored or replaced, as necessary;
- Garbage bins should be regularly serviced to prevent unsightly and unhealthy overflows.

## **Strategic Approaches to Cruise Development**

**Homeporting provides more opportunities to increase cruise passenger spend:** An analysis of available data indicates that *homeporting* offers more opportunities for cruise passengers to spend money in Barbados. The transportation aspect of moving a large number of passengers from charter planes to their cruise ships in the Bridgetown Port is merely scratching the surface of the opportunities associated with *homeporting*. The real *homeporting* benefits for Barbados are in areas, such as: hotel accommodation, meals in restaurants, money spent in night clubs & other night time attractions, using taxis and the like.

With respect to *homeporting*, the three lessons to take away from the FCCA data for the 2017/18 cruise may be summarized as follows:

- (1) Based on current data, total passenger and crew spending from one call at Barbados by (for example) a 4,000-passenger cruise ship is now approximately US\$247.9 thousand or \$136.6 thousand ***below*** what would have been spent if Barbados was operating at the regional average.
- (2) If the 4,000-passenger ship was homeporting in Barbados, the total passenger and crew spending (approx. US\$516.0 thousand) would more than double the spending by a comparable number of regular/transit cruise passengers and crew (approx. US\$247.9 thousand).
- (3) Whereas the average total amount spent by transit passengers and crew in Barbados is 35.5 % below the regional average, the average spent by *homeporting* passengers and crew in Barbados is only 2.8% below the regional average.

**The European Market Beckons & Barbados should respond:** It seems that there is a case to be made that the European cruise passengers are more compatible with where we want to go with our cruise tourism product. They are generally more affluent, more interested in heritage & cultural attractions, and they are also more oriented towards the pre & post aspects of homeporting than the increasingly budget conscious travellers coming out of the US. When these factors are taken into consideration, it is recommended that cruise tourism promotion authorities should step-up their efforts to attract more Europeans cruise passengers.

**Barbados should explore mechanisms for growing Summer Cruise Traffic:** Increased cruise traffic during the summer months would boost Barbados' economic benefits in a number of ways, including through supporting the financial viability of tourist attractions, which might otherwise be marginal undertakings. Barbados should endeavour to grow the summer season by giving cruise lines reasons to deploy their ships in our region during the summer months. The creation of an effective "Southern Caribbean Alliance" could help with this push. The areas, which could be promoted by such an alliance, include:

- Increasing regional cruise traffic generally;
- Exploring modalities for incentivising cruise lines to maintain a buoyant summer schedule in the Southern Caribbean; and
- Cooperation in the areas of marketing and the negotiation of port fees and the like.

**Training should be a priority, including certification for tour guides:** Barbados' tourism authorities and persons in the cruise sector must prioritize training and treat it as a core component of capacity-building with respect to essential cruise sector personnel. In addition, continuing training should be introduced for various types of service staff, including: store employees, taxis drivers, and front line staff at attractions, tour operators etc.

## **Barbados Must Unveil Hidden Tourism 'Gems'**

**Paradigm Shift Needed:** The cruise tourism sector demands that the Barbados experience should exceed visitor expectations "*all the time every time*" because cruise tourism does not provide opportunities for Barbados or Barbadian service providers to recover from initial sub-par performances. Consequently, Barbados needs to address visitor concerns about quality of service, neglected physical environment, and limited variety of products.

**Partnerships are invaluable for cruise tourism:** Tourism authorities should become more proactive in establishing standards of behavior and service for the sector; broadening the range of "*products*" being offered to cruise lines; and exploring additional opportunities to bring greater economic benefits to Barbados. *This approach requires an agency, public or private sector or a public-private partnership, with a mandate and the capacity to promote, stimulate, and facilitate the diversification and growth of the sector.*

## Institutional Considerations

**Cruise Division or comparable entity must become a genuine facilitator:** BTMI's Cruise Division or the Division in partnership with a complementary entity should have a clearly-articulated developmental and business facilitating role.

- i) The Division must become more proactive and innovative in brokering strategic partnerships and packaging small attractions into viable tours.
- ii) It should be able to support tourism-related projects which are facing bureaucratic or related challenges in getting approvals;
- iii) It should be able to provide information, guidance, and introductions to key regulatory institutions and to potential strategic partners.

**Regulatory requirements are too burdensome:** Written and verbal comments from persons in the cruise tourism sector convey the impression that the regimes for purchasing duty free vehicles, obtaining permits for tour buses, and securing approval for modifications to vehicles involve opaque requirements and distinctly inhibiting procedures. Business operators report a number of negative experiences, with respect to their dealings with Town Planning, the Ministry of Finance, and the regulatory arm of the Ministry of Transport and Works.

## Comment

Barbados, which is considered by many to be a marquee cruise destination, has been losing ground to regional competitors over the past nine/ten years. One of the key messages, which is emerging from recent studies and from interviews with stakeholders, is that Barbados needs to present a more diversified portfolio of tours and attractions.

Meanwhile, the objective of involving more SMEs in the cruise sector will not be achieved organically, it will necessitate significant encouragement and *“hand holding”*. In the circumstances, there is a role for a suitably enabled institution, the cruise division within the BTMI or similar entity, to become more *“hands on”* in facilitating the diversification and expansion of the island's suite of visitor attractions. Barbados needs to do a better job developing and promoting all of the island's cruise sector offerings.

## **A New Dawn for Cruise Tourism in Barbados**



### **1.0 Context**

#### **1.1 Thumb-nail sketch of cruise industry**

The cruise market is one of the fastest growing segments in the travel and tourism industry and it can make a significant contribution to a destination's economy. The phenomenal growth of cruise tourism has been driven by the continuing dynamism in cruise activity and the increasing number of countries that include cruise, as a key component of their tourism development. The competition to attract visits from cruise lines is fierce within the Caribbean and beyond.

Worldwide, the combined Caribbean and Latin American region continues to be the leading cruise destination. In 2017, according to the Cruise Lines International Association (CLIA), the Caribbean and Latin American region accounted for 35.4% of the global cruise sector deployment. The second leading region for cruise visitors was the Mediterranean with just over 15%.

Meanwhile, the two defining trends, with respect to Barbados' cruise tourism sector in recent years, have been:

- 1) The island is receiving more cruise passengers, but they are spending less money; and
- 2) Barbados' overall cruise sector competitiveness and performance have been deteriorating vis-à-vis other regional cruise destinations.

## 1.2 Establishment of the National Cruise Development Commission (NCDC)

It is against the background of an underperforming cruise tourism sector that the Cabinet of Barbados decided, in August 2018, to establish a National Cruise Development Commission with a mandate, *“to identify immediate workable solutions to the challenges currently facing the cruise sector in Barbados”*. The Commission was appointed the following month (September 2018) and its principal deliverables include:

- ✓ An up-to-date assessment of the cruise industry in Barbados, including an audit among local public and private stakeholders and the general public;
- ✓ Motivating the active participation & investment of small and medium-sized enterprises in the development & diversification of the local cruise sector;
- ✓ ***Identifying opportunities to expand the economic benefits, which can be derived from cruise tourism;***
- ✓ Recommending short-term initiatives to enhance the onshore experience and increase visitor spend for the 2018/19 winter season; and
- ✓ Identifying an additional body of measures to ensure the long-term competitiveness of the cruise industry.

## 1.3 The Commission's Vision and Expected Results

### 1.3.1 Vision

*“To establish Barbados as the premier cruise destination in the Caribbean and Latin American cruise region”*

### 1.3.2 Overarching Goal

It is envisaged that the recommendations put forward by the Commission will contribute to *“A sustainable increase in the cruise industry-related economic benefits for Barbados”*.

### 1.3.3 Strategic Objectives

The strategic objectives listed below are expected to contribute to the overarching goal stated above and should also help to establish a basis for monitoring the performance of the principal cruise sector institutions over the next six (6) years.

- a) Number of cruise passengers visiting Barbados increased by thirty (30) per cent over the six-year period 2017/2018 to 2023/24;
- b) The number of cruise passengers *homeporting* in Barbados increased from 149,065 in the 2017/18 cruise year to 185,000 in 2023/24;

- c) The percentage of *homeporting cruise passengers* persuaded to spend pre or post hotel nights in Barbados increased from 7% in 2017/18 to 13% by 2023/24;
- d) Sixty (60) new or reconfigured tour packages<sup>3</sup> introduced over the next six years;
- e) Fifteen (15) new or re-imagined attractions or visitor experiences introduced over the next six years;
- f) Average spend per *transit cruise passenger* increased from US\$64.05 in 2017/18 to US\$100.00 by the 2023/24 cruise season;
- g) Average spend per *homeporting cruise passenger* increased from US\$144.78 in 2017/18 to US\$235.00 by the 2023/24 cruise season;
- h) Cruise passenger satisfaction, with respect to shopping, improved from 20<sup>th</sup> of 36<sup>th</sup> countries in the C&LA region in 2017/18 to a place in the top third by the 2020/21 cruise year.

#### 1.3.4 Key assumptions

Although the key assumptions relate to conditions that are outside the control of the Commission, the achievement of the desired results depends on whether or not the assumptions hold true. The assumptions, listed below, represent some of the conditions that must obtain in order to ensure the attainment of the Overarching Goal and Strategic Objectives.

With respect to cruise tourism development in Barbados, key assumptions include that:

- The Government of Barbados, the Ministry responsible for Tourism, and other stakeholders at all levels will be fully supportive of the Cruise Tourism sector, even in the face of severe national financial constraints;
- Barbadian institutions, organisations, agencies and individuals associated with cruise tourism (BTMI, BTPA, BTII, BPI, the GAIA, Tour & Taxis Operators, Organisers of Visitor Experiences, Operators of Attractions, craft vendors, and Operators of duty-free establishments) will be committed to the growth of cruise tourism and to increasing cruise passenger ‘spend’ in Barbados;
- Adequate resources will be available to the Ministry responsible for Tourism and to tourism facilitating agencies to support the promotion and development of cruise tourism in Barbados;
- Stakeholder capacities to support cruise tourism, including infrastructural development, the diversification of visitor attractions, and the shopping experience, will be enhanced; and
- Transparent and effective mechanisms will be applied to ensure that there is a “level playing field” with respect to the provision of services to the cruise tourism sector.

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<sup>3</sup> Tour packages refer to the variety of configurations of attractions, which can be combined into different packages by tour operators to offer more options to our visitors.

## 1.4 The Commission's approach

### 1.4.1 Establishment of three working committees

It was decided to organise the Commission into three committees in order to facilitate better coverage of the diverse range of issues, which needed to be considered.

The areas covered by the three committees are:

1. Visitor attractions & experiences
2. Tours, plus Bridgetown redevelopment
3. Air & Sea Ports, plus Duty-free, and indigenous Craft

The Commission has been evaluating and reflecting on the entire cruise passenger experience – procedural, visual, verbal and experiential – from arrival at the sea and/or airport to final departure from Barbados - in order to be able to make informed recommendations to address any identified shortcomings.

The Commission's Committees have been meeting with key cruise sector stakeholders (individuals and organisations) and have undertaken a number of site visits to both the airport and seaport, incl. the Cruise Terminal. The Commission and its Committees have convened Town Hall Meetings; have visited and did assessments of a variety of visitor attractions; and have evaluated the challenges, which are having negative impacts on some of the attractions that are now being developed or which are operational, but are seeking to attract cruise ship business. The views of cruise line executives have also been canvassed in order to get their perspectives on cruise passenger expectations and about areas where Barbados might be falling short or failing to capitalize on what it already available on the island.

### 1.4.2 Review previous technical work

The Commission has reviewed and taken into consideration recent studies and other technical work related to the Cruise sector in Barbados, including:

- The 2011 Barbados Cruise Tourism Development Strategy;
- The Barbados Tourism Master Plan 2014-2023;
- The 2014/15 BREA<sup>4</sup> Study for the FCCA<sup>5</sup>;
- The 2016 BTPA Cruise Audit Report;
- The 2017 study by the Duke University Global Value Chain Center “Barbados in the Cruise Tourism Global Value Chain”; and
- The 2017/18 BREA Study for the FCCA.

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<sup>4</sup> Business Research and Economic Advisors, a New Jersey-based organization, which undertakes marketing & economic impact analyses for tourism & travel industry clients

<sup>5</sup> Florida-Caribbean Cruise Association, a trade organization which seeks to enhance relations between its member cruise lines and governments and cruise-related institutions in cruise destinations.

**Figure 1: Prime Minister Mottley & delegation at FCCA Conference with senior cruise line executives, November 2018**



#### 1.4.3 Guiding Principles

These principles, not only reflect the basis on which the Cruise Development Commission went about its work, but more importantly should underpin the actual implementation of any national cruise development strategy.

- (i) *'Visitor welcome' and 'level of service'* - Tourism authorities and those operating in the cruise sector (Port officials, Immigration and Customs Officers, Cruise terminal staff, sales representatives, tour guides, taxis operators, craft persons, and those working with attractions and the like) must do their utmost to ensure that, as a tourism destination (both long stay & cruise), Barbados must not be beaten on the overall quality of the 'visitor welcome' and 'level of service'.
- (ii) *Heritage & Culture* - A more effective promotion of Barbadian Heritage and Culture will enable Barbados to differentiate its cruise tourism product from what is available elsewhere in the Caribbean. There is tremendous potential in differentiating the 'Barbados Brand' from its competitors and Barbados must take full advantage of this hitherto untapped potential.

- (iii) *Contribution to employment, economic growth, and foreign exchange earnings* - The focus of tourism promotion in Barbados, including the cruise sector, has traditionally been to monitor and report on the number of visitors each quarter or each year. However, modern tourism planners are placing greater emphasis on “visitor spend”. In the circumstances, it can reasonably be argued that a strategic decision to allocate more and more scarce resources (directly and indirectly) to the facilitation of cruise tourism can only be justified if cruise tourism is making an increasing contribution to employment, economic growth, and foreign exchange earnings in Barbados.
- (iv) *Sustainable Development* – The growth of the cruise sector must be founded on sustainability. Preservation of the environment, as well as the island’s heritage and culture must also be paramount. Future development must be oriented towards high quality and significant value added rather than overemphasizing quantity.
- (v) *Awareness and Sensitisation* - Barbados seems to be falling behind in the area of visitor welcome and friendliness towards visitors. There should be a sustained, but almost subtle, campaign to make Barbadians more aware of the importance of the tourism industry and to encourage them to ‘engage with the visitors’. Barbados must recapture and enhance its reputation as being a welcoming, orderly, clean and safe destination.
- (vi) *Specific and implementable recommendations* - It is envisaged that the Commission will, not only identify challenges and shortcomings, but will make implementable recommendations for addressing identified problem areas.

## 2.0 Cruise Tourism – Situational Analysis

### 2.1 Current global trends

Over the past thirty-five years, worldwide demand for cruise tourism has posted some of the biggest gains within the tourism industry and cruise has cemented its reputation as one of the fastest growing segments in the travel and tourism industry.

The global cruise market grew from almost 3.8 million passengers in 1990 to 25.8 million in 2017, according to the Cruise Lines International Association (CLIA), which represents 95% of the global cruise capacity. When CLIA began tracking cruise passengers in 1980, the number was only 1.4 million and, when we look at a more recent time period, the global cruise market has increased by 81% since 2006 – advancing from 15 million in 2006 to the 25.8 million recorded in 2017.

In terms of capacity, the cruise industry added nine (9) new ships in 2016, six (6) more in 2017 and an additional fifty (50) are on order for delivery between 2018 and 2025. These sixty-five (65) new cruise ships will add more than 250,000 to the industry’s worldwide passenger capacity

over the ten-year period from beginning 2016 to end of 2025. Therefore, governments globally are investing large sums of money in high quality infrastructures to accommodate these ships and the hundreds of thousands of additional passenger arrivals.

### What is Cruise Tourism?

In the context of this Report, cruise tourism is seen as a form of leisure travel, involving an all-inclusive holiday on a cruise ship. The ship-based holiday should be at least 48 hours and follow a specific itinerary in which the cruise ship calls at a number of ports or cities.

A cruise can be a one-way or a round trip journey and generally passengers come ashore to visit attractions and experience the culture and shopping of that town, city or region.

Sometimes travelers first fly to a specific destination, take a cruise trip from there and then fly back, the so-called 'fly & cruise' or 'homeporting'.

The USA dominates global cruise demand, providing 46.6% of cruise passengers in 2016. The next largest supplier was China, with 8.5%, followed closely by Germany (8.1) & the UK (7.7). However, the relative dominance of the United States, as a source of cruise passengers, is being eroded because the cruise market expansion is currently being driven by growing demand from Europe and the rest of the world<sup>6</sup> (especially Australia/New Zealand and China/Asia).

*European residents, including from the UK, now represent over 25% of worldwide cruise passengers<sup>7</sup>. European cruise passengers represent an **interesting target market for Barbados** because they are usually more interested, than Americans, in exploring culture and heritage and are also more likely to disembark<sup>8</sup> during their cruise trip.*

## 2.2 Caribbean remains dominant cruise destination

Worldwide, the combined Caribbean and Latin American (C&LA) region continues to be the dominant cruise destination. The reason why this region is so popular is because of its weather and proximity to the principal source market in North America. In 2017, according to CLIA, the C&LA region accounted for 35.4% of the global cruise sector deployment. The C&LA region was followed by the Mediterranean with just over 15%. Europe without the Mediterranean received about 11%, followed by China and Australia/New Zealand with around 5% each.

