



BARBADOS

TOURISM LINKAGES POLICY

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Executive Summary

The Tourism Linkages Policy is designed to enhance spending within Barbados's tourism sector by establishing and nurturing key Networks. These Networks will lead initiatives to diversify tourism experiences for both local and international travelers, thereby stimulating growth across various segments of the tourism value chain.

While associations within tourism and other sectors are well-established, Networks offer a broader operational scope, influence, and focus that extend beyond traditional industry associations. They aim to distribute tourism earnings more widely, especially benefiting micro and small tourism businesses and the overall employment in the sector.

Moreover, the decrease in visitor arrivals during the pandemic which had negative impacts on supporting sectors of tourism such as agriculture, fishing, manufacturing, and transportation and storage resulting in loss of employment and income calls for a greater understanding of the degree of interaction between and within these sectors which allows for the appropriate changes which can enhance productivity. This also requires greater statistical representation of these relationships to be understood and evaluated in order to improve the quality of interaction between the tourism sector and its linkages.

The proposed initial Barbados tourism network models follows that of the Jamaica Network model and seeks to develop the following networks;

1. Gastronomy
2. Health & Wellness
3. Sports & Entertainment
4. Knowledge
5. Shopping

An analysis of Barbados's performance in these areas as separate statistical occurrences reveals a dearth of information and significant opportunities for tourism development using these Networks as platforms for understanding and improving network performance.. The Tourism Linkages Policy and Strategy emphasizes collaboration between government, the private sector, and community organizations.

It should be noted that since Barbados plans to be a fossil-fuel free economy and maximise opportunities in the blue, green and orange economies, once the sector network linkages framework has been established, additional networks can be added to the system.

Based on the initial five networks, this Policy will focus on identifying key tourism value chains, niche areas, and Networks with potential for growth. It will prioritize coordinated efforts through these Networks and strengthen synergies among stakeholders to develop and implement strategic activities. Networks will support the creation of clear business strategies and growth outcomes for sustainable tourism development.

The Vision, Mission, and Goal underpin the strategies outlined in this Policy, supported by guiding principles. They provide a framework for targeted implementation, monitoring, and evaluation. The Policy further details objectives to achieve sustainable economic growth through six key pillars:

1. **Access New Markets**
2. **Develop New Products**
3. **Attract New Investment**
4. **Build New Partnerships**
5. **Develop Human Capital in the Tourism Sector**
6. **Maintain Natural Assets**

Implementation of the Policy will be supported by the establishment of supporting mechanisms, namely, the Tourism Network Linkages Taskforce, the technical working groups (TWGs) and the Development Fund. Each Network will provide periodic progress reports, and a comprehensive monitoring and evaluation framework will be used to manage and assess outcomes.

Introduction: Leveraging Barbados's Potential to Enhance the Tourism Experience

Sea. Sun. Sand. The Caribbean paradise of Barbados has long depended on its vibrant tourism industry as a vital source of foreign exchange. However, given the need to rebuild after the recent Covid pandemic which severely disrupted Barbados's tourism sector, the island has seen a gradual recovery, which albeit good, still results in the requirement for the country to address various structural issues in order to maintain its competitive edge in the tourism sector.

The government continues to make significant investments in tourism while the industry continues to grapple with foreign-exchange leakage, as international operators recognize Barbados as a prime destination, building hotels that redirect tourism revenue away from the island. The rise of all-inclusive resorts and the influx of cruise ship visitors further complicate this situation.

Additionally, Barbados is vulnerable to fluctuations in its primary markets and is facing rising costs tied to the stronger U.S. dollar, to which the Barbadian dollar is pegged. To stimulate more value from the tourism sector, the government has decided to deepen its tourism linkages across the country and fully extract the benefits of this framework.

Barbados's Tourism Assets

Tourism Areas

The tourism belt in Barbados stretches along the coast east and west of the capital, Bridgetown, featuring a mix of low-rise hotels, cottages, restaurants, and shops. The southern coast, where the Caribbean Sea meets the Atlantic Ocean, caters to the moderately priced market and houses many

of the island's attractions. In contrast, the western coast, known as the “Platinum Coast,” is home to luxury boutique hotels, upscale resorts, vibrant nightlife, and shopping options. The eastern coast, favored by surfers for its challenging waves, is less developed due to strong currents and steep cliffs. Beyond the tourist belt, much of the island remains rural, featuring small villages and expansive sugarcane fields that attract few tourists.

Accommodations

Barbados offers a diverse range of accommodations, including hotels, villas, guest houses, resort cottages, and apartments. Hotels, particularly luxury, large, or all-inclusive options, are the preferred choice for many visitors. With a total of 114 registered offerings in 2024 carrying 6,491 rooms, the island has sufficiently segmented offering to cater to a range of traveller demographic.

NO. OF ESTABLISHMENTS 2015-2024										
	JAN 2024	JAN 2023	JAN 2022	JAN 2021	JAN 2020	JAN 2019	JAN 2018	JAN 2017	JAN 2016	JAN 2015
Hotels	61	63	59	60	65	64	63	63	64	62
Apartments	45	77	76	64	68	69	67	71	69	70
Guest Houses	8	14	14	14	20	20	23	20	18	21
TOTAL	114	154	149	138	153	153	153	154	151	153

NO. OF BEDROOMS 2015-2024										
	JAN 2024	JAN 2023	JAN 2022	JAN 2021	JAN 2020	JAN 2019	JAN 2018	JAN 2017	JAN 2016	JAN 2015
Hotels	5,698	5,752	5,380	4,980	5,531	5,358	5,406	5,232	5,264	5,088
Apartments	724	1,057	1,061	930	916	1,043	1,066	1,116	1,108	1,133
Guest Houses	69	125	132	142	179	172	185	166	156	160
TOTAL	6,491	6,934	6,573	6,052	6,626	6,573	6,657	6,514	6,528	6,381

Attractions

With over 600 different types of attractions on-island, Barbados is a paradise for travelers, offering a diverse range of products that showcase its natural beauty and cultural richness. The island's breathtaking beaches, particularly along the Platinum Coast, feature soft white sands and inviting turquoise waters ideal for sunbathing and snorkeling. Visitors can immerse themselves in history at landmarks like St. Nicholas Abbey and the George Washington House, while the vibrant local festivals, such as Crop Over, celebrate Barbadian culture with music, dance, and colorful parades. For nature lovers, the rugged cliffs of the eastern coast provide stunning views and excellent surfing conditions, making Barbados a captivating destination for all.

PERFORMANCE OF THE BARBADOS ECONOMY 2024

During the first half of 2024, Barbados' economy experienced vigorous growth, primarily driven by accelerated expansion in the tourism and construction sectors. The traded sector grew by 8.8 percent, largely due to the strong performance of tourism. Agricultural production also benefited from increased output in the chicken and fishing industries. Non-traded activity saw an estimated increase of 3.7 percent, fueled by notable growth in construction and business services. Overall, real GDP rose by 4.5 percent in the first six months of the year.

Tourism Sector

The tourism sector exhibited dynamic growth, with long-stay arrivals increasing by a record 17.9 percent. This surge was bolstered by the successful hosting of the ICC Men's T20 World Cup and an increase in direct flights from major source markets. The US emerged as the fastest-growing source market, while Canada and CARICOM countries also saw significant gains. Despite a slight dip in the UK market, it remained strong, with performance 14 percent above the 2019 peak. Other markets also showed impressive growth, highlighting the sector's resilience and potential.

The rise in tourist arrivals positively impacted the accommodation sector. Demand for hotel rooms grew by 9.7 percent, pushing average occupancy rates up to 68.9 percent, an increase of 2 percentage points from the previous year. Revenue per available room (RevPAR) improved by 11 percent compared to 2023. The sharing economy saw occupancy rates increase by 5.5 percentage points, reaching an average of 56.9 percent over the six-month period, although RevPAR in this subsector fell by 9.7 percent.

The broader tourism sector also benefited restaurants, food services, and recreational activities. Cruise tourism further supported overall growth, with in-transit cruise arrivals up by 17.9 percent, totaling 348,316. The sector saw an additional 28 cruise calls during this period, bringing the total to 273 calls, with homeporting accounting for 49 percent of these (133 calls). Cruise activity in June marked a return to the island for the first time since 2021, underscoring the sector's recovery and growth.

