

DIVERSIFICATION OF CARIBBEAN TOURISM EXPERIENCES

A custom report prepared by Euromonitor International

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ABOUT THE PROJECT

Main project objectives

Category Coverage

Tourism

- Leisure Tourism
- Community-Based Tourism(CBT)

Country Coverage

Source market: US

Destination markets:
Antigua & Barbuda,
the Bahamas,
Barbados, Belize,
Dominica, Grenada,
Guyana, Jamaica, Saint
Kitts & Nevis, Saint
Lucia, Saint Vincent &
the Grenadines,
Suriname, Trinidad &
Tobago

Project Background

This initiative is a component of the Innovation for Tourism Expansion and Diversification project being implemented by the Compete Caribbean Partnership Facility (CCPF) with the objective to build the capacity of the Caribbean Tourism Organization (CTO) to diversify the regional product offering and enable more entrepreneurs to generate revenues from tourism. CCPF's purpose is to drive inclusive and sustainable economic growth through greater competitiveness and innovation in the private sector. While growth has been recorded in the Caribbean tourism industry, rural or non-coastal communities are largely excluded from the revenues generated. For these communities to benefit economically, they must diversify their product offering, expand Community-Based Tourism (CBT) and take advantage of the paradigm shift in the industry.

Client Objectives

Compete Caribbean Partnership Facility (CCPF) would like to:

- Acquire knowledge regarding shifts and quantify market demand (volume of interest, type of activity, and willingness to pay) for Caribbean entrepreneurs to assess profitability.
- Utilize outcomes of research to educate micro, small and medium enterprises (MSMEs) about the size and characteristics of market opportunities for a variety of products and services that can be offered locally through partnerships with Caribbean Tourism. Organization (CTO) and other business support organizations in the region facilitating business clusters.

Action to be Taken

Ultimately, Euromonitor International provided CCPF with the following deliverables:

- Segment and profile potential tourists from US profiles based on consumer research.
- Identify the products and services that can be offered, and prioritize the ones that will be assessed based on local capacity and market potential.
- Define the products and services for which the market demand will be assessed. This may involve assessing the importance of value-added activities such as Organic certification, Fairtrade, sourcing locally, etc.
- Collect data from the main customer segments through focus groups, surveys, and consultation with tour operators or other knowledgeable actors, and analyze the data to assess the size and characteristics of potential opportunities.
- Highlight any local constraints or key success factors in meeting demand sustainably.
- Provide specific and pragmatic recommendations to generate revenues for MSMEs and CBT projects in an inclusive and sustainable manner.

Definition of community-based tourism used in the project

In 2006, CTO adopted a statement defining community tourism as:

*A collaborative approach to tourism in which community members exercise control through active participation in appraisal, development, management and/or ownership (whole or in part) of enterprises that delivers net socio-economic benefits to community members, conserves natural and cultural [heritage] resources, and adds value to the experiences of local and foreign visitors. This encompasses both tourism activities in a community and goods and services supplied to the tourism industry by one or more community members.**

* CTO-European Commission. *Competing with the Best: Good Practices in Community-based Tourism in the Caribbean*. (2006)



ACTIVITY SELECTION PROCESS

Steps taken in the prioritization of activities to conduct in-depth analysis

1

Determine existing niches and activities in Caribbean with desk research

- Define niche markets: Adventure, Agro and Food Tourism, Culture and Heritage Tourism, Nature-Based, S.A.V.E.*, Wellness Tourism
- Categorize existing CBT activities in the Caribbean under each niche and defining an intermediate category (“activity”) to be tested in the scorecard
- The total number of activities is 30

2

Establish scorecard metrics and their score with Pulse interviews

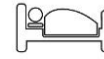
- Number of businesses offering the CBT experience and its price
- Community involvement in the activity (low-mid-high)
- Employment potential throughout the value chain (low-mid-high)
- Capacity in the Caribbean to implement the activity (low-mid-high)
- Interest and popularity of the activity among US tourists (low-mid-high)

3

Assign weight to metrics and prioritize

- Determine the percentage of importance of the six metrics
- Calculate final score for all 30 activities and establish the top 15 to be prioritized to further test in the online focus group and survey
- Beach Tourism is also incorporated as part of the analysis

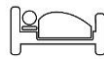
Prioritized 15 activities + Beach Tourism

	Beach Tourism		Indigenous Tourism
	Ecolodge		Local Tourism
	Farm to Table		School Exchanges and Cultural Immersion
	Farm Tour		Traditional Cuisine
	Festival		Traditional Health and Wellness
	Food and Beverage Tour		Volunteer with Local Experience
	Heritage Site		Wellness
	Homestay		Wildlife Tourism in Natural Habitat

*S.A.V.E. refers to Scientific, Academic, Volunteer and Educational tourism

ACTIVITY DEFINITIONS

Definitions used in the project

	Beach Tourism	Tourism activity that is centered around the marine environment. It includes visits to coastal towns and recreational activities related to enjoying the sun, sand, and sea including sunbathing, snorkeling, paddle boarding, scuba diving, walking/playing on the beach, etc.)
	Ecolodge	A tourist accommodation facility that is ecologically designed and managed to have a minimal negative impact on the natural environment and host community in which it is situated. Ecolodges are mainly located in a remote destination in nature, and are often built from natural materials.
	Farm to Table	A culinary experience that includes products that are locally grown or sourced. This may include a farm tour, harvesting ingredients, and/or a cooking class in addition to a meal/tasting using locally sourced ingredients.
	Farm Tour	An activity linked to a tour/visit to an agricultural farm. This can include organic farm tours, or tours of specialized crops such as coffee and cacao plantations, spice farms and medicinal herbs. Farm tours may include meals, food tastings, and/or accommodations.
	Festival	Festivals are events centered on celebrating or commemorating some aspect of local indigenous culture, heritage and traditions, spiritual practice, gastronomy, film and/or music of a country, community, religion, ethnic or social group. Festival Tourism is a popular niche market segment, defined as travel for the main purpose of attending festivals.
	Food and Beverage Tour	Expeditions that include visits/excursions linked to food and related products and activities. Tours might highlight the process, include a tasting and/or culinary cooking activity. Popular tours include rum, coffee, spices, and chocolate.
	Heritage Site	Historical, cultural, archeological and indigenous sites and ruins such as monuments, buildings, structures and cemeteries of significant local value or where political, military, cultural or social history has been preserved.
	Homestay	A homestay property is an alternative accommodation in a private residence/local home that accommodates paying guests. Travelers usually stay with a family and experience their cooking. Homestays can be offered by individuals and their families or by structured organizations.

ACTIVITY DEFINITIONS

Definitions used in the project

	Indigenous Tourism	Tourism activity that is owned, operated, and/or managed by members of indigenous communities, and offers unique and authentic experiences to visitors while also contributing to sustaining local livelihoods, protecting valued socio-cultural traditions, and the natural and cultural heritage resources of the community.
	Local Tourism	Tourism activity that offers experiences linked to the local/host community. May include multiple activities across various tourism niches and categories, with an aim to offer an authentic and local experience. Experiences may be packaged to include transportation, accommodation, meals, a guide, etc.
	School Exchanges and Cultural Immersion	Travel experience which has as a primary motivation the tourist's engagement and experience in learning, self-improvement, intellectual growth and skills development. Includes a broad range of products and services related to academic studies, skill enhancement, school trips, career development courses and language learning among others. Experiences can be focused on specific subject areas or aspects of culture where learning is the primary goal, and travel is a complementary criterion.
	Traditional Cuisine	Activities in the destination where the local food and beverage including agricultural products, gastronomic offerings and methods of food preparation are the primary pull factors and key aspects of the experience. Can be offered at family and local restaurants including the traditional fish fry.
	Traditional Health and Wellness	Tourism that is based on locally significant wellness activities, done by tourists with the principal purpose of improving their health and wellbeing. Examples may include mineral baths, spa treatments, courses on ancient herbs and their uses, etc.
	Volunteer with Local Experience	Trips taken to a destination for the purpose of assisting the host community, often with a social cause as the primary motivation with travel as a complementary feature. Examples include voluntourism for reconstruction in the aftermath of a natural disaster, community development activities, conservation, and clean-ups.
	Wellness	Activities that offer preventive, lifestyle-enhancing, relaxing, pampering and healing treatments. Experiences can include yoga, mindfulness, and meditation retreats including detox retreats, and retreats guided by expert nutritionists among other specialists.
	Wildlife Tourism in Natural Habitat	Trips to destinations with the main purpose of observing the local fauna. Includes birdwatching, turtle watching, and generally observing wildlife in its natural habitat. This does not include reserves or sanctuaries.

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COMMUNITY-BASED TOURISM ACTIVITIES

TOURIST PROFILES

CBT TRENDS

RECOMMENDATIONS

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METHODOLOGY FOR EVALUATING CBT ACTIVITIES**Four of 15 CBT activities were identified for high Caribbean benefit and US tourist interest****Assessing Community-Based Tourism (CBT) Activities in Caribbean**

MSMEs can offer many different CBT activities in the Caribbean. A scorecard* was used to identify the activities with the greatest potential to generate revenues and increase competitiveness.

Scorecard criteria:

- Price range to value high-value activities
- Current number of Caribbean businesses offering activity
- Involvement of community
- Employment potential
- Interest/popularity

**Top 4 CBT Activities in Caribbean**

The four activities for **Caribbean MSMEs to prioritize** based on high Caribbean benefits** high US tourist interest*** include:

- **Local Tourism:** Community experiences with local people
- **Food and Beverage Tour:** Rum, coffee and chocolate tours
- **Traditional Cuisine:** Offered at family-run or local restaurants
- **Farm to Table:** Culinary experience involving locally grown and prepared food

Source: Euromonitor International

* Scorecard used to rank CBT activities included in appendix

**Caribbean benefits refer to the combination of metrics from the scorecard (community involvement, employment potential, capacity, activity price, and number of businesses)

***Interest levels based on consumer survey, N = 629

WILLINGNESS TO PAY FOR HIGH-BENEFIT AND HIGH-INTEREST CBT ACTIVITIES

MSMEs can develop CBT activities with attributes that generate greater willingness to pay



Local Tourism

- Among those who prefer Local Tourism, most are willing to pay (WTP) as much as US\$300 per activity.
- MSMEs have opportunity to align product offerings with what US tourists are willing to pay (current Caribbean offering US\$100-2,000+).
- Over half are willing to pay more if they know the ticket price % that goes back to the community and VIP options.
- Almost 70% of respondents would pay more for local transportation and being combined with other activities.



Food and Beverage Tour

- Among those who prefer Food and Beverage Tours, most are willing to pay up to US\$300 for their experience.
- MSMEs have an opportunity to align product offerings with US tourist WTP (current Caribbean offering US\$30-1,200).
- 35% are willing to pay more for any of the following attributes: Organic certification, avoidance of chemicals, locally sourced, Fairtrade certification, benefits everyone fairly, and embraces environmental sustainability.
- Around 20% are willing to pay at least 25%-50% more for VIP options and access.



Traditional Cuisine

- Among those who prefer Traditional Cuisine, most are willing to pay as much as US\$100 for their experience.
- MSMEs have a great market opportunity to capture US tourist WTP as the current Caribbean offering is US\$10-15.
- Half of respondents are willing to pay more if they know that the food is sourced locally, and nearly 40% are willing to pay extra for organic produce.
- 65%+ of respondents would pay up to 25% more for local transportation and being combined with other activities.



Farm To Table

- Among those who prefer Farm to Table, the majority would pay as much as US\$100 for their experience
- The current CBT offering of MSMEs (US\$25-110) aligns with what US tourists are willing to pay.
- About half of respondents are willing to pay more if the Farm to Table experience is locally sourced, embraces environmental sustainability, and offers VIP options or access (e.g. a private and romantic experience for a couple).
- Almost 65% of respondents are willing to pay up to 25% more for local transportation.

Source: Euromonitor International

*Caribbean benefits refer to the combination of metrics from the scorecard (community involvement, employment potential, capacity, activity price, and number of businesses)

**Interest levels based on consumer survey, N = 629

ADDITIONAL INSIGHTS ABOUT CBT ACTIVITIES IN THE CARIBBEAN**MSMEs should consider other key findings from US tourist survey responses****1****Ensure safety and hygienic conditions for US tourists**

- Focus on safety and hygiene as part of customer service.
- Certifications to show that standards have been met, and provide needed credibility for US tourists.

2**Bundle Wellness with high-interest CBT activities**

- Wellness activities currently see low interest among tourists.
- Tourists show more interest in combined activities.
- Bundle them with high-interest CBT activities (e.g., Traditional Cuisine) to generate greater demand.

3**Opportunity in high-interest/low-benefit for CBT providers**

- MSMEs focused on community benefit have opportunity in Heritage, Festival and Wildlife Tourism, activities with fewer CBT businesses.
- Pioneer activity and differentiate among competition; however, this is likely to require significant capital funds.

4**Redefine activities generate highest average WTP**

- ‘Redefine’ activities (lower Caribbean benefit and lower tourist interest) have a higher average ticket price than other CBT activities.
- This presents a value opportunity for MSMEs with fewer US tourist participants.

5**Include attributes to meet US tourist basic expectations**

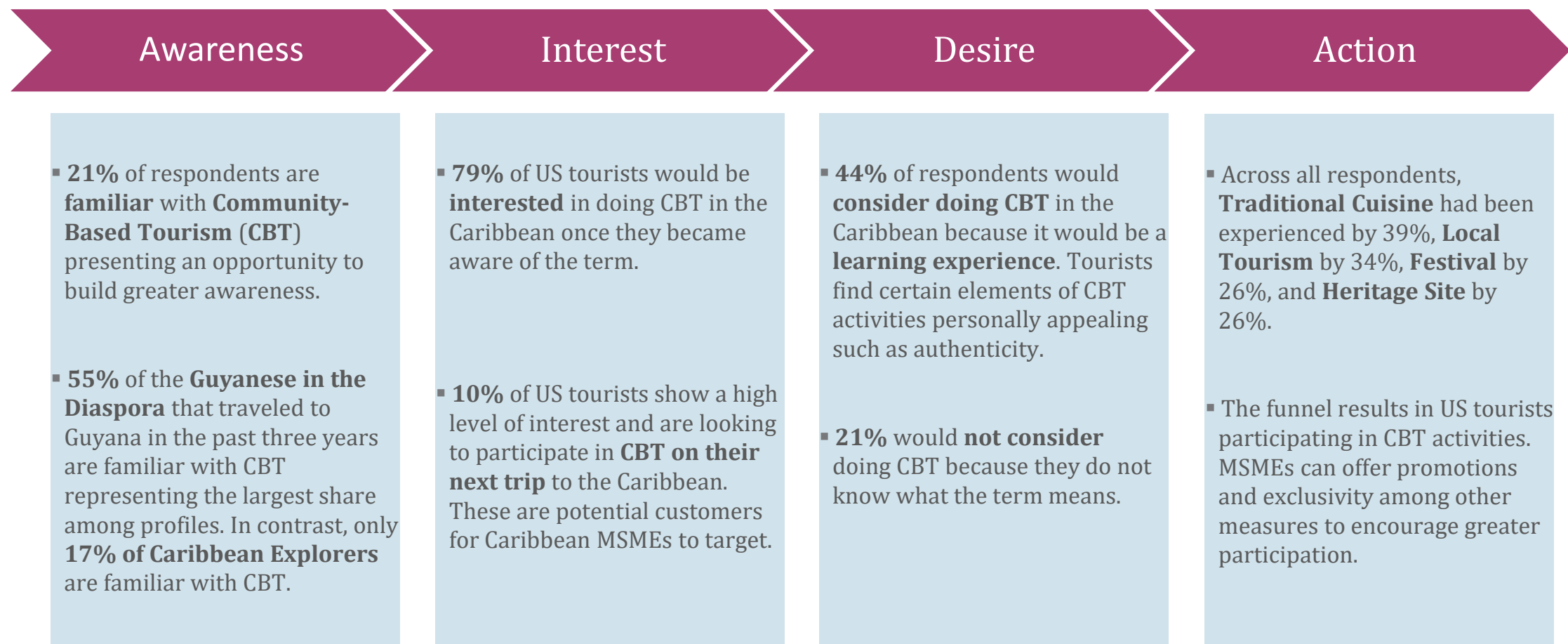
- At least 20% of US tourists expect local transportation to be included in activity price (except Wellness).
- Half of respondents expect a local guide for Wildlife Tourism in Natural Habitat, Heritage Site, Farm Tour, Indigenous Tourism, and School Exchanges and Cultural Immersion.

6**Offer tiered CBT experiences to capture greatest WTP**

- Present CBT experiences in basic, advanced, and premium packages that incorporates a mix of CBT activities to capture greatest willingness to pay.
- Tiered pricing often encourages consumers to opt for middle-priced options.

GENERAL US TOURIST OVERVIEW

Greater CBT awareness among US tourists will generate more long-term CBT participants



Source: Euromonitor International based on consumer survey in the US. N=469

'Caribbean Explorers' profile is based on survey conducted in the US. N = 467

'CBT Connoisseurs' profile is based on survey conducted in the US. N = 262

'Guyanese in the Diaspora' profile that have travelled to Guyana in the last three years. N = 11

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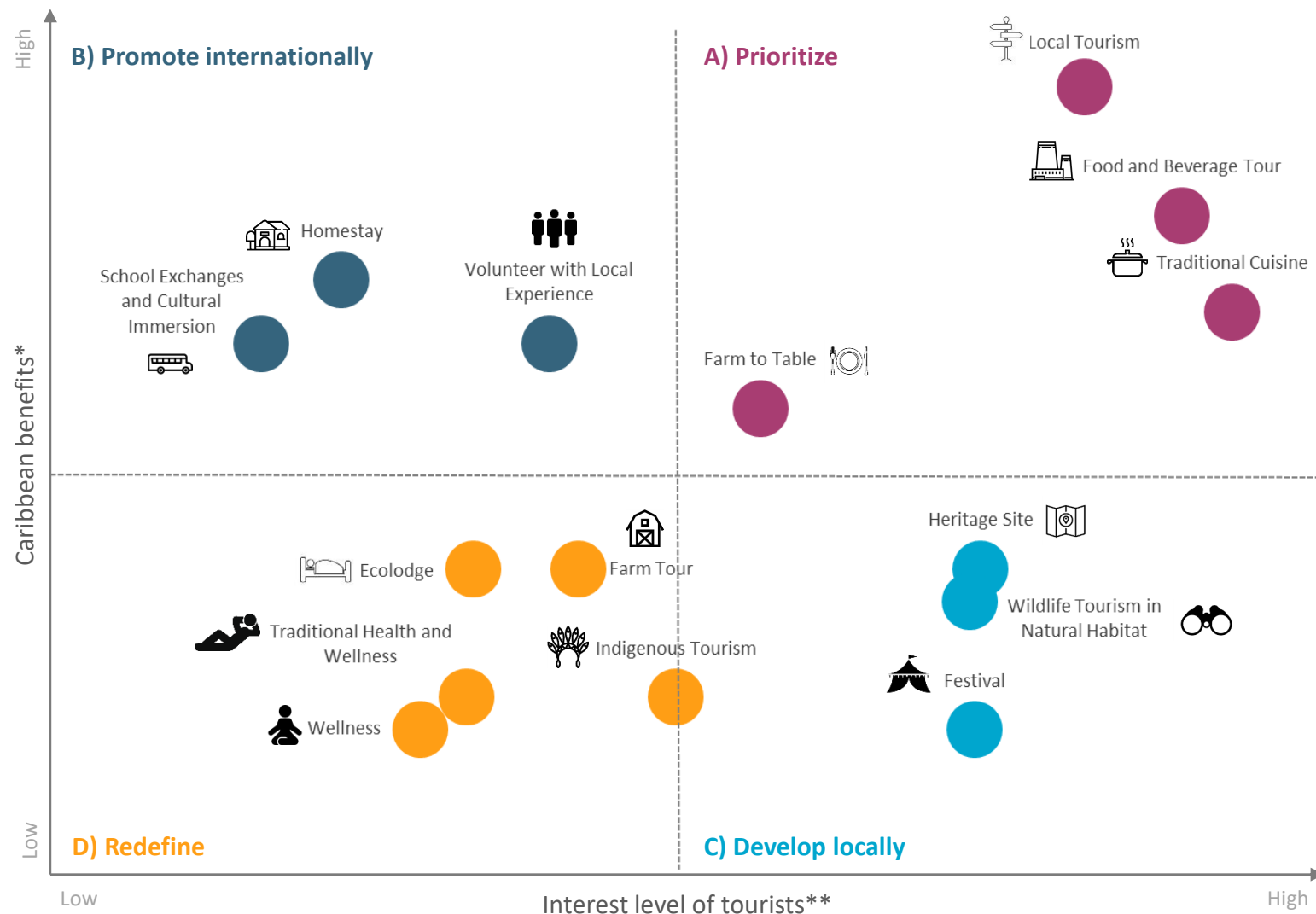
CONCLUSIONS

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SELECTED CBT ACTIVITIES IN THE CARIBBEAN

Activities were divided into four groups based on regional benefits and tourist interest

**A) Prioritize**

- These activities show highest benefits for the region.
- They are most interesting to US tourists.

B) Promote internationally

- Benefits for the Caribbean are high.
- US tourists show low interest; therefore, promotion and repositioning are required.

C) Develop locally

- US tourists are highly interested in these.
- They bring lower benefits to the region, therefore, they need further development.

D) Redefine

- Interest level among tourists is low, as are the benefits for the Caribbean compared to the rest of the activities.
- Requires repositioning to strengthen both.

Source: Euromonitor International

*Caribbean benefits refer to the combination of metrics from the scorecard (community involvement, employment potential, capacity, activity price, and number of businesses)

**Interest levels based on consumer survey, N = 629

A) Prioritize

- These activities offer high benefits for the Caribbean
- Level of interest among tourists is also high
- Activities include:
 - Local Tourism
 - Food and Beverage Tour
 - Traditional Cuisine
 - Farm to Table



**LOCAL TOURISM OVERVIEW IN THE CARIBBEAN****Multi-activity excursion striving for an authentic and local experience**

Local Tourism is a tourism activity that offers experiences linked to the local/host community. May include **multiple activities across various tourism niches and categories**, with an aim to offer an **authentic and local experience**. Experiences may be packaged to include transportation, accommodation, meals, a guide, etc.

Examples in the Caribbean

- Typically **extended multi-day stays** with variations of full-day offerings that combine school visits, museum visits, Heritage Sites and local cuisine as seen in 'Country Style' in Jamaica.
- **Authentic and unique experiences** are exemplified by 'Porus Manchester Rastafarian Experience', a multi-activity experience involving **direct interaction** with a **local family**, **participatory cooking experience** prepping local cuisine, transportation and a **local host**.
- 'Jamaican Root Experience' offers a similar **complete** experience focusing on **storytelling and traditional folklore**.
- The 'Belvedere Community Nature and Heritage Woodlands' is an excursion to an **isolated village** including natural elements off the beaten path such as local knowledge about **herbal remedies and folklore**.

Favorable characteristics for Local Tourism

- Offers authentic 'day-in-the-life' experience for tourists including the history and cultural traditions of the destination, fostering true appreciation of the community.
- Tourists more clearly understand the direct benefit of tourism dollars on the community based on positioning.
- Cultural preservation through structured and repeated tourist activity led by educated and knowledgeable locals.
- Local guide, transportation, and various structured activities boosts confidence among tourists and encourages participation.

Challenges for Local Tourism

- Tourist uncertainty as to activity outcomes and expectations can drive them to choose other activities while traveling.
- Existing physical infrastructure can limit access to rural communities that could offer Local Tourism.
- Local communities and villages can be perceived by tourists as unsafe due to lack of information and knowledge (about crime).
- Uncertainty as to amenities, including quality of food and water, available in communities can limit greater tourist participation.

VALUE PROPOSITION FOR LOCAL TOURISM**Opportunity to visit various tourist spots for an insider view of destination**

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Who to target

- Popular among broad demographics, including couples, solo travelers, and families with children, but skewed towards adults over 50.
- Usually travel with their partner or friends, plan their vacations up to 1 year in advance, but activities are decided closer to the travel date or on the spot.
- Tourists choose unique activities that can be enjoyed with their family while they relax. This is why they normally include climate and safety among top considerations when selecting a destination.
- They seek to gain an in-depth local understanding of the destination country.