In terms of cruise industry impact, in the C&LA region, during the 2017/2018 cruise year (May 2017 – April 2018), cruise tourism generated nearly US\$3.4 billion in direct expenditures, created 79,000 jobs, resulting in US\$903 million in employee wages in the thirty-six (36) cruise

<sup>6</sup> CBI in the Netherlands, "What are the opportunities for cruise tourism with guests from Europe?"

<sup>7</sup> Daly, J., Fernandez-St.K., (Aug.2017) "Barbados in the Cruise Tourism Global Value Chain"

<sup>8</sup> Daly, J., Fernandez-St.K., (Aug.2017) "Barbados in the Cruise Tourism Global Value Chain"

destinations in the Caribbean, Mexico, and Central and South America, which have been included in the latest triennial survey conducted on behalf of the FCCA by BREA.

**Table 1. Cruise Line Deployments by Region<sup>9</sup> (% of available Lower Berths)**

<b>Region</b>	2012	2013	2014	2015	2016	2017
Caribbean	37.3%	34.4%	37.3%	35.5%	33.7%	35.4%
Mediterranean	19.9	21.7	18.9	19.5	18.7	16.0
Other	16.5	15.8	14.5	15.0	13.8	14.5
Europe (w/o Mediterranean)	9.8	10.9	11.1	10.6	11.7	11.5
Asia (incl. China)	3.6	3.4	4.4	6.0	9.2	10.4
Australia	4.1	5.0	5.9	6.0	6.1	6.0
Alaska	5.4	4.8	4.5	4.5	4.1	4.0
South America	3.4	3.9	3.3	2.9	2.7	2.2

The cruise industry has divided the Caribbean and Latin America into the following four (4) cruise itineraries: The “Eastern Caribbean”, comprising ten (10) destinations, which received an estimated 14.5 million *cruise visitors*<sup>10</sup> (passengers and crew) during the 2017/18 cruise year; the “Western Caribbean”, comprising nine (9) destinations and accounting for 10.1 million passenger and crew arrivals; the “Southern Caribbean”, comprising Barbados and eight (8) other destinations and receiving only 6.5 million passengers and crew; and Mexico, involving eight (8) destinations and receiving 9.7 million passengers and crew.

Overall, eight (8) of the twenty-two (22) Caribbean<sup>11</sup> destinations, listed in table 2 below, welcomed more than a million *cruise passengers* during the 2017/18 cruise year. The Bahamas headed this ‘*big eight*’ with three million (2,999.7 thousand) passengers, followed by Jamaica with 1.99 million and ending with Belize at 1.025 million. Barbados reported passenger arrivals of 730.9 thousand, placing it thirteenth on the list of Caribbean destinations, immediately behind St. Maarten<sup>12</sup> (896.2), Turks and Caicos (813.5), Aruba (812.8), and Antigua & Barbuda (790.2).

<sup>9</sup> CLIA, 2018

<sup>10</sup> Note that cruise visitors include passengers & crew, whereas cruise passengers do not include ships’ crews

<sup>11</sup> “Caribbean” in this context and, as used elsewhere in this document refers to the twenty-two (22) destinations, comprising the relevant English, Dutch, and French-speaking islands of the Caribbean, plus Belize and Puerto Rico.

<sup>12</sup> St. Maarten & USVI were seriously affected by hurricanes in 2017 and each recorded about one million fewer cruise passenger visits than normal.

**Table 2: Arrivals, Onshore Visits and Expenditures by Caribbean Destination  
2017/2018 Cruise Year<sup>13</sup>**

Destinations	Passenger Arrivals (Thousands)	Passenger Onshore Visits <sup>14</sup> (Thousands)	Average Spend per Passenger (US\$)	Total Passenger Expenditures (\$US Millions)
<i>Antigua &amp; Barbuda<sup>15</sup></i>	790.02	663.0	\$73.55	\$48.76
Aruba	812.8	677.0	\$121.94	\$82.55
<i>Bahamas</i>	2,999.7	2,444.8	\$131.95	\$322.57
<i>Barbados</i> ②	730.9	630.8	\$83.12	\$52.43
<i>Belize</i>	1,024.9	877.3	\$77.88	\$68.33
Bonaire	481.1	378.6	\$67.19	\$25.44
British Virgin Islands	140.8	124.9	\$78.11	\$9.75
Cayman Islands	1,855.5	1,636.5	\$105.17	\$172.12
Curacao	724.8	602.3	\$70.00	\$42.16
<i>Dominican Republic</i> ②	1,062.8	881.9	\$88.26	\$77.84
<i>Grenada</i>	343.6	298.3	\$51.57	\$15.38
Guadeloupe ②	417.1	396.2	\$100.29	\$39.73
<i>Jamaica</i> ②	1,988.8	1,773.2	\$115.98	\$205.66
Martinique ②	594.1	516.1	\$54.99	\$28.38
Puerto Rico ②	1,187.7	1,105.0	\$90.78	\$100.32
<i>St. Kitts &amp; Nevis</i>	1,120.8	978.5	\$135.94	\$133.02
<i>St. Lucia</i>	668.0	585.2	\$81.12	\$47.47
St. Maarten	896.2	784.2	\$142.23	\$111.54
<i>St. Vincent</i>	241.0	203.2	\$52.67	\$10.70
<i>Trinidad</i>	48.0	40.8	\$54.17	\$2.21
Turks and Caicos	813.5	699.6	\$95.51	\$66.82
U. S. Virgin Islands	1,115.7	943.9	\$165.42	\$156.14

<sup>13</sup> Adapted from the BRIA Oct. 2018 study. This table focuses on CARIFORUM countries & other Caribbean island destinations

<sup>14</sup> On shore visits refer to those cruise passengers, who actually disembarked cruise ships and visited the destinations

<sup>15</sup> CARIFORUM destinations are shown in italics

② The homeporting destinations are indicated by this symbol ②

### 2.2.1 Competition intensifies

*“Today’s cruise ships offer a world of innovations that build cruise lines’ brands – from sky-diving simulators, biking above the ocean and robotic bartenders to celebrity chef kitchens, butler service and all-suite staterooms – and facilities that accommodate family members of all generations<sup>16</sup> ..”* Cruise ships are continually striving to exceed the expectations of a growing number of travelers and ‘cruisers’ can easily find a ship, cabin, and itinerary to satisfy their requirements. Consequently, destinations within the Caribbean region, the Mediterranean, and the Pacific are also “*raising their game*” in order to meet or exceed cruise passenger expectations. *Barbados must take steps to keep pace or it will be left behind.*

For example, Jamaica is reportedly investing \$US 110 Million into the redevelopment of its Montego Bay Cruise Terminal facility. In Bahamas, cruise lines such as “Carnival, Royal Caribbean, Disney and MSC are completing negotiations for major developments that would mean hundreds of millions of dollars being invested over the next year or two.”

Cruise destinations across the region have committed to various enhancements to their cruise tourism offerings in order to capitalize on the potential benefits to be derived from the sector. In Barbados, policy makers recognize the need for investment in new port facilities. However, the proposed dedicated cruise terminal, Sugar Point, which has been just over the horizon for a few years, remains shrouded in uncertainty.

### 2.3 Cruise Passenger ‘spend’ in Barbados disappoints

*Barbados has been positioned in the “Southern Caribbean” together with the following eight (8) destinations: Aruba, Bonaire, Curacao, Grenada, Martinique, St. Lucia, St. Vincent, and Trinidad. This cruise itinerary is the worst performing in the C&LA region, averaging only 722,220 visitors (passengers & crew) per destination, compared to 1.45 million per “Eastern Caribbean” destination, 1.12 million per “Western Caribbean” destination; and 1.21 million per destination in Mexico. On the Southern Caribbean itinerary, only Aruba (1.13 million) and Barbados (1.06 million) received more than one million cruise visitors (passengers & crew) during the 2017/18 cruise year.*

Barbados experienced mixed fortunes during the recently-concluded 2017/18 cruise year. Cruise passenger arrivals reached 730,909, comprising 581,844 regular cruise passengers and 149,065 “homeporters” compared with the 674,160, comprising 554,400 regular and 119,760 “air-to-sea” passengers, who arrived in 2014/15. However, **average spend per transit cruise passenger** for 2017/18 was only US\$64.05 or 15.6% below the US\$75.85 recorded in 2014/15. The problem is underlined when it is considered that the 2014/15 per passenger spend was itself already well below the \$111.82 figure, achieved nine years earlier in the 2005/06 cruise year.

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<sup>16</sup> FCCA’s 2018 Cruise Industry Overview

*There are also indications that the perception of Barbados as a cruise tourism destination has slipped vis-à-vis other destinations in the region. Indeed, Barbados is now ranked 21<sup>st</sup> out of 36 with respect to overall shopping experience, 29<sup>th</sup> in terms of initial shore-side welcome, and 26<sup>th</sup> as it relates to satisfaction with overall prices.*

**Table 3: Spending by Transit & Homeporting passengers (\$US), 2017/18 cruise year**

<b>Expenditure Categories</b>	<b>Av. spend per transit passenger Across the region</b>	<b>Av. Spend per transit<sup>17</sup> passenger in Barbados</b>	<b>Av. Spend per Homeporting<sup>18</sup> passenger in B'dos</b>
Lodging	---	---	\$66.06
Shore excursions	\$24.26	\$22.25	\$34.65
Food & Bev. at restaurants & bars	\$7.44	\$5.05	\$7.20
Clothing	\$10.11	\$7.80	\$13.76
Local crafts & souvenirs	\$8.09	\$5.74	\$2.59
Taxis/Ground transportation	\$2.70	\$2.82	\$6.56
Other purchases	\$8.43	\$5.50	\$6.93
Watches & jewelry	\$34.21	\$12.13	---
Perfumes & cosmetics	\$0.95	\$0.12	\$1.06
Retail purchases of liquor	\$2.52	\$1.87	\$3.18
Entertainment/Night clubs	\$0.68	\$0.75	\$0.80
Telephone & internet	\$0.18	----	\$1.90
Electronics	\$0.10	--	\$0.10
<b>Total Av. spend per cruise passenger</b>	<b>\$99.69</b>	<b>\$64.04</b>	<b>\$144.78</b>

Despite an increased number of cruise visitors, the total regular cruise passenger spend in 17/18 was only US\$30.9M or a decline of US\$2.1M (6.4%) from the 2014/15 total of US\$33.0M.

<sup>17</sup> The 481,767 Transit passengers, who disembarked & visited Barbados during the 2017/18 cruise year, spent US\$30.9 million

<sup>18</sup> In the 2017/18 cruise year, the 149,065 homeporting or air-to-sea passengers, who started their cruise in Barbados, spent US\$21.6 million

On the other hand, the really good news with respect to the latest cruise year was the performance of homeporting. This category of cruise passengers recorded solid growth of 24.4% over the three-year period (advancing from 119,760 to 149,065) and there was a spectacular increase in the average spend per homeporting passenger, from US\$85.94 per person in 2014/15 to US\$144.78 in 2017/18.

In assessing these latest figures with respect to homeporters, we should be mindful of the impact of hurricanes on other cruise destinations in the region during the period under review. Indications are that the impact of hurricanes during the 2017 season, particularly on St. Maarten and USVI, drove additional homeport business to Barbados during 2017/18 and helped to stimulate the trial of extended stay business for Barbados during the same period. Nevertheless, the reality is that total **homeporting spend** in 2017/18 was US\$21.6M, a significant increase over the US\$10.3M recorded in 2014/2015.

## 2.4 Cruise Tourism's Economic Impact

Driven by the exceptional performance of homeporting, overall cruise tourism economic impact for 2017/18 was estimated at US\$71.0 million compared with US\$57.3 million in 2014/15. This reflects an accumulated increase of 23.9% over the three-year period. In terms of further economic impact, the US\$71.0 million is associated with 1,227 direct and approximately 2,351 indirect jobs in Barbados.

The economic benefits of cruise tourism to Barbados flow from three principal sources:

- 1) The expenditures by cruise passengers on tours to places of interest, visits to attractions, purchases of duty-free items, such as: jewelry, clothing etc. and purchases of souvenirs (local arts and craft);
- 2) The expenditures by ships' crews on food and beverages, local transportation, and duty-free purchases of clothing and electronics;
- 3) The expenditures by the cruise lines for port services (mainly navigation and utility services and taxes, such as: wharfage and dockage fees) and purchases of supplies, such as: food and beverages and other stores

Similar to other small economies in the region, cruise tourism is making a significant impact on economic activity in Barbados. More than fifty-five (55) per cent of the 1.4 million tourists, who visited the country in 2017, were cruise passengers.

The 630.8 thousand cruise passengers, who actually disembarked and visited Barbados during the 2017/18 cruise year, spent a total of US\$52.43 million. The resulting weighted average of US\$83.12 per passenger, even though it was boosted by the stellar performance of homeporters, was 18.1% below the regional weighted average.

**Table 4: Economic contribution of cruise tourism, by destination, 2017/18 cruise year<sup>19</sup>**

Destinations	Total Cruise Tourism Expenditures (\$US millions)	Total Employment	Total Employee Wage Income (\$US Millions)
<i>Antigua &amp; Barbuda<sup>20</sup></i>	\$77.74	1,466	\$14.41
Aruba	102.75	2,255	38.03
<i>Bahamas</i>	405.75	9,004	155.71
<b><i>Barbados</i> ②</b>	<b>71.03</b>	<b>2,351</b>	<b>25.36</b>
<i>Belize</i>	86.12	2,530	27.68
Bonaire	30.15	525	8.77
British Virgin Islands	12.63	234	4.33
Cayman Islands	224.54	4,622	92.24
Colombia	59.85	1,186	8.56
Costa Maya	89.54	2,081	13.45
Costa Rica	29.24	825	5.17
Cozumel	474.07	11,945	78.21
Curacao	71.73	1,106	20.73
<i>Dominican Republic</i> ②	134.72	4,052	17.43
Ensenada	40.39	1,016	7.69
<i>Grenada</i>	19.25	529	3.65
Guadeloupe ②	52.94	994	8.56
Guatemala	11.08	345	1.66
Honduras	107.36	2,198	11.61
<i>Jamaica</i> ②	244.53	8,293	56.57
Manzanillo	2.71	58	0.45
Mazatlan	15.87	420	2.56
Martinique ②	38.22	790	6.43
Nicaragua	5.70	323	0.96
Panama	77.75	1,827	12.65
Progreso	32.72	807	5.02
Puerto Rico ②	151.17	3,644	56.00
Puerto Chiapas	1.59	38	0.25
Puerto Vallarta	42.50	1,027	7.27
<i>St. Kitts &amp; Nevis</i>	149.28	2,065	17.64
<i>St. Lucia</i>	59.42	1,465	11.64
St. Maarten	143.24	3,499	72.34
<i>St. Vincent</i>	16.43	418	3.39
<i>Trinidad</i>	3.50	116	1.59
Turks and Caicos	86.47	1,461	26.76
U. S. Virgin Islands	184.69	3,439	77.89
Total – All destinations	\$3,356.65	78,954	\$902.68

<sup>19</sup> Adapted from the BRIA Oct. 2018 study.

<sup>20</sup> CARIFORUM countries are shown in italics

The expenditures by ships' crew, during the cruise year, totaled US\$6.94 million for the 127.8 thousand crew members, who disembarked and visited Barbados. The weighted average of US\$54.26 per crew member was significantly higher than the US\$40.2 recorded in 2014/15, but still only ranked 13<sup>th</sup> in the region and 10.2 % below the regional average.

*During the most recent cruise year, direct expenditures by cruise lines in Barbados totaled US\$11.7 million, which placed the island in 16<sup>th</sup> position among the thirty-six (36) C&LA destinations and fifth among the seven homeports in the region. Only the French islands of Guadeloupe and Martinique performed worse among homeports in the region.*

## **2.5 Essential and transformational interventions needed to overcome the principal challenges confronting cruise tourism in Barbados**

Some of the findings of the Commission with respect to the conditions and challenges, which contribute to the underperformance of the cruise sector in Barbados, were also identified, explicitly or implicitly, by the studies referred to earlier. These shortcomings and location-specific impediments, which have a negative impact on the competitiveness of the cruise sector were also identified by Daly, J. & Fernandez-St, K., in their August 2017 work for the Duke Global Value Chain Center, "Barbados in the Cruise Tourism Global Value Chain".

The principal challenges confronting the cruise sector in Barbados and the essential or transformational interventions proposed, include the following:

- (1) The aging and aesthetically limited Bridgetown cargo port has made a significant contribution to development of the cruise sector over the past four decades, but cruise has outgrown this facility.

*Barbados needs a dedicated cruise terminal. However, while we are waiting for a new cruise terminal to be constructed, there must be meaningful enhancements to every aspect of the cruise passenger experience – docking, transiting the Port, and exiting the Port by tour bus or taxi.*

- (2) After the shore-side welcome, Barbados' lowest performance in the 2017/18 BREA cruise passenger survey was associated with its shopping experiences. Barbados' ranking in the following areas is indicative of the problems - Courtesy of store employees 20<sup>th</sup> of the 36 destinations; quality of goods 18<sup>th</sup>; overall prices 26<sup>th</sup>; and overall shopping experience 21<sup>st</sup>.