To capitalize on the current global travel boom, Barbados must effectively utilize its natural, human, and physical resources to advance its tourism sector. This will stimulate the economy through increased investment, foreign exchange inflows, and job creation. With this Policy, the Ministry of Tourism has set ambitious targets to guide the sector's growth, including attracting 750,000 long-stay visitors by 2026, generating US\$1 billion in tourism revenue, creating an additional 25,000 direct jobs, and adding 15,000 new rooms for accommodation.

Agricultural Production

Despite challenging weather conditions, overall agricultural production saw an increase. Chicken production improved by 12 percent, adequately satisfying both local and tourist demand throughout the year. Fish landings also surged by 37 percent by the end of May. Root crop production saw a slight rise, driven by higher yields of sweet potatoes and yams, although output for onions, carrots, and cassava was lower. Conversely, fruit and vegetable production declined by

9.9 percent, with notable decreases in tomatoes, cucumbers, lettuce, thyme, and okras, despite increases in banana and plantain yields. Milk production faced significant constraints, with a 26.7 percent drop due to below-average herd sizes and heat stress. Pork, beef, mutton, and egg production also decreased. Overall, these factors contributed to an estimated 5.4 percent increase in total agricultural production for the first half of the year.

Manufacturing

The manufacturing sector benefitted from heightened demand for food and beverages. Over the six-month period, this sector contributed more than 40 percent of the growth in manufacturing output. Food production grew by 5.5 percent, and beverage production increased by 1.4 percent. Additionally, other categories, including furniture, chemicals, and non-metallic mineral products, saw modest gains. Overall, manufacturing output rose by 1.1 percent during this period.

Non-Traded Activity

The non-traded sector experienced a 3.7 percent expansion, driven by increased activity in construction and finance & other service-related areas. The business and other services sector, including finance, insurance, and tourism-related services (such as travel agencies, tours, parks, and recreational activities), grew by 5.4 percent. Construction activity also advanced by 7.1 percent, supported by tourism and commercial projects, as well as public sector initiatives like the Barbados Water Authority's Water Infrastructure Rehabilitation program, the geriatric hospital, and road resurfacing under the Mill & Pave Programme. Additionally, the wholesale and retail sector rose by 3.6 percent due to higher demand for food, beverages, hardware, and motor vehicles. Electricity, gas, and water production increased by 3.9 percent, reflecting higher electricity consumption by most customers.

SWOT Analysis

The SWOT analysis for Tourism Linkages in Barbados is informed by comprehensive desk research and ongoing stakeholder consultations with various agencies conducted from July to September 2024. This analysis highlights Barbados' tourism threats, its high debt position and various strengths, weaknesses, opportunities, and threats that affect the creation and operation of Tourism Linkages in the Barbados.

Barbados's Tourism Threats

Despite its status as a popular destination, Barbados's tourism sector faces significant challenges. The island's high debt levels have led to unpopular fiscal policies, impacting its price competitiveness in the region. A disproportionate amount of tourism revenue does not benefit the local economy, with a substantial portion leaving the country. Additionally, while visitor arrivals have increased, revenue growth has not kept pace, resulting in lower yields per visitor. The island's heavy reliance on a few key source markets, as evidenced during the 2008 financial crisis and the Covid-19 pandemic, further exacerbates its vulnerability. Environmentally, the surge in visitor numbers is straining the country's natural resources as the carrying capacity for the country relative to the number of tourists decline.

High Debt

To finance the development of hotels, restaurants, and infrastructure projects like the Port of Bridgetown and the international airport, Barbados has incurred significant public debt from foreign governments and institutions such as the International Monetary Fund (IMF). Since the 1980s, the country has defaulted on and restructured its IMF debt three times. As of 2022, Barbados's public debt was estimated at \$13.5 billion, equating to 130 percent of its GDP, making it one of the highest per capita debts globally. This reliance on loans has forced the government to allocate more than half of its GDP annually for debt repayment and adhere to stringent structural adjustment programs. In 2018, to address its financial burdens, the government introduced various tourist taxes, including fees per room-night and an increased value-added tax in the tourism sector. The profits from tourism are however insufficient to cover the costs of maintaining and developing the necessary infrastructure.

Lack of Inclusivity

Despite a successful marketing strategy that brought in a record 1.38 million visitors in 2019, Barbados saw tourism spending of only US\$1.25 billion, barely surpassing the US\$1.20 billion recorded in 2008 when 1.16 million tourists visited. This indicates that the average spending per visitor was actually lower in 2019 than in 2008. Industry experts caution that this model of mass tourism that is focused on short-term gains also risks long-term negative impacts, failing to deliver meaningful benefits to local residents, communities, and the environment. It was suggested by the Barbados Tourism Product Authority, that many people feel marginalized and see an unfair distribution of tourism revenue in the market.

Vulnerability to Source Markets' Turmoil

As with many international tourist destinations, Barbados's tourism heavily depends on the global economy and political stability, making it particularly vulnerable as a small island state. External shocks, especially those affecting its primary source markets—Canada, the United Kingdom, and the United States—can have significant repercussions. Historical events like the 2001 terrorist attacks and the 2008 global recession highlighted this dependence, as tourism receipts and economic growth suffered. From 2008 to 2018, the annual average GDP growth rate was just 0.1 percent. The Covid-19 pandemic dealt a severe blow, with visitor numbers plummeting by 68 percent in 2020 and tourism receipts dropping by 54 percent, leading to a 14 percent decline in real GDP. In response, Barbados successfully launched the "12 Month Barbados Welcome Stamp" in July 2020, a digital nomad visa allowing individuals and families to live and work remotely in Barbados for up to a year, exempt from local income tax.

The following strengths, weakness, threats and opportunities are also identified:

Strengths

- **Strategic Location:** Barbados's prime location in the Caribbean enhances its appeal as a hub for tourism activity and events.
- **Established Institutions:** The presence of reputable educational and research institutions, such as the University of the West Indies (UWI), Ross University, and Barbados Community College, provides valuable knowledge and expertise.
- **World-Class Facilities:** High-quality conference and event venues, including the Lloyd Erskine Sandiford Centre and Barbados Hilton, support the island's role in hosting international events.
- **Innovative Initiatives:** Efforts like the Barbados National Tourism Programme project showcase the island's commitment to integrating technology and innovation into the tourism sector.

Weaknesses

- **Resource Limitations:** There may be constraints related to financial and technical resources needed to fully support and expand Tourism Linkages.
- **Limited Local Expertise:** While there is substantial expertise, there may be gaps in specialized knowledge required for niche tourism sectors.
- **Infrastructure Challenges:** Some areas may face limitations in infrastructure and facilities necessary for advanced tourism operations and knowledge sharing.
- **Fragmented local supply bases** with individual business which were often too small and not sufficiently organized to provide the required supply on a consistent basis.
- **Compliance Standards:** Local MSE's not in compliance with the industry standards required by the hotels such as hygiene, food handling, manufacturing, storage and packaging.
- **MSE Business practices:** have been viewed as opportunistic by some hoteliers as prices appear to be set on the basis of seeking to get as much for a "one-off purchase" rather than a set pricing model based on consistent supply.
- **Lack of information generation and sharing:** Individual SME's were found to be unable or unwilling to invest in the effective marketing of their products to allow for effective planning by purchasers.
- **Unfavorable payment terms for MSEs:** Payment terms which would be offered by hoteliers which ranged from 30 to 90 days were viewed unfavourably by MSE's as many of them were working with limited capital and as such waiting on large payments negatively affected further ongoing products.
- **Defunct Procurement practices:** Procurement practices by local distribution companies were oriented to imports which would allow for the consistency of supply, quality and pricing required by hoteliers.

Opportunities

- **Enhanced Collaboration:** Increased partnerships with international tourism organizations and local institutions can boost resource availability and knowledge sharing.
- **Growth in Niche Tourism:** Expanding into niche areas like gastronomic tourism, edutourism, and cultural tourism can attract diverse visitor segments.
- **Technological Advancements:** Leveraging technology and big data to improve tourism management and visitor experiences offers significant potential for growth.

Threats

- **Economic Fluctuations:** Global economic changes can impact tourism flows and financial stability.
- **Competitive Market:** Intense competition from other Caribbean destinations may affect Barbados's market share and tourism growth.
- **Environmental Concerns:** Issues related to climate change and environmental sustainability could pose risks to tourism infrastructure and natural resources.

TOURISM LINKAGES POLICY RATIONALE

Based on the SWOT analysis, the implementation of the Tourism Linkages Policy represents a significant transformation for Barbados's tourism sector, aiming to boost global competitiveness through innovation and entrepreneurship. By adopting Tourism Linkages, Barbados seeks to modernize its approach to tourism, moving beyond traditional mass-market vacations and reinforcing its position as a pioneering destination.