What tourists expect to get

- Usually lasts from half to a full day, depending on activity selection.
- Typically stay in a hotel or all-inclusive resort and plan several activities to do as well as enjoying some time at the beach.
- Tourists expect this activity to have a local guide that walks them through all the attractions that typically include a combination of town visits, cultural and agricultural attractions and a home-cooked meal.
- Travelers expect a convenient experience, with transportation to and from their accommodations, and all entry fees paid for all activities on the tour.

How the activity should be positioned

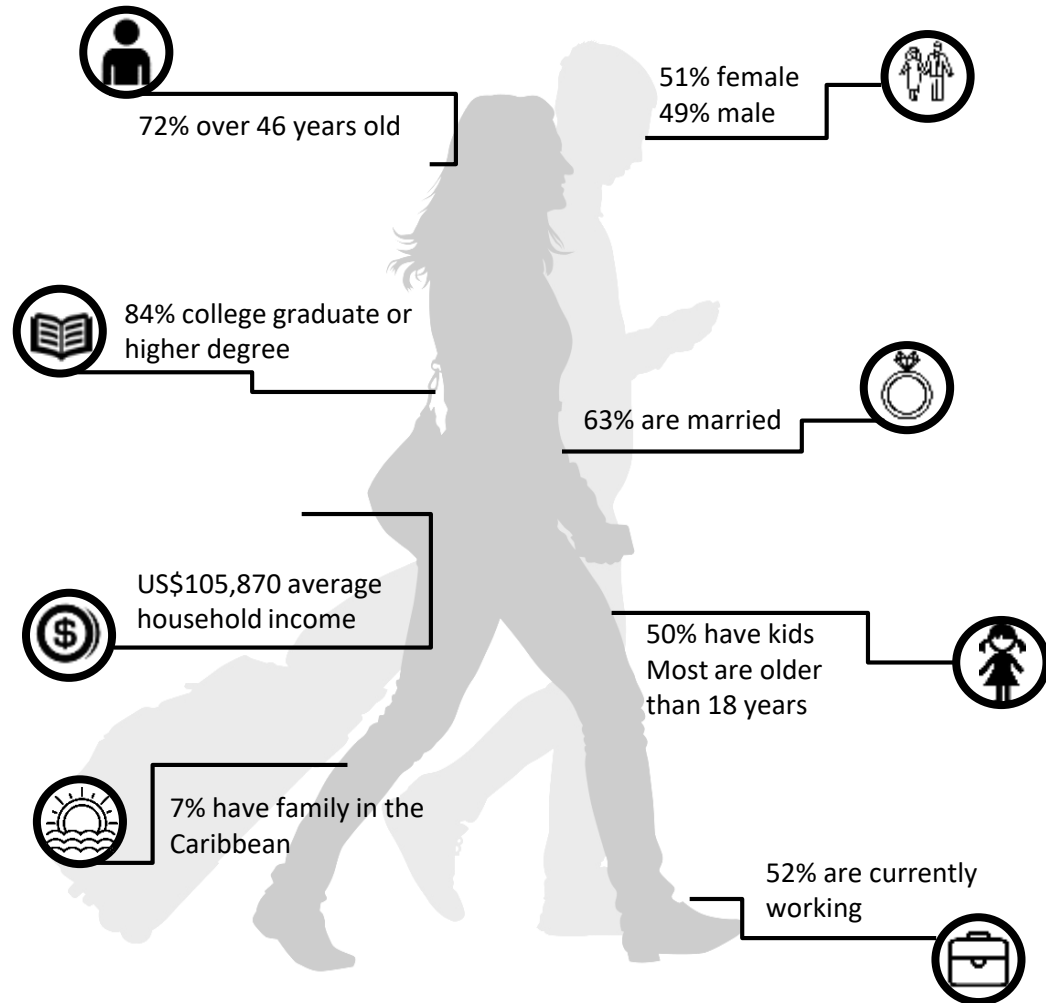
- A unique opportunity to witness the destination and interact with locals to gain a true appreciation of the community, its culture, and heritage.
- Offers an insider view into the destination's history and cultural traditions with the aid of a local guide, which boosts tourist confidence as tourists are concerned about issues such as local crime and the safety of water and food.
- Tourists are mostly interested in combining Local Tourism with culinary activities such as Food and Beverage Tours or Traditional Cuisine, and are willing to pay more if these come as part of a package deal.

Where to promote and advertise the activity

- Advertise online in source market through travel websites to encourage pre-booking as a 1-day excursion.
- Promote also at destination as many tours are booked after arrival via resort staff and activity brochures, through billboards, tourist information kiosks, tour operators, and taxis.
- The majority of tourists expect to book online and pay with credit or debit card, or pay as part of the package with the tour operator or hotel.

TOURIST PROFILE

Couples who seek immersive and local experiences that combine different activities



General travel habits

- They normally travel with their partners looking for learning experiences.
- They plan their vacation at least three months in advance but decide what activities to do once the date is closer or when they are at the destination.
- Airline and hotel websites are used to search and book, while destination and travel websites are preferred to research about the destination.

About the Caribbean

- Interesting tourist attractions, especially the beautiful beaches, as well as the tropical weather make the Caribbean an attractive destination for those tourists that want to travel there in the next 18 months.
- The length of the trip will be a week and an all-inclusive resort is the preferred accommodations. Taking a cruise is also of their interest.

About Community-Based Tourism

- Most tourists are unfamiliar with the term CBT.
- Most tourists might consider doing CBT because they want to explore the community with locals, making it a unique and different experience.
- However, unfamiliarity with the term discourages people as they do not know what to expect and how they can benefit from the activity.

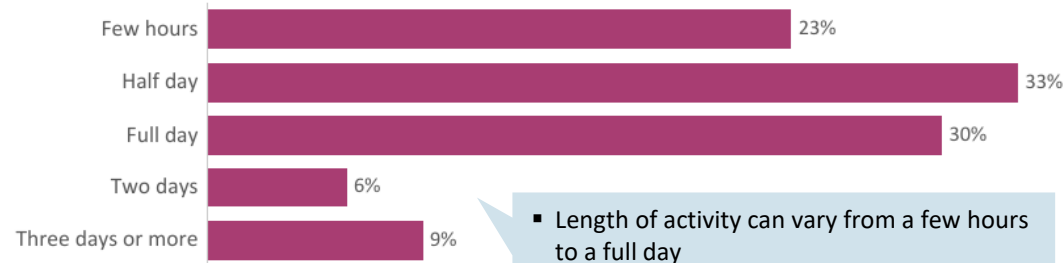
HOW THE TOURIST DESCRIBES THE ACTIVITY

Half- to full-day activity that provides guidance and convenience when visiting key local spots



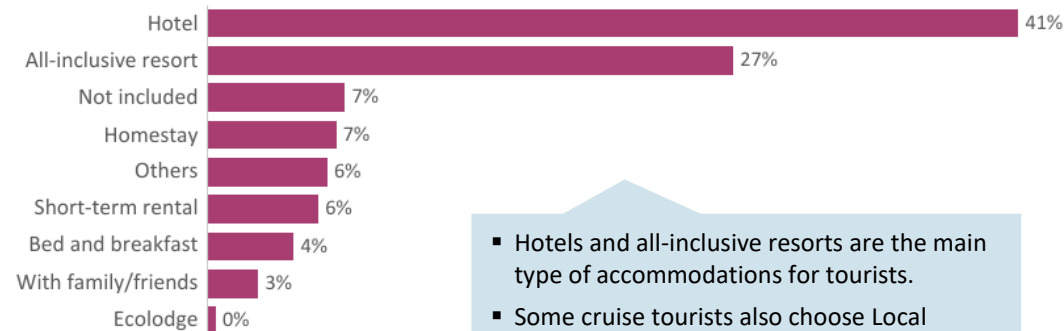
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Length of the activity



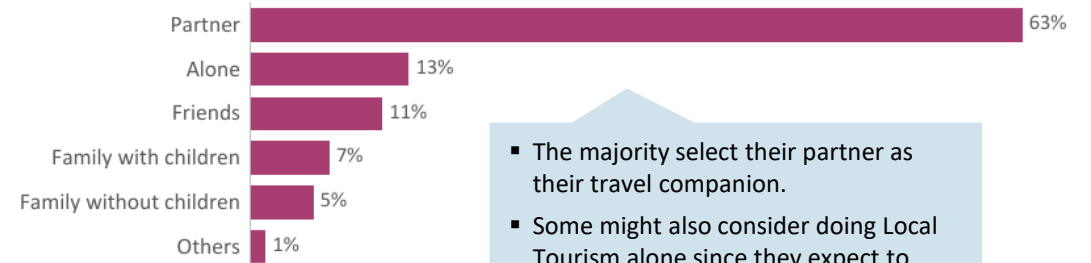
- Length of activity can vary from a few hours to a full day
- It depends on the number of sites to visit and if it is combined with other activities.

Preferred accommodation



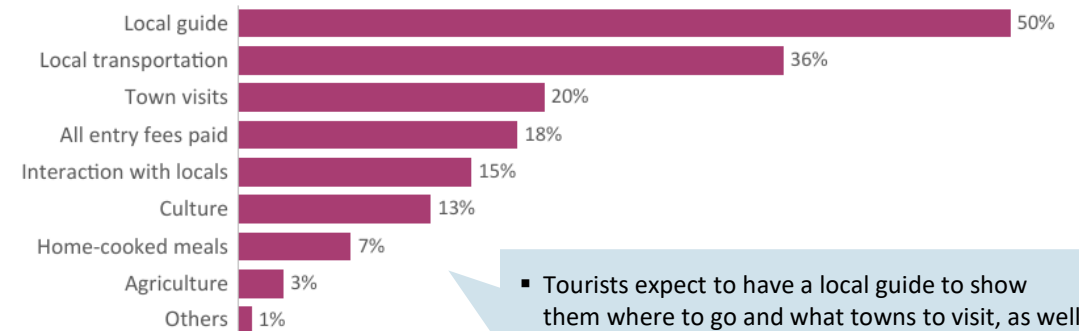
- Hotels and all-inclusive resorts are the main type of accommodations for tourists.
- Some cruise tourists also choose Local Tourism as an activity to do while they stop in a country for a few hours or a day.

Travel companions



- The majority select their partner as their travel companion.
- Some might also consider doing Local Tourism alone since they expect to engage directly with the local people.

Characteristics of the activity



- Tourists expect to have a local guide to show them where to go and what towns to visit, as well as facilitating all logistical aspects.
- The activity can combine different visits; if so, tourists expect to have local transportation included.

WILLINGNESS TO PAY

Duration and number of activities have a significant impact on prices

US\$31-300

Price range that **tourists are willing to pay** based on their description

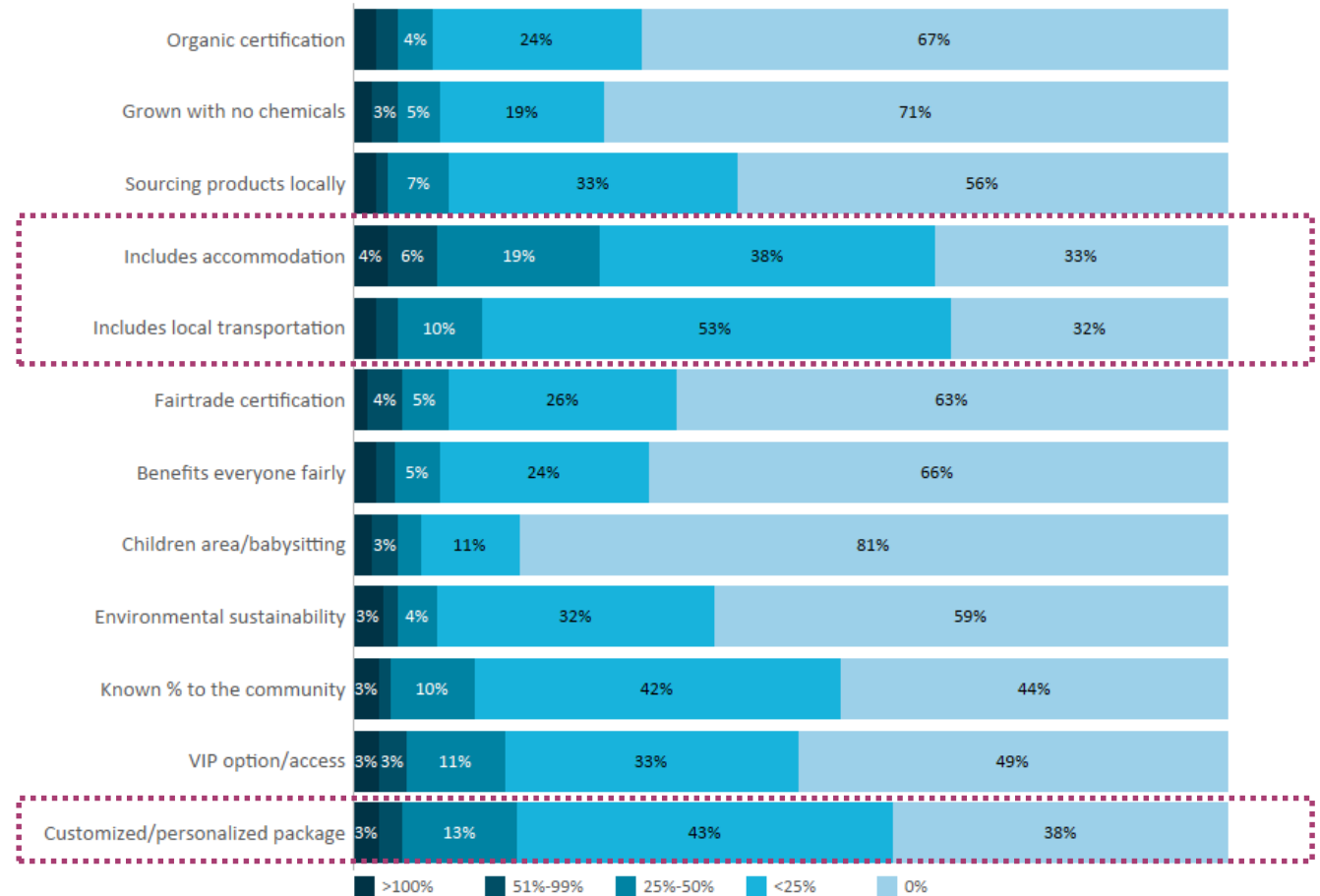
US\$100-2k+

Price range **currently offered** in the Caribbean

How to encourage tourists to pay for a higher ticket:

- Offer tourists the possibility of **customizing their activities**, letting them select what to do, time spent, and restaurants visited according to their interests and needs.
- Highlight the **authenticity of the local experience**, as tourists are willing to pay more if they know a percentage of the ticket goes to the community.
- Offer **convenience** to visitors by providing transportation to and from the hotel.

How much more tourists would be willing to pay if the activity included:



**WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS****Accommodation, transportation, and customization offer highest value for tourists****1****Greatest share of tourists willing to pay more**

- 67% of tourists value accommodations enough to pay extra, and the greatest share of tourists (38%) are willing to pay up to 25% more.
- 68% are willing to pay more if the experience includes transportation; 53% of them are willing to pay up to 25% more.
- 62% are willing to pay more for customized packages; 43% of them up to 25% more for them.
- Over 50% of respondents are also willing to pay more for VIP access and known percentage that goes back to the community. Most of them are willing to pay no more than 25% extra.

2**Middle share of tourists willing to pay more**

- 30-45% of respondents are willing to pay for Local Tourism with Organic and Fairtrade certification, locally sourced products, environmental sustainability, fair community benefits, etc.
- Most of them are willing to pay up to 25% more for these extras.

3**Least share of tourists willing to pay more**

- 29% of tourists said they are willing to pay extra for Local Tourism and produce grown with no chemicals.
- 19% of tourists said they are willing to pay extra for Local Tourism with child care.
- 8% of tourists are willing to pay at least 25% more for child care.



FOOD AND BEVERAGE TOUR OVERVIEW IN THE CARIBBEAN

Gastronomic tour that allows tourists to appreciate unique flavors and products

Food and Beverage Tour are expeditions that include visits/excursions linked to food and related products and activities. Tours might highlight the process, include a **tasting and/or culinary cooking** activity. Popular tours include rum, coffee, spices, and chocolate.

Examples in the Caribbean

- Tours may focus solely on the **production process** of a **local product** as seen at the Pick Pepper Sauce Factory that also houses a retail store for tourists to purchase **locally made culinary products**.
- Other tours are **multi-activity** such as the 'Mero Secret Tour' including a **tour** of the **banana plantation**, nature hike to waterfalls, beaches, sampling local cuisine, and an optional bat cave experience.
- Tours focused around alcoholic beverages are typically less frequented by families; however, popular experiences include **rum tours** in Barbados and throughout the Caribbean islands.
- Other **regional products** include **coffee and cacao**; tour examples include 'Mavis Bank in the Blue Mountains' which combines coffee tours with a full day of events. A single-activity, tour-only option is available at the same locale.

Favorable characteristics for Food and Beverage Tours

- Authentic foods and beverages unique to destination country.
- Full learning and gastronomic experience from agricultural education, food and beverage production, to tasting.
- Complementary activity within tourist itinerary that allows tourists to experience new things, as well as rest and relax.
- Environmentally conscious tourists interested in locally sourced ingredients for food and beverage production.
- Organized Food and Beverage Tours are more trusted than less structured agro and food tourism offerings.

Challenges for Food and Beverage Tours

- Tourists perceive food to be a risk in terms of safety, and are hesitant to take part in activities with a strong focus on tasting food and beverages.
- Not all geographies have well-marketed and unique food and beverage offerings.

**VALUE PROPOSITION FOR FOOD AND BEVERAGE TOURS**

An add-on experience that is a unique, authentic aspect of destination

Who to target

- Married adults over 55 years old as well younger adults aged 26 to 35 who generally travel to countries closer to the US.
- These demographics usually seek affordable beach destinations where they can relax and also see, try, or learn something new. They pay special attention to food and restaurant offerings, followed by sightseeing offerings.
- Destination and travel websites are their main source of information but they also rely on recommendations from acquaintances to determine which activities to do. Typically, they decide closer to the departure or on the spot.

What tourists expect to get

- The activity is expected to last from a few hours to half a day, and most tourists enjoy these activities more if done with their partner.
- Tourists want to witness firsthand how local products are made through a guided or self-guided tour. They expect to see the authentic local practices as well as the local ingredients used. and be able to try the final products.
- Convenience is highly appreciated, as they expect to have a local guide and local transportation, especially if the location is located far from their accommodations. They also want to pay for the full tour at the time of booking.

How the activity should be positioned

- Highlight the unique aspects of production processes in the Caribbean so that tourists gain a deeper understanding of what they are paying for and its cultural meaning.
- Certifications, hygiene, and safety practices are important factors for tourists with strong concern about the region's food and water regulations.
- As culinary experiences are highly popular, they can also be promoted together with Traditional Cuisine or Farm to Table as consumers are willing to pay for a well-rounded, local culinary experience.

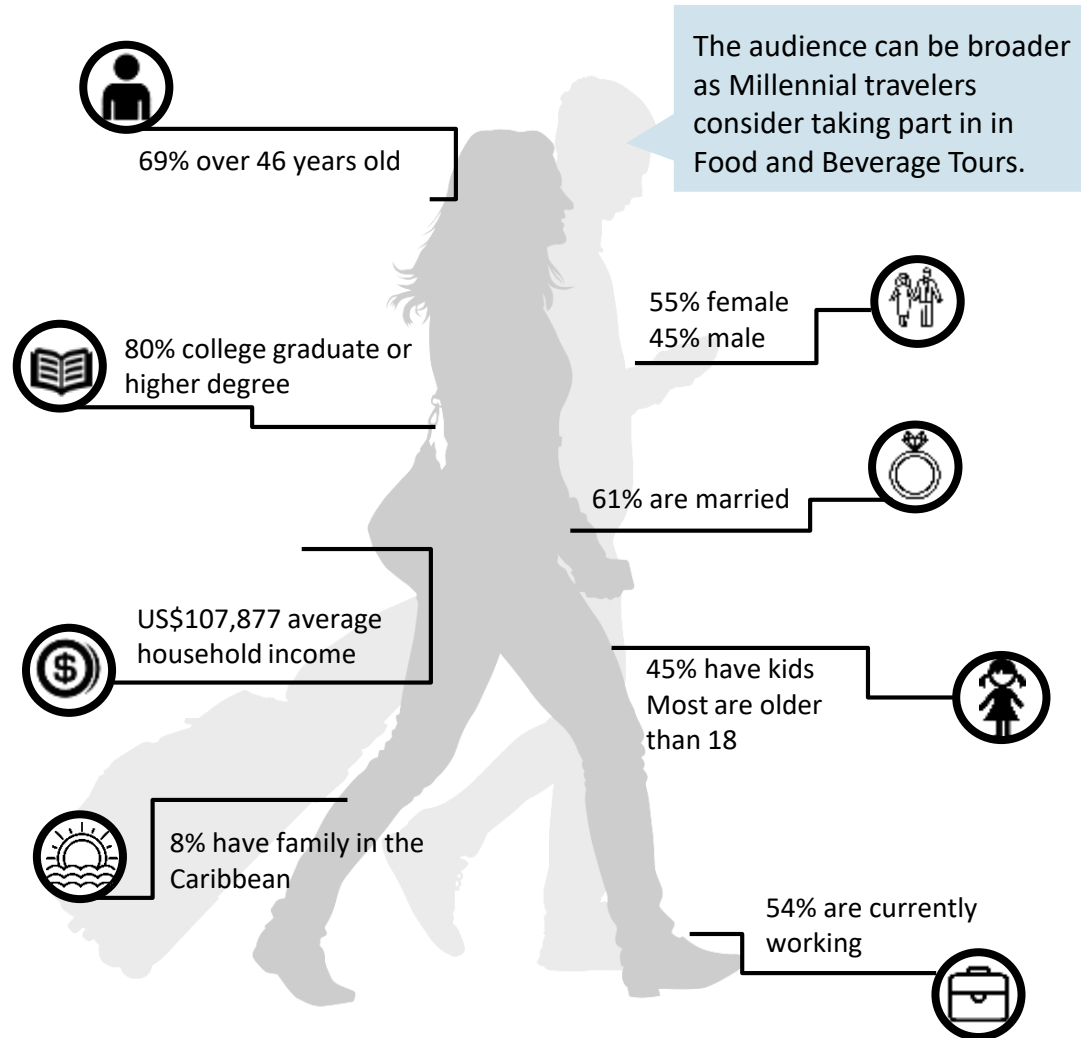
Where to promote and advertise the activity

- Advertise both in source market and at the resort. For pre-planned itineraries offered by travel agents and hotels, include as one of the activities.
- Online, destination-specific and global travel websites that allow for pre-booking and/or paying online with a card to capture high interest among tourists.
- Advertisements and/or features on food and travel channels will help develop awareness and interest.



TOURIST PROFILE

Time split evenly between relaxing at beach and exploring country authentically



General travel habits

- They seek a good balance between trying something new and having a relaxing, no-stress vacation with their partners, friends or family.
- Leverage online resources to learn about the destination and activities.
- Are price-sensitive but also prioritize the local food and restaurants available as well as sightseeing options in making their selection of destinations.

About the Caribbean

- The Caribbean is an ideal destination, mainly for the tropical weather and beaches that allow tourists to let go of their stresses and relax.
- Tourists all show interest in exploring local, authentic food and drinks.
- The trip will typically last a week at an all-inclusive resort or hotel with convenient and direct access to the beach.

About Community-Based Tourism

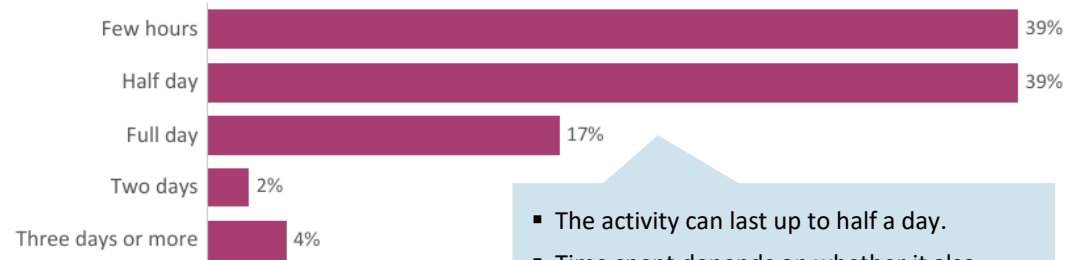
- Most tourists do not know the term CBT. They guess it means engaging with people in the community or locals that run guided tours for visitors.
- Although interest in CBT is high, 25% are hesitant as it is something completely new that they have never done before, they do not know what it involves, and they might simply prefer to relax on the beach instead.