*There have been repeated calls in recent months for Bridgetown stores to open for business on public holidays when cruise ships are in port. It is equally important that Bridgetown merchants, particularly those in the duty-free sector, improve the competitive of their products and the level of customer service in order to attract more cruise passenger business.*

- (3) The Pelican Village craft centre is not delivering. It is too inward-looking, uninviting, lifeless and lacking in creativity.

*The Commission recommends a radical overhaul of ambition, management, merchandising, and marketing in order to breathe new life into the moribund complex.*

- (4) Historic Bridgetown and its Garrison is the best kept UNESCO Heritage secret.

*It is time to work with tour operators, the taxi associations, the museums and other heritage attractions in maximising the opportunities for sharing this heritage site with the hundreds of thousands of cruise passengers, who flock to Barbados every year.*

- (5) Bridgetown is beginning to look like a weary, poorly maintained, and declining city (a product well past its sell by date)

*A visionary transformational approach is needed if Bridgetown is to become a truly 21<sup>st</sup> century smart city. This is envisaged in three phases – cleaning-up the city, establishing visitor centres and expanding the use of technology; introducing more traffic-free streets and water taxis; and delivering on transformational initiatives.*

- (6) The Oistins Bay Gardens is very popular with both visitors and locals, particularly on Friday and Saturday nights, but the area is in desperate need of serious rehabilitation. The complex looks dirty and poorly maintained.

*It is recommended that the refurbishment of Oistins Bay Gardens should be prioritized, but, as far as possible, the work should be done in phases in order to avoid a total shutdown of the complex.*

- (7) Across the C&LA cruise region, more than twenty-two per cent (22%) of homeporters are spending an average of two and a half pre &/or post hotel nights in the homeport. In Barbados, the figure is seven per cent (7%), who only spend one pre or post hotel night. Furthermore, in the 2017/18 cruise year, the average ‘spend’ per homeporter in Barbados was more than two and a quarter times the average ‘spend’ by a regular cruise passenger.

*Clearly Barbados has considerable scope to improve these numbers. It is recommended that Barbados should place much more of its business facilitating and promotion emphasis on increasing the number of “homeporting” cruise passengers as well as the extra nights they spend in Barbados.*

- (8) A persistent complaint from cruise line executives has been that there is not enough variety in the Barbados product offering of attractions. However, when cruise line executive visit the island on “familiarization trips”, they are moved to comment favourably on the number of attractions that they did not know existed.

*Barbados must do a better job in facilitating the emergence of new attractions and tour*

*operators and of promoting all of the “product” that can be made available to cruise passengers.*

- (9) Foster & Ince, a major player in the distribution of the cruise tourism product, has made an outstanding contribution to the development of the cruise industry in Barbados over the past forty plus years. However, their dominance in and control of the key aspects of the industry present a significant challenge for new small and medium-sized businesses interested in working with cruise lines.

*This situation raises questions about the level of competition, equal access to markets, and, of course, how best to foster “... the active participation and investment of small and medium-sized enterprises in the development and diversification of the local cruise sector”.*

- (10) Small and medium-sized Barbadian companies, seeking to enter the cruise tourism sector, often seem ill-prepared to engage with international partners and often complain about the onerous requirements. In the circumstances, it is not surprising that many of them fail to make a favourable impression.

*Barbadian SMEs need to raise their game in order to compete successfully in the cruise tourism sector. They must become more outward-looking, more engaging with international partners, and knowledgeable about how international business works. Barbadian small businesses need to fully understand the nuances of the cruise sector compared with conventional stay-over tourism.*

- (11) Barbados’ road network and the general physical environment – verges, parks and beaches – is in an embarrassingly poor condition.

*Barbados must execute urgently a sustained island-wide road rehabilitation programme and agencies, such as the NCC must do a much better job of maintaining the physical environment.*

*In chapter one of this Report, we outlined the context within which the National Cruise Development Commission (NCDC) was established. Chapter two allowed us to provide an overview of the underperformance of Barbados’ cruise sector in recent years, to review some of the challenges facing the sector, and to introduce some of the essential or transformational proposals to overcome the identified challenges.*

*Subsequent chapters of the Report will analyse some specific problem areas and propose alternative approaches or corrective actions. The Report will also consider some fundamental changes with respect to market segments; will underline the importance of facilitating the emergence of new ‘product’; and will assess the sector’s institutional framework in order to recommend some strategic adjustments.*

## 3.0 Barbados' Key Infrastructures Below Par

### 3.1 Port experience of cruise passengers visiting Barbados must be enhanced

The need for major expansion of the existing Bridgetown Port or the construction of a new dedicated Cruise Port and Terminal has been embraced by all cruise sector stakeholders and has been under serious consideration for a number of years. All parties seem to agree that any new Cruise Terminal should be located closer to the centre of Bridgetown, but there are some differences about the best location. *There are also concerns that incorporating a large purpose-built shopping facility in a Cruise Terminal within easy walking distance of the City Centre will be a major blow to retail business in the City and is likely to contribute to the eventual demise of Bridgetown.* Given the uncertainty surrounding Sugar Point et al, this Report will proceed on the basis that Barbados is still some years removed from any new Cruise Terminal. In the circumstances, the actions discussed below are relevant in enhancing the performance of the Port with respect to the handling of cruise ships and passengers, in the short to medium term.



The Port is critical to the Cruise sector. Indeed, one of the key requirements of cruise lines is an accessible port and a second major consideration is the availability of good facilities for handling passengers and a welcoming environment at the Port. In addition, beyond the infrastructural considerations, the arrival and disembarkation provide the first

opportunity to give the cruise passengers a warm welcome to Barbados. Indications are that the overall arrival experience for cruise passengers in the Barbados Port is below what is experienced in most other Ports in the region.

The BTPA's 2016 Cruise Sector Audit cited this issue by referring to a comment from a cruise line executive that "in Grenada, guests always speak about the warm welcome they receive at the gangway....." and observing that Barbados' welcome does not measure-up to that desired visitor experience.

There have been other negative comments about the first impression conveyed by the Port and, in the 2017/18 BRIA study, Barbados was ranked only 29<sup>th</sup> out of 36 Caribbean & Latin American destinations in terms of passenger satisfaction in response to the question "How satisfied were you with your initial shore-side welcome?" .

The management team at the Port appreciates the need for change and steps are being taken to address some of the issues. However, as we begin a new calendar year, more urgency should be brought to the amelioration of these problem areas, particularly the low-key shore-side welcome, the dangerous-looking simultaneous movement of pedestrians and vehicles/equipment in the Port, and the challenging tour bus and taxis dispatch areas.

Some of the initiatives discussed below might seem basic, but if such simple steps are going to make a cruise line and the three or four thousand passengers arriving in Barbados aboard each of its ships happy, the Commission recommends that Barbados should embrace the “*simple but effective*”.

**First**, the *dock/shore-side welcome*, both the built and personal aspects need a major upgrade. With respect to the built aspect, the use of murals to beautify the doors on the water side of shed three (3) reflects some progress since 2016. However, shed three (3) can also be freshened-up internally and on the land-side (to improve the Port welcome as well as Immigration & Customs processing ambiance for Air-to-sea cruise passengers/Homeporters).

Shed two (2), which all arriving cruise passengers can see close-up on their way to the Cruise Terminal, needs to be similarly decorated. There have been some observations about the high cost of murals, such as those placed on shed three (3). *In the circumstances, perhaps consideration should be given to using pictorial advertisements of key tourists attractions (Harrison’s cave, changing of the guard at the Garrison in their zouave uniforms, Parliament buildings, a beach scene, one of the gardens etc.,). In other words, the Port might be able to earn some advertising revenue and at the same time secure the desired decoration of the doors to its sheds.*

In terms of the personal aspect, a welcoming interactive approach is needed. For example, perhaps a small steel pan band or tuk band (attired in colourful matching outfits), plus 4 or 5 stilt walkers (also in colourful outfits), and a few individuals (male & female colourfully attired and looking happy) on a platform behind the steel pan band supporting a banner, which reads “*Welcome to Barbados*”. The idea is to present a welcoming picture, characterized by fun, infectious music, bold colours and a ‘*we are happy to welcome you to our shores*’ ambiance.

**Second**, there is a need for *Improved Signage* throughout the Port & Cruise terminal as well as on Trevor’s way. My understanding is that the Port is installing new standardized signage, some of which is now in place and the remainder will be installed as soon as they are delivered by the local manufacturer. The new signs will use English, plus easily-recognised international symbols.

**Third,** the Port needs to have appropriate arrangements for the safe *movement of cruise passengers*, throughout the Port. There should be a clearly-spelt out regime, incorporating procedures for regulating vehicular and pedestrian movements to ensure that the two do not come into conflict. This regime should be shared and discussed, as necessary, with all relevant parties to ensure that everyone involved understands what is expected. In addition, adequate transportation, including vehicles specially-equipped for the differently-abled, should be available to move passengers from the Breakwater or other distant berths to the Cruise Terminal.

Port management has indicated that this area of concern is being addressed and a number of trams have already been acquired to transport passengers. However, the trams have not yet been commissioned and therefore are not in service. In other words, the Port is still relying on the inadequate bus fleet to transport cruise passengers across the Port.

**Fourth,** Creating *branding/marketing opportunities* – Deliberate efforts should be made to place “*Welcome to Barbados*” signs and related images strategically in positions where cruise passengers might be motivated to take selfies and other photos to post on their various social media platforms showing friends and relatives that they are *in Barbados*. This simple action can help to brand and market Barbados as a welcoming destination for visitors.

**Fifth, the Tour Bus Dispatch area** - The area reserved for tour buses to pick-up cruise passengers needs proper organization. When the area was used, on a regular basis, by only one or two tour operators, the process could have been virtually self-managed.

However, a number of additional tour companies and entities marketing attractions have now applied for and been granted permission to pick-up passengers from the Cruise Terminal. With the additional tour companies and buses to be accommodated, the process has not been working as it should. One of the new players, after complaining verbally on a few occasions, wrote recently to complain that more than once already this season her ‘pick-up’ operation has been compromised because two of the four bus bays, assigned to her company, were occupied by a rival tour company. This is a problem, which is having a negative impact, not only on current activity at the loading bays, but also potentially on the willingness and ability of other tour operators to offer services to cruise ships and their passengers.

Port management acknowledges the problem and is working on a solution, but challenges remain and a fully workable solution must be developed, discussed with the applicable stakeholders, and implemented with some urgency. The *status quo* is neither desirable nor sustainable and this matter will not resolve itself to the betterment of Barbados.

### Proposed tour bus dispatch system

The Port/Cruise Terminal must take charge of the tour bus dispatch arrangements and introduce a new regime, which takes into consideration the reality of greater demand and a larger number of ‘players’. Some options for consideration include:

- ✚ Instituting a scheduling system with a particular bus bay or bays assigned to “Operator ‘A’ or ‘B’ for a pick-up at a given time (i.e. 9.00 a.m.) and departure by a certain time (i.e. 9.30 a.m.). This type of scheduling works at busy airports and bus terminals around the world.
- ✚ The Tour Operators would be required to schedule their pick-ups and share their schedule with the applicable Port Manager well in advance in order to facilitate any necessary adjustments, where pick-up times might conflict.
- ✚ Tour operators would be required to keep their buses in a “holding area” close to the Cruise Terminal and only approach the loading bays at their scheduled pick-up times.
- ✚ A holding area could be designated within the Port compound, if possible & practical given space and security considerations. If not, on some of the vacant land in the BIDC industrial park, immediately outside of the Port.
- ✚ A proper PA system (it must be audible in the cruise terminal & the tour dispatch area) should be introduced to announce the departure of each tour, 15 minutes before scheduled departure and at departure time. This would require each tour to be identifiable by those visitors taking that particular tour and, of course, by the tour operator representative responsible for boarding the tour.
- ✚ Tour operators would be prohibited from “parking” their buses in the pick-up area during busy pick-up and drop-off times, except when they are making scheduled pick-ups or drop-offs.

*The proposed system, like all systems with a number of moving parts, requires discipline, cooperation, and conformity to the agreed rules. The system should include a contractual “code of conduct” and enforceable obligations on both sides. The arrangements should be discussed at meetings with all of the tour operators (perhaps two or three meetings to address concerns and agree on any necessary operational adjustments). Most importantly, the new regime must be enforced even-handedly and there must be penalties for violators.*

### Proposed Taxi dispatch system

The arrangements for taxis picking-up passengers are even more contentious than those for tour buses. Although a “dispatch system”, which had been developed primarily by the taxi associations, has been in place for sometime and was supposedly governed by a code of practice, the code is not followed. Infractions are common and every rule is routinely broken with impunity. Consequently, there is no semblance of order.

Many of the taxi operators also complain that the Associations' executives take the best jobs for themselves and give them the "leftovers". One regular port taxi operator stated: *"I respect the rules, but if the executives are going to go past the line and get the best work then I have to go past the line too, to get work. If I wait for what they leave back, I get the scraps. I have no choice but to break the line too"*.

Taxi operators who seek to abide by the code of practice often come into conflict with those who ignore the rules and solicit jobs outside of the system. This 'hustling' often encourages cruise passengers to congregate or walk about in the road in order to negotiate their tour. Clearly this raises safety concerns and if anyone of these passengers is struck by a vehicle, the Port would be liable.

The letter, reproduced below, was sent to Port management by one of the cruise lines in January 2018. It should be evident that the type of behavior referred to in the letter will have a negative impact on visitor perception of Barbados. The letter reads:

*" Good afternoon ?????,*

*May we ask for your assistance in relaying some observations from our guests to the local port authorities pertaining to the taxis inside the pier yesterday.*

*The taxi drivers inside the pier were quite aggressive, not directly to our guests, However amongst each other.*

*They were fighting over passengers and at some point became physical with each other making our guests feel unsafe and scared.*

*We are not sure if there is only 1 taxi company or taxi union who is allowed to access the pier, however they seem to be in tight competition for getting passengers*

*Best Regards"*

The cruise line further indicated that their passengers were so terrified by the aggression of the taxi drivers in the Cruise Terminal's courtyard that they cancelled their plans for touring and returned to the vessel. Therefore, the passengers never left the Port and never even had the opportunity to spend any money in Barbados. ***We do not know who or what benefitted from this incident, but we are certain that Barbados did not benefit.***

The letter above is one of a number of reports about taxis drivers quarreling (even sometimes physical altercations) with each other and generally confusing &/or terrifying visitors. This type of behavior must remain in the past. **The political directorate, Port management, and the taxi associations must all stand firm against such unruly behavior. Responsible leaders (public or private sector) simply cannot justify 'aiding and abetting' or 'turning a blind eye' while a recalcitrant and selfish minority destroys the integrity of an entire sector.**

In the circumstances, the Port feels obliged to introduce a new system. However, the two taxis associations, with permission to operate in the Port, are not happy with the proposed new dispatch arrangements. Port management and the Associations have been engaged in a “back-and-forth” over the past few weeks, during and between structured meetings, with each side blaming the other for perceived shortcomings in the system. The two sides continue to exchange views on the new dispatch system and it is hoped that they will soon find a mutually-acceptable arrangement.

The previous system, featuring multiple taxi lines, seems unnecessarily complicated to administer and prone to abuse. A simple system with one line and controlled by independent dispatchers might be the best arrangement. In the circumstances, the following system is proposed for consideration.

There should be **one (1) dispatch line**, regulated by Taxi Dispatchers. Over time, the laws of probability will distribute short, intermediate & long trips. There should be provision that when there are parties of 4/5 or more, the closest maxi-taxi in the cue will be called forward to take that trip. Alternately, there could be a separate line reserved only for maxi-taxis.

- 1) There should be a contractual arrangement between the Port and the Taxi Associations authorized to work in the Port and the contract should include a "Code of conduct", which should be approved by both the Port & the taxi associations.
- 2) The code of conduct should comprise obligations on both sides and **must** include enforceable penalties and these penalties **must** be enforced impartially (**there should be no doubt in anyone's mind about the consequences for violating the agreed code of conduct**).
- 3) In addition to the obligations of individual taxi operators, the taxi associations should also be subject to evaluation and penalties when the associations do not fulfill their responsibilities.
- 4) The Port should also consider going out to tender, perhaps every three or five years, provided other interested taxi associations can satisfy the operating criteria stipulated by the Port.

Port management and the Taxi Associations need to develop and try a new dispatch system ‘*in good faith*’. The arrangement should provide for periodic reviews and discussion about any necessary adjustments, based on actual empirical evidence of what is working and what needs to be modified.

***While some of the problem areas mentioned above may be cumulatively important, they seem rather cosmetic when compared to the continuing problems in the Tour Bus and Taxis Dispatch areas. Taking control of and properly managing the two dispatch areas is a challenge that must be addressed urgently because it has the potential to damage seriously the perception of Barbados as a welcoming, well-regulated and orderly society. It could also have***

*the impact of dissuading new and innovative entrepreneurs from offering services to the cruise sector because they become completely “turned-off” by the chaos.*

**Port entrance & exit** – The process of entering and exiting the Port’s main gate seems unnecessarily slow, whimsical and prone to bottlenecks. The problem seems to revolve around the capacity to deploy an adequate number of Customs & Immigration officers in a timely manner. This is an irritant, which can easily be addressed if and when those responsible decide to solve the problem.