Recognizing the importance of a collaborative approach to tourism development, the Ministry of Tourism and International Transport is therefore advancing the networking strategy to support the tourism economic growth, creating connections throughout the economy and offering new opportunities for development.

The Five Networks

1. Gastronomy Network

Gastronomy tourism involves exploring local food and drink, offering unique and memorable culinary experiences. In Barbados, this includes contributions from farmers, restaurateurs, fishermen, and other food-related entities. The Gastronomy Network will leverage global interest in culinary tourism by promoting Barbados's diverse culinary offerings through festivals and other initiatives, creating a competitive tourism product.

2. Health & Wellness Network

Health and wellness tourism focuses on trips aimed at improving health and wellbeing, including spa visits, medical treatments, and alternative therapies. Barbados's Health & Wellness Network will develop existing spa facilities and promote the use of indigenous natural products. This Network will work to align local spas with international standards, enhancing the credibility and appeal of Barbados's health and wellness tourism offerings.

3. Sports and Entertainment Network

The Sports and Entertainment Network combines sports and entertainment sectors to enhance and promote local events. Sports tourism includes attending international events like cricket tournaments and golf classics, while entertainment enriches visitors' experiences and diversifies revenue sources. This Network will collaborate to strengthen both sectors and attract more tourism.

4. Knowledge Network

The Knowledge Network will foster a community of knowledge sharing among policymakers, practitioners, and researchers. It will focus on best practices, community tourism development, and human resource development. The Network will also promote Barbados's Meetings, Incentives, Conventions, and Exhibitions (MICE) facilities and utilize ICT to enhance tourist experiences.

5. Shopping Network

Shopping tourism involves travel motivated by purchasing goods not available in source country's environment. The Shopping Network will improve the shopping experience, linking purchases to the travel experience and encouraging repeat visits.

Functions of Tourism Linkages

The Networks are designed to:

- Enhance Barbados's global competitiveness.
- Target new tourism niches aligned with the country's natural and cultural strengths.
- Address emerging demographics, spending patterns, and traveler interests.
- Mitigate seasonality by offering diverse events and activities year-round, promoting a sustainable tourism sector.
- Enrich visitor experiences through excellence in service and standards.

Research indicates that successful Tourism Linkages require several key elements to function effectively and sustainably. These elements include clear objectives and purpose, a well-defined organizational structure, adequate resourcing, active member engagement, and a culture of inter-organizational learning.

Benefits of the Tourism Network Strategy Approach

Implementing the Tourism Network Strategy offers several benefits, including:

- Increased visitor arrivals
- Higher visitor expenditure
- Enhanced visitor experiences
- Continuous innovation in tourism products
- A more inclusive tourism value chain
- Strengthened business strategies and growth outcomes
- Improved capacity building

SITUATIONAL ANALYSIS

Tourism Linkages: Global Context

Globally, the use of Network structures in tourism has gained traction, with diverse stakeholders operating at both macro and micro levels. One prominent example is the United Nations World Tourism Organization (UNWTO), which leverages the expertise of member countries by integrating NGOs, governments, and academic institutions. The UNWTO manages several key networks:

- **UNWTO City Tourism Network:** Promotes collaboration between public and private sectors to enhance urban tourism.
- **UNWTO Gastronomy Network:** Facilitates partnerships with experts, destination management organizations, academia, and member states to advance gastronomy tourism.
- **UNWTO Knowledge Network:** Brings together knowledge generators, policymakers, and practitioners to create and apply tourism knowledge resources.
- **UNWTO Shopping Network:** Encourages the development of shopping tourism by sharing best practices.

GASTRONOMY TOURISM

Gastronomy tourism encompasses travel for the purpose of experiencing a destination's food culture, including local cuisine, cooking classes, food festivals, and wine tasting.

Market Growth:

The gastronomy tourism market is projected to grow significantly, with estimates indicating it could reach a value of \$1 trillion by 2025, driven by the increasing interest in food experiences among travelers.

Key Destinations:

Cities like Paris, Tokyo, Barcelona, and Bologna are renowned for their culinary offerings, attracting food enthusiasts from around the world. Emerging destinations are also gaining recognition for unique local cuisines.

Impact of Social Media:

Social media platforms have influenced gastronomy tourism, with food photography and culinary experiences becoming key drivers of travel decisions.

Statistics

1. Expenditure:

- Studies show that food-related activities can account for up to 30% of a tourist's overall travel spending. In some regions, food and beverage expenditures surpass those for accommodations.

2. Visitor Engagement:

- Approximately 50% of travelers indicate that local food is a major factor in choosing a travel destination, highlighting the importance of gastronomy in travel decisions.

3. Culinary Events:

- Major culinary events, such as food festivals and competitions, attract large crowds; for instance, the Melbourne Food and Wine Festival draws over 100,000 attendees each year.

HEALTH AND WELLNESS

Health and wellness tourism includes travel for medical procedures, spa treatments, wellness retreats, and holistic health experiences. This sector focuses on improving physical, mental, and emotional well-being. Health and wellness tourism has expanded globally, with destinations like India leveraging traditional practices such as Yoga and Ayurveda to attract wellness travelers. Similarly, the Dominican Republic has developed wellness packages combining elective surgery with spa treatments. As travel costs decrease and information about health and wellness becomes more accessible, this sector continues to grow, presenting opportunities for innovative tourism offerings.

Market Growth

The global health and wellness tourism market is projected to grow from approximately \$639 billion in 2022 to over \$1 trillion by 2025, driven by increasing health awareness and the desire for preventive care.

Key Destinations

Popular destinations include Thailand, India, Mexico, and Costa Rica, known for their wellness retreats, traditional healing practices, and medical tourism services.

Influence of Aging Population

An aging global population is driving demand for health-related travel, particularly in regions with advanced medical facilities and wellness programs.

Statistics

1. **Expenditure:**
 - Medical tourists can spend anywhere from \$3,000 to \$12,000 per trip, depending on the procedures and treatments sought.
 - In 2019, the medical tourism sector alone was valued at \$54 billion globally.
2. **Visitor Numbers:**
 - Estimates suggest that over 14 million people travel for medical tourism each year, with significant growth expected in the coming years.
3. **Market Segments:**
 - Wellness tourism accounts for about 16% of all domestic and international travel, with wellness-focused trips often involving spa treatments, fitness activities, and mindfulness practices.

SPORTS AND ENTERTAINMENT

Sports tourism involves traveling to participate in or observe sporting events and has seen rapid growth. It includes:

- **Sport Event Tourism:** Traveling to watch a sporting event, often combined with other local attractions.
- **Active Sport Tourism:** Traveling to participate in sports activities.
- **Nostalgia Sport Tourism:** Visiting sport-related attractions or museums.

Sports tourism has significant economic and social impacts, including revenue generation and enhanced destination profiles. Events like the FIFA World Cup and the Olympic Games can boost travel statistics and support related sectors.

Sports and entertainment tourism has become a dynamic segment of the global tourism industry, attracting millions of visitors and generating substantial economic impact. Here's an overview of the global context, key statistics, and potential policies to enhance tourism linkages in this sector.

Market Growth

The sports tourism market is expected to grow significantly, with estimates projecting a value of around \$600 billion by 2025. Similarly, the entertainment tourism sector is also on the rise, driven by events, festivals, and cultural attractions.

Key Destinations

Cities like Las Vegas, London, Rio de Janeiro, and Barcelona are popular for major sporting events (e.g., the Olympics, World Cup) and entertainment festivals (e.g., Coachella, Edinburgh Festival).

Impact of Mega Events

Hosting mega-events can have a profound impact on tourism, often leading to long-term benefits in terms of infrastructure and global visibility.

Statistics

1. Expenditure:

- Attendees at major sporting events can spend significantly. For instance, visitors to the 2016 Rio Olympics spent an estimated \$2 billion during the games.
- The Super Bowl generates about \$300 million in economic impact for the host city.

2. Participation:

- Research shows that about 30% of travelers participate in sports tourism, with activities ranging from attending events to engaging in recreational sports during their travels.

3. Growth of E-sports:

- The global e-sports market is projected to exceed \$1.5 billion, with major events attracting large audiences both in-person and online, reshaping the landscape of entertainment tourism.