HOW THE TOURIST DESCRIBES THE ACTIVITY

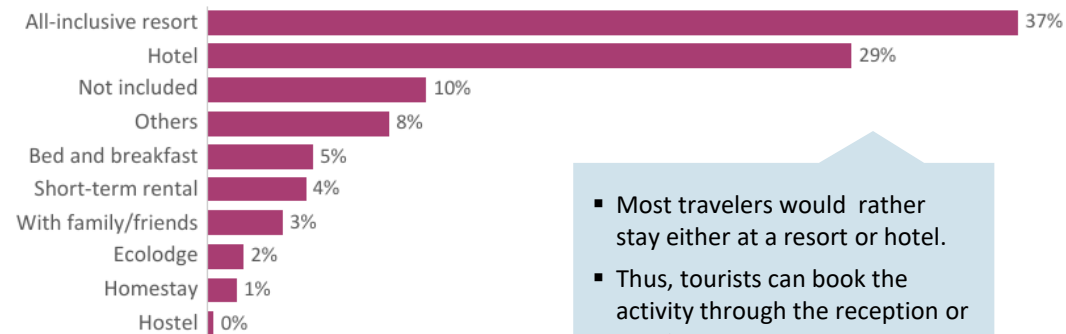
A half-day culinary experience that involves cooking local food and tasting local products

Length of the activity



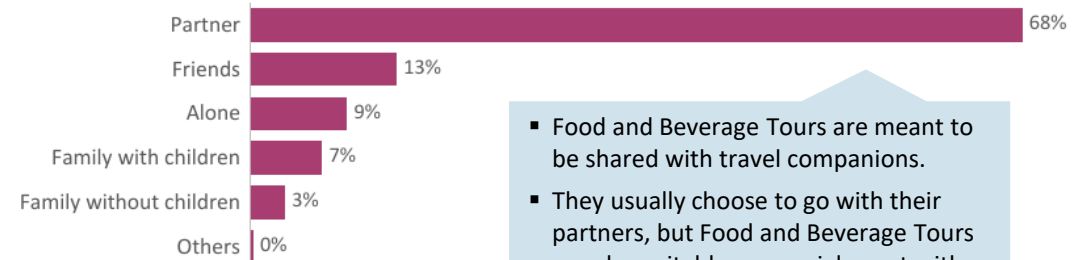
- The activity can last up to half a day.
- Time spent depends on whether it also includes food tasting, full meals, or just visiting the establishments.

Preferred accommodation



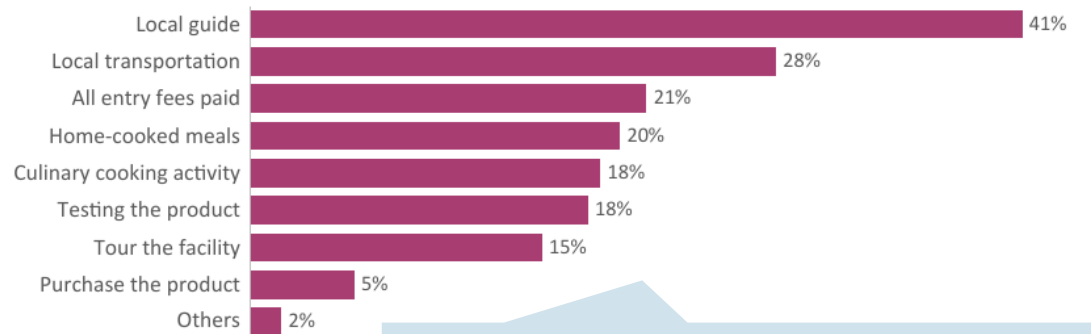
- Most travelers would rather stay either at a resort or hotel.
- Thus, tourists can book the activity through the reception or concierge.

Travel companions



- Food and Beverage Tours are meant to be shared with travel companions.
- They usually choose to go with their partners, but Food and Beverage Tours are also suitable as a social event with friends.

Characteristics of the activity



- The activity should be guided and include convenient local transportation if the distance is long.
- Tourists expect the tour to go beyond just seeing the facility but also having a meal, tasting the product and even having an option to take a cooking class if possible.
- Simply purchasing the product is not enough if they do not get hands-on experience.



WILLINGNESS TO PAY

Tourists are unlikely to pay high sums for an add-on activity to their beach vacations

US\$50-300

Price range that **tourists are willing to pay** based on their description

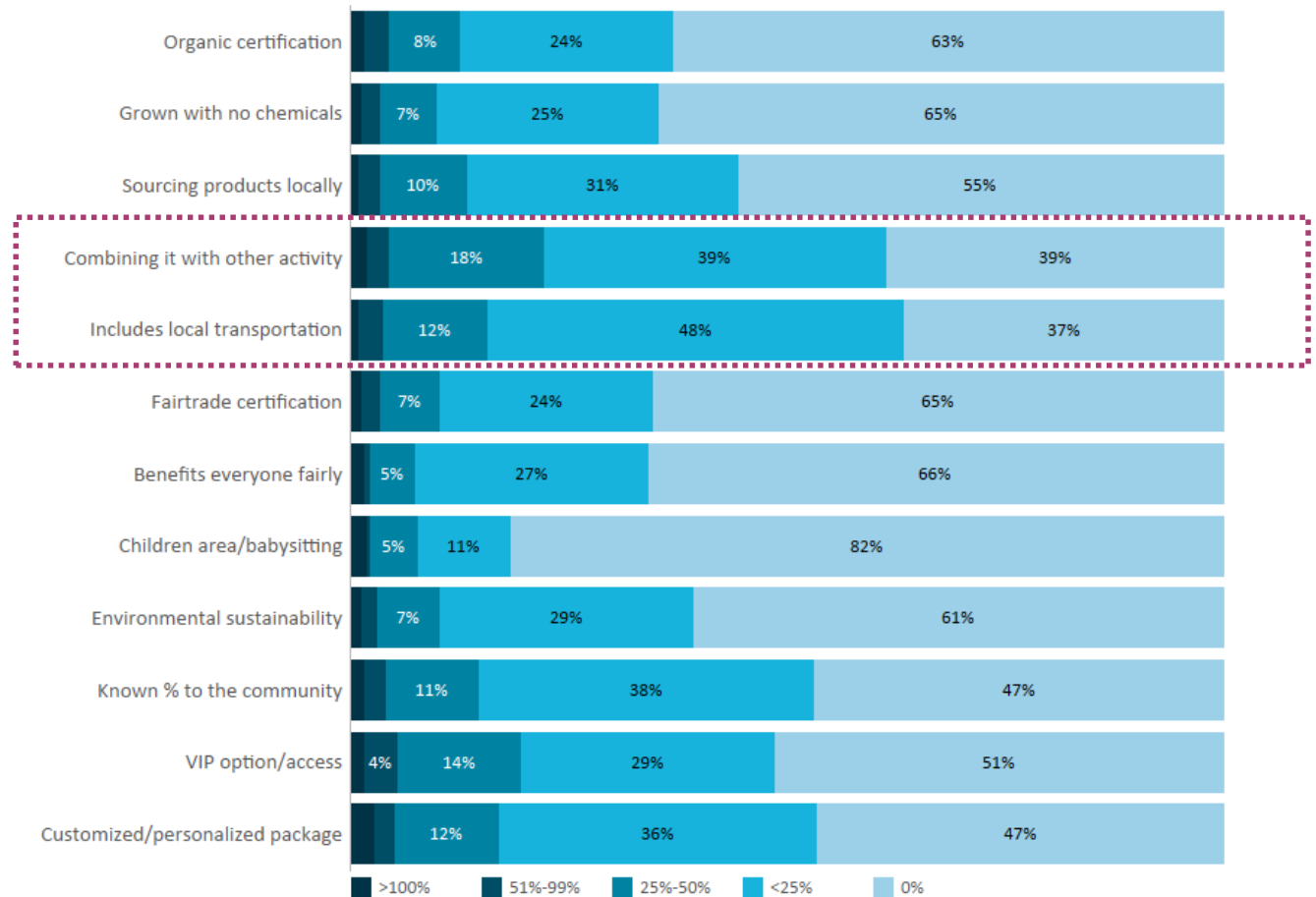
US\$30-1,200

Price range **currently offered** in the Caribbean

How to encourage tourists to do the activity:

- **Combine the tours with other activities** that enhance the food and beverage experience such as Farm Tours to see where ingredients come from, cooking classes that use local ingredients, or visits to Heritage Sites that are relevant in the area.
- Offer a **more convenient experience** with transportation to/from the hotel or port, and flexible schedules adapted to the needs of tourist groups.
- Highlight all the **benefits of this activity** including the complete **learning experience** for curious foodies as well as the profits that go back to the **community** thanks to the tourist investment.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

Local transportation and tours combined with other activities offer highest value



27

1

Greatest share of tourists willing to pay more

- 63% of respondents are willing to pay more if the activity includes transportation, with most willing to pay up to 25% more.
- 61% show more willingness to pay for an activity package. 39% of tourists are willing to pay up to 25% more.
- 53% are also willing to pay more for a known percentage that goes back to the community and customized packages. Most of them are willing to pay no more than 25%.

2

Middle share of tourists willing to pay more

- 34-49% of respondents are willing to pay for Food and Beverage Tours with Organic and Fairtrade certification, locally sourced products, ingredients grown without chemicals, environmentally sustainable, VIP access and fair community benefits.
- The majority of them are willing to pay up to 25% more for these extras.

3

Least share of tourists willing to pay more

- 18% of tourists said they are willing to pay extra for Food and Beverage Tour with child care.
- 7% of tourists are willing to pay at least 25% more for child care.



TRADITIONAL CUISINE OVERVIEW IN THE CARIBBEAN

Culturally relevant cuisine and flavors unique to destination geography

Traditional Cuisine is activities in the destination where the local food and beverage including **agricultural products, gastronomic offerings and methods of food preparation** are the primary pull factors and key aspects of the experience. Can be offered at family and local restaurants including the traditional fish fry.

Examples in the Caribbean

- **Family-owned restaurants** such as Plas Kassav in St. Lucia that feature local cuisine.
- **Community events** that offer food and a lively music celebration attracting both **local community members and tourists** such as the weekly Anse La Raye Fish Fry in St. Lucia and Oistin's Fish Fry in Barbados.
- Restaurants that serve local cuisine such as Little Ochi in Alligator Pond and Alligator Hole are **promoted by community tourism networks**.

Favorable characteristics for Traditional Cuisine

- 'Less invasive' cultural immersion activity that allows tourists to sample local flavors and culturally relevant cuisine unique to the destination and interact with local chefs in a more real, less touristic way.
- Easy access and feasibility for Caribbean residents to open businesses and create employment opportunities.
- Variety of options from budget single-course meals or snacks to gourmet multi-course meals.
- Yelp and other applications make easy for tourists to post and read reviews, and find local businesses.

Challenges for Traditional Cuisine

- Tourists perceive regulation as limited and so they place great trust in customer reviews; negative reviews can seriously limit traffic.
- High investment costs required for players that want to open upscale or more premium restaurants featuring local cuisine.
- Limited gourmet options and Caribbean recognition to merit higher willingness to pay by tourists.
- Tourists perceive certain areas in towns as unsafe due to high crime and thus are hesitant to visit outlets without a local guide.

VALUE PROPOSITION FOR TRADITIONAL CUISINE**Try the 'real deal' in local cuisine using local ingredients with traditional recipes****Who to target**

- Popular among all demographics, especially among foodies that are up for trying new things when on vacation and look to enjoy a meal at a local restaurant that is different from cuisine they have at home.
- Travel usually accompanied by their family or friends, and they might take their children (mostly over 18 years old).
- Choose destinations that offer a good balance among local activities (e.g. sightseeing and cultural attractions), food and restaurant availability and time off, as these are reasons why tourists find Beach Tourism in the Caribbean attractive.

What tourists expect to get

- Typically lasts a few hours up to half a day, done with their partner.
- Looking to dine one or two times at a local restaurant, but not necessarily interested in having cooking classes or Farm to Table activities.
- They do not want to go to a hotel restaurant simulating local food. They want a place that provides a local feel, and prefer locally owned restaurants from the community they are visiting.
- Tourists also appreciate being able to interact with the owners, even get the chance to gain a local recipe and value locally sourced ingredients.

How the activity should be positioned

- Positioned as an authentic local experience, as tourists are looking to try the real local food and not an adapted version.
- Consumers are also willing to pay more to have a personalized experience, offering options appealing to different tourists, as well as a socially responsible educational experience, as tourists are interested in appreciating and benefiting the local community while having an educational experience.
- Food safety is a concern. Thus, certifications and transparent practices can be showcased to increase credibility among tourists.

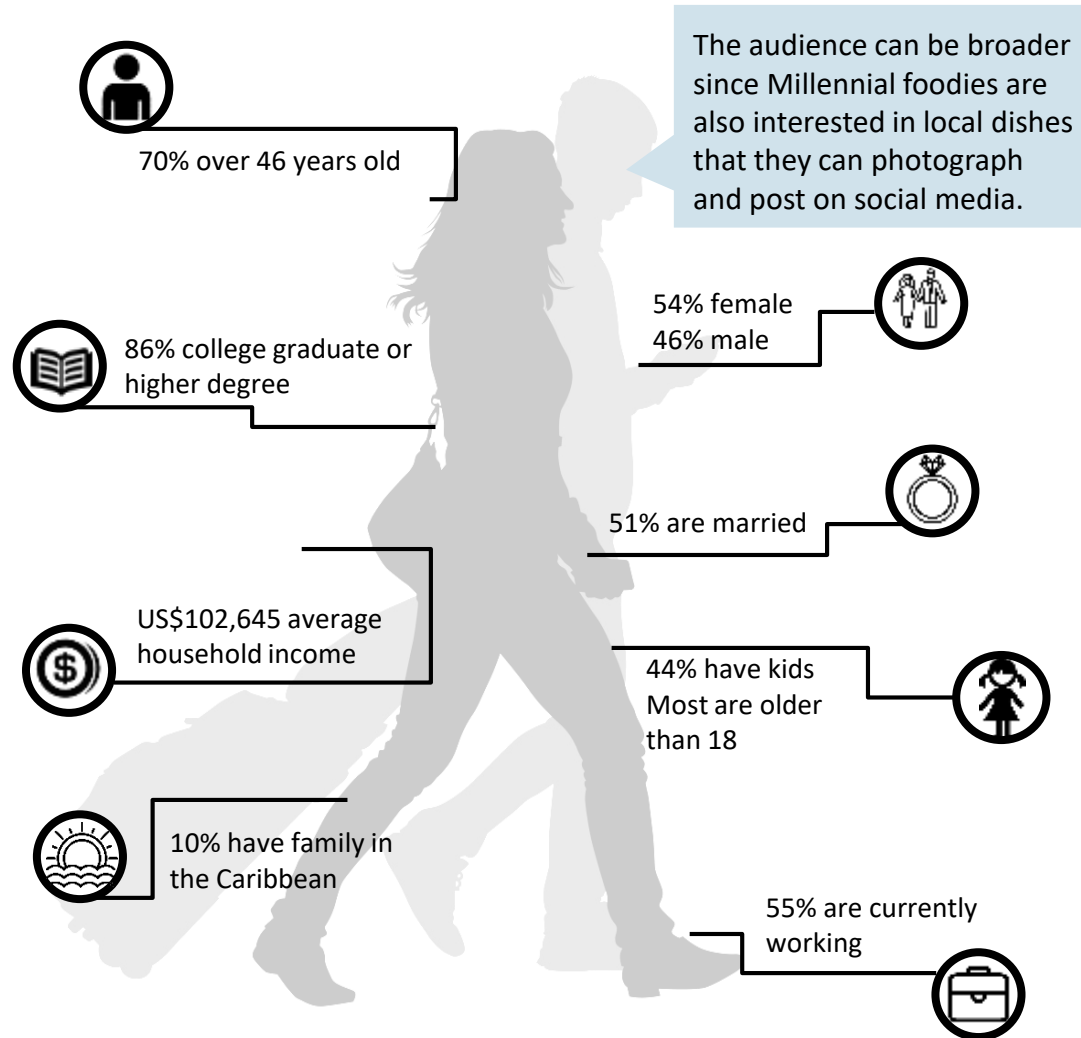
Where to promote and advertise the activity

- An online presence is a must since it is the first source tourists check when deciding where to make a reservation.
- Websites that allow for online reservations as well as posting reviews and photos that are unbiased boost credibility and encourage tourists to book.
- Travelers expect to be able to pay with credit or debit card. Cash payment is less common among tourists that might not carry cash on vacation.



TOURIST PROFILE

Price-driven foodies that enjoy relaxing on vacation but want a taste of real local cuisine



General travel habits

- Tourists enjoy trying, seeing, and learning something new on vacation but also taking time to relax with their partners, friends or family.
- Normally plan their trips at least three months in advance, but are more spontaneous when they choose what activities to do at the destination.
- Destination selection depends on total cost and main attractions available.

About the Caribbean

- Most express interest in visiting the Caribbean for the tropical weather and the beaches, where they can stay for a week with their partners at a hotel or resort, to enjoy a relaxing vacation.
- Additionally, they appreciate that the Caribbean is an affordable destination with a interesting offer of local food and Traditional Cuisine.

About Community-Based Tourism

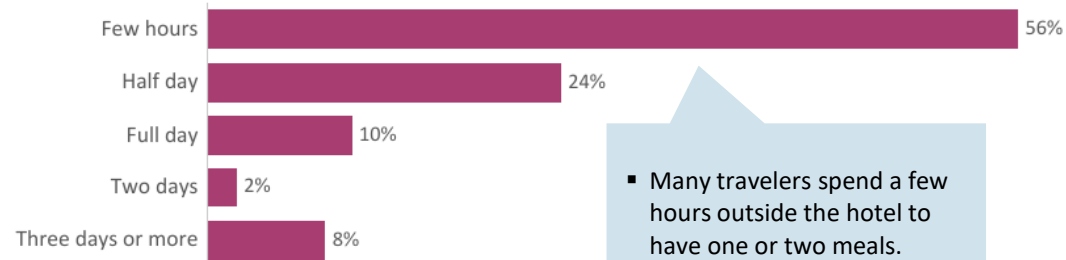
- Low familiarity with CBT; they interpret this as mainly engaging with the community while on vacation, which is not attractive for over 20%.
- Lack of knowledge about CBT limits interest and willingness to take part in it as tourists seek learning opportunities more related to local food, rather than immersive and fully cultural or historical experience.



HOW THE TOURIST DESCRIBES THE ACTIVITY

A one-of-a kind, 100% local meal that lasts for a few hours and is shared with a partner

Length of the activity



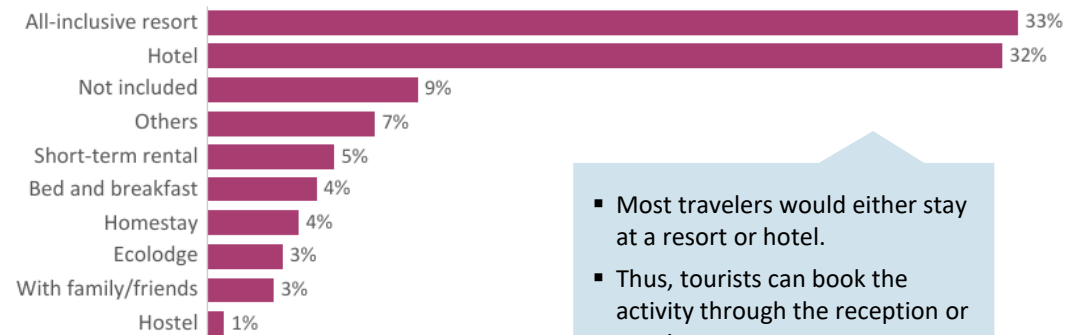
- Many travelers spend a few hours outside the hotel to have one or two meals.

Travel companions



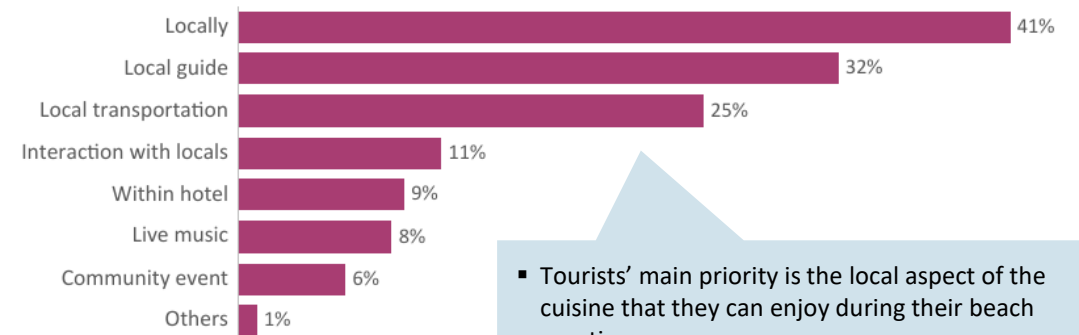
- Culinary experiences are meant to be social experiences shared with travel companions.
- Tourists typically travel with their partners, but also travel with friends.

Preferred accommodation



- Most travelers would either stay at a resort or hotel.
- Thus, tourists can book the activity through the reception or concierge.

Characteristics of the activity



- Tourists' main priority is the local aspect of the cuisine that they can enjoy during their beach vacations.
- They also want to be guided by someone who knows where to find the best local restaurants, and can help them get around the destination and keep them safe.



WILLINGNESS TO PAY

Tourists are willing to pay more than current offering if meal has a local feel

US\$15-100

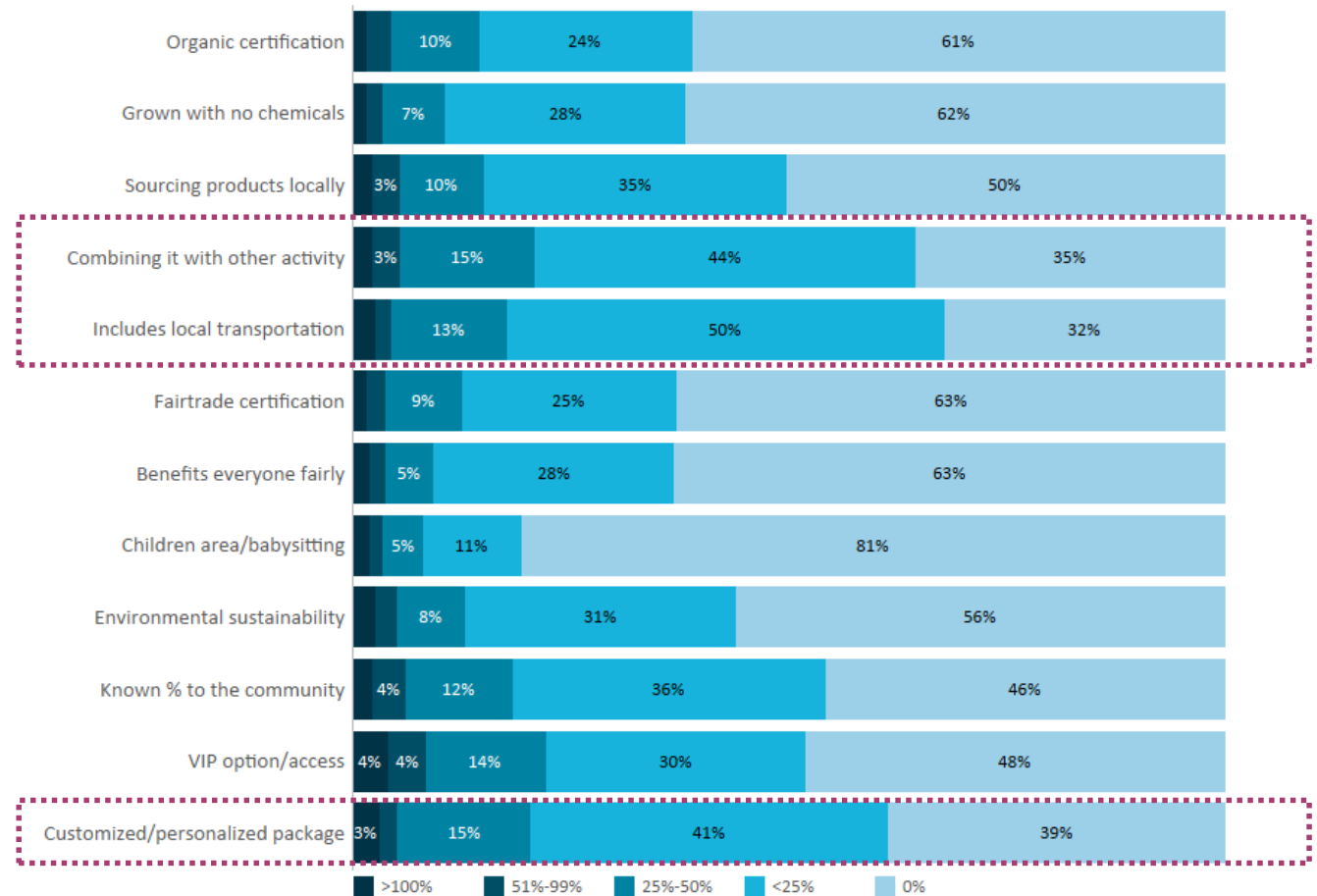
Price range that **tourists are willing to pay** based on their description

US\$10-15

Price range **currently offered** in the Caribbean

- Highlight the **authenticity** of the Traditional Cuisine offered, and its **food standards and safety** in order to draw travelers to the restaurant.
- Use this meal as a 'foot in the door' strategy to **capture the attention of tourists that might be interested in learning more** about where the ingredients come from:
 - Partner with local farms to promote follow-up activities such as Food and Beverage Tours.
 - Also offer additional in-house activities such as cooking classes or food tasting events to encourage travelers to come back.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

33



Customized packages that also include transportation show highest potential

1

Greatest share of tourists willing to pay more

- 68% of respondents are willing to pay more if it includes transportation. The majority of tourists (50%) are willing to pay up to 25% more.
- 65% also consider an activity package to be valuable and 44% of tourists are willing to pay up to 25% more.
- 61% of respondents are also willing to pay more for a customized packages, and most of them are willing to pay up to 25%.
- Over 50% of respondents are also willing to pay more for products sourced locally, known percentage that goes back to the community, and VIP access. Most of them are willing to pay no more than 25%.