In addition to the need to deploy additional Customs & Immigration officers when three/four/five cruise ships are in Port, there seems to be issues of consistency. One tour operator reports that their tour was recently leaving the Port with a load of passengers and scuba gear, when they were required to return to the Terminal to secure a clearance form for the equipment. This was a surprise and an inconvenience (a 40-minute delay) because they had previously offered and delivered golfing and scuba diving tours without any problems.

We are not at all questioning the right of the persons controlling the gate to ask for a clearance form, if one is required. Our concern is with clarity and consistency. If a form is required, this information should be communicated to the tour operators and it would be their responsibility to ensure they have the form. If the form is demanded by some persons manning the gate and not by others, that is also a problem. There should be established procedures, which are clearly communicated to those transacting business in the Port. In this way, there is no uncertainty or confusion about what is required. This is a fundamental, first step, in implementing best practice.

It is not far-fetched to imagine this simple incident leading to a cruise line becoming skeptical about the capacity of the new tour operator to handle their business or about their passengers having good experience in Barbados. Then we wonder why we are falling behind our competition. Barbados is considered to be a well-established premier destination, we must live-up to those standards.

***Chaotic scene in front of Port exit*** - The congregation of taxis and drivers outside of the main entrance/exit of the Port is another problem that should be addressed sooner rather than later. The large number of taxis in front of the exit tend to obstruct the flow of traffic and presents a chaotic spectacle. In addition, in their quest to secure business, the drivers often aggressively solicit visitors and the verbal exchanges between drivers can be boisterous. This scene can be intimidating for visitors, particularly elderly persons who are unaccustomed to travel in the Caribbean.

Port management is working on a solution, which would limit the number of taxis parked in front of the Port exit and the majority would be parked in a holding area close to the Port. The Commission supports this approach to regulating the large number of taxis, which previously were stationed at the main exit from the Port. It is hoped that steps can also be taken to curb the aggressive solicitation by the taxi drivers – six drivers jostling each other and shouting at visitors

can also have a serious negative impact on visitors' comfort level and their perception of the destination.

***Lighting & maintenance of Trevor's way.*** As we get more into homeporting & ships remaining in Port for late night sailings. Lighting comes more into focus. Women have commented that they would not walk on Trevor's way after dark and observed that the area looked too dark and dangerous for cruise passengers to be walking in that area at night.

In reality, the lighting on Trevor's Way is oriented towards the main road, Princess Alice Highway, so that someone standing or crouching away from the road and trying to avoid being seen could be difficult to detect.

There have also been observations about the unsatisfactory maintenance of Trevor's Way. Given that cruise passengers walking out of the Port inevitably walk on Trevor's Way, every effort should be made to ensure that it can be seen as a creatively-presented, well-maintained, and verdant area.

### **3.2 The 'pilot project' re cruise ships berthing on the West Coast should be expedited**

In recent months, shipping agency representatives and tourism officials have been approached by a number of cruise lines, which operate smaller "high-end" cruise ships, about the possibility of a berthing location in a more exotic location, away from the Bridgetown Port.

Discussions with the interested cruise lines, in conjunction with the Bridgetown Port and the BTMI, have resulted in the identification of both Holetown and Speightstown as possible anchorage locations on the west coast. However, tangible progress has been painfully slow and no agency seems ready to take charge of the matter, determine what needs to be done, and move the process forward to a resolution.

Nevertheless, in December 2018, a team from one of the interested cruise lines came to Barbados for a site visit on the west coast. Speightstown seems to be the preferred location and the findings of the cruise line's team may be summarized as follows:

- A direct beach landing with "beachers/launches" seems difficult because of the number of rocks on nearby beaches and the fact that the launch's engine is below water level;
- The beaches in the area are small and poorly maintained (they are dirty and do not compare favourably with beaches in with other Caribbean destinations).
- A tendering operation using the jetty is not possible, at this time, because the jetty is damaged;
- If it is decided to repair the jetty, it will still be necessary to provide some type of '*step up and step down*' to facilitate the disembarkation and embarkation of passengers because of the height of the jetty compared with the low platform of the "beachers"; and

- If Government is interested in exploring the potential of the destination, we (the cruise line's technical staff) will be more than pleased to assist.

Given the lack of urgency with which government agencies seem to be handling this matter, the relevant cruise lines might already be wondering whether Barbados is really interested in facilitating this option.

*If it has been decided that Barbados should not enable the anchoring and landing of cruise ships on the West Coast, this information should be communicated to the cruise lines without undue delay – stringing along serious business persons is always a bad idea.* On the other hand, if it is thought that this initiative is likely to benefit the cruise tourism sector in Barbados, some individual or entity needs to take the lead in making it happen.

The 'anchoring and tendering' approach, which would have to be used for a west coast landing, is itself not a problem for the applicable cruise lines and their passengers. These small luxury ships, which habitually go into more unusual bays or landing areas, have their own landing craft (beachers/zodiacs) which they use to ferry their passengers from the anchored ships to the onshore landing area.

**Figure 3: A typical 'beacher' on the beach at Speightstown. Note the low boarding platform**



A Hometown/Speightstown landing area would be perfect for these smaller luxury ships, carrying hundreds rather than thousands of passengers (usually only a few hundred). This initiative could be a good opportunity to expose the north of the island and create much-needed economic activity in the greater Speightstown and Hometown areas. In addition, attractions such as the Animal Flower Cave, River Bay, Cherry Tree Hill, St.Nicholas Abbey, East Coast Road etc. would become more readily accessible to cruise passengers, who are on the island for only a few hours.

Given that a west coast landing could possibly be accommodated, on an interim basis (pilot project), with very little infrastructural work, it is recommended that every effort should be made to take advantage of this opportunity. If Barbados is able to use this “pilot phase” to demonstrate that a West Coast anchorage can work well, both for the cruise lines and for public and private sector stakeholders in Barbados, the relevant cruise lines might be persuaded to plan more West Coast landings for the coming seasons. In addition, other cruise lines might also be influenced to take their smaller ships to the Holetown/Speightstown area.

**Figure 4: Broken jetty at Speightstown. Repaired jetty would be useful to both locals & visitors**



*The real concern with respect to this matter is the seeming level of uncertainty about how best to proceed and the concomitant inaction. If Barbados is unable or unwilling to demonstrate the level of interest and degree flexibility to satisfy a relatively straightforward customer request, there is the possibility that the cruise lines will find another destination, which is more customer-friendly, service-oriented and willing to act with a sense of urgency when the situation demands.*

### **3.3 GAIA needs to plan for the increasing air-to-sea demand**

One might wonder about the GAIA’s connection to cruise tourism. The answer lies in homeporting (the air-to-sea transfer). One of the important aspects of homeporting is the logistics arrangements for handling arriving and departing air-to-sea cruise passengers. The current provisions for arriving passengers seem to work satisfactorily with the passengers arriving by charter, being met on the tarmac, and transported directly to a check-in facility in

Shed 3 at the Bridgetown Port. However, there are indications that the available transportation equipment is already stretched to properly service this arrangement.

In the circumstances, GAIA will need to develop a regime that will enable it to handle larger numbers satisfactorily as we pursue a strategy of growing the more lucrative homeporting aspect of cruise tourism. The most appropriate arrangement might necessitate the scheduling of air-to-sea arrivals to ensure that the system can comfortably handle the increased numbers. In an ideal scenario, some homeporters would arrive on island three or four days before sailing, others would arrive two or three days before etc.

Unlike the arriving air-to-sea passengers, the departing homeporters have been facing long lines to clear security checks at the airport and a crowded Departure Hall in which to await the boarding call for their flights, particularly on weekends. The recent elimination of outbound immigration has enabled the airport to install additional security screening positions to facilitate departing passengers. A new departure area (gates 14 – 22) was opened in January, specifically to accommodate cruise passengers. These arrangements represent a step in the right direction and should improve the airport transit experience of departing cruise passengers.

The question of sufficient capacity to handle satisfactorily the number of cruise passengers is already a concern and the situation will be exacerbated as homeporting expands. In the circumstances, as discussed earlier with respect to arrivals, the most practical arrangement might necessitate the scheduling of departures in a phased manner.

### **3.4 Visitor centres, information kiosks & public toilets needed**

Public toilet facilities throughout the island are often either inadequate in number or in a state of disrepair or are closed without notice. Non-existent or broken hand driers – malfunctioning taps – missing toilet tissue – broken or missing toilet seat covers – unsanitary facilities. These are some of the problems with public toilet facilities across the island, from Bridgetown to Ragged Point and everywhere in between.

In 21<sup>st</sup> century Barbados, there must be adequate public toilet facilities at the following places, *inter alia*:

- In Bridgetown, Holetown, Speightstown, and Oistins;
- At major bus terminals in Bridgetown and elsewhere;
- In shopping malls and other major shopping or entertainment venues; and
- At visitor centres, heavily-trafficked public beaches and popular attractions

There is also a need to provide satellite locations on roads which are normally used by tour buses, taxis, self-driven visitors, and sight-seeing Barbadians. These visitor centres would be convenient locations where visitors can seek information, purchase maps, take a refreshment

break, and acquire authentic Barbadian souvenirs. In addition, the centres and their toilets must be designed to accommodate the '*differently-abled*', who are taking cruises in increasing numbers.

### 3.5 Road infrastructure, sidewalks & overall physical environment must be addressed

The lack of adequate infrastructure often prevents cruise passengers from visiting interesting tourist attractions or landmarks. Therefore, it is important to have good transport connections between the Cruise Terminal and important heritage sites or other attractions. In theory Barbados should not have concerns about easy road access to any attraction, but in reality, roads across the island are in such a state of disrepair that it is now a valid question to ask about vehicular access. *Barbados needs a serious and sustained road rehabilitation programme. Merely patching the occasional street will not do.*

**Figure 5: Derelict vehicle beside the road in Christ Church, Nov. 2018**



Associated with road rehabilitation is the issue of overall maintenance of the environment. There is bush everywhere and, in some areas, uncontrolled shrubbery covers significant portions of the roadway. Abandoned vehicles litter the roadside and it has been reported that some cruise passengers, particularly Europeans, wonder why there is so much debris and uncollected garbage

by the roadside. The verges and other greenery, which are intended to help beautify and “soften” the roadside, have been allowed to get out-of-control. The NCC needs to make a serious effort to regain control of the environment.

**Figure 6: This stop sign is barely visible behind overgrown roadside bush in Christ Church**



### **3.6 Transport vehicles must be subject to minimum standards**

Tour buses in Barbados are usually maintained in relatively good condition. Nevertheless, as steps are taken to establish and enforce minimum standards throughout the cruise tourism sector, appropriate standards should be put in place with respect to vehicles providing transportation services to the tourism market.

Taking into consideration the importance of visitor safety and the requisite high level of liability insurance cover, certain standards should be mandatory for tour buses and taxis. These vehicles should be subjected to annual inspections to ensure that they are sound mechanically and that bodywork and upholstery are in good condition.

In addition, tour buses should be appropriately equipped with properly-functioning public address systems as well as video systems and screens. The video systems could be used to enhance the visitor experience, by showing images of popular attractions, amazing Barbadian scenery etc.

## **4.0 It is time to restore Pelican Village, Bridgetown, & Oistins**

### **4.1 A New Lease on Life for Pelican Craft Centre**

The Pelican Craft Centre, which is adjacent to Trevor's Way, is floundering under the burden of numerous shortcomings. The first problem is the lack of proper signage - directional, promotional, or interpretative. As an example, there is a sign, just off the roundabout by the exit from the Port. The sign is promoting "Pelican Centre", but there is no indication that indigenous arts and craft are being sold in this 'centre'. The sign advertises 'Fine Food', 'Great gifts' and 'Free Wifi'. Unfortunately, the word "craft" does not appear anywhere on the sign - this is not a suitable sign to advertise the island's largest craft centre, particularly one that already suffers from an identity crisis.

In addition to the signage issue, the Pelican Craft Centre also has the appearance of a "block of offices" rather than a vibrant location marketing a range of local arts and craft. There is no activity and no visible evidence from the main road (Princess Alice Highway) or Trevor's Way that this complex is a centre of arts and craft production and/or sale. Consequently, the centre neither appeals to nor attracts cruise passengers or Barbadians, who usually go pass the centre on their way to and from Bridgetown.

There have been many negative comments about the Pelican Craft Centre complex, including that it is a waste of prime real estate, which could be used more productively. Even Barbadians complain that they do not know what goes on in the complex. The reality is that there is little effective advertising either locally or to cruise passengers.

The situation in Pelican is exacerbated by the fact that, on the one hand, many of the tenants are making few sales and have not been paying their rent. On the other hand, the landlord (BIDC) thinks that the tenants are not trying hard enough to make sales and to pay their rent. Persons on both sides of this divide are gloomy and pessimistic.

Pelican craft centre must address the following three major challenges:

- 1) The need to get the attention and arouse the curiosity of cruise passengers and others traversing Trevor's Way;
- 2) The need to attract passersby and others to come into the Pelican Village shops to see what is being sold; and
- 3) The need to motivate those who come into the craft center to purchase locally-made items.

Pelican craft centre requires a complete re-think if it is going to confront these three challenges satisfactorily. In the past, merely tinkering has failed to produce the desired outcome. Therefore, the following initiatives are recommended for implementation over the short and medium terms:

**Figure 7: What is this sign advertising? What is Pelican Centre?**



### Strategic decision

The question has been raised by more than one person in recent weeks and, in the margins of the recent Pelican Town Hall meeting, about whether the BIDC is still the best institution to manage the Pelican Craft Centre. BIDC has contributed immeasurably to the development of the craft sector in Barbados, but the present relationship between the tenants in Pelican and the management of the craft centre (BIDC) is far from good. Neither side has much confidence or trust in the other and this toxic relationship should not be allowed to continue. In the circumstances, consideration should be given to the installation of new management. The possibility might also be explored of a management contract with a private sector entity (Government would determine the fundamental operating principles – a minimum percentage of the shops must be selling local arts & craft etc.)

Meanwhile, regardless of the arrangements for the future management of Pelican Craft Centre, the following are a few recommendations that could be and should be implemented immediately in order to capture some of the 2018/19 season's business.

**Maintenance** – Pelican craft centre is beginning to look *in need of preventative maintenance*. The complex should be repainted; murals could be placed on selected walls; some tiles in the court yard have risen-up and should be properly reinstalled; and the fountains, which currently look abandoned, should be brought back to life. This type of maintenance work should be done in order to give the property a lift and also to arrest further deterioration.

**Rent moratorium/forgiveness** – Given the current situation, there might be merit in a new beginning. Assess the seriousness and capability of all tenants with rent arrears. Convert overdue rent into equity or deferred payments – introduce a one-month moratorium on rent payments while both management & the tenants prepare for a new regime – New leases should be introduced to set out properly the responsibilities of management and tenants, with the clear understanding that the obligations, on either side, will be enforced.

To get people's attention & attract them into Pelican Craft Centre

**Signage** – A new series of bold, attention-getting, and unambiguous signs should be erected in the Cruise Terminal (if possible), at the exit to the Port, on Trevor's Way across from the craft centre and pointing towards the craft complex, and on the craft centre itself but facing out towards Princess Alice highway. For example, the sign outside of the Port exit might be re-made to read:

## **Pelican Craft Centre**

Local Arts & Craft

Great Souvenirs

Free Wifi

*There is also the potential to introduce interpretive signage, linking Pelican Village to Pelican Island and the Deep Water Harbour.*

**Advertising** – The management of Pelican Craft Centre should execute an online marketing campaign, positioned to reach persons booked on cruise ships sailing to Barbados and visitors or locals looking for local arts and craft. There should also be selected TV and radio advertising in Barbados to attract locals.

**Shuttle service** – Pelican Craft Centre is a short walk from the Cruise Terminal for those cruise passengers who enjoy walking, but would be a long walk for those, who really don't want to do any walking or whose mobility is constrained. At present, there is a shuttle service between the Cruise Terminal and the city centre. The possibility could be explored of incorporating a stop at the Pelican Craft Centre into that shuttle service.

**Entertainment** - When cruise ships are in Port (day and/or late night departures) and at other special occasions (Crop over, Independence, Christmas etc.), the Craft Centre should organize modest, but colourful entertainment packages ( chosen from small steel pan bands, stilt walkers, Tuk bands, Mother Sally etc.) around the gazebo area and on the lawn beside Princess Alice Highway.

To motivate cruise passengers & others to purchase

**Open market** – The lawn looking out towards Trevor’s Way, around the gazebo, and the area along the artist wall should become an “open air craft market” when cruise ships are in Port. Large umbrella assemblies could be used to protect vendors & their customers from the sun. *Above all else, vendors must leave their “closed Units” and come outside to interact with the visitors in a friendly and engaging manner.*

**Customer experiences** – Management of the craft centre, together with the tenants, should arrange a number of interactive craft production experiences, where cruise passengers and others would have the opportunity to experience the production of wood work, straw work, jewelry design, leather craft, glass blowing, pottery making and the like - from preparation of the raw material through the various stages of the process to delivery of the final product - examples of which would be beautifully displayed and available for purchase.