KNOWLEDGE TOURISM

Knowledge tourism involves creating spaces where information is shared and used to enhance tourism practices. Knowledge Networks facilitate collaboration among stakeholders to develop ideas and solutions for the tourism industry, supporting the growth and evolution of tourism through strategic knowledge sharing. Knowledge tourism includes activities such as attending conferences, workshops, seminars, cultural exchanges, and academic programs. It fosters a deeper understanding of cultures, history, and contemporary issues.

Market Growth

The knowledge tourism market has been growing steadily, driven by globalization, increased educational exchange, and a rising interest in lifelong learning. The global educational tourism market was valued at around \$200 billion and is expected to expand in the coming years.

Key Destinations

Major cities like Boston, London, Berlin, and Sydney are notable for their educational institutions and cultural offerings, attracting international students and researchers.

Impact of Digital Technology

Online platforms have made educational resources and experiences more accessible, but they also emphasize the need for in-person interactions and experiential learning.

Statistics

1. Expenditure:

- International students contribute significantly to the economies of host countries. For instance, in the U.S., international students contributed over \$40 billion to the economy in 2021.

2. Demographics:

- A study indicated that approximately 45% of university students worldwide are interested in studying abroad, reflecting a strong demand for educational travel.

3. Event Participation:

- The global business events industry, including conferences and workshops, was valued at over \$1 trillion, highlighting the economic potential of knowledge tourism.

SHOPPING TOURISM

Shopping tourism has emerged as a significant segment of the global tourism industry, blending travel with retail experiences.

Market Growth

The global shopping tourism market was valued at approximately \$500 billion in recent years and is projected to grow steadily, driven by rising disposable incomes and a growing middle class in emerging economies.

Key Destinations

Major cities such as New York, Paris, London, Dubai, and Hong Kong are renowned shopping destinations, attracting millions of tourists each year.

Cities in Asia, particularly Singapore and Tokyo, are also gaining popularity for their unique shopping experiences.

Consumer Behavior

Tourists often spend significantly more on shopping compared to locals, with research indicating that shopping can account for 30% to 50% of their total expenditure.

Impact of E-commerce:

The rise of online shopping has influenced physical retail spaces, pushing them to enhance the in-store experience to attract tourists.

Statistics

1. Expenditure:

- A report indicated that Chinese tourists alone contributed over \$200 billion to global shopping tourism in recent years, emphasizing their importance in the market.

2. Demographics:

- Studies show that Millennials and Gen Z travelers prioritize shopping experiences, with 72% of Millennials considering shopping an essential part of their travel experience.

3. Tourist Spending Breakdown:

- On average, shopping tourists spend 5 to 10 times more than domestic consumers on retail purchases.

TOURISM LINKAGES: REGIONAL CONTEXT

In the Caribbean, establishing linkages between tourism and other sectors has proven to be a significant driver of economic growth. A notable initiative is the “Strengthening of the Tourism Sector through Development of Linkages with the Agricultural Sector in the Caribbean,” launched in 2009 by the Institute for Cooperation on Agriculture (IICA) and the Organization of American States (OAS). This program aimed to enhance economic opportunities, improve resilience in rural communities, and support sustainable development in the agriculture and tourism sectors across seven Caribbean countries, including Barbados.

Regional Gastronomy Tourism

Caribbean gastronomy tourism offers travelers the opportunity to explore the rich culinary traditions of the region, blending African, European, and indigenous influences. The diverse food culture, from local street food to fine dining, plays a significant role in enhancing the overall tourist experience, making it a key component of Caribbean travel.

Statistics

According to the Caribbean Tourism Organization (CTO), food and beverage spending accounted for approximately 20% of total visitor expenditure in 2019, translating to roughly \$2.5 billion in revenue for the region. The demand for authentic culinary experiences, including local dishes and drinks, continues to grow, with an increasing number of tourists seeking immersive food-focused travel experiences.

Linkages

Culinary Collaborations: Local chefs, food producers, and hotels can partner to create exclusive dining experiences, such as cooking classes, rum tastings, or farm-to-table meals, which highlight Caribbean flavors and ingredients. These partnerships not only elevate the culinary tourism experience but also support local economies.

Food Festivals and Events: Hosting food festivals, such as seafood and spice festivals, provides an excellent opportunity for visitors to discover the region's gastronomic diversity while engaging with local culture. These events foster a sense of community and offer a platform for local food artisans to showcase their talents to a global audience.

Digital Platforms: The use of digital platforms to promote Caribbean gastronomy, such as booking food tours, cooking classes, or virtual tastings, extends the region's culinary offerings to tourists before they even arrive. This digital shift creates a sustainable revenue stream for local businesses and enhances the visibility of Caribbean cuisine worldwide.

Regional Health & Wellness Tourism

The Caribbean is increasingly recognized as a premier destination for health and wellness tourism. With its pristine natural environment, diverse flora, and cultural practices rooted in holistic approaches, the region offers unique opportunities for visitors seeking relaxation, rejuvenation, and wellness.

The health and wellness tourism market is a rapidly growing segment within the Caribbean. According to a 2021 report by the Global Wellness Institute, the wellness tourism sector is valued at approximately \$639 billion globally, with the Caribbean capturing a notable share due to its natural beauty and holistic offerings.

Statistics

Market Growth: In the Caribbean, wellness tourism grew by 10% annually from 2015 to 2020, significantly outpacing overall tourism growth in the region, which was around 5% during the same period.

Visitor Demographics: A 2022 survey indicated that 62% of visitors to wellness resorts in the Caribbean sought stress relief, while 45% aimed to improve physical health through yoga, spa treatments, and holistic therapies.

Linkages

Complementary Services: Resorts and spas collaborate with local wellness practitioners to offer comprehensive packages that combine traditional therapies with modern wellness practices. For example, a wellness retreat in Jamaica might include yoga sessions, massages using local herbs, and nutrition workshops featuring Caribbean cuisine.

Community Engagement: Local communities can develop wellness tourism experiences that promote cultural heritage. Programs such as guided herb walks or traditional cooking classes not only educate tourists but also provide economic benefits to local artisans and farmers.

Health Conferences and Retreats: The Caribbean can host health and wellness conferences, attracting professionals and enthusiasts from around the globe. Such events can create networks that enhance knowledge sharing and foster innovation within the industry.

Regional Sports & Entertainment Tourism

The vibrant sporting culture of the Caribbean is a significant draw for tourists. From cricket and soccer to sailing and diving, the region is home to numerous sporting events and activities that attract both participants and spectators. The sports tourism market in the Caribbean has seen significant growth, with a 2019 report estimating its value at \$140 million.

Statistics

Event Attendance: The Caribbean Premier League (CPL) cricket matches attract over 350,000 spectators annually, generating an estimated \$20 million in tourism revenue.

Participation Rates: A 2021 survey revealed that 38% of visitors participated in recreational sports activities, such as water sports, golf, and hiking, during their stay.

Linkages

Event Tourism: Major sporting events, such as the Caribbean Premier League cricket matches or sailing regattas, can be combined with entertainment festivals, showcasing local music, dance, and cuisine. This not only enriches the visitor experience but also encourages longer stays and greater spending.

Sports Training Camps: The warm climate and beautiful settings make the Caribbean an ideal location for sports training camps. Athletes from around the world can train in various disciplines while enjoying the local culture, creating opportunities for partnerships between sports organizations and local tourism boards.

Cultural Exchange Programs: Collaborations with international sports teams or entertainers can facilitate cultural exchange programs, allowing local talent to showcase their skills while learning from global icons, thus promoting mutual growth and exposure.

Regional Knowledge Tourism

The Caribbean is not just a vacation destination; it is also a hub of knowledge and education. The region's rich history, biodiversity, and cultural heritage provide ample opportunities for educational tourism. Educational tourism is increasingly recognized as a vital segment of the Caribbean tourism landscape. The region's rich history and biodiversity offer unique learning opportunities for both students and tourists.

Statistics

Growth in Educational Programs: The number of educational programs and research expeditions has increased by 15% from 2018 to 2022, with institutions like the University of the West Indies leading initiatives.

Visitor Engagement: A report from the Caribbean Tourism Organization (CTO) noted that educational tourists tend to stay 25% longer and spend 40% more than regular tourists, highlighting the economic benefits of this sector.

Linkages

Academic Collaborations: Caribbean universities can partner with international institutions to offer programs that combine study with travel. Research expeditions on marine biology or anthropology could attract students interested in hands-on learning experiences.

Workshops and Seminars: Local experts can host workshops and seminars on topics such as sustainability, conservation, and cultural heritage. These events can attract tourists eager to learn, fostering an environment of knowledge exchange that benefits both visitors and locals.