2

Middle share of tourists willing to pay more

- 37-44% of respondents are willing to pay for Traditional Cuisine with Organic and Fairtrade certification, with ingredients grown without chemicals, environmentally sustainable, and fair community benefits.
- Most are willing to pay up to 25% more for these extras.

3

Least share of tourists willing to pay more

- 19% of tourists said they are willing to pay extra for Traditional Cuisine with child care.
- 8% of tourists are willing to pay at least 25% more for child care.

FARM TO TABLE OVERVIEW IN THE CARIBBEAN

Full gastronomic experience from local sourcing to prepared culinary experience



Farm to Table is a **culinary experience** that includes products that are locally grown or sourced. This may include a farm tour, harvesting ingredients, and/or a cooking class in addition to a meal/tasting using locally sourced ingredients.

Examples in the Caribbean

- Experiences can take place **at a farm** such as the Crooked Tree Good News Cashew and Mango Picking Tour, which includes a tour of the farm, lets tourists **pick their own** cashews and mangos, and **taste locally grown foods**.
- **Hotels** strive to **locally source** foods such as fish and fresh produce from purveyors in the community to be **prepared by local chefs** and served as **gourmet dishes**. Some hotels offer guests an opportunity to **go to local markets or sources of food** and invite them to take part in **food preparation at the hotel**.
- Some farms, hotels, and providers of local cuisine highlight **locally sourced** ingredients and **certifications such as Organic or Fairtrade**.

Favorable characteristics for Farm to Table

- Activity that allows tourists to explore new things, relax and enjoy time spent with partners, family, and friends.
- Appreciation for natural products including locally sourced foods.
- Preferred activity by foodies that encompass a full gastronomic experience from ingredients to prepared meals.
- Awards such as Rainforest Alliance Certification and Green Tourism certificate resonate with the environmental values of more and more tourists.

Challenges for Farm to Table

- Farm to Table experiences without any culturally unique or diverse elements are often considered activities that tourists can do in their home countries, and are not perceived as special.
- Tourist perception of food regulations being insufficient, so foods are less trusted in terms of safety; this makes some tourists hesitant to take part in activities such as Farm to Table.
- Perception that the Caribbean is limited in terms of culinary skill and is not recognized as having gourmet cuisine.

VALUE PROPOSITION FOR FARM TO TABLE**A more comprehensive and hands-on Traditional Cuisine experience****Who to target**

- Foodies seeking something more than just a meal at a local restaurant.
- Open to trying new cuisine at new locations, often engaging with the source of the ingredients such as a farm.
- Popular among all demographics, including food enthusiasts and experts (e.g. food bloggers) looking to capture moments and share everything online.
- Usually travel with their partner or friends to a destination where they can relax but also experience new things.

What tourists expect to get

- Usually lasts a few hours up to half a day, done with a partner.
- Tourists describe the Traditional Cuisine experience as having a meal with locally sourced ingredients, that lets them see where and how they were grown. The experience can also include a cooking class or demonstration.
- The meal is meant to be an experience that is educational but also fun and hands-on.
- Emphasis is on the local and wholesome ingredients used that are grown in a sustainable way using local approaches to farming.

How the activity should be positioned

- Opportunity to experience authentic dishes that are unique to the local cuisine, emphasizing regional flavors and spices, and the fact that are prepared with locally sourced ingredients.
- An interactive experience, in which tourists can learn about local history and traditions as well as help keep them alive with part of what they pay for the experience going back to the community.
- Activity to be combined with Food and Beverage Tours, Traditional Cuisine and Local Tourism, as tourists are willing to pay more for a comprehensive experience.

Where to promote and advertise the activity

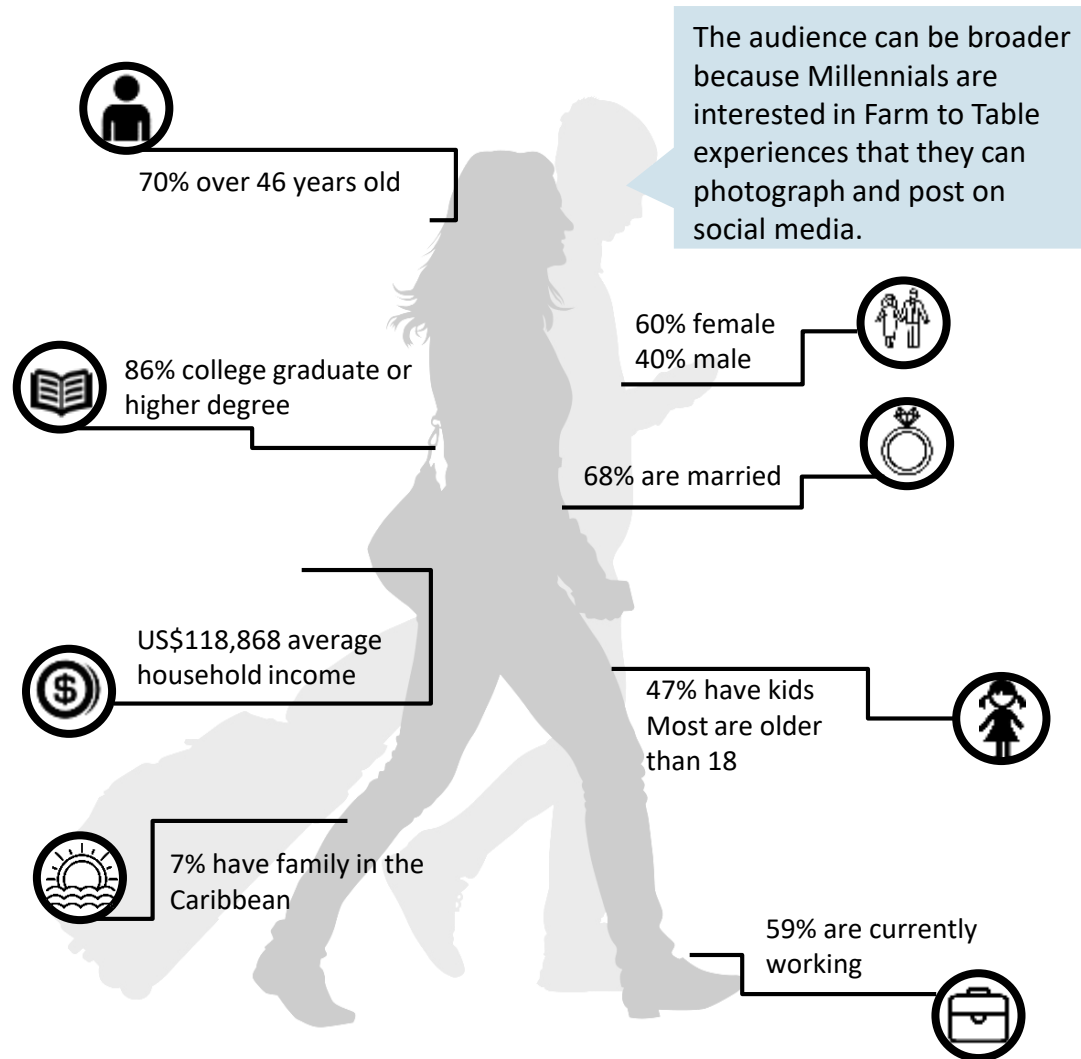
- Online presence is a must since it is the first place tourists check when deciding where to make a reservation.
- Partnerships with culinary influencers (bloggers) could help increase awareness and influence the decision-making process when tourists choose their destination.
- Tourists expect to pay by credit or debit card both if they pre-book online and if they pay at the beginning/end of the activity.

TOURIST PROFILE

Middle-aged explorers who want to learn more about what they are already familiar with



36



General travel habits

- Prefer to experience new things with their companions on vacation but also want time to simply relax and unwind without an itinerary.
- Choose destination and travel websites and magazines as their main source of information when planning trips and looking for fair prices.
- Highly interested in trying local foods and restaurants while on vacation.

About the Caribbean

- Tourists might be interested in visiting the Caribbean to enjoy the tropical weather and relax on the beach with their partners.
- They will typically stay for a week and the preferred accommodation is an all-inclusive resort or hotel, if the budget does not allow for more.

About Community-Based Tourism

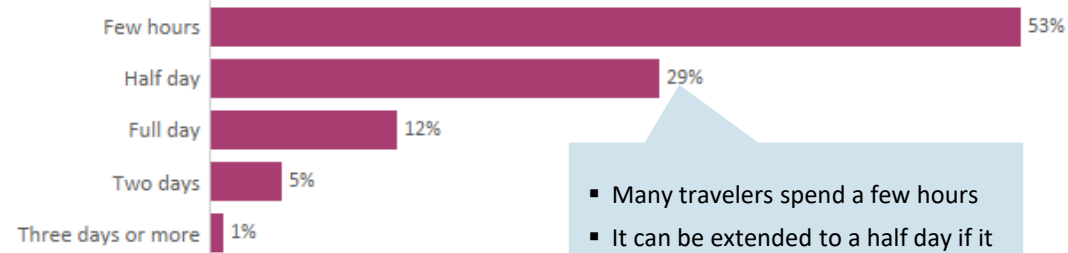
- CBT is an unfamiliar term, They think it relates to engaging with people from the community or communities that guide tourists while visiting.
- Although the majority would consider doing CBT, almost 30% do not show interest as it is a totally new concept that they need to research, and it might take time away from enjoying the Caribbean beaches and food.



HOW THE TOURIST DESCRIBES THE ACTIVITY

Half-day activity to do as a couple and have a meal with locally sourced ingredients

Length of the activity



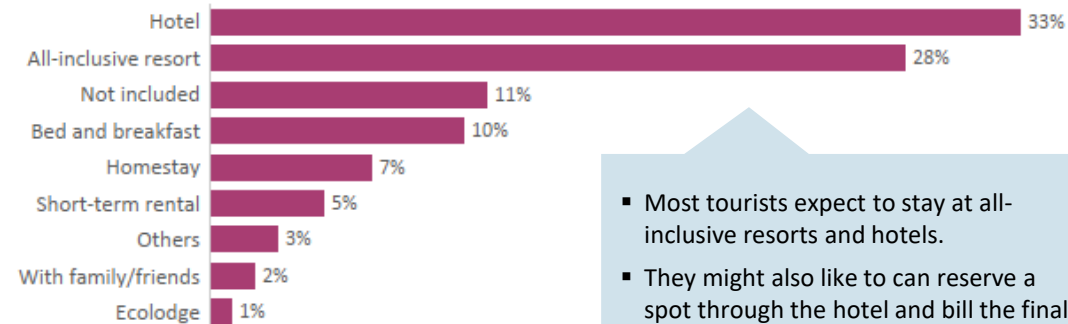
- Many travelers spend a few hours
- It can be extended to a half day if it includes a variety of activities.

Travel companions



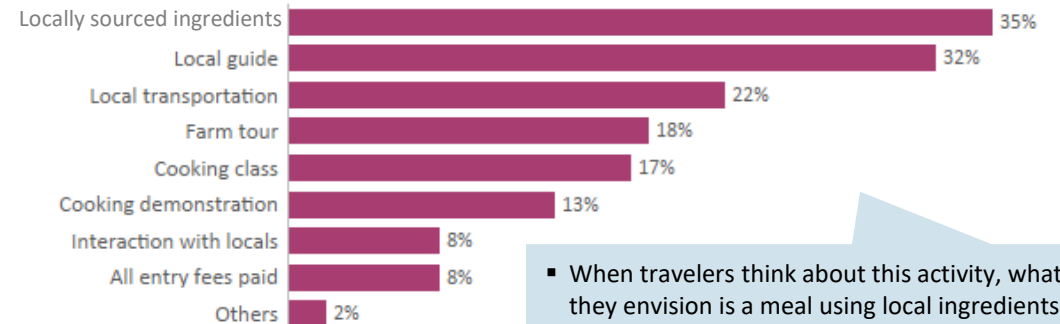
- Culinary experiences are meant to be social experiences shared with travel companions.
- Tourists typically travel with their partners, but also with their friends

Preferred accommodation



- Most tourists expect to stay at all-inclusive resorts and hotels.
- They might also like to can reserve a spot through the hotel and bill the final cost to their rooms.

Characteristics of the activity



- When travelers think about this activity, what they envision is a meal using local ingredients prepared by locals that can take them through the culinary experience.
- The experience can also include a Farm Tour where they can see where and how the foods are grown, as well as a cooking class or demonstration, in which they can also learn a few recipes to take back home as a type of souvenir of their trip.

WILLINGNESS TO PAY

No room to increase price as current prices are in line with tourists' willingness to pay



US\$31-100

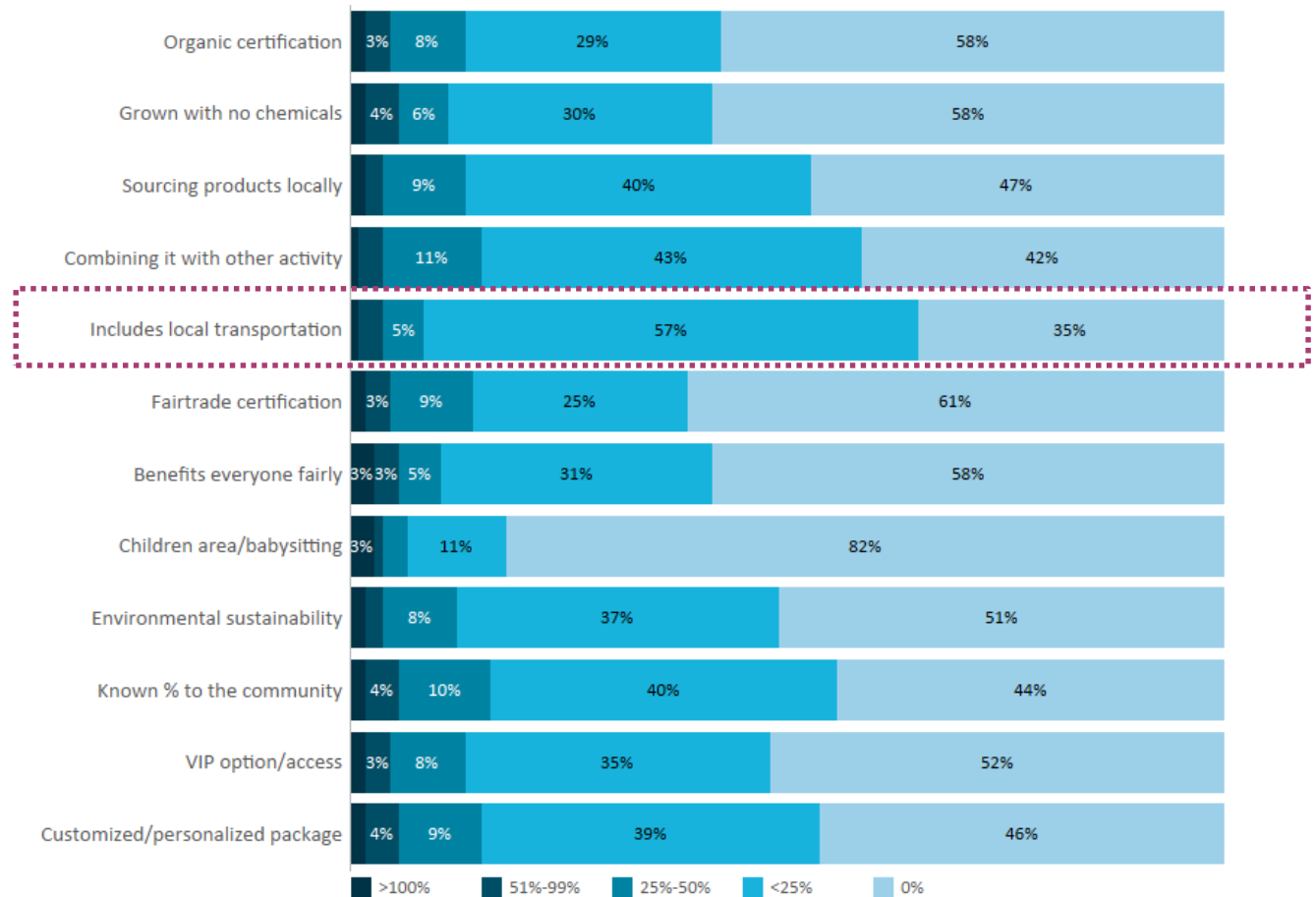
Price range that **tourists are willing to pay** based on their description

US\$25-110

Price range **currently offered** in the Caribbean

- Tourists are generally not willing to pay much more for anything to be added to the activity. Thus, the goal is to encourage interested tourists to book and purchase the activity:
 - Be **present online** when tourists are in the research phase to invite them to book
 - Highlight all the **benefits of this activity** including the full **learning experience** they will receive, as well as the profits that go back **to the community** from the tourist investment.
 - **Promote word-of-mouth** and positive **recommendations online** to bring in new tourists.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

39



The majority of Farm to Table participants are willing to pay more for local transportation

1

Greatest share of tourists willing to pay more

- 65% of tourists are willing to pay more if it includes transportation. The majority (57%) are willing to pay up to 25% more.
- 58% of tourists are willing to pay more for an experience combined with other activities. 43% of tourists would pay up to 25% more.
- Over 53% of respondents are also willing to pay more for attributes such as locally sourced product, customized packages, and known percentage that goes back to the community. Most of them are willing to pay no more than 25%.

2

Middle share of tourists willing to pay more

- 39-49% of respondents are willing to pay for Farm to Table with Organic and Fairtrade certification, with ingredients grown without chemicals, environmentally sustainable, and fair community benefits.
- The majority are willing to pay up to 25% more for these extras.

3

Least share of tourists willing to pay more

- 18% of tourists said they are willing to pay extra for Farm to Table with child care.
- 7% of tourists are willing to pay at least 25% more for child care.

B) Promote internationally

- These activities offer high benefits for the Caribbean
- Level of interest among tourists is low
- Activities include:
 - Homestay
 - School Exchanges and Cultural Immersion
 - Volunteer with Local Experience





HOMESTAY OVERVIEW IN THE CARIBBEAN

Alternative accommodation that provides true appreciation for community

A **Homestay** property is an alternative accommodation in a **private residence/local home** that accommodates paying guests. Travelers usually **stay with a family** and experience their cooking. Homestays can be offered by individuals and their families or by structured organizations.

Examples in the Caribbean

- Positioned as an **alternative to camping while hiking national trails** as offered by **individual families** on Waitukubuli National Trail in Dominica.
- **Country Style Homestay** as done in Jamaica positioned as a **village experience** with a **local family** during which a tourist might experience cooking authentic food, storytelling, and local music.
- **Traditional indigenous homestay** experience as offered by the **Kalinago community** in Dominica, which offers **home-cooked meals** and access to other **activities at the cultural center**.
- **Airbnb** offers tourists to book **local homes** as opposed to traditional hotel accommodations.
- **Multi-day voluntourism** experience with local homestays.

Favorable characteristics for homestays

- Provides true appreciation for the community.
- Try authentic and local food.
- More affordable than hotels or resorts.
- Airbnb's easy-to-navigate and familiar platform for tourists looking to book alternate accommodations, which can positively expand homestay revenue streams for local families.
- Voluntourism as experiences often include homestays.

Challenges for homestays

- Shortage in homestays due to hurricane destruction.
- Technological literacy and access to internet of Airbnb owners could reduce demand for traditional homestay offerings.
- Concern about level of regulation and perception of overall safety by US tourists.
- Perception of a rural, rustic experience linked to developing countries, since tourists seek upscale resorts in the Caribbean.
- Tourists prefer to participate in other activities on vacation.

VALUE PROPOSITION FOR HOMESTAY

A unique experience to gain insider view of community that can be booked online

**Who to target**

- Mature adults over 50 years old, with at least a college degree.
- The majority are retired, married and with adult children older than 18 years old, and do not have family in the Caribbean.
- They travel with their partners, plan their vacations about six months in advance, and search for information online on travel and supplier sites.
- Tourists choose activities that let them explore and learn new things, so they prioritize the main attractions when choosing a destination and typically look for sightseeing, cultural and historical attractions, food, and restaurants.

What tourists expect to get

- The activity usually lasts more than 2 days and is done with their partner.
- An opportunity to experience and more deeply understand the local culture and cuisine, as tourists enjoy the interaction with a local family and they expect to get home-cooked meals.
- Tourists would like it if the experience also included a local guide and the possibility to get local transportation for a small extra cost.
- One added benefit is the lower cost compared to hotels in the country.