**Product development** – Many of the craft items now available for sale in Pelican Craft Centre and elsewhere on the island are either also available in other Caribbean islands (often at lower prices) and/or imported from extra-regional sources. The craft vendors in Barbados need to pay more attention to new product design with a view towards developing a range of “Authentic Barbadian souvenirs”, which would be different from what is being sold elsewhere in the region. Pelican Craft Centre, as the island’s premier location for craft items, should lead this movement into the creation and sale of more authentic Barbadian arts and craft. BIDC has a design centre, which could work with craft producers to design a range of souvenirs that represent uniquely Barbadian objects and which can realistically be produced commercially.

#### **4.2 Historic Bridgetown and its Garrison must be promoted more effectively**

Barbados must make a serious effort to protect and effectively promote “***Historic Bridgetown and its Garrison (an UNESCO World Heritage Site)***”. For reasons that remain a mystery, this UNESCO World Heritage Site (with all of its varied heritage attractions) has been largely ignored as an area to which cruise passengers should be exposed. On the contrary, the achievement of an UNESCO World Heritage designation should be celebrated and promoted with interpretive signage and enlightening tours to enhance the experiences of our visitors.

Every effort must be made to package and promote this World Heritage Site effectively. In addition, there are a number of individual attractions, such as: the Museum of Parliament, Exchange Museum, Jewish Synagogue, and Dinner with George come to mind as examples of attractions/experiences that seem to be under-promoted and under-utilized.

**Figure 8: Parliament Buildings, Bridgetown**



From St. Mary's Church through the city centre, along Bay street, and onto the Garrison. This entire area needs proper interpretive signage; restoration must be encouraged and incentivized; historic buildings need to be protected by appropriate legislation; penalties for violating the related legislation should be severe and applied to any and all violators.

A BTMI cruise division, with a clear mandate to be more facilitating, would work closely with tour operators and taxi associations in packaging and promoting tours to showcase the many interesting attractions within Bridgetown and its Garrison. We need to visualize and work towards the reality of a 14-seater maxi-taxi, driven by a trained and engaging driver, setting-out on a "Heritage City Tour", with stops at an awakened Pelican Craft Centre, Museum of Parliament, Exchange Museum, Jewish Synagogue, a properly-developed Rihanna Drive (a phase 2 project), George Washington House and the tunnels, the changing of the guard (attired in Zouave uniforms) at St. Ann's Fort, a light Bajan-oriented lunch somewhere on Bay street or around the Careenage, shopping on Broad street.

**Figure 9: Changing of the sentry at the Main Guard, St. Ann's Fort**



This is merely an idea, tours could be/should be packaged differently by different tour operators and might have different add-ons (stop at a beach, at the Screw Dock, Mt. Gay Rum Tour, a drive up to Gun Hill Signal Station etc.) and the sequencing of stops would need to be worked-out for maximum efficiency.

*Meanwhile, the BTMI, in cooperation with the Port, has been working recently with the two taxi associations which operate from the Port to put together a tour package incorporating the above-mentioned museums. In addition, the Commission's Attractions Committee has been assisting the Museum of Parliament and the Exchange Museum in preparing to launch a "Heritage Museum Passport", which might also involve the Jewish Synagogue and George Washington House.*

### **4.3 Bridgetown re-imagined**

Bridgetown, as a city, has lost her soul. We must resuscitate her and bring her back to life in order to encourage, not only visitors but also Barbadian residents to return to the city after the sun has gone down and the stars have come out.

It is proposed that this should be done in three phases. The first phase would cover those things, which can and should be done immediately, the second phase would look at the medium term, and the third phase would address the long term transformation of our capital city.

#### Bridgetown Phase one

**First,** Bridgetown needs a more effective sanitation service (public, private, or a combination). The streets of the city always seem to have garbage about, as a result of uncollected trash or overflowing bins, and there are reports that rats are rampant in the city.

- The sanitation service should meet with businesses in Bridgetown and work out an implementable arrangement for effective garbage removal. This could include the use of private garbage collection by those businesses, which generate large volumes of garbage;
- More and larger trash receptacles are needed throughout Bridgetown. The cans could have covers and removable bags, which should be replaced periodically during business days. However, given environmental concerns, rather than using plastic bags, a system of rotating garbage cans can be employed with the cans being rotated periodically and the full cans taken to a central collection point to be emptied into a waiting truck. This garbage removal process would be accomplished by deploying persons with small push carts, in order to avoid the dislocation that would result from the deployment of regular garbage trucks in the City during the work day.
- Box Drains/ Open Gutters and the like must be cleaned and kept cleared of trash at all times. The smell emanating from dirty blocked drains can be offensive and off-putting to Barbadians and visitors alike, particularly if they are in front of or close to restaurants and other places selling food.
- In view of the extent of the rodent problem in the City, there is need for an unrelenting effort to rid the city of rats or, more realistically, to reduce the problem significantly.
- Unsightly Graffiti should be removed from walls and it should be an offense to paint graffiti on walls, stick advertisements and posters randomly on street light poles or the sides of buildings.

**Second,** Bridgetown needs public toilet facilities. The long term solution probably involves the provision of a few strategically-placed Visitor Centers, comprising information kiosks, attended toilet facilities, basic refreshments, and space for selling local arts & craft. The cost of these Centres might be shared between Government and the private sector and consideration should be given to charging a small ‘user’ fee to help meet the cost of manning and maintaining the toilets.

**Third,** The Careenage/Constitution river, which was cleaned recently, now presents a more agreeable appearance and smell. There should be a structured maintenance programme to remove trash and other debris and try to maintain the condition of Bridgetown's only waterway. Indeed, the recently-dredged river might even be used for transporting visitors, in small motor launches, from the Port into the City centre or 'up river' as far as Queens Park.

*Meanwhile, the Commission has learnt that there is an IDB-funded "National Tourism Programme" to reinvigorate the tourism industry and the programme's first phase includes the establishment of a major Visitor Centre, probably in the Old Town Hall building, and the development of a "Tourist Urban Route" in Historic Bridgetown.*

*The Commission envisages that its recommendations concerning the placement of information kiosks, craft outlets, and associated public toilets will complement and build upon the IDB-funded project. It is hoped that the IDB-funded Visitor Centre will stimulate private sector initiatives to establish a number of "satellite visitor centres" around the city, in areas such as: Independence Square, Church Village Green, Lower Wharf Road, James Street, and Roebuck Street. In addition, the "Tourist Urban Route", which is also part of the IDB-funded project, can serve as a catalyst, prompting tour guides and other private sector operators to develop complementary routes, as part of their suite of activities for cruise passengers.*

**Figure 10: Aerial view of the Careenage**



**Fourth,** consideration should be given to the deployment of a few "Tourist Ambassadors" or "City Guides" at select locations, when cruise ships are in Port – Trevor's Way, top & bottom of

Broad Street, Independence Square etc. These would probably be retired individuals, who wanted to help, and/or students who saw an opportunity to improve their foreign language skills, by providing a welcoming presence and information to visitors. These “Guides” would not be salaried employees, but would receive modest honoraria.

**Fourth**, the shopping experience for cruise passengers visiting Bridgetown during the 2017/18 cruise year has not been good, according to the latest BREA survey. This FCCA-supported study reported that Barbados ranked 26<sup>th</sup> of 36 destinations with respect to overall prices, 20<sup>th</sup> in terms of the courtesy of store employees, 18<sup>th</sup> re quality of goods, and 21<sup>st</sup> with respect to the overall shopping experiences. Stores in Bridgetown, especially duty free shops, must endeavor to change these perceptions.

**Figure 11: Colonnade (DaCosta Mall) – A heritage building & duty-free shopping**



In the first place, Bridgetown merchants should be encouraged to open on Sundays and public holidays, when cruise ships are in the Port? Given that the arrival dates for the cruise ships are known well in advance, the stores should be able to publicize that they will be open so that residents will also be motivated to come out to shop. In addition, the stores need to assess carefully the range and competitive pricing of their products and their staff should be exposed to continuous training on how best to interact with both visitors and residents.

**Fifth**, these days access to reliable wi-fi is almost a necessity for Barbadians and visitors. The much talked about initiative to make Bridgetown a ‘smart city’ should be advanced a step closer to reality with the introduction of ‘free wi-fi’ throughout Bridgetown. This would be an attraction for ships’ crews and for a large number of cruise passengers, who would now be able

to upload and/or transmit to relatives and friends, without hassle or inconvenience, images of their visit to Barbados. *In addition to the convenience for our visitors, this would help to promote brand Barbados among the hundreds of thousands with whom the photos of an exotic city would be shared.*

**Sixth,** in an effort to encourage and facilitate cruise passengers and ships' crews who might be attracted to the idea of walking from the Cruise Terminal into Bridgetown, the BTII and/or a consortium of Bridgetown merchants could introduce a walking map. This map, available both as a 21<sup>st</sup> century interactive mobile version and as an old-fashioned printed version, would identify a number of useful/interesting landmarks (including walking distances between them), from the Cruise Terminal to St. Patrick's Cathedral.

**Seventh,** Use large potted plants to decorate and help to enhance the appearance of Trevor's Way, Broad Street, Swan Street, and other non-vehicular streets around Bridgetown and our other towns. These large potted plants should also be installed in City squares and other open public spaces to help to improve the ambiance (either in place of trees or to supplement the trees, which are already in place).

#### Bridgetown Phase two

For the medium term, the Commission proposes the following:

- Removing vehicular traffic from Broad Street – From time-to-time the question has been raised about reducing or eliminating traffic from Bridgetown's main shopping street. The Commission thinks the time has come to take that step. Increasingly, small cities around the world, particularly those situated on rivers, lakes or close to the ocean, are removing vehicular traffic and opening-up city streets to outdoor cafes and the like.
- Introducing open air cafes – The removal of vehicular traffic from more city streets would, not only help to reduce pollution in Bridgetown, but also encourage the introduction of more water side and open air cafes. Observe the visitors dining or drinking outdoors at the Waterfront Café, particularly when cruise ships are in Port?
- Road-side food vendors – a number of licensed (this would be a requirement) road-side vendors would be allowed in a cleaned-up and re-invigorated Baxter's Road and at other designated locations throughout Bridgetown. In addition to the mandatory health certificate to prepare and sell food, the food vendors would be required to have a license to set-up in a particular area.
- Introducing water taxi service - With vehicular traffic removed from Broad Street, consideration should be given to the introduction of a water taxi service to ferry guests

between yachts, anchored in the bay, and the inner Careenage and also to transport persons between the inner Careenage and upper Bay street, Rockley, and Oistins or Brighton, Holetown and Speightstown.

- Enhancing open spaces around the city - The Squares and other open spaces in the city should be cleaned-up, seating installed etc., not only for Independence, but throughout the year so that they can become areas for both Barbadians and visitors to enjoy the outdoors. This would make it appealing for parents to bring their children, buskers to showcase their skills, young emerging performers to display their talents, as they hone their performing skills in front of strangers.
- Homeless & Vagrants – The worsening of the economic situation over the past decade has led to an increase in the number of homeless persons and vagrants, who tend to use the city's parks and squares as living quarters. This undesirable development needs to be addressed by finding alternative arrangements for housing the few dozen homeless/vagrants and a suitable covered space to feed more comfortably the hundred plus, who tend to descend on the city at meal time.

#### Bridgetown Phase three – Transformational Initiatives

The transformation of Bridgetown began in phase two, with the removal of vehicular traffic from Broad Street and the introduction of water taxi services. In phase three, some of the proposed transformational initiatives are identified and it is envisaged that they will be developed, refined, and implemented in the years to come.

**Bridgetown Fish Market re-invented:** One of the principal landmarks and visitor attractions in the city of Seattle is Pike Place Market. The market, which is a favourite location for locals and visitors, covers several acres and includes a reported 150 stalls of fresh seafood, produce, flowers, artisanal products, and local art, plus see the numerous street performers wandering throughout. There are also a number of restaurants within the complex.

Similarly, the Castries market has been one of the city's iconic landmarks and a must-see attraction for generations of visitors to the St. Lucian capital. The Market provides a one-stop shopping opportunity for local cuisine, provisions, spices, herbs, and crafts. A new and improved Castries market will provide a setting that appeals to visitors, citizens and vendors.

It is envisaged that the current Bridgetown Fishing Complex or a nearby location could be similarly developed into a city landmark. Can you imagine a Bridgetown/Pelican Market, designed and developed to combine in one location: A world class fish and meat market (operating in compliance with first world SPS standards; a market for provisions, herbs, spices and various cooking paraphernalia; an entertainment space with music, day and night; and two

restaurants – a casual space for a quick lunch, dinner or snack; and a high-end restaurant combining air-conditioned space with an open air on the water ambiance.

**Build a Bridgetown Marina:** Discussions about building a marina in the Carlisle Bay area have been around for decades. Barbados, as the most easterly of the Caribbean islands, is the natural first landfall for yachts crossing the Atlantic. Sailing races in Barbados’ waters is a sport that attracts diverse local, regional, and extra-regional participants. It is time for Government to encourage, promote, and incentivize this initiative. A world-class full service marina would attract more yachting-related activity to Barbados and the spin-off business would be significant as more yachts and power boats would find Bridgetown an appealing and convenient place to dock. *The marina could be developed as a BOT project in order to limit the demand for scarce Government funding.*

**Make Bridgetown a livable city for young professionals:** In order to maximize its potential, Bridgetown needs to attract young professionals to live, work, and socialize in and around the city. The capital city and its immediate environs are dotted with old/unused warehouse space, the refurbishment and utilization of these spaces, as accommodation for upwardly-mobile professionals, a high-end boutique hotel, and to present quality experiences/entertainment, should be encouraged and incentivised.

**Re-claim parking lots from prime real estate:** Curiously, Bridgetown, which is a small city with very little space that can be developed, has at least three open parking lots sitting on prime water-side land. It would seem that a better approach would be to discourage parking in the city and make use of well-lit and patrolled multi-story car parks away from the water’s edge. The water-side land would then be available for recreational use, upmarket housing, or environmentally-friendly commercial activity.

**Restore Bridgetown’s historical buildings:** The restoration of a number of the historic building, which are currently running to ruin within Historic Bridgetown, should be pursued as a long term project.

- The old Empire Theatre could be restored as a city centre entertainment space to complement Frank Collymore Hall. The Bridgetown Live Musical “Rihanna” and similar productions would be able to find suitable homes in this type of purpose-built (interior) within a genuine heritage building.
- The abandoned Dale Carnegie Library could be restored to its former glory and use or be restored and used as a museum.

**Figure 12: The historical Carnegie Library Building, part of our heritage abandoned**



- The dilapidated Eye Ward building (a truly iconic structure) needs to be saved. This eyesore in our heritage city needs to be restored and its prime location maximized.

There are probably other buildings within the ambit of Historic Bridgetown and its Garrison that are deserving of restoration. The three listed above are merely indicative of what could and probably should be done.

#### **4.4 Time to save the Oistins ‘goose’ or risk losing the ‘golden egg’**

The founding of the Oistins Fish Festival and the subsequent creation of the Oistins Bay Garden breathed new life into Oistins. However, the Bay Garden area is looking run down and in need of major refurbishment.

The Oistins “Fish Fry” remains very popular with both visitors and locals, particularly on Friday nights, but the area is in desperate need of serious rehabilitation. Although the darkness of night might camouflage a number of the problems, the area looks dirty, bathroom facilities are poor, the smell of raw sewage permeates the area, particularly when it rains, and *there is a seemingly permanent pool of stagnant water between the restaurant area and the craft vendors.*

The unfiltered glare of daylight makes the above-listed shortcomings even more pronounced. In addition, the list can be supplemented by adding the abandoned and rotting boats (a haven for rats and other vermin), uncollected garbage, the broken tables and chairs, the wooden tables and

chairs which clearly need re-painting, dilapidated vendor stalls, and a general air of disrepair and neglect.

The Commission has also learned that phase two of the previously-mentioned IDB-funded tourism reinvigoration project is expected to address the rebuilding and expansion of the existing Oistins Bay Garden to incorporate the Berinda Cox Fish Market and the boatyard. Since phase one of the IDB-funded project is scheduled to be completed in summer 2020, it seems unlikely that phase two will commence before second half of 2020.

However, the entire Bay Garden facility urgently needs a major refurbishment. A cosmetic coat of paint would be inadequate. In the circumstances, consideration should be given to advancing the execution timeframe for the Oistins Bay Garden refurbishment and undertaking the work in phases in order to avoid a total shutdown of the complex. This matter should be addressed without delay to ensure that we keep the Oistins ‘goose’ alive and she can continue to lay ‘golden eggs’.

**Figure 10: The back of Oistin’s Bay Gardens - This photo was taken about 11.30 a.m. towards the end of November 2018. There was no rain overnight or earlier that morning.**



Within the context of an overall refurbishment, the following areas should be specifically targeted for immediate action and should be addressed, even if the extensive rebuild has to be deferred:

- Bathroom facilities must be upgraded and should remain open and attended whenever the Bay Garden facility is open. Consideration should be given to charging a small user fee to help offset the cost of the attendants.
- The stagnant pool of water that seems to be a permanent fixture should be addressed. The area might need to be paved and graded so that rain water runs off into gutters and out to sea (but this requires a professional evaluation leading to a sustainable solution that will not simply relocate the problem within the complex).
- *Rotting boats, abandoned appliances and other debris* must be removed from the area without delay and proper management practices introduced to address this problem.
- Proper stalls must be provided for the craft vendors, both to make them more comfortable and also to improve the shopping ambiance for persons wishing to acquire local craft items.
- The Complex's wooden tables and chairs should be restored/refreshed or replaced, as necessary.
- The management of the Bay Garden Complex should employ at least one person to walk around the area continuously throughout the evening to empty the garbage bins, replacing the liners and disposing of the full garbage bags.
- The facility should be properly illuminated and visible but engaging security personnel deployed throughout the complex (patrons must feel protected and safe, but not be terrified that they are in danger).