Heritage Trails: The development of heritage trails that highlight historical and cultural sites can encourage educational tourism. These trails can be promoted through guided tours led by local historians, providing immersive experiences that enhance appreciation of the region's diverse heritage.

Regional Shopping Tourism

Shopping in the Caribbean offers a unique blend of local crafts, luxury goods, and vibrant markets. The region's diverse cultural influences are reflected in the products available, making shopping an essential part of the visitor experience.

Statistics

Consumer Spending: According to the CTO, shopping accounted for approximately 25% of total visitor spending in 2019, translating to around \$3 billion in revenue.

Market Growth

The demand for local artisan products has surged, with a reported 30% increase in sales of handmade crafts and goods from 2017 to 2022, driven by the rising popularity of authentic, locally sourced items.

Linkages

Artisan Collaborations: Local artisans can partner with hotels and resorts to create exclusive products that reflect the culture and heritage of the region. This not only supports local economies but also provides tourists with authentic souvenirs.

Pop-Up Markets and Festivals: Seasonal markets and festivals can be organized to showcase local products, crafts, and culinary delights. Such events create a festive atmosphere that encourages both locals and tourists to engage with the community, fostering a sense of belonging.

Digital Shopping Platforms: The integration of e-commerce can enhance shopping opportunities for tourists even after they leave the region. By promoting local products online, artisans can reach a broader audience, creating a sustainable revenue stream that benefits the community.

TOURISM LINKAGES THE BARBADIAN CONTEXT

FOOD AND AGRO-TOURISM

In Barbados, local cuisine has become a cornerstone of the island's tourism appeal. Renowned for its culinary delights such as Bajan pepper sauce and flying fish, Barbados continues to build on its gastronomic reputation. Initiatives such as food festivals and the promotion of local food experiences aim to attract visitors and enhance their engagement with Barbadian cuisine. Efforts are also underway to formalize street food vendors and ensure compliance with local regulations, contributing to a more structured culinary tourism sector.

It has been noted that in Barbados, Agro-tourism can be broken down into six categories:

1. **Agro-trade** – this is related to activities which directly link the agricultural industry and the tourism industry via the creation of trading arrangements such as the supply of food items directly to the hotel or restaurant by farmers.
2. **Culinary tourism** – which focuses on utilizing local cuisine and food festivals.
3. **Farm-based/Agro-ecotourism** – activities such as farm tours, stays at rural bed and breakfast hotels or dive tours.
4. **Community Tourism** – activities which can provide visitors with a glimpse into local life, mainly in a rural setting such as local rum shops
5. **Health and Wellness Tourism** – promoting vacations which may be combined with local offerings for alternative medicine such as hot springs and local herbs.
6. **Agro-heritage Tourism** – activities which seek to highlight the agricultural industry or the history of the industry such as tours to a sugar plantation or even the local Agrofest.

Activities such as the annual local Agrofest, which showcases and highlights the local agricultural industry, while not designed on inception to specifically be an agro-tourism activity, is a prime example which can be used in facilitating and encouraging the development of agro-tourism. One author suggests that there is a difference between tourism on a farm and farm tourism, where in

the former tourism activities are simply to supplement to normal farm income, whereas in the latter, tourism and agriculture are intricately linked such as farm hotels.

HEALTH AND WELLNESS TOURISM

The distinction between medical tourism and health and wellness tourism is evolving. Medical tourism involves traveling for specialized medical care, while health and wellness tourism focuses on lifestyle and preventive care activities. This distinction highlights the growing importance of wellness as part of the overall tourism experience.

In Barbados, health and wellness tourism is gaining traction as part of the broader tourism strategy. The island's natural resources and established hospitality sector provide a strong foundation for growth in this area. Recent developments include the expansion of wellness facilities within hotels and standalone centers, and the promotion of local wellness products, such as those derived from indigenous plants. The Tourism Linkages Programme supports this growth by exploring opportunities in herbaceuticals and nutraceuticals, enhancing the sector's appeal.

Early Examples of Medical Tourism Initiatives

In the past decade, medical tourism has developed into a cohesive planning concept in Barbados. Initial efforts to market medical services to foreign patients were largely driven by small specialty clinics targeting both local and international clientele.

The island has historically been a provider of health services in the Eastern Caribbean. International patients have sought care at the Queen Elizabeth Hospital through both formal cross-border arrangements between national health systems and informal, patient-initiated trips.

These journeys have primarily been for consultations and treatments by specialists not available in patients' home countries. The Caribbean's medical training structure has supported the development of these referral networks among regional physicians.

The Barbados Fertility Centre

In 2002, the Barbados Fertility Centre (BFC) was founded. The decision to offer fertility services to international patients arose from the lack of comparable services on the island and the need for a larger patient base to sustain such an initiative. From the outset, the Centre incorporated international patient recruitment through the Internet, successfully attracting patients from the United States and the United Kingdom within its first year. The Centre quickly gained a strong reputation both locally and internationally, initially drawing most of its international clientele from the UK and Europe.

Potential for Health and Wellness Tourism Development

For Barbados health and wellness tourism to develop it has been suggested that two main groups of patients be targeted for the development of the medical tourism sector (Snyder et al, 2016). The first group consists of established international visitors, including repeat tourists and those from the wider Latin America and Caribbean (LAC) region. Barbados should aim to attract new patient inflows, particularly from North America and, to a lesser extent, Europe, focusing on individuals without prior ties to the island. This section explores the rationale behind targeting these groups and the potential for treating them as Barbados' medical tourism sector evolves.

Targeting Established Inflows: Recreational Tourists

Stakeholders in Barbados recognized regular visitors as a promising market for medical tourism. The island's status as a cruise ship destination presents opportunities to attract not just passengers, but also crew members to private medical facilities. Participants noted that tourists who stay for extended periods, often two to three months, are particularly valuable, as many own or rent long-term vacation properties. These visitors are seen as unique to Barbados, giving the island an edge over competitors.

Moreover, short-stay repeat visitors, including those who have been returning to Barbados for decades, represent an existing and future market for medical tourism. Stakeholders believe that these familiar tourists could easily transition into medical tourists, making them an "easy win" for the sector.

Targeting Established Inflows: Regional LAC Patients

Participants highlighted privately paying patients from the LAC region as vital for both existing revenue and future growth in medical tourism. One stakeholder noted that there are over three million people in the Caribbean seeking quality medical care. The region is perceived as a "huge market," but competition from other Caribbean nations is a concern.

Barbados is seen as having a strong reputation for quality healthcare compared to its neighbors, making it an attractive option for patients from the LAC region seeking superior care. Additionally, some patients from Eastern Caribbean countries have limited options at home, leading them to seek services in Barbados.

Targeting New Inflows: Uninsured and Underinsured Americans

The potential to attract uninsured and underinsured American patients is recognized as a key strategy for expanding medical tourism in Barbados. Given the private nature of the US healthcare system, there is a substantial pool of individuals without adequate coverage. Participants expressed optimism about the potential number of American patients seeking care abroad, particularly following changes in the US healthcare landscape.

Barbados stakeholders noted that many procedures could be significantly cheaper than in the US, making it an appealing option. Additionally, there is interest in forming partnerships with US insurance companies to facilitate coverage for American patients traveling to Barbados for treatment.

Targeting New Inflows: North Americans Seeking Accessible Care

Participants acknowledged the demand for more accessible medical care among Canadian and American patients. The lengthy wait times common in Canada present an opportunity for Barbados to attract patients seeking timely services. However, some stakeholders expressed concerns about the high cost of care in Barbados compared to other LAC nations, which could hinder competitiveness.

Despite the challenges, there is a belief that North Americans are increasingly looking abroad for healthcare options that are both affordable and timely, creating a favorable environment for Barbados to attract these patients.

Targeting New Inflows: North Americans Seeking Unique Procedures

There is a perception that patients from the US and Canada might be inclined to seek treatments unavailable in their home countries, such as experimental procedures or those pending regulatory approval. Barbados could capitalize on this demand, as it can offer a wider range of services without the same regulatory restrictions. The potential for high-profit margins from these unapproved treatments is appealing to stakeholders, who see this as a lucrative niche for the island's medical tourism sector.

In summary, Barbados can strategically position itself to attract various patient groups, leveraging its established tourism base while also exploring new inflows to enhance its medical tourism sector.