How the activity should be positioned

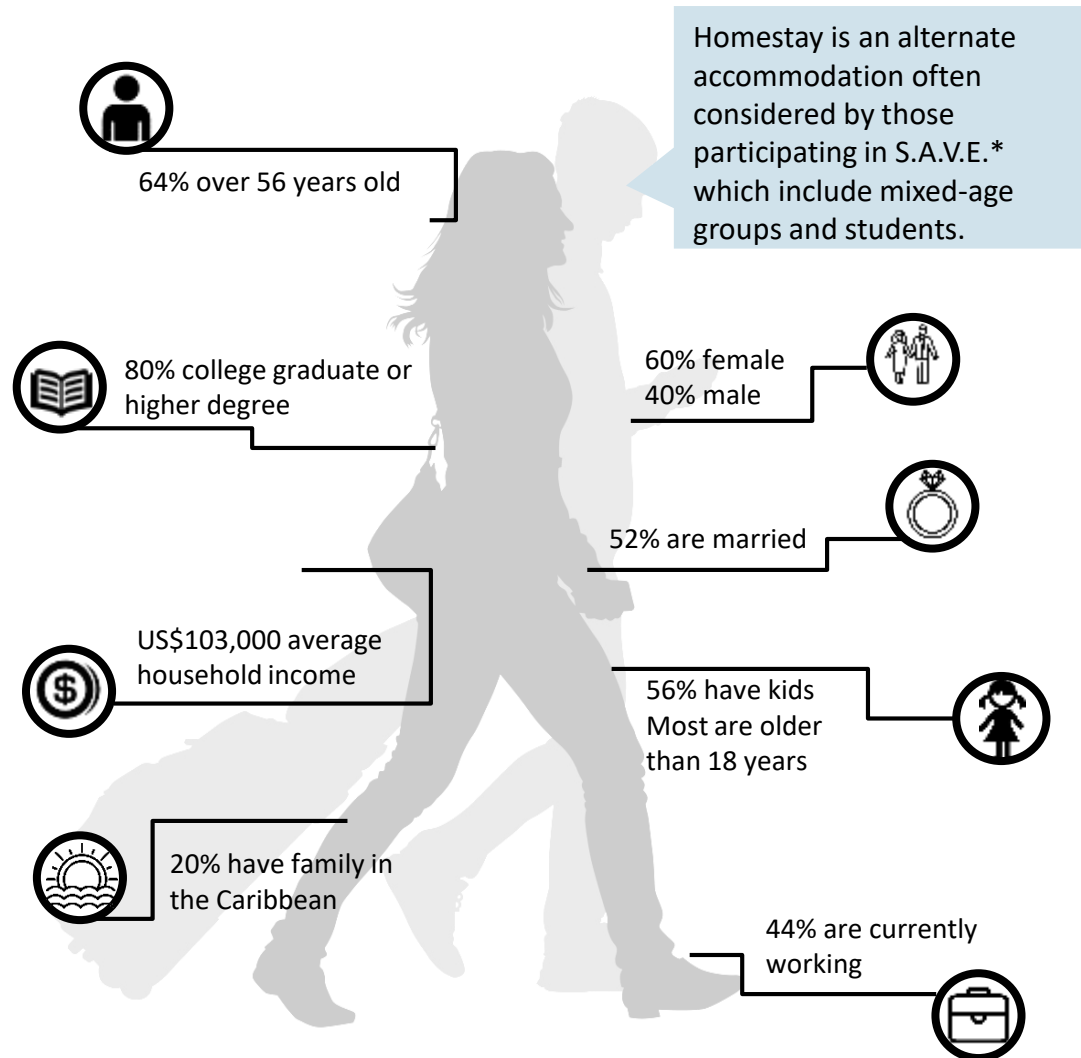
- A one-of-a-kind, exclusive cultural experience that offers the opportunity to explore the local culture, customs, and traditions at an affordable price.
- Offers an insider view of living in the community, with authentic local food and beverage as part of the package.
- Consumers are also interested in including other culinary activities as part of the experience such as Food and Beverage Tours or Farm to Table.
- As an alternative form of accommodations for volunteers in the Caribbean.

Where to promote and advertise the activity

- Advertise online via booking websites to attract tourists when they are researching their trip. They appreciate online reviews which boost the credibility of packages and places.
- Tourists expect to book online and pay by card, therefore homestays should be able to accept credit card payments at least by partnering with suppliers.
- Volunteer organization and tourism boards can also advertise these services, and travel agents can add homestay as part of the packs offered to tourists.

TOURIST PROFILE

Mature explorers highly interested in traveling to Caribbean but are unfamiliar with CBT



General travel habits

- Explorers that choose to see, try, and learn new things on vacations and inform themselves with destination travel websites or magazines.
- Plan their flights and lodging at least three months in advance but are willing to decide on activities closer to the date of departure or on the spot.
- Highly influenced by the destination activities, closely followed by price.

About the Caribbean

- High interest; would like to travel to the Caribbean in the next 18 months because it is affordable, the weather and beaches are attractive.
- They plan to travel with their partner to stay no more than 14 days.
- Going to the beach is the preferred activity but would also enjoy socializing with locals to experience their food, music, and lifestyle.

About Community-Based Tourism

- Low familiarity with the term CBT.
- They think it mainly entails engaging on vacation with people in the community who guide them around the area they are visiting.
- The majority might be interested or have never thought about doing CBT but find it appealing as a unique opportunity to interact with locals.

Source: Euromonitor International based on consumer surveys in the US (25 respondents for Homestay) and trade interviews in the US and the Caribbean

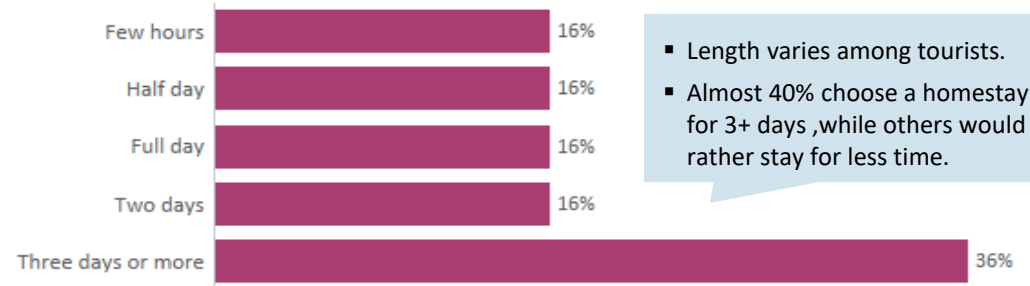
*S.A.V.E. refers to Scientific, Academic, Volunteer and Educational tourism

HOW THE TOURIST DESCRIBES THE ACTIVITY

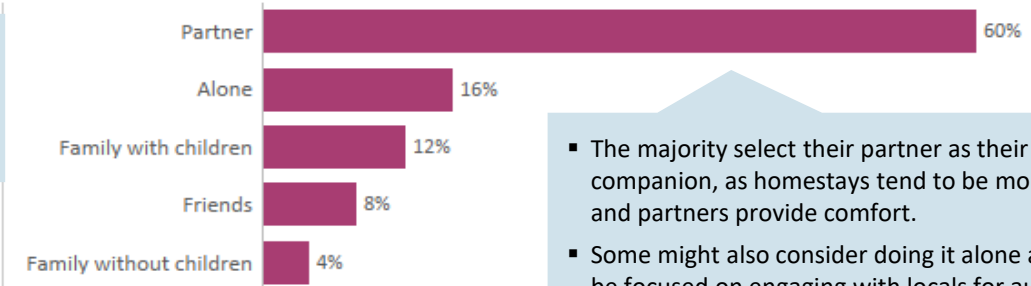
Three+ days homestay in Caribbean with partner, with home-cooked meals



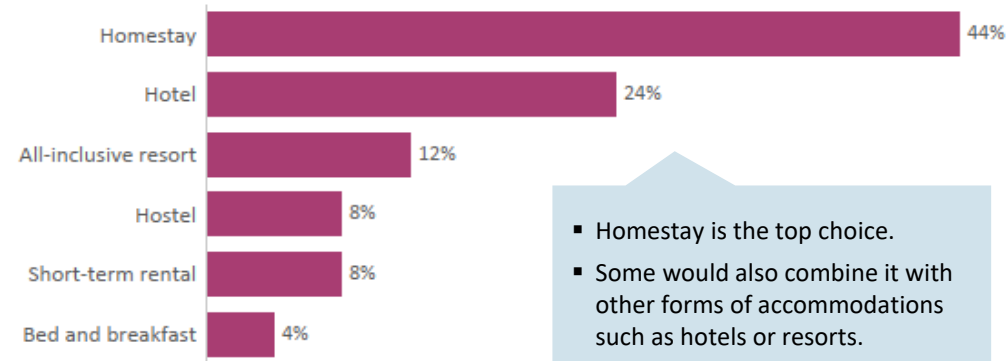
Length of the activity



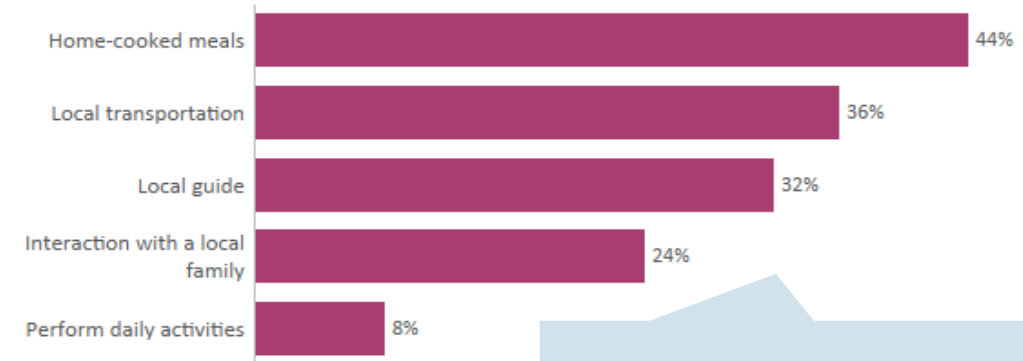
Travel companions



Preferred accommodation



Characteristics of the activity





WILLINGNESS TO PAY

Enthusiasts are willing to pay slightly more than current prices offered

US\$31-300

Price range that **tourists are willing to pay** based on their description

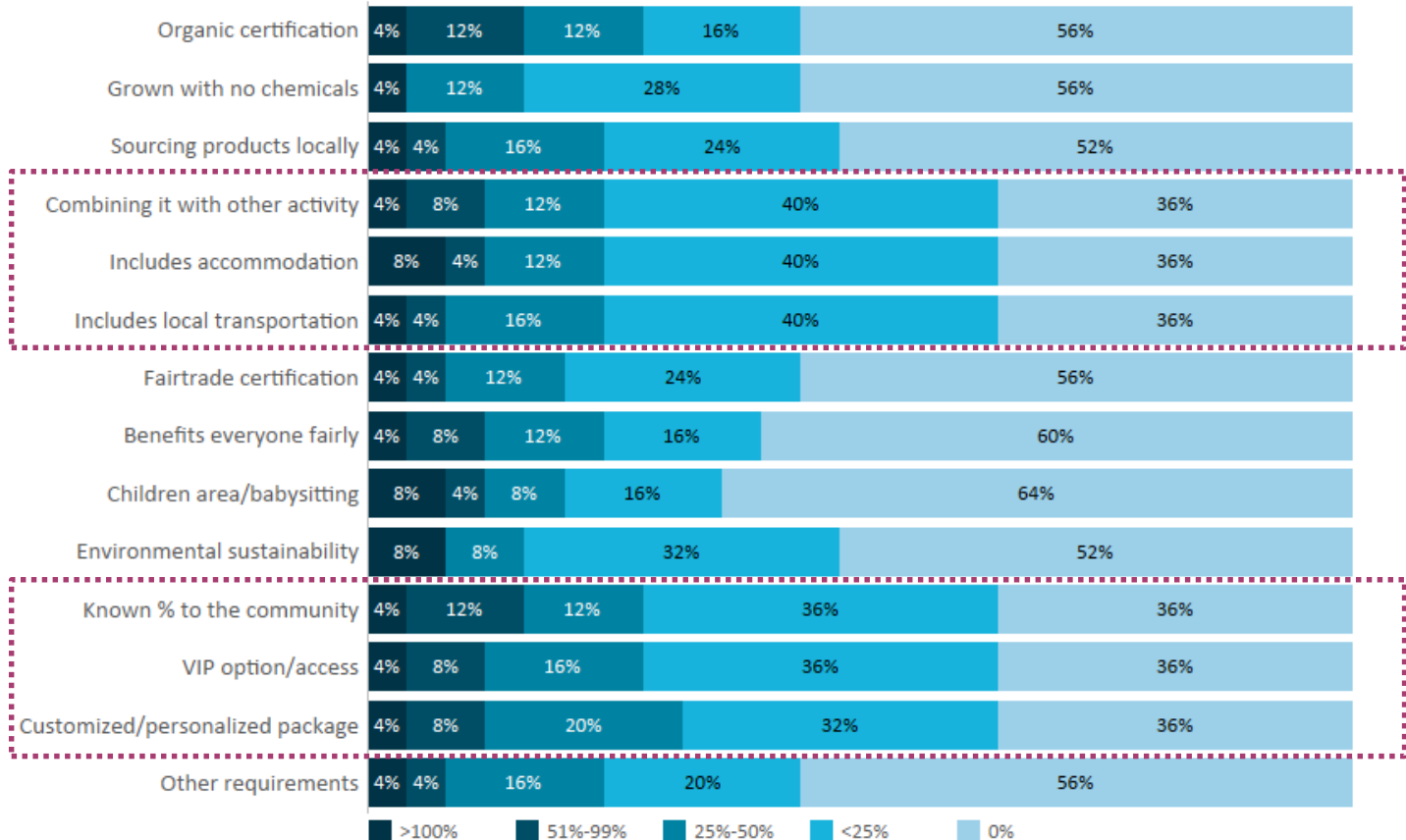
US\$35-110

Price range **currently offered** in the Caribbean

How to encourage tourists to pay for a higher ticket:

- Allow tourists to feel special by offering them a **VIP treatment** for which are willing to pay more.
- Promote the **homestay as a full local learning experience** by combining it with other CBT activities rather than just offering accommodations.
- Offer the **possibility to customize the homestay** by allowing tourists to select if they want only accommodations or additional things such as homemade meals, local transportation or a local guide.

How much more you are willing to pay for Homestay?



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

46



Tourists are willing to pay more for homestay packages with combined activities

1

Greatest share of tourists willing to pay more

- 64% show higher willingness to pay if the homestay includes local transportation, can be combined with other activities, or offers VIP options or personalized packages with the option to add other activities.
- Tourists also care about the percentage of the ticket that goes back to the community; over 60% are willing to pay extra if that percentage is known.
- Overall, most of them (over 36% of respondents) are willing to pay up to 25% more if the homestay includes any of the above.

2

Middle share of tourists willing to pay more

- 40-48% of respondents show some extra willingness to pay for homestay with Organic and Fairtrade certification, with ingredients grown without chemicals, locally sourced products, environmentally sustainable, and fair community benefits.
- The majority are willing to pay up to 25% more for these extras.

3

Least share of tourists willing to pay more

- 36% of tourists said they are willing to pay extra for Homestay with child care.
- 20% of tourists are willing to pay at least 25% more for child care.

SCHOOL EXCHANGE AND CULTURAL IMMERSION OVERVIEW IN THE CARIBBEAN

Multi-activity and personalized cultural learning experience



School Exchange and Cultural Immersion is a travel experience which has as a primary motivation the tourist's engagement and experience in learning, self-improvement, intellectual growth and skills development. Includes a broad range of products and services related to academic studies, skill enhancement, school trips, career development courses and language learning among others. Experiences can be focused on specific subject areas or aspects of culture where learning is the primary goal, and travel is a complementary criterion.

Examples in the Caribbean

- **Multi-day immersive itineraries** that are organized by faculty and universities in source countries, often with local Caribbean community connections, for students to study specific subjects and experience culture firsthand.
- Cultural immersion experiences **hosted by local Caribbean organizations** intending to provide educational experiences in an **immersive way** incorporating **homestays, local cuisine, and Local Tourism activities** as part of the itinerary.
- Typically **extended multi-day stays**, as full-day variations are typically **Local Tourism experiences**.

Favorable characteristics for school exchange and cultural immersion

- Opportunity to explore unique attributes of destination through a personalized and unique cultural experience.
- Connect with and experience firsthand the community's unique cultural practices including art, history, dance, and religion.
- Often includes elements of highly popular activities such as Local Tourism and Traditional Cuisine.
- Employment opportunities for community (guides, transportation, accommodations, teaching, craft demonstrations, cooks, etc.).

Challenges for school exchange and cultural immersion

- Fewer local businesses and organizations in the Caribbean that currently offer things targeted towards tourists (as opposed to school and religious or non-profit organization groups).
- School exchanges are less favorable to the majority of tourists as structured educational experiences are less desired on vacation.
- Limited awareness and understanding of activity limits demand.
- Smaller volume niche segments including families with children, and formal curriculum activities.

VALUE PROPOSITION FOR SCHOOL EXCHANGES AND CULTURAL IMMERSION**Personalized cultural learning experience with direct community engagement****Who to target**

- Diverse populations of mature adults over 50 years old, and adults ages 26 to 45 with above average interest in this activity.
- The majority are female, employed, married, and without children, and do not have family in the Caribbean.
- Tourists choose activities to explore unique aspects of the destination that result in a personalized experience in which they can learn something new.
- Planning time for flights and lodging is at least 6 months and travel agents are the main source of information. Activities can be decided on the spot.

What tourists expect to get

- The activity usually lasts a few hours and is done with partners, friends, or alone.
- A chance to experience firsthand the community's unique cultural practices, led by a local guide.
- Tourists would appreciate if the amount of tourist dollars that goes back to the community is disclosed, and also appreciate attributes such as accommodations and local transportation at a small extra cost.
- Tourists are willing to pay almost double if combined with other activities, and offered in a personalized and customizable package.

How the activity should be positioned

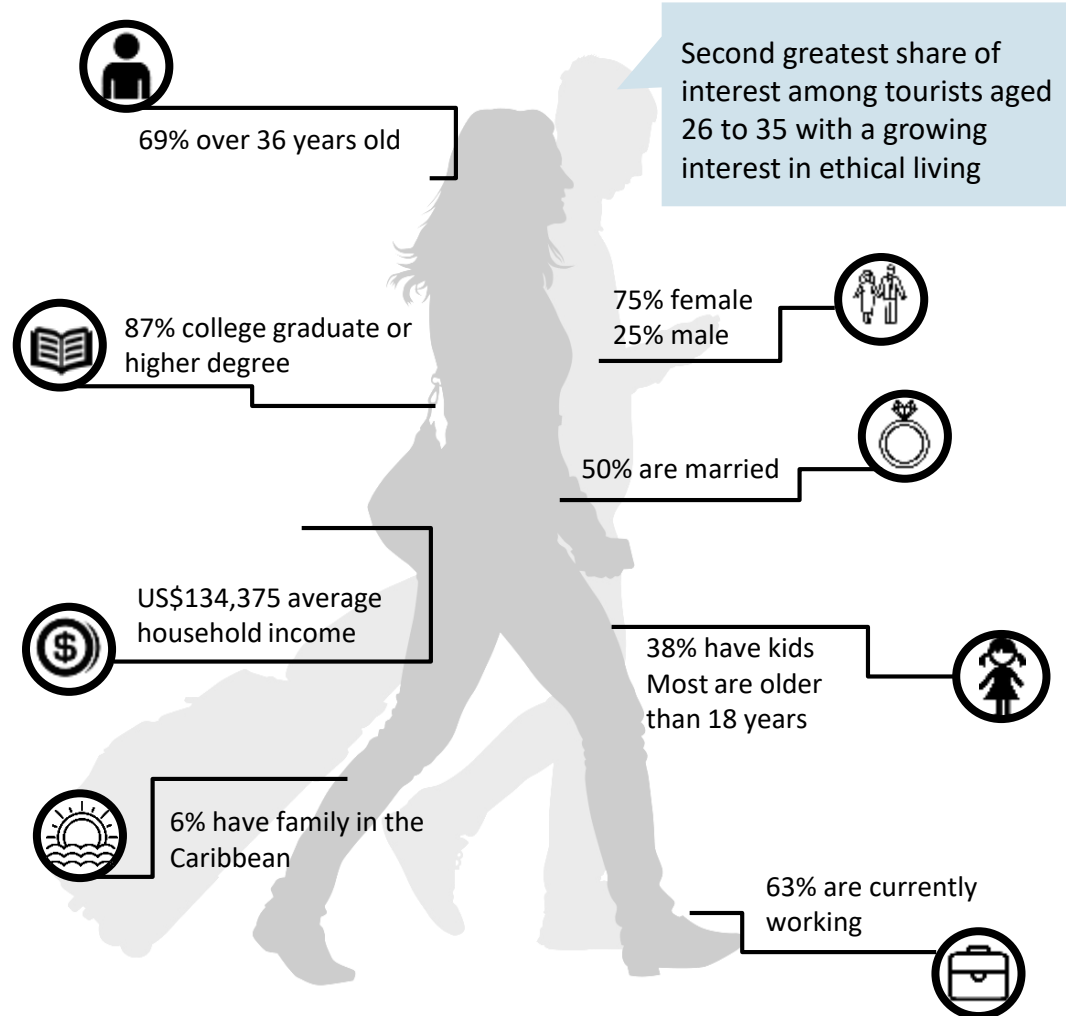
- Highlight a one-of-a kind cultural experience, even if part of a school exchange, to generate greater interest among more tourists.
- Position it as a learning experience as part of a package that includes other popular activities such as local cuisine, Heritage Sites, and wildlife tourism in a natural habitat that complement cultural learning experience.
- Promote ability to interact with local community members.
- Tours up to a day should target hotel guests, whereas multi-day experiences can also offer homestay for school-based or organization-based group travel.

Where to promote and advertise the activity

- Advertised online, especially in blog posts, videos, and travel sites to help tourists understand what to expect and what they will gain from participating, which will help drive overall interest in this activity.
- Tourists expect to book as part of the package with the tour operator, and thus school exchanges and cultural immersion should partner with tour operators and ensure their ability to accept credit card payments.
- Relationship-based partnerships such as universities, primary and secondary schools, and religious and other organizations in source markets promote these activities, including organized group travel opportunities.

TOURIST PROFILE

Younger, curious, and mostly female; unfamiliar with CBT yet interested in Caribbean



General travel habits

- Tourists that choose to see, try, and learn new things with their partner, or alone, and educate themselves via travel websites and magazines.
- Plan flights and lodging at least six months in advance but are willing to decide about the activities closer to the date of departure or on the spot.
- Select destinations based on cultural attractions, followed by price.

About the Caribbean

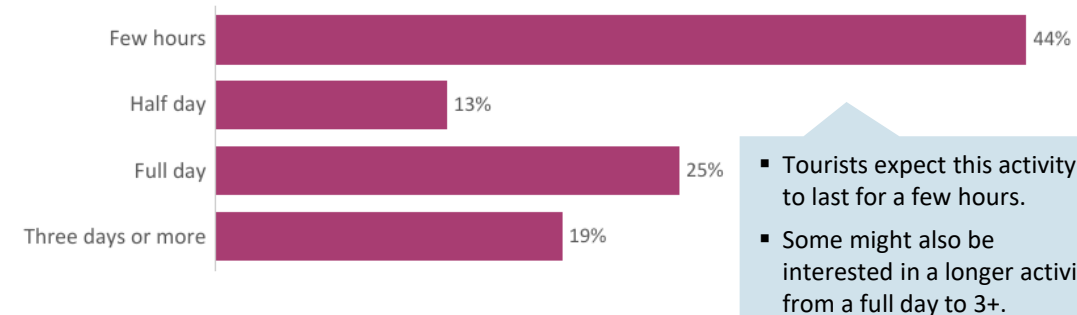
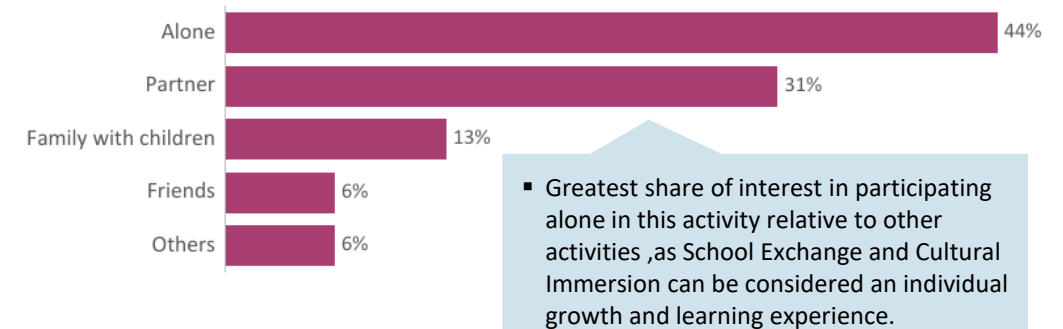
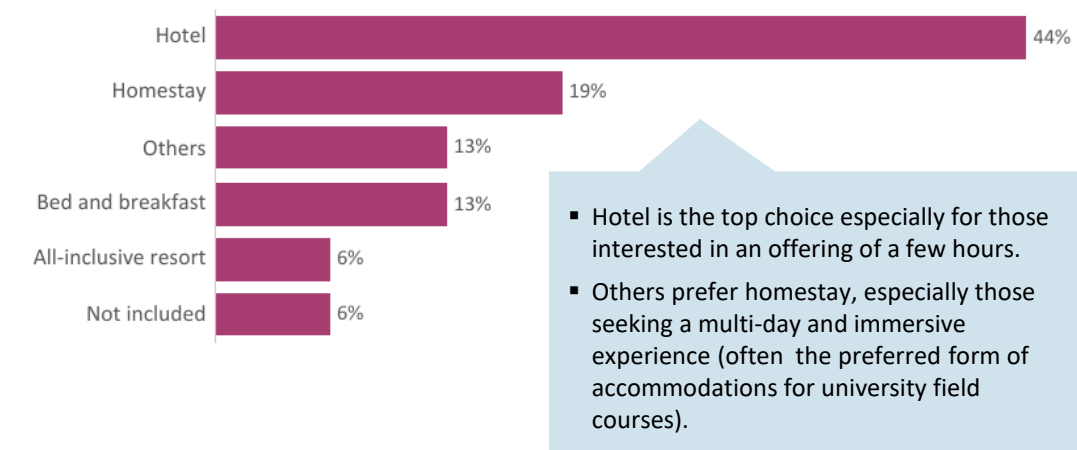
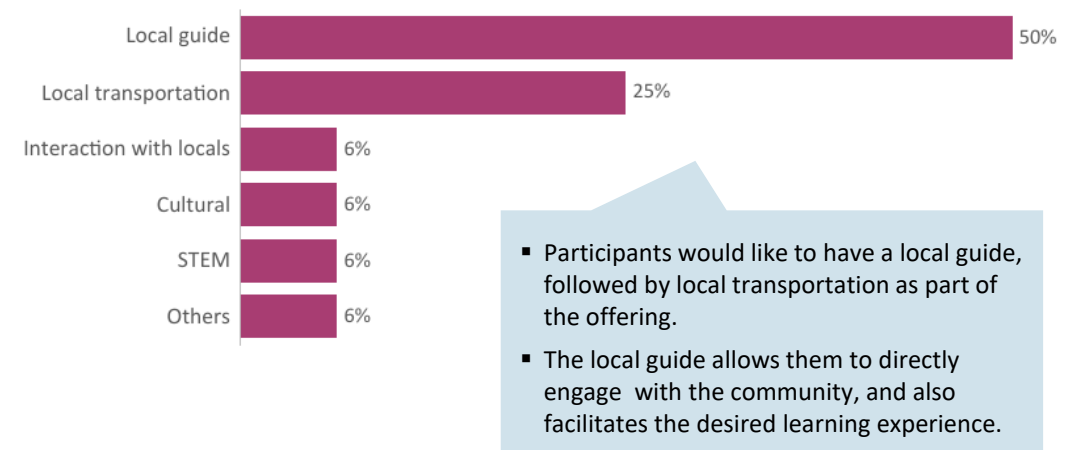
- Would like to travel to the Caribbean in the next 18 months because of its tropical weather and being a friend- and family-friendly destination.
- Plan to travel with their partner to stay a week or two.
- While beach and cruise tourism are preferred activities, spending time with locals and experiencing food, music and lifestyle are also of interest.