**Figure 11: Rotting boats & scattered garbage – This is Oistin's Bay Gardens, Nov. 2018**



## 5.0 Strategic approaches to cruise development

### 5.1 Barbados' Cruise Development Strategy Should Prioritize Homeporting

Tourism authorities must review their approach to the promotion and facilitation of homeporting, as well as the associated in-country arrangements in order to determine how to maximise the benefits for Barbados. The real homeporting (air-to-sea cruise tourism) benefits for Barbados are in areas, such as: hotel accommodation, meals in restaurants, money spent in night clubs & other night time experiences/attractions, using taxis and the like.

During the 2017/18 cruise year, **homeporting arrivals** in Barbados totaled 149,065. This number was 24.4% higher than the 119,851 recorded for 2014/15.

The average per-person-spend by **homeporting cruise passengers**, who began their Caribbean cruise from Barbados in 2017/18 was US\$144.78. This represents a 68.5% increase over the 2014/15 average homeporting passenger spend of US\$85.94. The total spend by **homeporting passengers** in 2017/18 was US\$21.6M, more than double the US\$10.3M in 2014/2015.

Available data underline the positives associated with homeporting in terms of passenger spend and overall contribution to economic activity. However, cruise lines do not schedule homeporting calls whimsically. Barbados needs a comprehensive strategy, plus a well-researched, properly-executed, and sustained promotion programme in order to attract more homeporting business and to ensure that Barbados obtains maximum economic benefits from the homeporting aspect of cruise tourism.

There were 25.2 million onshore visits by cruise passengers in the 36 Caribbean and Latin American destinations during the 2017/2018 cruise year, 1.02 million of these visits were made by air-to-sea cruise passengers, who embarked on their cruises from one of the seven homeporting locations - Barbados, Cartagena (Colombia), the Dominican Republic, Guadeloupe, Jamaica, Martinique and San Juan (Puerto Rico).

The average per passenger spend by homeporters in Barbados during the 2017/18 cruise year was US\$144.78 versus US\$64.04 for regular transit cruise passengers. Expenditures by homeporters were boosted by hotel costs and higher spending on key categories, such as: Shore excursions, Food & Beverage, and Clothing.

The strategy, with respect to homeporting, should not be limited to collecting persons from charter planes on the tarmac and transporting them to the Port for processing in order to board their ships and sail off into the sunset. We need a holistic approach, which envisages significant pre &/or post periods in Barbados. The additional expenditures on hotel rooms, attractions,

entertainment, food and beverage, and clothing etc. represent the real value added associated with cruise tourism.

**Table 5: Av. Onshore Expenditures (\$US) from a *Transit Call* by a 4,000 Passenger Cruise Ship**

	Arrivals	Onshore visits		Average spend US\$		Total spend US\$	
		Regional Average	Barbados	Regional Average	Barbados Average	Regional Average	Barbados
Passengers	4,000	3,400	3,320	101.52	64.04	345,168	212,613
Crew	1,670	651	651	60.44	54.26	39,346	35,323
Total	5,670	4,051	3,951	80.98	59.15	384,514	247,936

It is enlightening that, based on 2017/18 BREA data, one regular/transit call by a 4000-passenger cruise ship is likely to generate approximately US\$247.9 thousand in Barbados vis-à-vis the regional average of US\$384.5 thousand (Table 5 above). On the other hand, a comparable cruise ship on a homeporting call is likely to generate approximately US\$516.0 thousand in Barbados, compared with the regional average of US\$531.6 thousand (Table 6 below). The three lessons to take away from this data are:

- (i) Based on current information, total passenger and crew spending from a 4,000-passenger cruise ship call at Barbados is approximately US\$136.6 thousand below what would have been spent if Barbados was operating at the regional average.
- (ii) If the 4,000-passenger ship was homeporting in Barbados, the total passenger and crew spending would more than double the spending by a comparable number of regular/transit cruise passengers and crew.
- (iii) Whereas the average spend by transit passengers and crew in Barbados is 35.5 % below the regional average, the average spend for homeporting passengers and crew in Barbados is only 2.8% below the regional average.

*Across the C&LA more than twenty-two per cent (22%) of homeporters are spending an average of two and a half pre &/or post hotel nights in the homeport. In Barbados, the figure is seven per cent (7%), who only spend one pre or post hotel night. Clearly Barbados has considerable scope to improve these numbers.*

Passengers and cruise lines favour destinations, which consistently deliver high quality product. This is especially the situation with respect to homeporting in Barbados because many of the passengers are European and are more likely to disembark in order to visit heritage sites and cultural attractions. Consequently, Barbados must be constantly looking for unique experiences that can be packaged and brought to market, including entertainment and other

packages/experiences, specifically developed for ships' crews. In the context of homeporting, an additional selling point for Barbados is its geographic location and the fact that it is easily accessible by both air and sea.

**Table 6: Av. Onshore Expenditures (\$US) from a *Home Port Call* by a 4,000 Passenger Cruise Ship**

	Arrivals	Onshore visits		Average spend US\$		Total spend US\$	
		Regional Average	Barbados	Regional Average	Barbados Average	Regional Average	Barbados
Passengers	4,000	3,400	3,320	144.78	144.78	492,252	480,670
Crew	1,670	651	651	60.44	54.26	39,346	35,323
Total	5,670	4,051	3,951	205.22	99.52	531,598	515,993

A strategy, focused on securing additional pre and/or post hotel nights by homeporters and on persuading other cruise lines to remain in port until late (11.00 p.m./midnight) must also take into consideration the need to develop the requisite product to satisfy the additional and different passenger demand. Incidentally, this night product should also be targeted at residents and regular stayover tourists so that the potential developers of new attractions would not feel constrained or be deterred by the prospect of a limited (six – seven month) cruise market. Another factor that must be taken into consideration as Barbados promotes homeporting more aggressively is the availability of affordable hotel rooms.

## 5.2 The European Market Beckons & Barbados should respond

Globalisation of the cruise industry has led to consolidation within the ranks of the cruise companies, reducing the number of cruise operators to four principal players: Carnival Cooperation, Royal Caribbean Cruises, Norwegian Cruise Lines and MSC Cruises. Together they control more than eighty-five per cent (85%) of the worldwide cruise market. Horizontal concentration of the industry seems likely to continue since the investment required to build a modern “mega” cruise ship exceeds US\$250 million.

In this environment, only small, highly specialised cruise lines are likely to survive alongside the large groups. The small specialized cruise lines might be a good target group for Barbados because the smaller ships tend to cater to more affluent cruise passengers, who are more likely to disembark and more likely to be interested in the type of heritage and culture attractions, which Barbados can provide. Furthermore, the small ships might be attracted to alternative berthing arrangements in places like Holetown or Speightstown. This is also something that Barbados should encourage in order to relieve some of the congestion that is now associated with all aspects of the cruise activity in and around the Bridgetown Port.

Competition in the cruise market is fierce so a cruise destination, even one as well-known and established as Barbados, really has to have something attractive, unique or iconic if it wants to attract additional cruise lines and get more cruise passengers to disembark for tours and/or other attractions. The regular cruise passengers have limited time ashore, usually less than six hours to get to know a destination. They prefer to do a different activity at each port and will try to avoid repeating the same or very similar activity at different places on the same trip. It is for this reason that Barbados must place more emphasis on its heritage sites and other attractions that are uniquely Barbadian.

North America remains by far the largest source market in terms of cruise passengers, but we need to **look more closely at the European market**. It seems that there is a case to be made that the European cruise passengers are more compatible with where we want to go with our cruise tourism product. They are generally more affluent, more interested in heritage & cultural attractions and experiences, and more oriented towards the pre & post aspects of homeporting than the increasingly budget conscious travellers coming out of the US. In addition, Europe is a faster-growing market than North America and Barbados is still seen as an exotic destination. When these factors are taken into consideration, plus the prospect of attracting more homeporters, it is recommended that cruise tourism promotion authorities should step-up their efforts to persuade more Europeans to take a cruise to Barbados.

### 5.3 Barbados should explore mechanisms for growing Summer Cruise Traffic

Traditionally, the major cruise lines tend to relocate most of their ships to the Mediterranean because the weather is more predictable and the financial returns per cabin are higher. Carnival reported that, in 2016, passenger income represented 72% of its revenue for North American operations and 82% for European consumers.

Nevertheless, despite the lure of the Mediterranean and concerns about weather systems in the Caribbean during the summer months, Barbados should endeavour to grow the summer season by giving cruise lines reasons to deploy their ships in our region during the summer months. The creation of an effective “Southern Caribbean Alliance” could help with this push.

A Southern Caribbean Alliance was being discussed a few years ago and a MOU was proposed as a non-legal mechanism for promoting cooperation between the destinations on the “*Southern Caribbean Cruise Itinerary*”. The primary areas of common interest to be addressed were:

- To increase regional cruise traffic;
- To consider the possibility of a summer incentive programme; and
- To cooperate in the areas of marketing and communication

At that time, Barbados had the primary responsibility for advancing the process, but the initiative seems to have faltered.

Given, that the leverage of individual countries to negotiate almost any substantive issues with the cruise companies is limited by the substitutability of ports, an alliance encompassing all of the destinations on a particular cruise itinerary might afford the group some degree of leverage. This leverage might enable the Alliance more easily to negotiate a mutually-beneficial agreement with one or more of the cruise companies for additional summer traffic. A successful Southern Caribbean Alliance could also help to redress the balance of power in terms of negotiating higher port fees with cruise companies.

#### **5.4 Training should be a priority, including certification of tour guides**

Barbados' tourism authorities and persons in the cruise sector must prioritize training and treat it as a core component of capacity-building with respect to essential cruise sector personnel.

***First, ongoing training is necessary for all categories of service staff*** - The courtesy of store employees is one of the areas where Barbados lags behind most of its regional competitors. Given Barbados' profile in the cruise tourism sector and given the importance of presenting a welcoming and visitor-friendly outlook to the island's visitors, it is recommended that *training for service staff should be ongoing*, in how best to engage with visitors and Barbadians to whom they are delivering a service.

In other words, rather than having a training session now and another five years later or whenever the problem is again highlighted, Barbados should institute a training programme, which provides for frequent 'refreshers' in order to improve the likelihood of the desired behavior becoming automatic. This ongoing training should cover store employees, taxi drivers, tour bus drivers, and persons working at attractions and the like.

***Second, there must be appropriate training and certification for tour guides*** - Barbados should introduce, as a priority, professionally-developed and delivered training for tour guides. The relevant courses, oriented towards ensuring that the attendees acquire comprehensive knowledge of Barbadian heritage and culture and are equipped to deliver engaging tours, should lead to certification.

In addition, other key areas to be covered in the training should be related to awareness of cruise tourism and cruise tourists, communication and hospitality, tourist safety and security, interpersonal skills, language skills and environmental awareness.

***Third, Barbados should use the experience of strategic partners*** - FCCA-affiliated entities provide training for various types of service staff, Barbados should take steps immediately to make such training available to the various categories of front line staff, mentioned earlier. We need to build-in ongoing training for the above-listed categories of persons, including, as indicated earlier, provisions for annual 'refresher' training. Taxi drivers, tour guides, department store employees, staff at attractions, heritage sites and the like must be trained to interact easily with cruise passengers and to be able to sell Barbados effectively.

## 6.0 Barbados Must Unveil Hidden Tourism ‘Gems’

### 6.1 Barbados, as a cruise destination, must deliver in three key areas

In an interview with the third quarter 2018 edition of Travel & Cruise, Ugo Savino, Carnival’s Director of Deployment and Itinerary Planning opined that cruise destinations need to deliver in three areas:

- 1) The ability to generate demand, i.e. to create awareness of and a desire to visit, the destination. Marketing must increase awareness or interest in visiting. *If people know the destination & have already visited, there is likely to be a drop-off in those interested in going unless there are new products or some other form of demand creation.*
- 2) During the visit to a destination, it must offer a variety of tours that resonate with different guest profiles. *The portfolio of shore excursions needs to be refreshed on a regular basis in order to remain relevant and interesting.*
- 3) The destination needs to deliver a high satisfaction score, which will eventually lead to word of mouth promotion when the happy cruiser returns home and tell his/her friends about the fabulous experience in the destination.

Barbados’ cruise tourism planners and facilitators need to be mindful that these three elements are crucial in the decision making of those who plan cruise ship itineraries. Consequently, BTMI officials, related agencies, and developers of visitor attractions will know what has to be done in order to make Barbados more appealing to cruise passengers and to increase the likelihood of securing more calls by cruise lines.

### 6.2 Paradigm Shift Needed

Barbados' ability to maximize its earnings from the cruise tourism sector requires a paradigm shift in our thinking about visitor satisfaction and our approach to customer service. The cruise tourism sector demands that the Barbados experience exceeds visitor expectations “*all the time every time*”.

In a written submission a few months ago, one of our leading tour guides made the insightful observation that: “For the long-stay visitor, a poor reception at the port of entry may be erased by a warm reception at hotel check-in - An un-inspiring experience during the day may be compensated for by a wonderful evening of dinner and dancing - An unrewarded search today for local items can be overcome by a productive shopping day tomorrow”.

On the other hand, cruise tourism does not provide those opportunities for Barbados or Barbadian service providers to recover from initial sub-par performances. The visitor experience for cruise passengers is usually condensed into a few hours rather than being spread out over

days or weeks. Therefore, the initial welcome extended to cruise passengers arriving in Barbados must be memorable; the tours and attractions to which the ‘cruisers’ are exposed must be unforgettable; and the quality of their overall experience in Barbados must exceed their expectations and always leave them wanting more.

The demands of the cruise tourism sector underline the need to make a good first impression because there is so little scope for second or third opportunities. Barbados must make that first impression, not just good, but memorable. This is the time to unveil that “WOW FACTOR”.

One of the frequently repeated messages reaching the Commission over the past six months is that Barbados needs to take ‘preventive’ actions by addressing visitor concerns about quality of service, neglected physical environment, and lack of variety in product offerings. In recent years, both cruise companies and their passengers have indicated that there is a need for Barbados to refresh and diversify onshore experiences.

Consequently, it is evident that Barbados should deal with these shortcomings before conditions deteriorate to the point where the island loses ships, which decide to substitute other more appealing ports. Barbados’ policy makers and tourism planners are aware of the danger and are taking steps to boost the competitiveness of the cruise sector, but more must be done to expose cruise line itinerary planners and visiting cruise passengers to a greater variety of attractions and memorable experiences.

### **6.3 Partnerships are invaluable for cruise tourism**

Cruise lines operating large ships generally work with specific Destination Management Companies (DMCs) in which they have a financial interest or to which they have a strong commitment. Consequently, it is very difficult for small and medium-sized enterprises (SMEs) to work directly with these types of cruise lines. In the circumstances, a small island nation, like Barbados, finds it difficult to foster the emergence of SMEs in the cruise sector.

One possible approach in addressing this challenge is for governmental authorities to become proactive in establishing standards of behavior and service for the sector, broadening the range of “products” being offered to cruise lines, and exploring additional opportunities to bring greater economic benefits to Barbados. This approach usually requires an agency with a mandate and the capacity to promote, stimulate, and facilitate the diversification and growth of the sector. This Report recommends that, for the foreseeable future, BTMI’s Cruise Section or a comparable entity should be entrusted with that facilitating role.

In the early decades of the last century, Helen Keller, an American writer and social activist, who was deaf and blind, is reported to have used the following words to move those whom she could

neither see nor hear: *“We live by each other and for each other. Alone we can do so little. Together we can do so much.”*

This should be the “mantra” of those in Barbados, who are struggling to have their attractions sold on board cruise ships or who feel, rightly or wrongly, that some tour operators are deliberately trying to sabotage their efforts.

Partnerships are invaluable in both business and life. We often rely on partners for ideas, input and support. We need reliable and knowledgeable partners to stimulate and facilitate the growth of cruise tourism in Barbados. At this time, we have needs everywhere, beginning with the reality that:

- We need to bear in mind that Cruise lines prefer to work through “distributors” or tour operators rather than dealing directly with large numbers of small attractions – This is the preferred operating model for all of the cruise lines in whichever markets they operate around the world.
- Barbados needs enhancements to its existing attractions and it also needs to **develop** and **bring to market** new attractions and tour packages.
- Tour operators need attractions because that is what they sell, either through the cruise lines or directly to cruise passengers and other visitors.
- The operators of attractions need innovative and committed tour operators, who will market their attractions and deliver a continuing flow of customers.

#### 6.4 Perspectives of three visiting tourism strategic partners

During a Town Hall session at Hilton Barbados in July 2017, to engage with local entities which are supplying services to the cruise lines, Michele Paige, President of the FCCA stated *“We need to retain the Barbados identity”* and later in the same event, she stated *“We need to put the ‘Wow’ back into Barbados”*.