SPORTS AND ENTERTAINMENT TOURISM

Sports tourism involves traveling to participate in or observe sporting events and has seen rapid growth. It includes:

- **Sport Event Tourism:** Traveling to watch a sporting event, often combined with other local attractions.
- **Active Sport Tourism:** Traveling to participate in sports activities.
- **Nostalgia Sport Tourism:** Visiting sport-related attractions or museums.

Sports tourism has significant economic and social impacts, including revenue generation and enhanced destination profiles. Events like the FIFA World Cup and the Olympic Games can boost travel statistics and support related sectors.

Barbados is making strides in sports tourism, capitalizing on its reputation for sports excellence. It has recently hosted a National Consultation on Sports Tourism and has drafted a Sports Policy to govern growth in that sector in the medium term. The island has hosted various international sports events and is enhancing its sports tourism infrastructure. Initiatives include the promotion of local sports events and partnerships to boost international interest. In entertainment, Barbados continues to build on its vibrant cultural scene, with events like Crop Over and local music festivals enhancing the visitor experience.

With the proposed creation of the Sports Tourism Taskforce, it is expected that many of the potential initiatives highlighted in the sports tourism policy will be implemented.

KNOWLEDGE TOURISM

Knowledge tourism involves creating spaces where information is shared and used to enhance tourism practices. Knowledge Networks facilitate collaboration among stakeholders to develop ideas and solutions for the tourism industry, supporting the growth and evolution of tourism through strategic knowledge sharing.

In Barbados, the role of Knowledge Networks can be seen through the country's efforts to enhance its tourism sector by leveraging local assets and expertise. Barbados's strategic location in the Caribbean makes it an ideal venue for hosting events and conferences and facilitates easy travel to other regional destinations.

Local Expertise and Institutions: Barbados boasts a range of educational and research institutions, such as the University of the West Indies (UWI) and the Barbados Community College, which contribute to the tourism sector through research and training. These institutions provide a wealth of knowledge that supports the development of tourism practices and policies.

Tourism Training and Innovation: Programs like the Barbados Tourism Marketing Inc's (BTMI) initiatives and collaborations with local service providers aim to enhance the skills of tourism professionals. These include specialized training programs and apprenticeships to prepare and improve competencies for persons in the tourism industry.

Conference and Event Facilities: Barbados is home to several state-of-the-art conference facilities, such as the Lloyd Erskine Sandiford Centre and the Barbados Hilton, which are well-equipped to host international conferences and events. These facilities contribute significantly to the country's ability to attract and support knowledge-sharing events.

Knowledge Integration: The Barbados Tourism Marketing Inc. (BTMI) has focused on integrating innovative technologies and data analysis to enhance the tourism experience. Initiatives like the Barbados Smart Tourism project aim to utilize technology to improve visitor engagement and streamline tourism management.

Cultural and Educational Synergies: Barbados also leverages its rich cultural heritage and educational institutions to foster knowledge tourism. By promoting cultural and educational exchanges, Barbados positions itself as a destination where tourism and learning go hand in hand.

Overall, Barbados's approach to knowledge tourism emphasizes the importance of integrating local expertise with global best practices to foster growth and development in the tourism sector.

Statistics

1. Visitor Engagement:

- Research indicates that around 15% of tourists visit Barbados specifically for educational purposes, including academic conferences, workshops, and cultural events.

2. Student Enrollment:

- UWI in Barbados enrolls thousands of students annually, including a significant number from other Caribbean nations and beyond, contributing to knowledge tourism. Barbados also has Ross University, the American University of Barbados, the Barbados Community College and the Samuel Jackman Prescod Institute

3. Economic Impact:

- The educational sector, including knowledge tourism, contributes significantly to the local economy, with international students alone contributing millions in tuition fees and living expenses.

SHOPPING TOURISM

Barbados boasts a rich cultural heritage and a variety of shopping opportunities, including local markets, craft shops, duty-free stores, and high-end boutiques, making it attractive to tourists. Popular shopping locations include Broad Street in Bridgetown, Limegrove Lifestyle Centre, and local markets like the Oistins Fish Fry, where local crafts and food are offered.

Statistics

1. Visitor Spending:

- According to the MasterCard data tourists spend an average of \$200 to \$300 on shopping during their stay, with many visitors allocating a portion of their budget specifically for shopping.

2. **Duty-Free Shopping:**

- Duty-free shopping is a significant draw, with estimates suggesting that approximately 40% of visitors take advantage of these shopping opportunities.

3. **Contribution to Economy:**

- The retail sector contributes significantly to the national economy, with tourism-related shopping accounting for a substantial portion of overall retail sales.

THE TOURISM LINKAGES POLICY

Vision

To develop a vibrant tourism sector in Barbados that leverages networks in Gastronomy, Shopping, Sports and Entertainment, Health and Wellness, and Knowledge. By integrating these networks with other economic sectors, Barbados aims to generate widespread economic benefits and foster diverse, innovative tourism experiences that attract and captivate visitors.

Mission

To advance inclusive and sustainable tourism growth through a more integrated, diversified, and responsive value chain, ultimately increasing visitor arrivals and expenditures.

Key Policy Outcomes

- **Enhanced Economic Opportunities:** Increase the availability of goods and services from agriculture and manufacturing to the tourism sector through the Linkages Network Programme.
- **Supportive Institutional Framework:** Establish an institutional structure that underpins the Networks and Technical Working Groups (TWGs).
- **Enhanced Collaboration:** Foster stronger cooperation between private and public sector partners to diversify Barbados's tourism offerings.
- **Reduced Seasonality:** Mitigate the impact of seasonal fluctuations by diversifying tourism products to ensure consistent visitor traffic throughout the year.
- **Strengthened Destination Identity:** Promote Barbados's unique attributes in gastronomy, shopping, sports and entertainment, health and wellness, and knowledge sectors.

Guiding Principles

The following principles guide the Tourism Linkages Network's work, ensuring alignment with national goals and Sustainable Development Goals (SDGs), and integrating cross-sectoral economic activities:

- **Collaboration:** Strengthen and establish relationships with stakeholders to enhance the government's functions and achieve collective goals.
- **Enabling Environment:** Create a supportive framework to enhance visitor experiences and develop niche tourism areas, fostering sustainable sector and economic growth.
- **Harmonisation:** Ensure alignment between national and programmatic strategies, such as the National Tourism Programme and collaborative opportunities between Networks.
- **Adaptability:** Foster a proactive environment that responds to evolving tourism trends and market demands.
- **Inclusiveness:** Promote broader involvement of Barbadians in the tourism value chain, improving economic impacts and workforce skills.
- **Evidence-Based Monitoring and Evaluation:** Implement and evaluate activities based on research and best practices to ensure high success rates for Network initiatives.

Cross-cutting Issues

Internal

Establishment of an Institutional Framework

Policy Objective: To increase the understanding and the awareness of the current deficiencies in the supply of food products along the value chain and to identify the actions needed.

- **Considerations:**
 - Conduct a Supply Audit of the agricultural sector
 - Conduct a Value Chain Audit of the agricultural to tourism sector
 - Establish the Tourism Value Chain
 - Execute an agricultural census

Policy objective: To promote linkages between the agrifood sector and the tourism industry to increase sustainable local sourcing of fresh and processed agricultural and fisheries products through an effective agro-tourism policy.

- **Considerations:**
 - Create the Tourism Development Fund (TDF) for the Tourism Linkages Programme from surcharge on arrivals
 - Create the Tourism Linkages Taskforce (TLF)
 - Develop an agro-tourism policy

Policy Objective: To design inter-sectoral and inclusive policies which promote Public-Private sector Partnerships (PPPs) for improved local food use and consumption by the tourism and food service sectors.

- **Considerations**
 - Restart the PLANT (Promoting Linkages in Agriculture, Nutrition and Tourism) to help develop the local business and spur the development of agricultural tourism via the use of farm displays to attract visitors to farms thereby facilitating the connection of visitors to local food production and cuisine in addition to bringing general awareness to the importance of agriculture.
 - Restart the project between the Barbados National Union of Farmers (NUF) and the cruise industry which aims to scale-up existing value chain models to partner farmers with a local supermarket chain to create a bridge with the cruiselines. The project's scope was to enable 20 local farmers to supply 375 tons of local fresh produce to the supermarket chain for onward sale to UK cruise lines. The supermarket will serve as an intermediary buyer which would purchase produce from the farmers to give them a steady flow of income on a weekly and then sold the produce to the cruise liners throughout the cruise season.
 - Restart the engagement between the BHTA engaged with micro and small enterprises (MSE's) to anchor companies in the Barbados Hotel Value Chain.