About Community-Based Tourism

- Lower familiarity with term CBT, but greater than other activities.
- Perceive CBT as mainly engaging local communities that guide tourists to explore and learn about the area they are visiting.
- Plan to participate or might be interested in CBT since it provides an opportunity to interact with locals and connect with the community.

HOW THE TOURIST DESCRIBES THE ACTIVITY

Individual cultural immersion experience that lasts a few hours with a local guide

**Length of the activity****Travel companions****Preferred accommodation****Characteristics of the activity**

WILLINGNESS TO PAY

Disconnect in current offering and travelers' willingness to pay as they seek shorter activities 

US\$31-500

Price range that
**tourists are willing to
pay** based on their
description

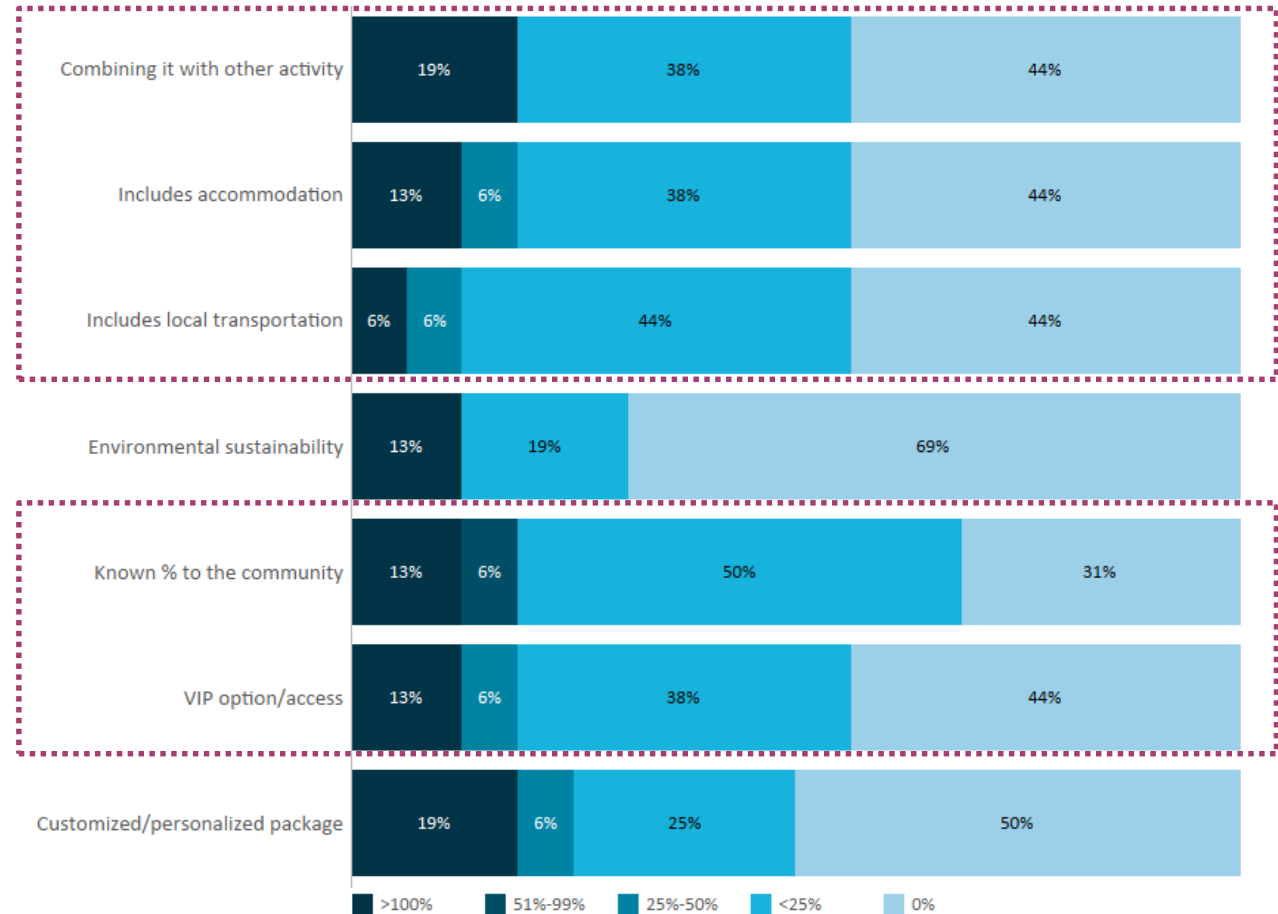
US\$1k-2k+

Price range **currently
offered** in the
Caribbean

How to encourage participation and generate greater revenues*:

- Offer **shorter packages at lower prices** that tourists find appealing, to encourage **greater volume and frequency of participation**; whereas **higher cost multi-day experiences** should be developed and offered for the niche segment seeking school exchange, and cultural immersion enthusiasts.
- Provide activity within package that includes accommodations, and other activities such as high-interest **agro and food tourism options** that also contribute to overall learning and cultural experience.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

Knowing how much goes back to community is most valuable attribute for tourists



1

Greatest share of tourists willing to pay more

- Almost 70% of respondents are willing to pay extra for school exchanges and cultural immersion activities that disclose the percentage that goes back to the community. The majority of respondents (50%) are willing to pay up to 25% extra.
- 56% of tourists are willing to pay more if the experience could be combined with other activities, and/or included accommodations, local transportation or VIP access. Over 38% of tourists are willing to pay up to 25% more.

2

Middle share of tourists willing to pay more

- 50% of respondents that show interest in school exchanges and cultural immersion activities would pay extra if they could choose customized packages.
- The majority are willing to pay up to 25% more for these extras.

3

Least share of tourists willing to pay more

- Environmental sustainability is the least valuable attribute among tourists.
- 69% of tourists said that they are not willing to pay extra for this service.

VOLUNTEER WITH LOCAL EXPERIENCE OVERVIEW IN THE CARIBBEAN**Multi-day experience with volunteering that develops tourists' understanding of daily life**

Volunteer with Local Experience are trips taken to a destination for the purpose of **assisting the host community**, often with a social cause as the primary motivation with travel as a complementary feature. Examples include **voluntourism for reconstruction** in the aftermath of a natural disaster, community development activities, conservation, and clean-ups.

Examples in the Caribbean

- Multi-day excursion promoted by international organizations like **Rotary Club International or Habitat for Humanity** focusing on infrastructure development, medical missions and more.
- Mission trips as led by **churches and other religious groups**
- **Government supported and tourism association promoted** multi-day volunteer experiences to aid in **island reparations and rebuild post-hurricane destruction** as seen in Dominica.
- **Locally developed and run organizations** offering volunteer trips that include **homestays and/or Ecolodge** as exemplified by '3 Rivers and Rosalie Forest Voluntourism and Adventure Package' blending **multiple CBT activities** (Traditional Health and Wellness with Sulphur baths, Farm Tours, cooking classes, and more).
- **Local and private hoteliers** offering a volunteer element as part of **sustainable practices** and **giving back** to the local community.

Favorable characteristics for Volunteer with Local Experience

- [Re]build infrastructure in a community.
- Employment opportunities and potential generated from multi-activity and multi-day itineraries.
- Social cause (e.g., health, education, animals) is primary to activity generating local community benefit.
- Provides a learning experience and offers a real perspective of daily life in the community.
- Often includes elements of highly popular activities such as Local Tourism and Traditional Cuisine.

Challenges for Volunteer with Local Experience

- Travelers may be interested in volunteering at home, but not on vacation, and it is harder to generate greater willingness to pay as this is perceived as "giving their time" instead of gaining an experience.
- Limited awareness of offerings limits tourist demand.
- Requires different partnerships for promotion including churches, universities, NGOs, development agencies, etc. for group tours (often less frequent in visits).
- Fewer locally organized CBT providers in the Caribbean.

VALUE PROPOSITION FOR VOLUNTEER WITH LOCAL EXPERIENCE

Adults seeking genuine community interaction and real community impact promoted online



54

Who to target

- Couples aged 26+ with interest, and those aged 55+ (with a tendency for greater participation), and groups wanting to participate in voluntourism.
- The majority are employed, married and have adult children, and do not have family in the Caribbean.
- Tourists choose activities to explore unique aspects of the destination that result in a personalized experience, and typically stay at a hotel, including bed and breakfast and all-inclusive options.

What tourists expect to get

- The activity usually lasts a few hours to a full day, whereas group tours typically are multi-day and multi-activity experiences.
- Tourists expect that this experience will be led by a local guide, and offers interaction with the local community as they seek learning opportunities while directly impacting the community.
- Tourists would appreciate it if accommodations, transportation and amount that went back to the community were included for a small extra cost.

How the activity should be positioned

- Place primary emphasis on the genuine cultural and personal growth experience in a safe environment, as even those tourists interested in giving back need to understand what they will gain personally from the experience.
- Qualify the tourist's firsthand community impact like [re]building infrastructure (as secondary focus of positioning) while demonstrating the tourist's simultaneous personal and direct interaction with community throughout.
- Tours that last a few hours should be positioned to beach vacationers as a "less invasive" experience that fits within their planned week.

Where to promote and advertise the activity

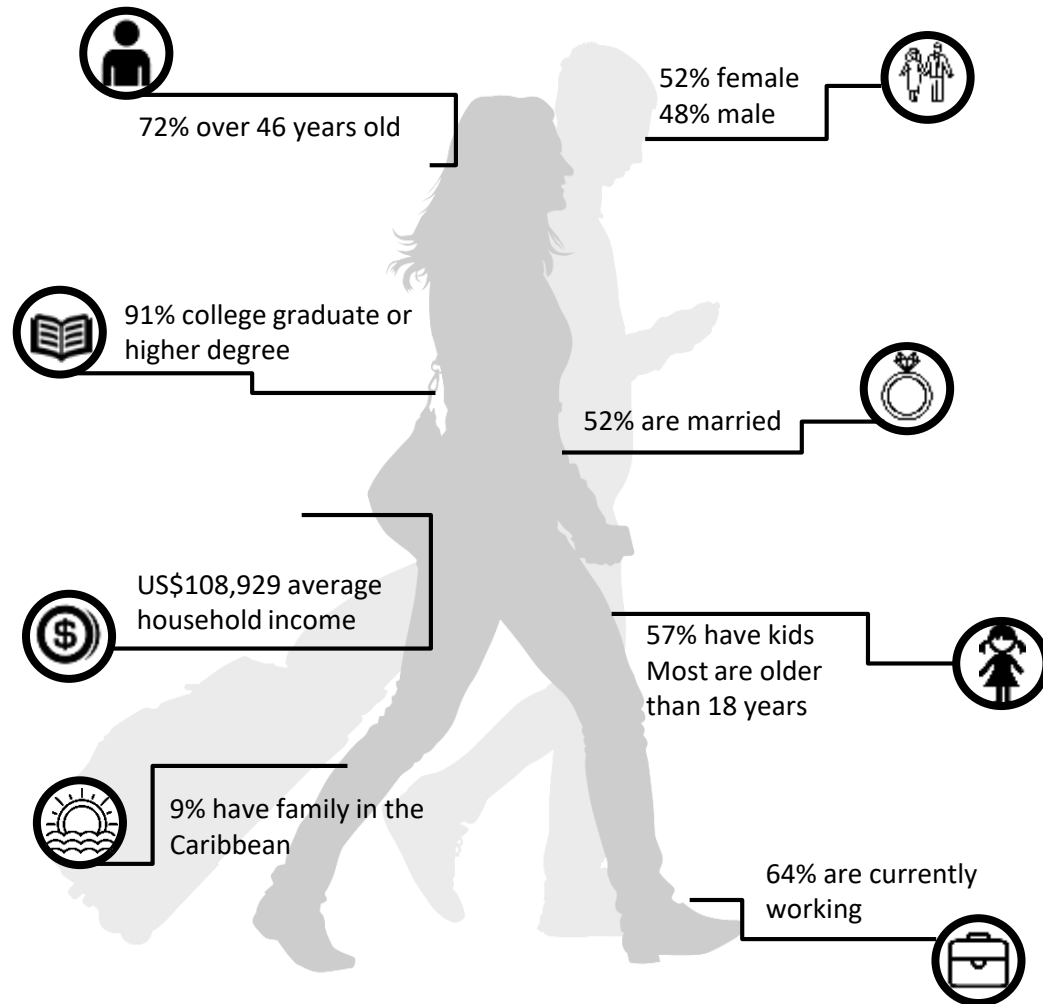
- Promote experiences that last a few hours through hotel partnerships that support giving back to the community in a relaxed way
- Hotel partnerships are a viable partner for local CBT providers in offering credit or debit card payment, which most tourists expect to be able to do.
- Relationship-based partnerships such as religious and other organizations with community missions in source markets for multi-day organized group travel opportunities.
- Advertising online, and promotion by tourism ministries and tourism boards build tourist awareness and credibility when choosing to participate.

TOURIST PROFILE

Cost-conscious and curious travelers interested in Caribbean but unfamiliar with CBT



55



General travel habits

- Explorers that choose to see, try, and learn new things on vacations and inform themselves with destination travel websites or magazines.
- Plan their flights and lodging at least three months in advance, yet decide about the activities closer to the date of departure or on the spot.
- Cost is the primary decision-making factor, followed by activities available at destination, of which historical and cultural attractions are preferred.

About the Caribbean

- High interest; would like to travel to the Caribbean in the next 18 months because of the tropical weather and being affordable.
- They plan to travel with their partner or friends to stay one to two weeks.
- Going to the beach is the preferred activity but they would also enjoy socializing with locals to experience their food, music, and lifestyle.

About Community-Based Tourism

- They think CBT is mainly engaging with people in the community, led by a guide, and a, unique experience among the local community.
- The majority might be interested or have never thought about doing CBT but would consider it since it is an opportunity to learn new things and allows for interaction with locals.

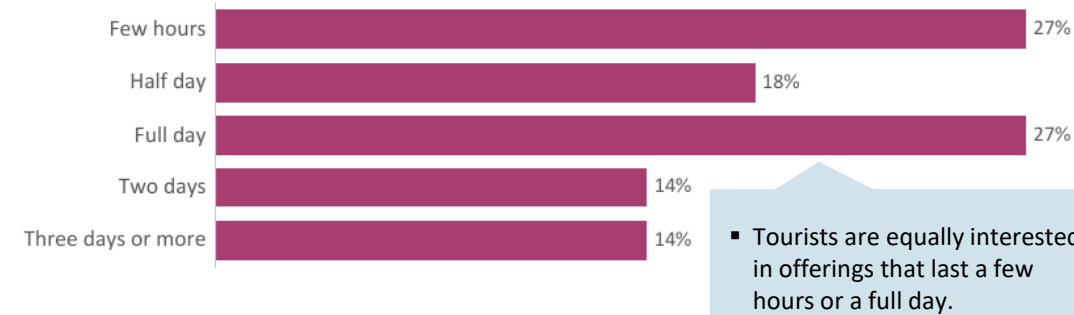
HOW THE TOURIST DESCRIBES THE ACTIVITY

Few hours to full-day volunteer experience with partner led by local guide

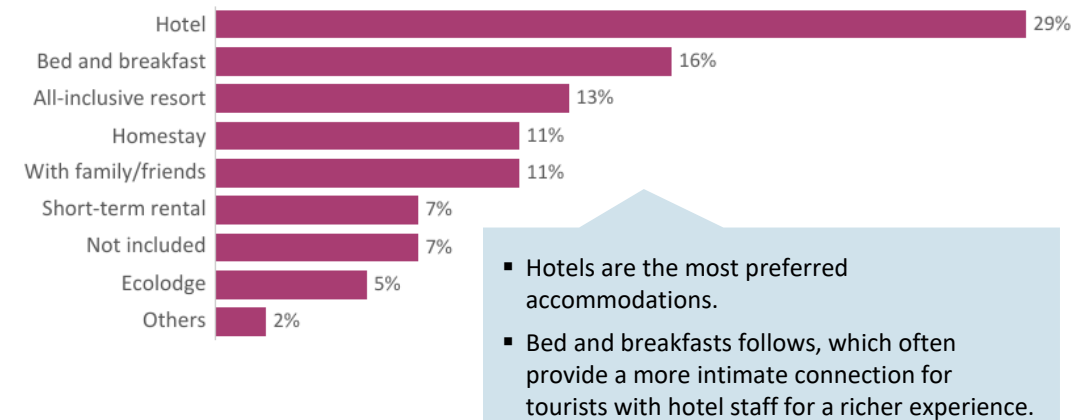


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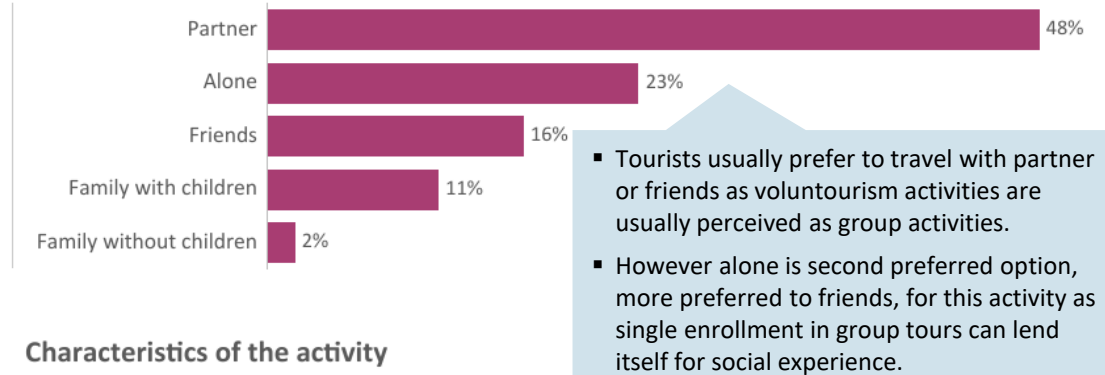
Length of the activity



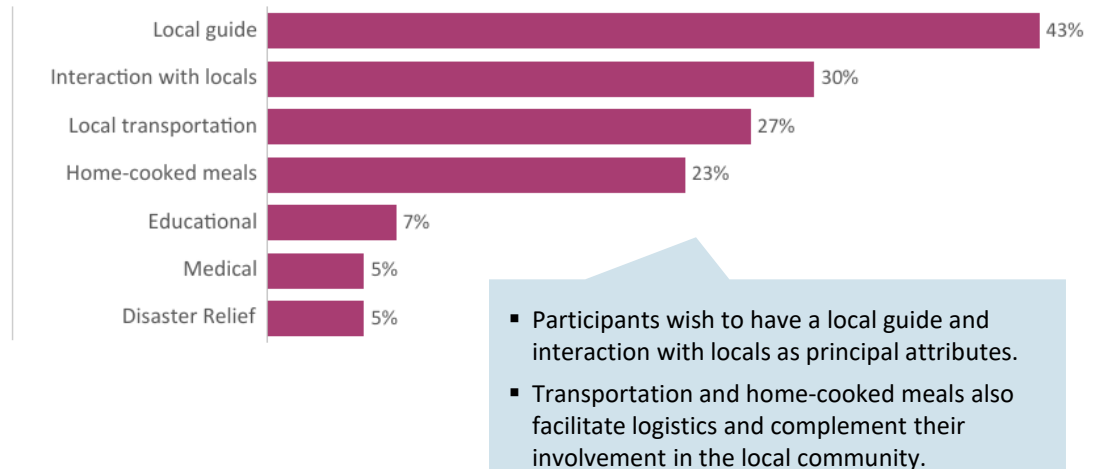
Preferred accommodation



Travel companions



Characteristics of the activity



WILLINGNESS TO PAY

Current offering exceeds travelers' willingness to pay as they view their time as payment



57

US\$31-300

Price range that
**tourists are willing to
pay** based on their
description

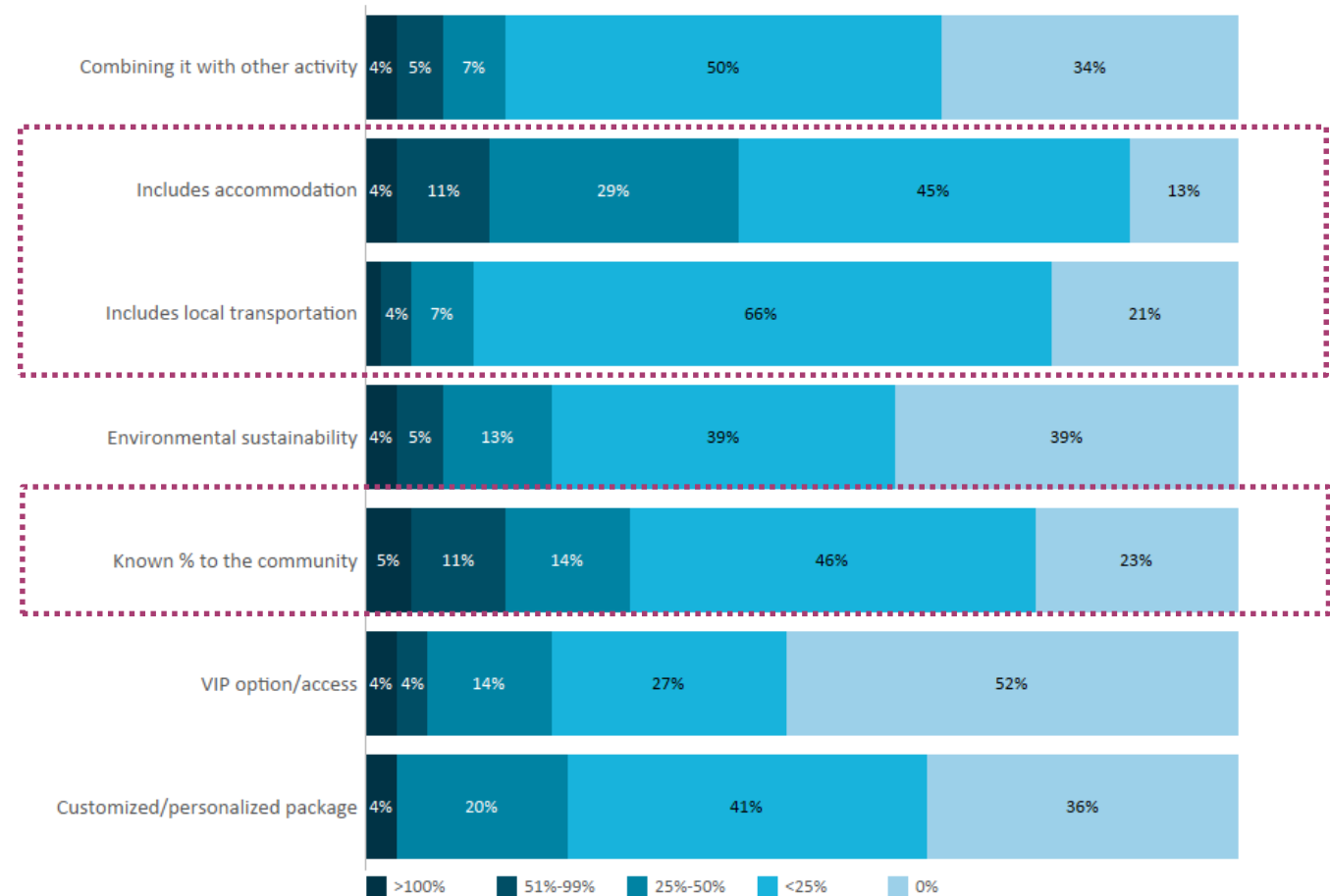
US\$800-2k+

Price range **currently
offered** in the
Caribbean

How to encourage participation and generate greater revenues:

- Reposition package with **primary focus on tourist's personal benefits** and **secondary focus on community impact**; this will help tourists shift their perception of giving their time for free to volunteer (generating overall lower willingness to pay) to their **personalized experience with the local community**, which they are more willing to pay.
- Provide activity as part of package that includes **accommodations and transportation** and that highlights **amount of tourist dollars that returns to the community**.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

Tourists value volunteer experiences that include accommodations and transportation



58

1

Greatest share of tourists willing to pay more

- Over 75% of respondents show a higher willingness to pay for volunteer experiences that include accommodations, local transportation and that disclose the percentage that goes back to the community.
- Most of them mentioned that they are willing to pay a price that is 25% higher if it included one of these extra characteristics.