In September 2018, Joe Thompson the Managing Director of Virgin Holidays, speaking at a function to celebrate the 20<sup>th</sup> anniversary of the company’s relationship with Barbados, stated: *“What we are always looking for and trying to encourage with our partners here in Barbados is to recognize that the way to be successful in the tourism industry is to keep evolving your product. I think .....the key to success in the long run is to keep investing in your products and to make sure that you are improving the guest experience in a way that keeps them coming back for more”*.

The Dutch CBI, in its 2017 paper “What are the opportunities for cruise tourism with guests from Europe“, wrote: *“Destinations that want to develop cruise tourism have to make sure they maintain the core natural and cultural values of their destination. They have to develop policies that safeguard their heritage and culture and that limit potential negative impacts. (They should) Focus on developing attractive, creative excursions for cruise passengers that include unique, authentic experiences”*<sup>21</sup>.

I think there are at least four ‘takeaways’ from the three statements above that Cruise Tourism policy makers should endeavor to inculcate into the thinking of both public and private sector ‘players’ servicing cruise tourism.

1. Barbados should remain true to itself and not simply try to copy others. Barbados needs to develop and present a product (Barbados brand), which is different from other destinations;
2. Barbados’ cruise development strategies should both protect and showcase its heritage and culture;
3. We need to give the visitor a positive and memorable first impression of Barbados; and
4. The tourism product can become ‘stale’ and uninviting unless it is frequently refreshed to improve the visitor experience.

## 7.0 Institutional Considerations

### 7.1 Principal Public Sector Tourism Stakeholders in Barbados’ Cruise sector

The cruise tourism sector in Barbados now comprises a number of public sector institutional actors. These institutions can play pivotal roles as intermediaries between the policy makers and private sector operators. On the one hand, they must ensure that the policies are clearly articulated and that an appropriate regulatory mechanism is in place to facilitate the business community. On the other hand, the public sector facilitating institutions should keep the policy makers informed on how the policies are working and whether there are any unintended consequences that should be addressed in order to enable the policies to accomplish what they were intended to do.

**Ministry of Tourism and International Transport** is the Government Ministry with responsibility for determining tourism-related policy and for overseeing the specialized

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<sup>21</sup> Centre for the Promotion of Imports from developing countries (CBI), Ministry of Foreign Affairs of the Netherlands - What are the opportunities for cruise tourism with guests from Europe

implementation agencies, such as the BTMI, BTPA and BTII. The Ministry needs to be sensitive to the challenges facing the cruise sector and be prepared to give the necessary oversight and support, including “fast-tracking” of legislation, expediting the introduction of regulations, and intervening with other Ministries, where necessary.

**Barbados Tourism Marketing Inc. (BTMI)** is the agency with responsibility for promoting and generally raising awareness of the entire Barbados tourism product. BTMI has a relatively new division dedicated to the development of the cruise sector. There is scope for elaborating the mandate of this division to ensure that it is able to function effectively as a facilitator of increased cruise sector activity. This facilitating role may also be pursued in partnership with a compatible and complementary private sector entity.

*In the circumstances where two of Government’s objectives with respect to the cruise sector are: (1) To increase the contribution of cruise tourism to economic development in Barbados; and (2) to stimulate and facilitate the participation of more small and medium-sized enterprises (SMEs) in the sector; the mandate of the BTMI’s Cruise Division should include the cultivation of relationships with operators of attractions and tours, regulatory and business support organisations, and cruise lines.*

**Barbados Tourism Product Authority (BTPA)** is the Government agency that works to improve tourism products in Barbados, primarily focused on licensing and regulation of entities in the accommodation sector. BTPA also assist with human capital development.

There is a view that the regulation, development, and facilitation of the tourism industry, particularly cruise, would benefit from the maximization of the synergies between BTMI and BTPA. It is posited that the existing personnel and financial resources would achieve more combined than they can within separate organisations. If BTMI and BTPA must remain as separate organisations, they should, at least, have a truly symbiotic relationship.

**Barbados Tourism Investment Inc. (BTII)** is the Government agency that coordinates investments in tourism projects. It is more engaged in the traditional tourism sector than in cruise tourism development. The BTII provides tourism-related loans through: 1) loan facilitation (fiscal incentives); 2) Public Private Partnerships (PPPs); and 3) straight investments. There should be a close and mutually-reinforcing working relationship between BTII and the other public sector tourism stakeholders.

## **7.2 Cruise Division or comparable entity must become a genuine facilitator**

BTMI’s Cruise Division’s overall responsibilities should include a clearly-articulated developmental and business facilitating role. The Division should be oriented towards working with new emerging or recently refurbished attractions and encouraging the type of private sector initiative, which is required to develop and market more attractions and tours.

The Cruise Division or some comparable entity should become more proactive in and committed to helping attractions to enter into strategic partnerships with various tour operators or with other attractions. A new collection of diverse and appealing attractions should be promoted, not just for the cruise sector, but that will equally appeal to residents and to stayover visitors. This broader outlook could be critical in ensuring the long term viability of an attraction, which might be marginal or unappealing financially if catering only for the six to seven month cruise season.

BTMI's Cruise Division, by itself or in partnership with an appropriate private sector entity, must become more proactive and innovative in brokering strategic partnerships and helping to package small attractions into viable tours. Furthermore, if potential tourism-related projects are facing regulatory, bureaucratic or other related challenges, BTMI should be able to assist, by helping to overcome these types of hurdles. Similarly, if the operators of existing attractions want to expand their market into the cruise sector, they should find a BTMI, which is willing and able to provide information, guidance, introductions to key persons and the like.

Genuine facilitation of SMEs, particularly those endeavouring to enter a complex and competitive international market, requires significant *“hand holding”*. Consequently, it is envisaged that the Cruise Division's officers would be willing and able to work with and facilitate the developers of new attractions or existing operators seeking to get into the cruise market, through the entire process – from conceptualisation to eventual realisation of an attraction receiving cruise passengers. This would necessitate, as we noted above, the cultivation and maintenance of relationships with several local and international economic operators and regulatory or business support institutions.

BTMI should also be a principal player in the administration of any incentives regime intended to stimulate investment in cruise sector-related projects. *Regardless of which institution has responsibility for the approval of incentives to cruise tourism projects, the regime should be transparent, predictable and open to consultation with cruise tourism staff.* Consequently, the relevant information about available incentives, qualifying criteria, required documentation, processing timeframes and the like should be readily accessible, as a resource tool, to support the business facilitation efforts of BTMI staff. Consequently, the mandate of BTMI's cruise division should include:

- ✓ The cultivation of relationships with local suppliers (operators of attractions and the like);
- ✓ Working with tour operators (who help to evaluate, package, market, and distribute the cruise products);
- ✓ Liaison with other support entities (sea and airport management);
- ✓ Building relationships with relevant regulatory institutions (those responsible for granting various approvals, licenses etc. to enable businesses to serve the cruise sector);

- ✓ Building contacts in and relationships with the cruise companies and cruise lines (who decide where to deploy cruise ships and plan itineraries for those ships etc.); and
- ✓ Working with counterparts in other regional destinations, particularly those in the “Southern Caribbean cruise itinerary”, (with the objective of developing joint strategic approaches in negotiating with cruise companies and other external partners).

### 7.3 Regulatory requirements are enmeshed in Bureaucratic obfuscation

A number of persons, who are involved in or trying to provide services to the cruise sector complain that the process for securing approval to purchase duty free vehicles seems to have been changed in recent years making it more difficult. It is now necessary, they claim, to secure input from more Ministries than before and, in the end, the Ministry of Finance seems intent on finding every possible mechanism to delay the process. The result of this “run around” is that it now takes, on average, five (5) to six (6) months to clear new vehicles out of the Port, compared with the three (3) weeks promised by the Ministry of Finance. *In this electronic age, even three weeks seem too long and six months is simply unacceptable if Government really intends to facilitate the conduct of business.*

Similarly, some operators of tour buses and prospective operators of tours observe that it is very difficult to secure permits to operate tour buses and incredibly complicated to retrofit and licence such buses. One small business operator writes of trying for over a year to obtain a BT licence, although she met all of the relevant requirements. She also observes that last year (2018) she was obliged to wait six months to obtain approval for a retrofit. *In the intervening months, she was driven almost to distraction by the pointless delays (including waiting until November for a letter, which she had been assured, in June, was being drafted).*

This lady concluded her letter by emphasizing that she was NOT complaining, but she want the process to be improved for the benefit of other applicants. *(Imagine this middle aged lady, trying to operate a small business, providing services to the sector which is supposed to be our leading foreign exchange earner. She battles to overcome incomprehensible bureaucratic delays and her concern is that the process should be improved “for the benefit of other applicants”. Employees of the applicable regulatory institutions should read her letter and ask themselves whether they are doing their best to facilitate the conduct of business in Barbados, particularly when this business will employ Barbadians and earn foreign Exchange”)*

Listening to and reading of the frustrations that businesses have to overcome simply to do business and employ Barbadians, it is amazing that any business actually gets done by small business people trying to equip themselves to provide services in the cruise sector. The impression conveyed is that the Customs Dept., certain sections of the Ministry of Finance, the Town Planning Dept., and MTW’s do more to frustrate than facilitate business persons.

In an earlier chapter of this Report, we underlined the need for training across the entire gamut of service providers. *Similarly, there is a need for sensitisation and training programmes to help the staff in regulatory agencies to appreciate the importance of what they do and how vital it is for them to see their role as removing obstacles and facilitating rather than erecting unnecessary barriers and frustrating people trying to do business with Government. The process of obtaining a tour bus licence is simply too opaque and convoluted. It must be made more transparent and less time consuming.*

## 8.0 Random Thoughts About Possible Visitor Attractions

The history of Barbados is littered with interesting and unusual stories, some bordering on the macabre. These random ideas are merely intended to stimulate the curiosity and sense of adventure in all of us, while serving as reminders that visitor attractions are often born out of the unusual, which is right next door.

### 8.1 Bajan Tales from the crypt - the mystery of the Chase Vault

The vault, which became infamous as the Chase Vault, can be found in the cemetery of the Christ Church parish church. The vault was originally built in 1724 and had an unremarkable history until August 9th 1812 when it was opened for the interment of wealthy landowner Colonel Thomas Chase. The coffins of Chase's two young daughters, Mary Ann and Dorcas, were already located in the vault and the burial team was horrified to observe that the coffins had seemingly been tossed about from their original locations and were now scattered to the sides of the vault. There was no evidence of human tampering with the sealed vault and other vaults in the cemetery had not been affected in the same way.

That might have been the end of the tale but for the fact that this spectacle was repeated four years later and again the following year, when two more coffins were added to the vault. Inspection of the vault revealed no alternate entrances or secret passageways.

In 1819 the Governor of Barbados oversaw another burial in the vault and affixed his seal to the concrete sealing the entrance. However, a year later, when the vault was opened once again (with the seal found intact) the coffins were again found in disarray. At this point, the authorities decided to remove the "moving coffins" and they were reburied separately elsewhere in the cemetery. The empty vault has remained open since that time and the mystery of the moving coffins is still unsolved.

### 8.2 Mermaids Tavern & the Charter of Barbados

These days Oistins is best known for two popular attractions; the **Oistins Fish Festival**, which was founded in 1977 by the late Sir Harold St. John, a former Prime Minister and parliamentary

representative for Christ Church South and the **Oistins Bay Garden**, which has become a popular entertainment venue, particularly with its Friday night Fish Fry.

However, Oistins is best known historically as the location for the signing of the Charter of Barbados at “Ye Mermaids Tavern” on January 11, 1652. A month prior to the signing of the Charter, an English naval force had blockaded Barbados, invading and burning Speightstown in December of 1651.

This charter peacefully ended the threat of invasion by English forces loyal to Oliver Cromwell, who had targeted Barbados because the island was supporting the Royalists. The signing of the Charter or “Articles of Agreement” meant that Barbados’ House of Assembly, which had been meeting since 1639, was officially recognized by Oliver Cromwell.

At that time, Oistins was both an important transshipment point for the sugar and cotton produced by neighbouring plantations and a centre for administration because the monthly sessions of the Court of Common Pleas were held in the town until 1828.

*It is reported that, in referring to the Charter, the educator Leonard Shorey wrote:*

*“The Treaty was indeed quite remarkable, for it actually guaranteed that ‘no taxes, customs, imports or excise shall be laid, nor levy made on any of the inhabitants of this island without their consent in a General Assembly’. This provision thus predated by more than 120 years the same important provision later adopted by the American colonies when they themselves revolted against the English Crown”.*

### 8.3 Barbados and the story of “Rumbullion”

Barbados is known as the birthplace of rum “Rumbullion” and the leading Barbadian brands are known around the globe. Nevertheless, the island of Martinique is known, *in the cruise tourism world*, as “Land of Grands Rhums”. *Martinique promotes itself as the “rum capital of the world”* – its distilleries are promoted as the only ones in the world to have been awarded the prestigious ‘AOC’ (appellation d’origine controlee) i.e. the same designation that recognizes certain exceptional wines of France.

They speak of the rums from Martinique as being distinguished by the “*rhum Agricole*” production technique – they speak about the technique & the results, from white rum to cocktails to dark rum (*making a comparison between the dark rum and a fine cognac*) & rum-based liqueurs. The publicity states that visitors are encouraged to travel & experience *La Route des Grands Rhums* to distilleries all over the island. Finally, the point is made that whichever distillery cruisers visit, “*they won’t be able to resist the chance to bring home a bottle or two ... to share with friends and loved ones*”.

On the other hand, although there is a ‘rum tour’ among the offerings of several cruise lines, it seems certain that Barbados, the home of rum, would have an even more enthralling story to tell. First we must develop a truly memorable “visitor experience” to replace the rather bland tours, which are currently on offer.

Secondly, we must launch a bold advertising/promotion campaign to let the cruise world know that we have a unique story of rum to tell, a memorable experience to enjoy, and a selection of unequalled rums to take home to share with friends.

## 8.4 Other tales from beneath the earth or high above it

### Garrison Tunnels

The 200-year-old tunnels, which were discovered accidentally during the restoration of George Washington House, reportedly comprise a two-mile network of underground corridors beneath the Garrison. Surely the secrets, which these tunnels hold, are just waiting to be brought to light as a thrilling mystery of what soldiers did or did not do five metres underground 200 years ago, when Barbados was one of the most heavily fortified locations on this side of the Atlantic.

### The HARP Gun

In the early nineteen sixties, Barbados was home to a High Altitude Research Project, which was being undertaken by the American and Canadian governments. Imagine a satellite launcher in Barbados almost sixty years ago. A project shrouded in secrecy, involving Canadians and Americans, Israelis and Iraqis – spies and assassinations – was it a scientific or military venture. What is the real or imagined story behind this 20<sup>th</sup> century mystery.

### Cherry Tree Hill

Cherry Tree Hill has long been well known for its fabulous views of the Scotland District and certain gravity-defying characteristics. Where else have you seen or heard of motor cars rolling uphill. Imagine experiencing this phenomenon, followed by a drink at a nearby establishment as you look out over the East coast and try to rationalize what you had just experienced.

## Comment

### A wake-up call is no longer enough, it is time for action

There is a tongue-in-cheek American saying “*déjà vu all over again*”

In an August 2016 interview with Gercine Carter, Cecil Ince, one of the founders of Foster & Ince, is reported to have said that he started to take a more active role in the cruise business

because “*I discovered that the cruise lines were not happy with the standard and quality of tours being offered in Barbados.*”

In December 2018, a similar message is being conveyed by cruise sector studies undertaken over the past seven/eight years, by formal and informal discussions with cruise sector stakeholders in recent months, and, most importantly, by the disappointing cruise sector per passenger spend during the past ten years.

It should be instructive that despite the pioneering work done by Foster & Ince and others over the past forty years, Barbados still finds itself struggling to remain competitive in today’s cruise tourism industry. The key message, which we should take away from this scenario, is that the cruise sector demands continuous innovation and reinvention. We must strive to give the cruise visitors a different and memorable experience every time.

It is evident that Government, perhaps through an enabled cruise section within the BTMI or similar entity, needs to become more “hands on” in facilitating the diversification and expansion of the island’s suite of visitor attractions. There is also an obvious need *to promote all* of the island’s cruise sector offerings more effectively to the cruise lines because there are repeated comments from cruise line executives that they did not know that Barbados had this or that attraction.

This is not “*a wake-up call*”, the cruise industry in Barbados has long passed that stage. The cruise sector, which provides more than half of all tourist visitors to the island, which contributed 71.3 million US dollars in foreign exchange during the 2017/18 cruise year, and which is responsible for more than two thousand, three hundred and fifty jobs, is not only underachieving, it has also been on a downward trajectory for the past decade. More than enough words have been spoken and written. Serious action is now a necessity.

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## **Appendix 1**

### **A Summary of Objectives & Recommended Actions**

Once the orientation, strategic objectives, and expected outcomes outlined in this Report have been approved by the applicable policy makers, a complete action plan can be prepared in cooperation with the relevant Ministries and agencies. The action plan should identify the Ministry or agency responsible for each action, the estimated budget, the timeframe within which the action should be completed, a number of key performance indicators, and provision for explaining the status of implementation at any given point in time.

Meanwhile, thirteen (13) expected Outcomes and the eighty-two (82) recommended actions, which are integral to the attainment of the particular Outcomes, are presented below.