Policy Objective: Enhance institutional capacity and management of the Linkages Network Programme.

- **Considerations:**

- Appropriately staff the Tourism Development Fund (TDF) for the Tourism Linkages Network within the Ministry of Tourism with support from a new Tourism Linkages Taskforce.
- Ensure alignment of Networks with TWG activities.
- Include key sector specialists and decision-makers on the Taskforce.
- Develop tools for comprehensive and accessible data collection and processing.

Information and Communication Technology (ICT) Strategy

Policy Objective: Utilize digital platforms to inform decision-making on tourism product supply and demand.

- **Considerations:**

- Engage tech experts to develop digital tools.
- Use ICT to map resources and analyze travel trends.
- Gather visitor insights through digital platforms.

Promotion of the Tourism Linkages Activities

Policy Objective: Develop international marketing strategies for the Networks to attract visitors.

- **Considerations:**

- Promote local Network activities through international network channels.
- Engage the Diaspora to increase product consumption.
- Market local tourism experiences to current visitors.

Identifying Passion Points across the Networks

Policy Objective: Implement research frameworks to understand and monitor visitor passion points.

- **Considerations:**

- Develop performance standards to monitor visitor interests.
- Use research tools to improve understanding of visitor needs.
- Facilitate communication between farmers and hotel purchasing managers through tracer studies.

External

Culture and Heritage

Policy Objective: Leverage Barbados's cultural and heritage assets for tourism while ensuring their protection.

- **Considerations:**
 - Align with cultural and heritage stakeholders.
 - Identify and promote cultural and heritage assets.
 - Raise awareness of cultural developments.

Youth Participation

Policy Objective: Encourage youth involvement in tourism through entrepreneurship and innovation.

- **Considerations:**
 - Promote youth employment and entrepreneurship in tourism.
 - Implement capacity-building programs in tourism.
 - Support youth participation in agriculture.

Gender Equality

Policy Objective: Ensure equitable access to tourism resources and opportunities for all genders.

- **Considerations:**
 - Ensure gender balance in business and skills training.
 - Support gender-inclusive tourism initiatives.

Environmental Sustainability

Policy Objective: Align Network activities with principles of environmental sustainability.

- **Considerations:**
 - Promote awareness of tourism's environmental impact.
 - Encourage sustainable practices within Networks and TWGs.
 - Share best practices on environmental sustainability.

Climate Resilience

Policy Objective: Develop adaptation strategies to protect tourism resources from climate change.

- **Considerations:**
 - Implement climate-proofing measures and resilience training for stakeholders.

Policy Strategies and Action Plan

Gastronomy

Programme Outcome: Utilize Barbados's rich food culture to create diverse culinary products and experiences, enhancing gastronomy tourism.

Product Development

Objective: Develop a market-ready gastronomy tourism product.

- **Strategies:**
 - Attract visitors with food festivals and international culinary personalities.
 - Develop targeted marketing strategies and spatial mapping of culinary products.
 - Promote local gastronomy and establish diverse culinary experiences across Barbados.

Quality and Standards of Gastronomy Tourism

Objective: Develop and implement gastronomy tourism standards.

- **Strategies:**
 - Partner with international certification bodies.
 - Update training programs in collaboration with educational institutions.
 - Promote best practices and innovation in gastronomy tourism.

Gastronomy Brand Development

Objective: Position Barbados as a leading gastronomy tourism destination.

- **Strategies:**
 - Enhance the cultural significance of Barbadian cuisine.
 - Support global marketing and create a branding strategy.
 - Develop a culinary ambassador program and maintain brand integrity.

Forging Linkages

Objective: Increase the use of local produce in the hospitality and food industries.

- **Strategies:**
 - Showcase local products and reward innovative farming techniques.
 - Encourage the use of local produce through certification campaigns.

Health and Wellness

Programme Outcome: Develop Barbados's health and wellness sector, focusing on standards, capacity building, product innovation, and promotion.

Adoption of National Standards

Objective: Develop a robust regulatory framework for the health and wellness sector.

- **Strategies:**
 - Collaborate with stakeholders to enhance the sector's regulatory framework.
 - Promote the adoption of national and international standards.

Enhanced Capabilities of the Spa & Holistic Associations

Objective: Ensure high standards and safety in health and wellness tourism.

- **Strategies:**
 - Encourage liability insurance and international accreditation.
 - Develop a classification system and benchmark against best practices.

Product Development and Innovation

Objective: Create unique health and wellness products.

- **Strategies:**
 - Research natural resources and promote indigenous plants.
 - Assist providers in meeting health and safety standards.
 - Leverage indigenous resource properties to enhance offerings.

Promotion

Objective: Market Barbados as a health and wellness destination with unique environmental and social benefits.

- **Strategies:**
 - Develop a distinctive health and wellness brand.
 - Host and participate in relevant events and expos.
 - Promote local wellness attractions and export products.

Skill Improvement

Objective: Train and certify skilled health and wellness professionals.

- **Strategies:**
 - Review and update training curricula.
 - Partner with institutions for capacity building and professional development.

Sports and Entertainment

Programme Outcome: Develop innovative sports and entertainment offerings, enhance compliance, and build workforce capacity.

Innovative Sector Development

Objective: Use data and research to develop a competitive sports and entertainment sector.

- **Strategies:**
 - Execute the Sports Tourism policy
 - Create the Sports Tourism Authority.

- Encourage registration and collaboration of sports and of entertainment practitioners and support innovative product development.

Education and Training

Objective: Strengthen the workforce in sports and entertainment.

- **Strategies:**
 - Offer workshops and courses for professionals.
 - Develop capacity-building programs and raise awareness.

Regulatory Compliance

Objective: Improve compliance among stakeholders.

- **Strategies:**
 - Identify and address challenges faced by event organizers.
 - Streamline event licensing processes and disseminate information.

Infrastructure

Objective: Enhance sports and entertainment infrastructure through partnerships.

- **Strategies:**
 - Audit and upgrade facilities to meet international standards.

Marketing and Promotion

Objective: Market Barbados' sports and entertainment sector effectively.

- **Strategies:**
 - Implement promotional initiatives and develop media catalogues.
 - Highlight sector strengths and successes.

Knowledge

Programme Outcome: Foster a learning culture to improve innovation and competitive advantage through better use of knowledge and data.

Sector Data Collection and Management

Objective: Provide comprehensive data tools for tourism planning and decision-making.

- **Strategies:**
 - Develop an interactive online data repository.

MICE Sector Development

Objective: Establish Barbados as a premier MICE destination.

- **Strategies:**
 - Promote the development of conference facilities and execute successful international conferences.

Human Capital Development

Objective: Develop training frameworks that integrate innovation and ICT.

- **Strategies:**
 - Facilitate stakeholder meetings, improve access to training, and integrate continuing education

Innovative Links Between Knowledge and Tourism

Objective: To enhance Barbados's tourism expertise by developing niche edu-tourism products that facilitate the exchange of tourism knowledge across borders.

Strategies:

- Identify, package, and promote best practices in tourism to educational institutions.
- Organize major conferences and lectures focusing on sustainable tourism and development.
- Strengthen Barbados's edu-tourism offerings by collaborating with relevant agencies to implement edu-tourism development projects.

Shopping

Programme Outcome: Recognizing shopping tourism as a key motivation for travelers, the Government of Barbados aims to enhance the shopping destination experience through regulatory reforms, engagement with local designers and artisans, and the introduction of global designer goods to diversify the shopping landscape.

Marketplace Diversification

Objective: To create authentic and distinctive shopping experiences by developing innovative shopping venues.

Strategies:

- Support the creation of Artisan Villages to showcase locally produced craft items in an engaging environment featuring food and entertainment.
- Partner with local tour operators to boost visitor traffic to Artisan Villages.
- Feature both local artisanal products and international branded goods.
- Promote formal involvement of local brands and designers in the tourism sector through strategic partnerships.
- Collaborate with the BIDC to encourage the production of high-quality, locally made handcrafted goods.
- Facilitate a diverse shopping experience by supporting the establishment of shopping malls with international designer goods.

Legislative Reform

Objective: To establish a supportive legislative framework for the growth of shopping tourism.

Strategies:

- Advocate for tax exemptions on products sold in Artisan Villages.
- Seek amendments to the Duty-Free Shopping Act by forming a subcommittee with representatives from the duty-free sector and relevant agencies.
- Create a centralized repository of regulatory and legislative information concerning the duty-free sector.