2

Middle share of tourists willing to pay more

- 61-66% of respondents are willing to pay for environmental sustainability, customized packages, and combining this with other activities.
- The majority are willing to pay up to 25% more for these extras.

3

Least share of tourists willing to pay more

- 48% of tourists said they are willing to pay extra for Volunteer with Local Experience with access to VIP options.
- 21% of tourists are willing to pay at least 25% more for this service.

C) Develop locally

- These activities offer low benefits for the Caribbean
- Level of interest among tourists is higher
- Activities include:
 - Heritage Site
 - Wildlife Tourism in Natural Habitat
 - Festival



HERITAGE SITE OVERVIEW IN THE CARIBBEAN

Sightseeing that offers a cultural and historical learning experience

Heritage Site is historical, cultural, archeological and indigenous sites and ruins such as **monuments, buildings, structures** and cemeteries of significant local value or where **political, military, cultural or social history** has been preserved.

Examples in the Caribbean

- Heritage Site tours often group **multiple sites, both natural and man-built, on day-long excursions** that include local transportation and local tour guides.
- These tours can be **personalized and structured** according to interest; for example, there are various **religious sites** of interest which can be grouped to create **customized tour**.
- **One-day city tours** offer experience to see multiple Heritage Sites, an experience **commonly offered in various destinations**.

Favorable characteristics for Heritage Sites

- UNESCO sites offer additional promotion of destination.
- Explore unique physical assets of destination while learning about its culture and history.
- Connect firsthand with community, often via a travel guide, to understand unique cultural and/or religious practices.
- Beach and cruise tourists often participate in one-day sightseeing city tours that stop at Heritage Sites.
- Employment opportunity created through local guides and Traditional Cuisine offered on or near sites.

Challenges for Heritage Sites

- Limited UNESCO sites in all geographies results in reduced promotion of Heritage Sites.
- UNESCO sites can be run by non-community members contributing to an overall lowering in the number of locally led and run tours, which in turn limits employment for local community members and overall community involvement.
- Tourists may feel their safety is at risk in areas where sites exist.

VALUE PROPOSITION FOR HERITAGE SITE**A bucket list experience that can be added to city tours to get to know local culture****Who to target**

- Popular among many demographics as Heritage Site visits are commonly part of one-day city tours booked by cruise travelers and overstay tourists.
- Especially popular among well-educated senior couples, who are older than 60 and have no family in the Caribbean.
- They plan their trips up to six months in advance and usually search for information on destination or travel websites or travel magazines.
- Tourists choose activities to see and learn new things and that is why they prioritize historical and cultural attractions to select the destination.

What tourists expect to get

- Usually lasts a few hours if it is part of a city tour excursion, up to half a day.
- Tourists are interested in visiting ruins and UNESCO sites to check off their bucket lists, and to learn about the history of the country.
- Local guides are very important to maximize the experience of tourists by sharing knowledge, recommending where to go and what to do, warning them about crime and keeping them from going off the beaten path.
- Visitors are willing to pay more for a personalized experience, in which they can select only the site(s) of their interest, and with an exclusive guide.

How the activity should be positioned

- The Heritage Sites can be divided and offered based on their significance, as they can have cultural, historical, natural or even scientific relevance.
- It should be an educational experience for tourists with the support of local guides that provide information and insight, not only to check off all the important sites on their bucket list, but to learn the story behind them.
- Provides an opportunity to explore something unique about the destination such as famous monuments or sites, highlighting the Caribbean Heritage Network certifications and awards.

Where to promote and advertise the activity

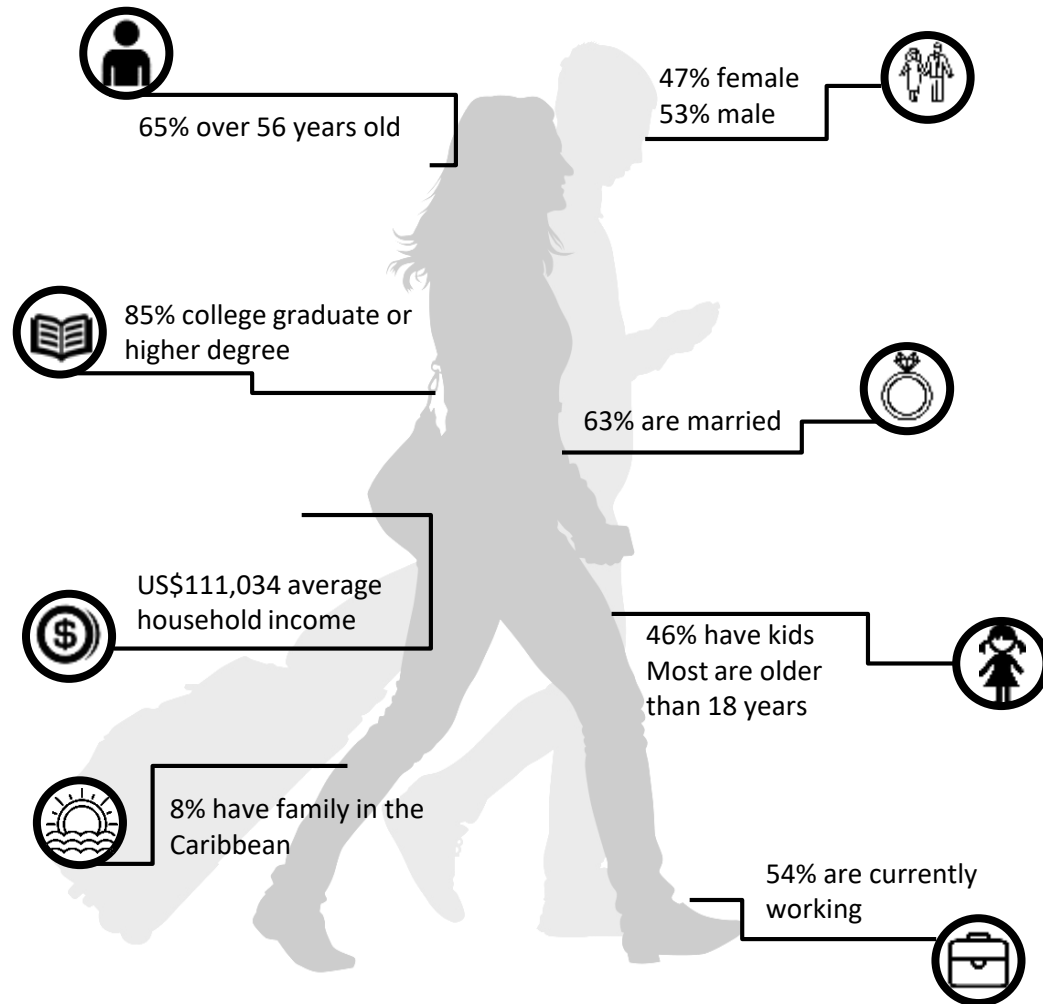
- To attract the attention of tourists, advertise online in leading global travel platforms, social media, tourism ministry websites, and pages or forums in travel, art, history, museums and related websites or magazines.
- Promoting and selling the activity as part of packages at hotels and resorts will also allow tourists to pre-book along with other day tours and activities.
- Visitors expect to pay with credit/debit card on site (if there are existing entry fees or other fees) but among tourists that book in advance, they typically pay online or as part of the package they purchased.

TOURIST PROFILE

Mature couples that want to enjoy travel by learning new facts about their destination



62



General travel habits

- Typically travel with their partners or friends and seek experiences in which they can learn new things, such as sightseeing and visiting cultural and historical sites, as well as trying new things such as local food.
- In addition to the main attractions, cost of trip is an important factor.
- Usually plan six months in advance but may decide activities on the spot.

About the Caribbean

- The majority consider traveling to the Caribbean as their next destination or for the next 18 months for beach or cruise tourism.
- They plan to stay for 1-2 weeks because it is an affordable destination where they can enjoy the tropical weather, relax, and is close to home.
- Tourists are likely to stay in hotels and all-inclusive resorts.

About Community-Based Tourism

- Few are familiar with the term CBT. and are unsure if it just means engaging with people in the community or having local guides to teach them about the area.
- Some might be interested in doing CBT in the Caribbean, while others have never thought about it, mainly because they have no previous experience and would first like to do more research on CBT.

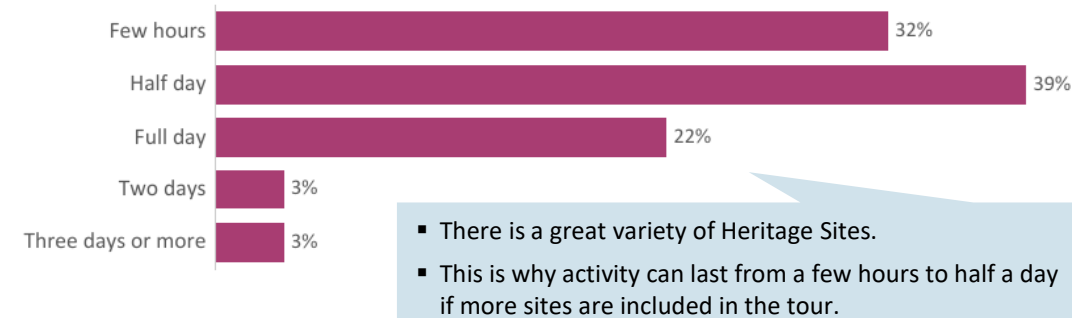
Source: Euromonitor International based on consumer surveys in the US (179 respondents for Heritage Site) and trade interviews in the US and the Caribbean

HOW THE TOURIST DESCRIBES THE ACTIVITY

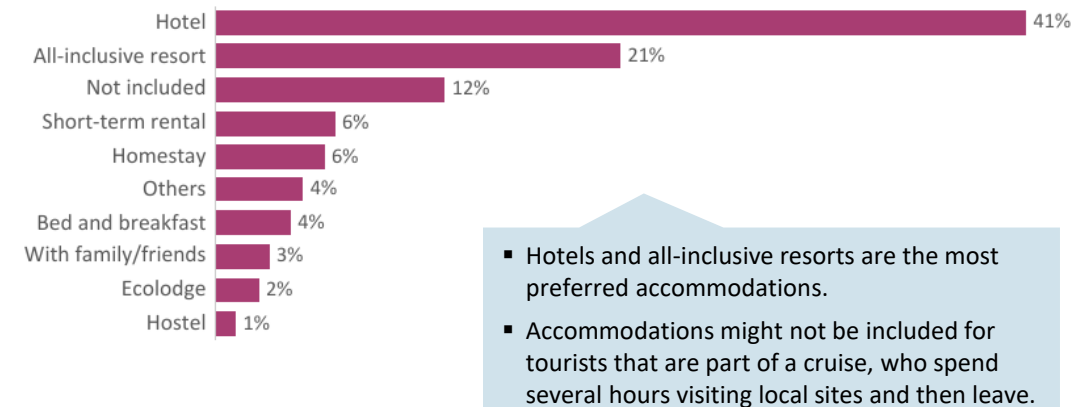
No more than half a day visiting local attractions with a local guide to help them explore



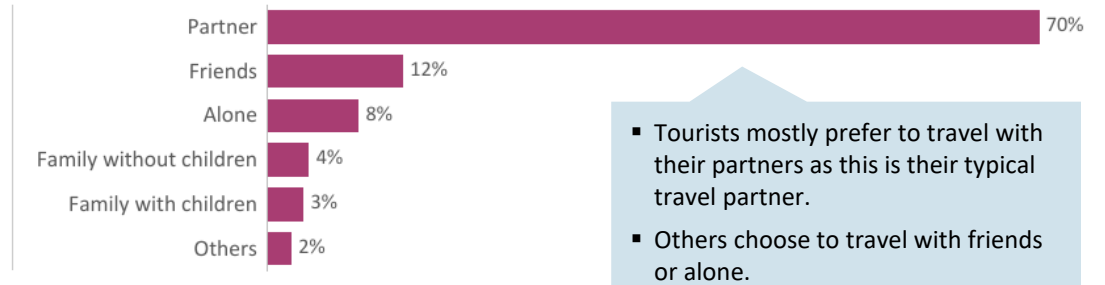
Length of the activity



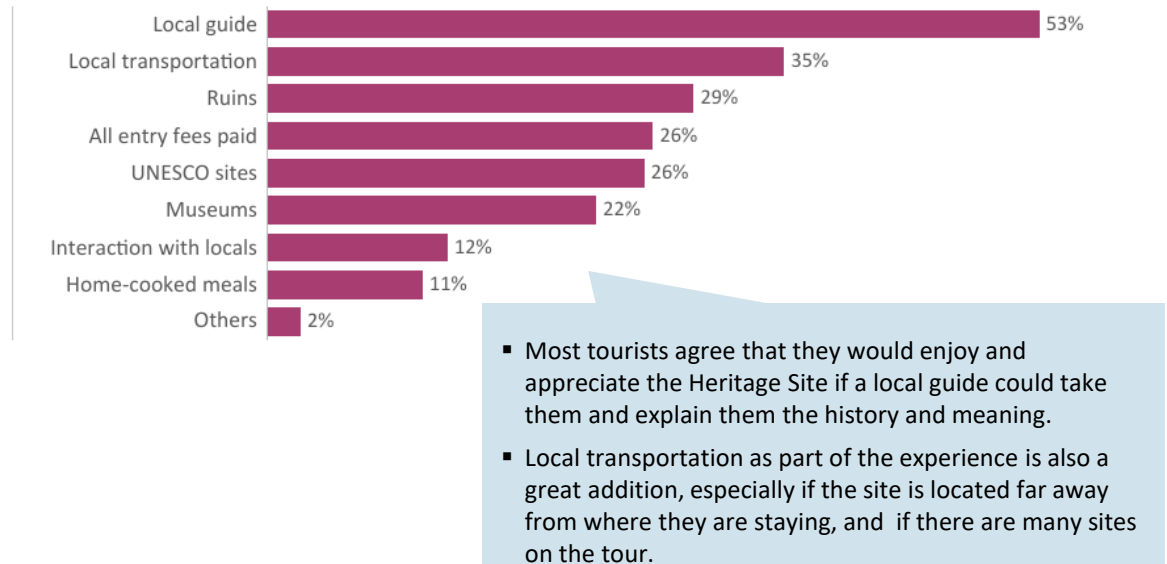
Preferred accommodation



Travel companions



Characteristics of the activity



WILLINGNESS TO PAY

Tourists are willing to pay more if they perceive added value of experience



64

US\$31-300

Price range that **tourists are willing to pay** based on their description

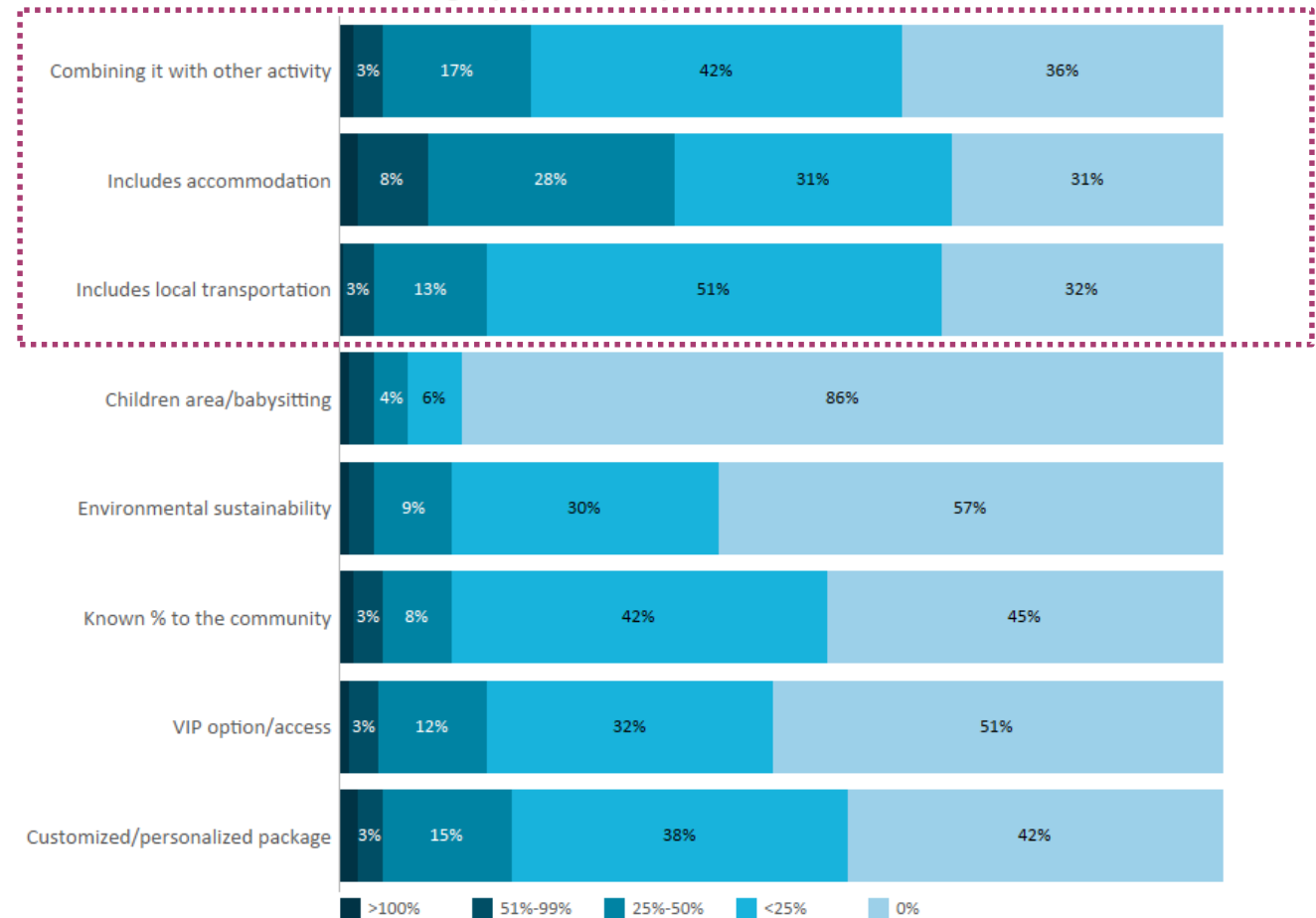
US\$2-300

Price range **currently offered** in the Caribbean

How to encourage tourists to pay for a higher ticket:

- Offer a **full educational experience** by providing a local guide that is knowledgeable about the Heritage Site's history, the country, and its culture.
- Provide **transportation to and from the hotel** and combine the Heritage Site visit with other activities such as meals at local restaurants and indigenous tourism, creating a more fulfilling experience.
- Give tourists the possibility of **customizing the experience** by choosing which sites to visit, the amount of time to spend at each one, and other tourism activities they wish to include in the package.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

65



Combining activities and VIP access generates at least 25% ticket price for 20% of tourists

1

Greatest share of tourists willing to pay more

- 69% of tourists are willing to pay more for Heritage Site with accommodations; 38% of tourists are willing to pay at least 25% more.
- 68% of tourists are willing to pay more for Heritage Site with local transportation; 17% of tourists are willing to pay at least 25% more.
- 64% of tourists are willing to pay more for Heritage Site combined with another activity; 22% of tourists are willing to pay at least 25% more.

2

Middle share of tourists willing to pay more

- 43-58% of tourists are willing to pay for Heritage Site with environmentally friendly activities, VIP access, customized packages, or when a known percentage of the price goes back to the community; the majority are willing to pay up to 25% more.
- 20% of tourists are willing to pay at least 25% for VIP access.

3

Least share of tourists willing to pay more

- 14% are willing to pay more for child care; 8% of tourists are willing to pay at least 25% more.



WILDLIFE TOURISM IN NATURAL HABITAT OVERVIEW IN THE CARIBBEAN

Appreciation of and desire to preserve unique natural geographical assets

Wildlife Tourism in Natural Habitat are trips to destinations with the main purpose of **observing the local fauna**. Includes birdwatching, turtle watching, and generally observing wildlife **in its natural habitat**. This does not include reserves or sanctuaries.

Examples in the Caribbean

- **Daytime and nighttime excursions** to experience wildlife in their natural habitat such as bird-watching on Mt. Charles in Jamaica, which also is a multi-activity offering including swimming and local cuisine.
- Excursions often **highlight the geography's unique and rare natural assets**: This includes a number of exotic bird species in Trinidad and Tobago, humpback whale watching, turtle watching, and observing the biodiversity of rainforests, endangered species, coral reefs, and more.

Favorable characteristics for Wildlife Tourism in Natural Habitat

- Emerging and growing popularity as alternative to wildlife in non-natural habitat due to environmentally friendly practices.
- Sustainable tourism and ecotourism policies/standards supported by local governments in certain geographies.
- Experience unique natural assets and species of destination.
- Caribbean's abundance of unique natural assets.
- Exploration with local guide and knowledge expert can offer adventurous yet safe experience.

Challenges for Wildlife Tourism in Natural Habitat

- Tourists perceive wildlife in natural habitat as activity they can participate in independently and unguided, which reduces employment potential.
- Limited sustainable tourism and environmental policies to support nature preservation in natural habitat.
- Wildlife in natural habitat can be perceived as less safe and dangerous depending on wildlife and species.

VALUE PROPOSITION FOR WILDLIFE TOURISM IN NATURAL HABITAT

Fun outdoor experience, environmentally sustainable, that appeals to wide audience

**Who to target**

- Most travelers prefer to engage in wildlife tourism while accompanied, mostly by their partners or friends but some like to take their children.
- They usually plan their vacations six months in advance, especially for their hotel and flights, and they use direct suppliers for booking.
- Activities are determined closer to departure and also on the spot. They rely on travel websites or seek recommendations to determine what to do.
- Destination selection depends on affordability and main attractions to learn new things, enjoy the outdoors, and be in contact with nature.