#### **Expected Outcome (1)**

##### **❖ Enhanced Port experience for cruise passengers visiting Barbados**

##### **Recommended actions**

According to the 2017/18 version of the triennial cruise passenger survey conducted by BREA on behalf of the FCCA, the shore-side welcome, which cruise passengers experience at the Barbados Port, is ranked 29<sup>th</sup> out of the 36 cruise destinations in the Caribbean and Latin America.

From the view of the cargo sheds as the ship docks to the exit from the Port by tour bus, taxi or on foot, the cruise passenger experience must be enhanced. In the interim, before a new Cruise Terminal is constructed, there must be significant upgrades to the shore-side welcome, transit through the Port and Cruise Terminal, boarding of tour buses or taxis, and the process of exiting the Port. The following are some of the recommended interventions:

- ✓ Reproduction on shed doors of murals &/or pictorial advertisements of Barbadian heritage sites and iconic attractions. Shed three (3), which is used for the processing of air-to-sea passengers, should also be freshened-up internally and on the land-side.
- ✓ Organisation of a rotating package of entertainment – perhaps including a small steel pan band or tuk band and stilt walkers in order to bring a feeling of pleasure, fun, Caribbean music, and colourful costumes to the shore-side welcome.
- ✓ Installation of new standardized signage throughout the Port and onto Trevor's Way. The new signs, some of which have already been installed, will use English, plus easily-recognised international symbols.
- ✓ Introduction of a proper regime to regulate the movement of equipment, traffic, & pedestrians in the Port. There should be a clearly-spelt out regime to ensure that

everyone involved understands what is expected. In addition, adequate transportation, including vehicles specially-equipped for the differently-abled, should be available to move passengers from the Breakwater or other distant berths to the Cruise Terminal.

- ✓ Creating ***branding/marketing opportunities*** by deploying “***Welcome to Barbados***” signs and related images strategically in positions where cruise passengers might be motivated to take selfies and other photos to post on their various social media platforms showing friends and relatives that they are *in Barbados*.
- ✓ Introduction of new Tour Bus Dispatch system that takes into account the increased number of tour operators and buses. This system would involve the scheduling of passenger pick-up times, plus the use of holding areas for buses waiting to enter assigned loading bays.
- ✓ Introduction of new Taxis Dispatch system that takes into account the need for transparency and fairness in the allocation of trips. The system, which would be regulated by independent dispatchers, is also intended to eliminate direct solicitation of cruise passengers by taxis drivers and thereby removing the trigger, which has led to verbal and sometimes physical altercations in the past.
- ✓ Engage with Customs Dept. in an effort to secure the timely deployment of additional Customs Officer, both for additional “Boarding Parties” and to speed-up the movement of tour bus and taxi traffic out of the Port.

## **Expected Outcome (2)**

### **❖ Expedited launch of ‘pilot project’ re cruise ships berthing on the West Coast**

#### **Recommended actions**

A designated facilitator should be mandated to take charge of this project and drive it through the various stages from repair of the broken jetty to assessment of the ‘pilot phase’.

- a) A lead entity and/or individual “champion” should be designated to advance this initiative;
- b) Efforts should be made to motivate the relevant Government Ministry/Agency to repair the broken jetty expeditiously;
- c) Lead agency must endeavor to persuade the Customs, Immigration, and Port Health services to facilitate a ‘*pilot project*’ by operating from a very temporary base.
- d) The cruise line’s offer of assistance should be accepted to ensure the speedy installation of facilities, which are acceptable to us, while also satisfying the requirements of the applicable cruise lines.
- e) Tourism authorities should engage with tour operators and taxi associations to facilitate the provision of workable tour and taxi dispatch arrangements.

- f) We should undertake an assessment of the '*pilot phase*', viewed from Barbados' perspective and from the experience of the relevant cruise lines, in order to take into consideration 'lessons learned' as we determine how best to move forward.
- g) Assuming that the '*pilot phase*' was satisfactory work would begin on the acquisition of the requisite permanent facilities to accommodate appropriately the applicable regulatory authorities and the disembarking cruise passengers.

### **Expected Outcome (3)**

#### **❖ Improved Maintenance of Roads and Related Infrastructure**

##### **Recommended actions**

The road conditions and the general physical environment had become a major embarrassment. Some steps have been taken to address the situation, but a lot of work remains to be done. In order to improve road conditions and the general ambiance around the country, it is recommended that:

- The Ministry of Transport and Works (MTW) should undertake a comprehensive road rehabilitation programme, which is front loaded to resurface, as a priority, the most heavily travelled roads and those used by tour buses and taxis to visit popular attractions.
- The NCC must develop and implement a structured action plan to address systematically the road verges, parks, and beaches for which that agency has responsibility.
- Since the SSA is struggling with limited resources, including garbage trucks, the agency should have discussions with the private sector with a view towards freeing-up some of the SSA's resources for household garbage collection as more businesses are encouraged to use private sanitation services providers.

The absence or unavailability of public toilets is a problem from Bridgetown to the most rural communities. In order to provide better facilities for sightseeing residents and cruise passengers, it is recommended that:

- A few visitor centres should be located along heavily travelled routes. These centres would comprise an information kiosk, space for vendors of local arts and craft, provision for refreshment (a drink, sandwich, muffin etc.) and attended toilet facilities.
- All public toilet facilities should be properly maintained, serviced by paid attendants, and kept open on public holidays & Sundays, as necessary. Consideration might be given to charging a small user fee to help cover the attendant's wages and to reduce the level of random vandalism.

## **Expected Outcome (4)**

### **❖ New lease on life for Pelican Craft Centre**

#### **Recommended actions**

The Pelican Craft Centre is struggling to survive. It is on life support and barely breathing. There is no visible evidence from the main road (Princess Alice Highway) that this complex is a centre for the production and sale of arts and craft. The recommendations listed below are intended to breathe new life into Pelican Village so that it becomes a vibrant location marketing a range of local arts and craft.

- **Installation of new management**, public or private sector - One of the first challenges for the new management would be to engage with the current tenants and make it clear how they propose to work - New leases, clearly setting out the rights & obligations of both parties would be introduced.
- **Timely maintenance and refurbishment** to make the complex more presentable, including the use of murals depicting our culture, iconic craft items, heritage images etc. could be interesting.
- **Signage** – Introduce a new series of bold, attention-getting, and unambiguous signs - in the Cruise Terminal, on Trevor's Way, on each side of the Pelican complex.
- **Advertising** – The management of Pelican Craft Centre should execute a marketing campaign – online, in print, on radio & TV.
- **Street crossings** - Create proper street crossings with flashing lights (from Trevor's Way) and from the 'cross street' for persons who might walk on the BIDC side of Princess Alice Highway.
- **Entertainment** – When cruise ships are in Port and on other special occasions - crop over, Independence, Christmas and the like - a colourful entertainment package should be rolled out on the lawns in front of the complex and around the area of the gazebo.
- **Open market** – The lawn beside Princess Alice Highway and the areas around the gazebo and along the artist wall should be used as an “open air craft market” - mobile "umbrella equipped stands" could be used to protect both the vendors and their customers from the sun.
- **Customer experiences** – Arrange interactive craft demonstrations, in areas such as: wood & straw work, jewelry design, leather craft, glass blowing, pottery making etc.

where visitors can see/experience craft items being made and, of course have the opportunity to buy.

- **Product development** – There should be a focused effort to introduce a line of “Authentic Barbadian souvenirs” - clock tower of Parliament, clock tower at St. Ann's Fort, Lion at Gun Hill, the Harp Gun (there must be photos somewhere), the screw dock, old windmills, Green monkeys, turtles etc. etc.

### **Expected Outcome (5)**

#### **❖ More effective promotion of Historic Bridgetown and its Garrison**

##### Recommended actions

To date, promotion of the Bridgetown Heritage Site has been restrained, the following are some recommendations to raise the profile:

- ✓ The UNESCO World Heritage designation of Bridgetown and its Garrison as a World Heritage Site should be celebrated and promoted.
- ✓ Tour operators should be encouraged to choose from the selection of Bridgetown heritage attractions to offer a variety of tour packages and enhance the experiences of our visitors.
- ✓ Interpretive signage must be installed throughout the Heritage area to enhance visitor appreciation for Historic Bridgetown and its Garrison. These interpretive signs can almost become destinations in their own right. They will draw attention to the unique history and identity of the Heritage City and help visitors to appreciate better why it is a UNESCO World Heritage Site.
- ✓ We should compile a comprehensive list of existing Bridgetown heritage attractions, of those which are now being developed, and of those with potential for development.
- ✓ The BTMI should become more proactive in helping tour operators, taxi operators, and heritage attractions to build strategic relationships.

### **Expected Outcome (6)**

#### **❖ Smart City Launched, Garbage Collection Improved, & Bridgetown Open for Business**

##### Recommended actions with respect to phase one of Bridgetown re-imagined

- The SSA and the business community should come together and consider alternative garbage collection arrangements in the city;

- Deploy more and larger trash cans throughout Bridgetown with provisions for servicing the cans throughout the business day;
- Maximize any opportunity to use the Careenage for recreation and in-city transportation;
- Deploy tourist guides around Bridgetown to give directions and provide other information about the city.
- Smart city launched with the introduction of free wifi throughout Bridgetown.
- A cooperative effort should be launched to persuade stores in Bridgetown to open for business on Sundays and Public Holidays when cruise ships are in Port and, at the same time, to get more cruise passengers into the Bridgetown stores.
- Introduction of a walking or self-guided map highlighting points of interest from the Port exit to St. Patrick's Cathedral.

### **Expected Outcome (7)**

#### **❖ Traffic-free Broad Street, Water-taxis Service Launched, & Visitor Centres Open**

##### **Recommended actions with respect to phase two of Bridgetown re-imagined**

- Use the IDB-funded tourism project, to establish a major Visitor Centre in Bridgetown, as a catalyst to encourage and facilitate private sector investment in a series of smaller satellite Visitor Centres throughout Bridgetown. The establishment of these centres would also help to address the insufficiency of public toilets.
- Re-route vehicular traffic from Broad Street, thereby making it a pedestrian street and opening it to outdoor cafes and the like.
- Use large potted plants to improve the aesthetics of traffic-free streets, public squares and the like in Bridgetown;
- Re-introduce community entertainment in places such as Baxter's Road
- Introduce a water-taxi service from Bridgetown eastwards to Oistins and westwards to Speightstown.

### **Expected Outcome (8)**

#### **❖ Iconic Bridgetown Market Developed, Marina built, Up-market Housing Introduced, & Restoration of Heritage Buildings underway**

##### **Recommended actions with respect to phase three of Bridgetown re-imagined**

- ✚ Develop the Bridgetown Fish Market area into a world class food and entertainment complex;
- ✚ Promote and facilitate the building of a marina in the larger Carlisle Bay area;

- ✚ Convert abandoned and underutilized warehouse space in Bridgetown into up-market apartment/town house-type accommodation in order to attract young professionals to live in the City.
- ✚ Re-claim water-side land from parking lots and convert them for recreational use, quality housing, or environmentally-friendly commercial activity.
- ✚ Initiate a long term plan to restore Bridgetown's historical buildings, using mostly donor funding

### **Expected Outcome (9)**

#### **❖ Oistins Bay Garden complex refurbished**

##### Recommended actions

Given plans for a major re-building of the Oistins Bay Gardens at a later phase of the IDB-funded tourism re-invigoration programme, the following actions are recommended at this time:

- Upgrade toilet facilities and make arrangements to ensure that they are open and attended whenever the Bay Garden complex is open;
- Implement a sustainable solution to the problem of stagnant water and poor run-off in the area in front of the craft vendor stalls;
- Arrange for the removal of rotting boats and other debris from the rear of the Bay Garden complex;
- Refurbish craft vendor stalls, not only to make them more comfortable for vendors, but also to improve the shopping ambience for persons looking to do business with the vendors;
- Refresh/restore the Complex's wooden tables and chairs in order improve the general appearance of the area;
- Deploy a sufficient number of garbage bins and arrange for their timely servicing when the complex is open;
- Improve lighting and security throughout the Bay Gardens complex, particularly on Friday and Saturday nights.

### **Expected Outcome (10)**

- ❖ **The number of cruise passengers homeporting in Barbados increased from 149,065 to 185,000 by the 2023/24 cruise year**

#### **Recommended actions**

- ✚ The total spend from a cruise ship homeporting in Barbados is more than double the total spend by an identical number of passengers on a regular cruise ship visit. *Barbados' cruise promotion strategy must place more emphasis on developing the homeporting side of the cruise sector.*
- ✚ As cruise tourism authorities intensify the promotion of homeporting, discussions should be initiated with management of GAIA to determine the most appropriate arrival and departure regimes to handle the increasing number of homeporters.
- ✚ Tourism authorities should engage with applicable cruise lines, at an early stage, in order to determine the best way forward to accommodate comfortably the additional air-to-sea cruise passengers.
- ✚ Expanded homeporting will only work if the associated requirements are also addressed. *Tourism officials must ensure that hotels are 'on board' with good packages, and that attractions are ready to deliver quality night experiences.*
- ✚ The work involved in planning, promoting, and securing homeporting calls is more challenging for tourism officials. *BTMI must develop a well-researched, carefully-targeted, and sustained programme to attract additional homeporting calls.*
- ✚ Although the USA continues to be the largest source market for cruisers into the Caribbean, Europe is a faster-growing market and European homeporters seem more interested in pre/post stayovers. *Against this background, Barbados should step-up its efforts to persuade more Europeans to take a cruise to Barbados.*

### **Expected Outcome (11)**

- ❖ **A More Diversified cruise Tourism Product, Characterized by Strategic Partnerships**

#### **Recommended actions**

- Barbados should focus on diversifying its range of visitor attractions and on enhancing visitor perception of what the island has to offer. Visitors should feel that Barbados is a place to which they want to return and about which they are happy to tell their friends;
- The promotion of Barbados as a cruise destination should place greater emphasis on quality of service and giving visitors a memorable first impression of Barbados;
- Passengers and cruise lines favour destinations, which consistently deliver high quality product. Barbados must be looking constantly for unique attractions/experiences that can be packaged and brought to market.

- *Tourism officials and the relevant private sector actors must be mindful of the need for entertainment and other packages/experiences, specifically developed for ships' crews.*
- Given the profile of the smaller ships as catering to more affluent cruise passengers, who are interested in heritage and culture, Barbados should target this group in its overall marketing package;
- Given that individual Barbadian SMEs seem to have difficulty in satisfying all of the cruise lines requirements for business plans, liability insurance and the like, they should pursue an approach based on establishing partnerships or strategic alliances with complementary attractions and/or tour operators.
- Greater emphasis should be placed on the development of human capital within SMEs, particularly exposure related to how business is done with the cruise lines. This would also include facilitating more interaction between cruise companies and SMEs;
- Barbados should avoid trying to copy what seems to be working for other destinations in the region and, instead, should focus on developing and marketing authentic Barbadian attractions or experiences, which are different from what is available in other Caribbean destinations;

### **Expected Outcome (12)**

#### **❖ BTMI's Cruise Division or a comparable entity must become a genuine facilitator**

##### Recommended actions

Although the Cruise Division already undertakes some of the activities listed below, there should be greater support and appreciation for the need to pursue a systematic and holistic facilitating role, including:

- ✓ The cultivation of relationships with the developers and operators of attractions, heritage or cultural experiences and the like;
- ✓ Working with and assisting tour operators in evaluating, packaging, marketing, and distributing products to satisfy cruise passenger demand;
- ✓ Liaison with other support entities, including sea and airport management;
- ✓ Building relationships with relevant regulatory institutions, particularly those responsible for granting various approvals, licenses etc. to enable businesses to serve the cruise sector;
- ✓ Building contacts in and relationships with the cruise companies and cruise lines, particularly those executives, who are responsible for the deployment of cruise ships and who plan itineraries for those ships; and
- ✓ Working with counterparts in other regional destinations, particularly those on the "Southern Caribbean cruise itinerary", with the objective of developing joint strategic approaches in negotiating with cruise companies and in marketing the cruise itinerary.

### **Expected Outcome (13)**

#### **❖ Implementation of an industry-wide continuous training programme, including certification of tour guides**

##### **Recommended actions**

Barbados' tourism authorities and persons in the cruise sector must prioritize training and treat it as a core component of capacity-building with respect to essential cruise sector personnel.

- The courtesy of store employees is one of the areas where Barbados lags behind most of its regional competitors. Given Barbados' profile in the cruise tourism sector and given the importance of presenting a welcoming and visitor-friendly outlook to the island's visitors, it is recommended that *training for service staff should be a continuous process*, in how best to engage with visitors and Barbadians to whom they are delivering a service.
- In place of ad hoc periodic training sessions, Barbados should institute a training programme, which provides for frequent 'refreshers' in order to improve the likelihood of the desired behavior becoming ingrained. This ongoing training should cover store employees, taxis drivers, tour bus drivers, persons working with attractions and the like.
- *Barbados should introduce, as a priority, professionally-developed and delivered training for tour guides. The relevant courses, oriented towards ensuring that the attendees acquire comprehensive knowledge of Barbadian heritage and culture and are equipped to deliver engaging tours, should lead to certification.*
- Barbados should benefit from the experience of strategic partners, by partnering with FCCA-affiliated entities, which already provide training for various types of service staff. Cruise tourism officials, as a priority, should take steps to make such training available to the various categories of front line staff operating in the cruise sector.

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