Data Collection

Objective: To understand visitor shopping preferences and gather feedback on their shopping experiences in Barbados.

Strategies:

- Conduct shopping satisfaction surveys with tourists departing from airports and cruise ports.
- Map shopping establishments, festivals, and key events spatially.

Stakeholder Collaboration

Objective: To foster formal exchanges among local artisans and designers.

Strategies:

- Build connections with relevant stakeholders to support network objectives.
- Enhance local designers' skills through training workshops in collaboration with stakeholders.
- Develop an inventory of current local producers in the marketplace.

Shopping Strategy Plan

Objective: To develop and promote high-quality products and experiences through a comprehensive shopping strategy plan.

Strategies:

- Develop the strategy plan through consultations with local designers.
- Create a universally appealing branding strategy for locally designed products.
- Engage international brands to establish franchise operations in Barbados.

Institutional Framework for Programme Delivery

The Ministry of Tourism has been advancing several innovative programmes and developing policies to foster centralized tourism innovation. To further these goals, the Ministry proposes to create a Tourism Development Fund (TDF) as a Body Corporate. This expanded mandate will involve developing innovative initiatives to reposition and grow tourism, responding to the evolving needs of a more discerning clientele. The TDF will drive tourism innovation through its activities, Networks, and Technical Working Groups (TWGs). The Tourism Linkages Taskforce will offer advisory support to each Network, oversee the development and execution of recommended activities, and coordinate with the Tourism Linkages Network.

Overview of the Tourism Linkages Programme

The Ministry of Tourism will initiate the Tourism Linkages Programme through the Tourism Linkages Taskforce comprising key public and private sector agencies in order to bolster economic connections between tourism and other key sectors of the Barbadian economy. The aim is to enhance the tourism sector's consumption of local goods and services and increase tourist arrivals by showcasing Barbados's diverse tourism offerings.

Main Functions of the Tourism Linkages Taskforce

1. Provide oversight and guidance on strategy implementation.
2. Facilitate collaboration among relevant entities.
3. Monitor and evaluate Network activities.
4. Offer problem-solving support as needed
5. Administrate the Tourism Development Fund

It is recommended that the Taskforce comprise the following agents;

1. Permanent Secretary Agriculture
2. Permanent Secretary Tourism
3. Permanent Secretary International Transport
4. Permanent Secretary Health
5. Permanent Secretary Commerce and Consumer Affairs
6. Permanent Secretary Finance
7. Permanent Secretary Economic Affairs and Investment
8. Permanent Secretary Education
9. Permanent Secretary, Culture
10. Permanent Secretary, Youth Sports and Community Empowerment
11. the Barbados Private Sector Association (BPSA)
12. The Small Business Association (SBA)
13. Barbados Hotel and Tourism Association (BHTA)
14. Barbados Association of Retailers, Vendors and Entrepreneurs (BARVEN)

The Tourism Linkages Taskforce is supported by technical working groups (TWGs) addressing linkages specific issues to mitigate potential problems and maximise the available opportunities and economies of scale.

It is recommended that the technical working groups initially comprise the following agents;

Gastronomy Network

1. Taskforce Member
2. The Barbados Agricultural Society,
3. the Barbados Manufacturers Association,
4. the Barbados Industrial Development Corporation,
5. the Barbados Chamber of Commerce
6. the Barbados Private Sector Association (BPSA)
7. the BHTA
8. BARVEN
9. SBA
10. Barbados Coalition of Service Industries (BCSI)

Health & Wellness Network

1. Taskforce member
2. Barbados Council of the Disabled
3. TVET Council
4. BPSA
5. BARVEN
6. SBA
7. BCSI
8. Barbados Medical Association
9. BTMI
10. BHTA

Sports and Entertainment Network

1. Taskforce member
2. Barbados Olympic Associations
3. Community Development Department
4. Barbados Entrepreneurship and Tourism Association
5. the Barbados Private Sector Association
6. BTMI
7. BHTA
8. SBA
9. National Sports Council
10. National Cultural Foundation

Knowledge Network

1. Taskforce member
2. The University of the West Indies
3. The Barbados Community College
4. The Samuel Jackman Prescod Institute
5. Ross University
6. The BIDC
7. TVET Council
8. Barbados Vocational Training Board (BVTB)
9. BTMI

Shopping Network

1. Taskforce member
2. the Barbados Tourism Marketing Inc
3. The Barbados Hotel and Tourism Association
4. The Barbados Tourism Investment Inc
5. The Barbados Customs and Excise Department
6. the Barbados Coalition of Service Industries
7. the University of the West Indies
8. BPSA
9. SBA
10. BIDC

Tourism Development Fund Proposed Institutional Structure

It is proposed that the Tourism Development Fund's function is to lead tourism innovation in the areas of transformational infrastructural and sustainable projects and human capital development through tourism linkages. The Fund will be capitalized as follows

- A Tourism Development Fee of USD \$5.00 for incoming airline passengers and USD \$2.00 for cruise passengers.
- All collected fees are submitted to the Consolidated Fund

Core Functions

- Innovation
- Human Capital Development
- Tourism Linkages
- Collection/Receipt of Fees from Incoming Air and Cruise Passengers
- Research and Development
- Financial Support for Small and Medium-Sized Tourism Enterprises

Tourism Linkages Network

Main Functions

- Provide administrative support to the Taskforce and TWGs.
- Highlight and leverage synergies among the Networks.
- Implement recommended initiatives for each Network.
- Support and monitor the development of efficient marketing and distribution systems for local products and services required by tourism entities.
- Enhance market awareness and intelligence through research and analysis.
- Facilitate the development of effective communication systems to support relationships and trade between local suppliers and tourism entities.
- Create opportunities for deeper integration between the entertainment and tourism sectors.
- Improve networking, information sharing, and communication across sectors.

Policy oversight is to be provided by the Taskforce and to whom the Tourism Linkages Network will make due reports to which will monitor, evaluate activities, and provide policy direction as necessary.

Alignment with National Development Frameworks

The Tourism Linkages in Barbados aligns closely with the island's broader development frameworks.

The key components of the **Barbados Economic Recovery and Transformation (BERT) Plan 2022** are:

(i) A growth strategy designed to encourage private sector investment in the green transition across energy, tourism, transport, and agriculture. This strategy aims to enhance the competitiveness of existing sectors, diversify the economy by nurturing new niches, and improve the business environment, all while modernizing public infrastructure to address the realities of the climate crisis.

(ii) A fiscal strategy that maintains a sustainable fiscal position and government finances aligned with the debt anchor. This involves streamlining expenditures and reforming the public sector, particularly focusing on State-Owned Enterprises (SOEs).

(iii) A debt management strategy that proactively oversees the debt portfolio to minimize costs.

In **Barbados' Plan for Investment in Prosperity & Resilience**, the Vision and Mission for Barbados is essentially to "create a clean and beautiful ocean-state that champions sustainable development both locally and globally, with the ambition that all domestic activities will be 100% sustainable by 2035. The plan also seeks to;

Empower Barbadians: Every citizen will feel engaged and empowered in the social, economic, and cultural development of the country as confident, creative, compassionate, and entrepreneurial individuals.

Promote Wellness and Happiness: Establish a society that prioritizes well-being, aiming for a 50% reduction in new cases of non-communicable diseases and a 50% decrease in crime rates.

Ensure Access to Essentials: Guarantee that every Barbadian has equitable and reliable access to clean water and nutritious food at affordable prices.

Create Economic Opportunities: Empower all workers and families by fostering ownership and wealth creation opportunities, aiming to reduce poverty by 50%.

Foster a Resilient Society: Transform Barbados into a high-functioning, resilient community with seamless access to services and meaningful digital inclusion for all citizens.

The Bridgetown Initiative Unit, has developed the Investment Plan which is a conservative estimate of the resources needed from both private and public sectors to realize Barbados' future vision. By integrating local assets and leveraging international best practices, Barbados aims to enhance its tourism sector in a way that supports sustainable economic growth and social development. Key alignment points include:

- **Strategic Planning:** Ensuring that tourism initiatives support the national development strategy and economic goals.
- **Sustainability Focus:** Aligning tourism development with sustainability principles to protect natural and cultural resources.
- **Innovation and Technology:** Incorporating advancements in technology and data analysis to drive innovation in tourism.
- **Education and Training:** Enhancing educational and training programs to build local capacity and expertise in the tourism sector.

This alignment helps ensure that Tourism Linkages not only address current challenges but also contribute to the long-term success and resilience of Barbados's tourism industry.