What tourists expect to get

- Usually lasts between half a day to a full day.
- Tourists expect to get a unique and educational experience, getting close to unique wildlife species, without disturbing their habitat.
- They can benefit from having experienced local guides, as their knowledge of the destination will further enhance the tourist experience.
- Preferences on arrangements vary: Some expect these tours to take place inland with walks included, while others prefer water-based tours.

How the activity should be positioned

- Activities should be divided into land- and water-based activities that are unique to the geography. For instance, water enthusiasts engage in snorkeling to get closer to coral, fish and turtles in a memorable and sustainable way.
- Highlight sustainable practices, as this is key for wildlife enthusiasts who want an enriching experience without harming wildlife.
- Local and experienced guides are highly important to guarantee compliance with safety and sustainable standards (especially for more risky activities that can be life-threatening for visitors and/or wildlife species).

Where to promote and advertise the activity

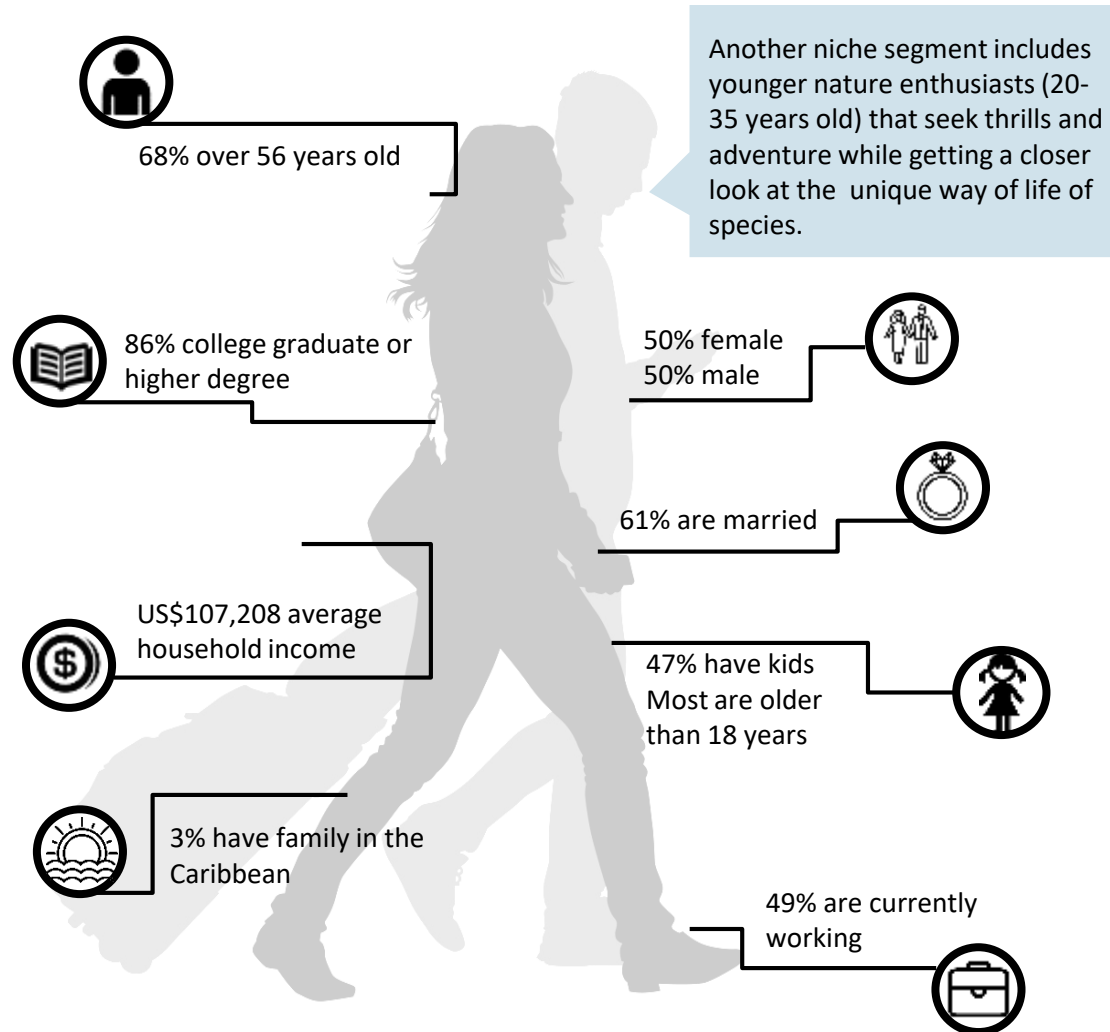
- Nature channels, magazines, and websites such as National Geographic as well as more activity-specific sites such as diving association, bird conservation sites, WWF and related organizations.
- Wildlife conservation forums, universities/education-related forums involved in wildlife work, as this can also be an educational experience for academic programs or volunteers to work together sustainably.
- More than half of tourists expect to pay with credit/debit card or for costs to be included as part of the package they purchased at home or the hotel.

TOURIST PROFILE

68



Adult couples value observation; younger travelers choose adventure



General travel habits

- Enjoy seeing, trying, and learning new things and usually look for destinations where they can do sightseeing and visit historical and cultural attractions.
- They are cost-conscious, and also consider the uniqueness of the destination and its level of safety.
- Travel with partner or friends and plan tours up to six months in advance.

About the Caribbean

- Travelling to the Caribbean is on their list for the next 18 months, attracted by its tropical weather and beaches, and to relax.
- They are likely to stay for 1-2 weeks, in all-inclusive resorts and hotels.
- Beach Tourism is their top activity, but they are also interested in cruise tourism.

About Community-Based Tourism

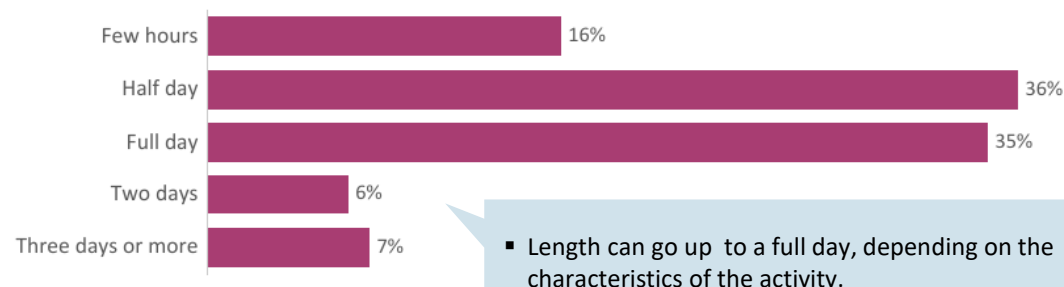
- They have little knowledge about CBT, and mainly think it means engaging with people in the community while on vacation.
- Some might be interested in doing CBT, while other have never thought about it. Those who are interested see it as a unique opportunity to learn new things, while other need to do more research first to decide.



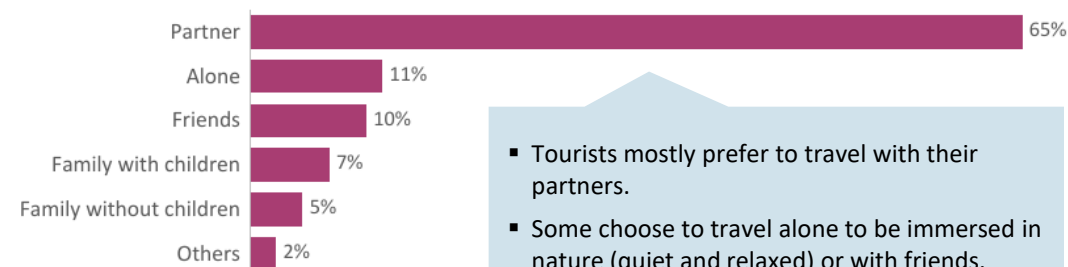
HOW THE TOURIST DESCRIBES THE ACTIVITY

A guided activity that can take up to a day and is shared with a partner

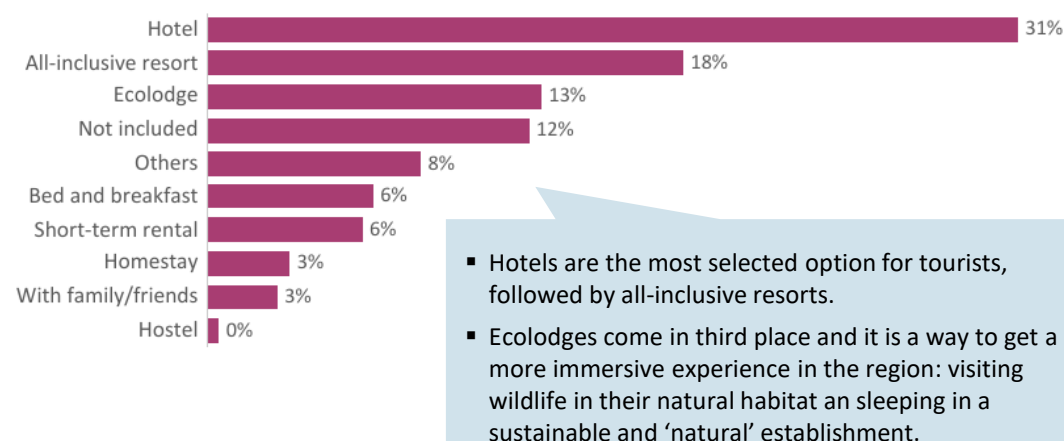
Length of the activity



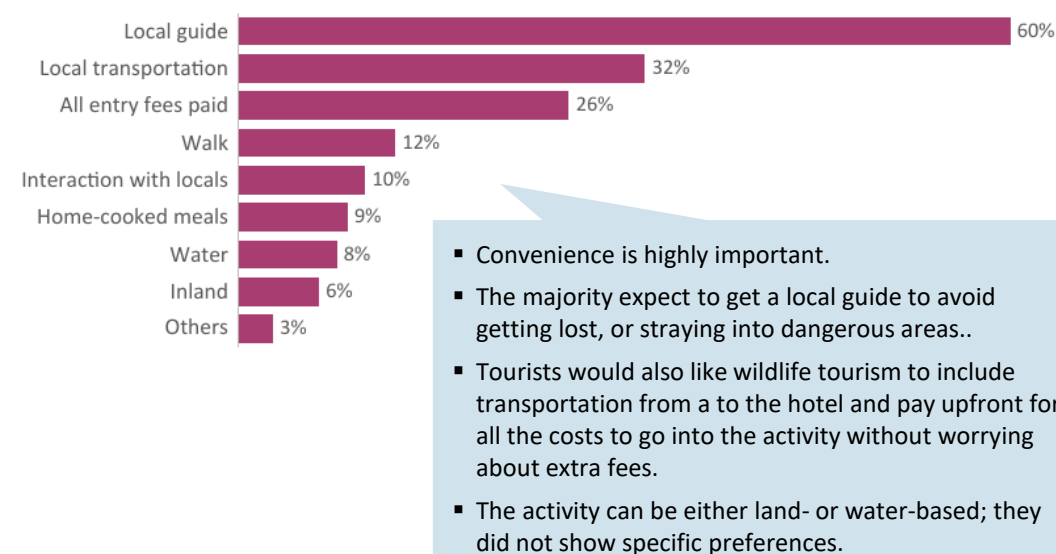
Travel companions



Preferred accommodation



Characteristics of the activity



WILLINGNESS TO PAY

Move from a 'do-it-yourself' activity to encourage tourists to expand beyond free activities



US\$31-300

Price range that **tourists are willing to pay** based on their description

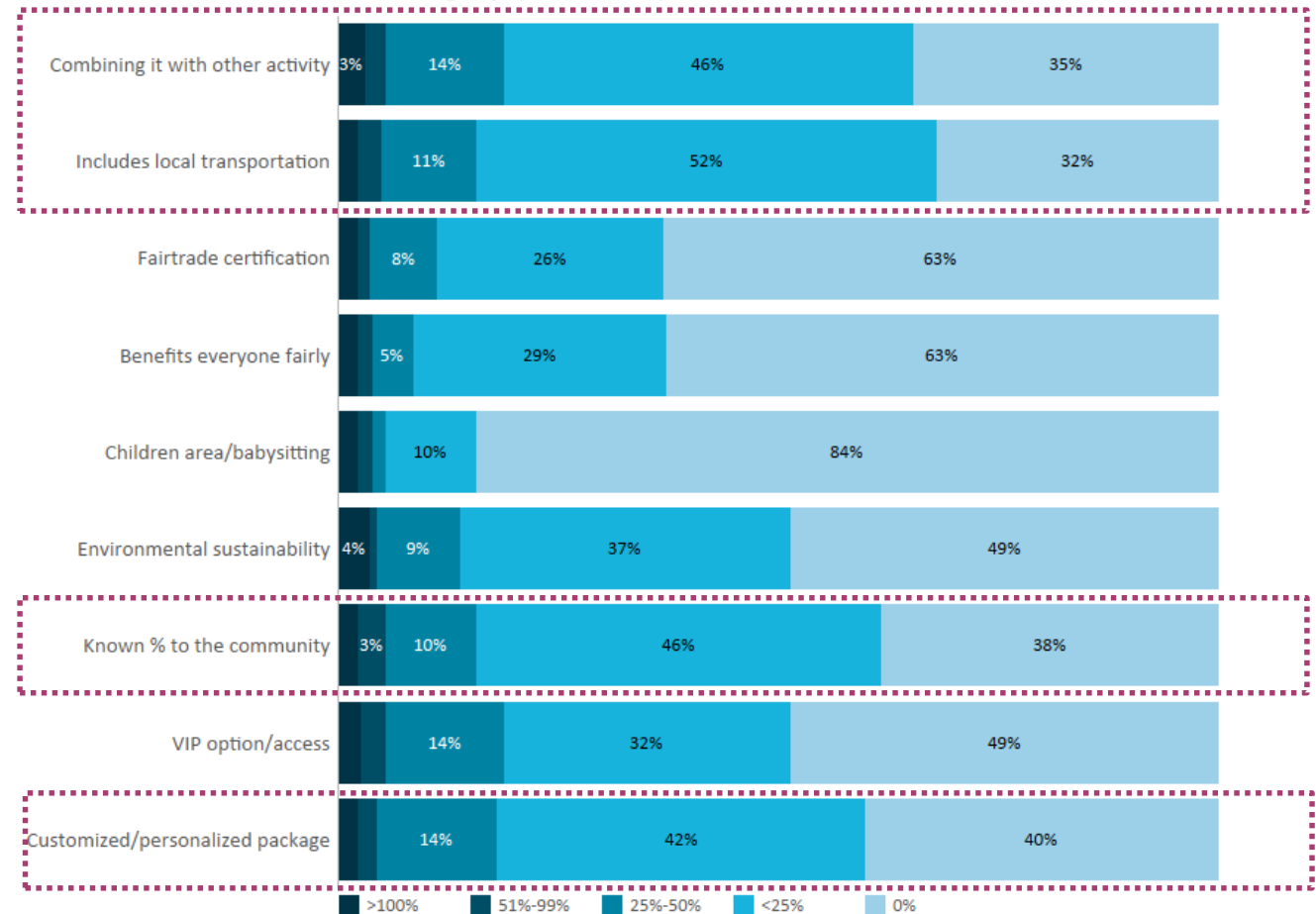
US\$0-100

Price range **currently offered** in the Caribbean

How to encourage tourists to pay for a higher ticket:

- Make it **convenient** by offering a final price that includes all entry fees paid as well as local transportation and an experienced local guide.
- Promote wildlife tourism as an **enhanced learning experience** with local guides that also benefits local communities as a relevant source of income.
- Offer **customized packages** in which they can select land-based, water-based or a combination of both activities, and the option to add other activities (such as local cuisine and visiting other Heritage Sites) to extend the experience during the day.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS**Tourists (18%) WTP at least 25% more for customization, VIP access and combining activities** **1****Greatest share of tourists willing to pay more**

- 68% of tourists are willing to pay more for Wildlife in Natural Habitat with local transportation; 52% are willing to pay up to 25% more.
- 65% of tourists are willing to pay more for Wildlife in Natural Habitat combined with other activities; 46% of them up to 25% more.
- At least 60% of tourists are willing to pay more for Wildlife in Natural Habitat with a known percentage of ticket price given back to the community or offered with customized package; 18% are willing to pay at least 25% more for both of these.

2**Middle share of tourists willing to pay more**

- 37-51% of tourists are willing to pay for Wildlife Tourism in Natural Habitat that is environmentally friendly, with VIP access and fairly benefits everyone and has a Fairtrade certification; the majority are willing to pay up to 25% more for these extras.
- 18% of tourists are willing to pay at least 25% more for Wildlife Tourism in Natural Habitat with VIP access.

3**Least share of tourists willing to pay more**

- 16% of tourists are willing to pay more for Wildlife Tourism in Natural Habitat and child care; only 6% are willing to pay more than 25%.

FESTIVAL OVERVIEW IN THE CARIBBEAN

Celebration that highlights local culture and community assets



72

Festivals are events centered on celebrating or **commemorating** some aspect of local indigenous **culture, heritage and traditions**, spiritual practice, gastronomy, film and/or music of a country, community, religion, ethnic or social group. Festival Tourism is a popular niche market segment, defined as travel for the main purpose of attending festivals.

Examples in the Caribbean

- Many islands offer **annual island Festivals** such as Guadeloupe's Goat Festival highlighting local cuisine, music and dance performances, artisan crafts, and more, while others have a religious focus.
- Larger island Festivals such as Domfesta in Dominica provide an opportunity with high-tourist traffic yet only for a limited number of community members.
- Festivals can focus on specific events such as the **Jazz Creole** Festival in Dominica.
- Festivals can be **day-long to multi-day events**; Kalinago's Valval is a weeklong Festival embracing cultural traditions.

Favorable characteristics for Festivals

- The Caribbean is recognized for annual Festivals that showcase its unique heritage, music, dancing and traditional food.
- Promotes entire community and its collective offering.
- Community members offer local food and beverages, and craft stalls that appeal to the interests of various tourist segments.
- Experience culture and unique aspects of the destination through celebration that fosters a true appreciation for the community.

Challenges for Festivals

- Limits of community infrastructure (e.g., accommodations) within geographies hosting Festivals restrict Caribbean capacity.
- Need for central planning committee for large Festivals.
- Low differentiation among Caribbean cultural Festivals.
- Most Festivals are free of charge, limiting total potential revenues for community.
- Inconsistent and seasonal, limiting employment potential.

VALUE PROPOSITION FOR FESTIVAL

An authentic experience for a wide audience that seeks out local music and/or food

**Who to target**

- Broad segment that ranges from young travelers to mature adults and retirees because of their wide interest in local food and music.
- When on vacation, they want to experience new things and seek activities they can do accompanied but also have some time to relax and unwind.
- They are careful deciders that plan their vacation six months in advance and pay attention to a variety of aspects before deciding their destination.
- Although they are cost sensitive, activity offering, safety and the local weather can make or break their decision.

What tourists expect to get

- Tourists enjoy Festivals in company of their partners or friends.
- They choose to spend a few hours or half a day, and sometimes even a full day at Festivals, and expect to combine them with other activities during their stay such as Beach Tourism, food tours and Traditional Cuisine.
- Music is the top attraction at Festivals, where tourists expect to engage in the festivities while learning more about unique heritage, dance and food.
- They are concerned about their safety at the destination, so they expect to see security to reassure them so they can enjoy the event without worry.

How the activity should be positioned

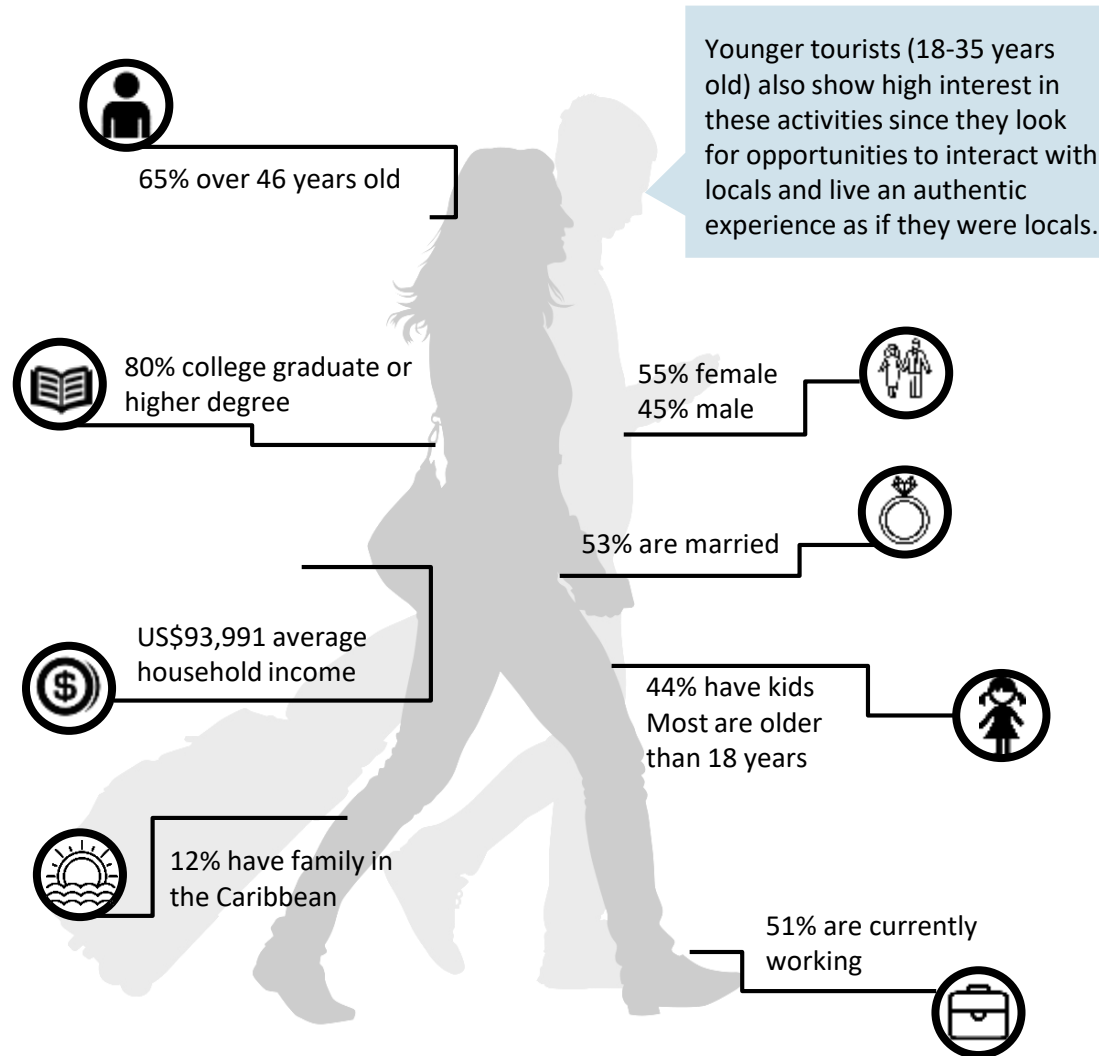
- An opportunity to take part in the local cultural experience and explore something unique and authentic about the community that is fulfilling.
- Differentiate Caribbean Festivals by emphasizing unique heritage with music, dancing, and traditional food. The interaction with locals also provides a sense of uniqueness as tourists can live the experience as if they were locals.
- Festivals are more than just a fun activity to do in the Caribbean but also an opportunity to contribute with something more meaningful for the community: celebrating and preserving its heritage and traditions.

Where to promote and advertise the activity

- Draw the attention of travelers mainly online on tourism websites and travel channels, as well as lifestyle publications or online magazines. Reviews or comments from tourists that have experience can motivate newcomers.
- Partner with local hotels so that they can highlight special promotions or deals during the Festival season to make it even more attractive to visit.
- At the destination, local billboards or flyers can help catch the attention of current visitors to encourage them to attend the local Festival.

TOURIST PROFILE

From younger to mature tourists that value affordable but unique activities such as CBT



General travel habits

- Likely to travel with partner or friends.
- They are price-driven, and in addition to the main attractions offered, are usually mindful of the safety of the destination.
- Typically combine Festivals with other sightseeing activities, visiting historical and cultural attractions, and relaxing at the beach.

About the Caribbean

- Consider the Caribbean an attractive destination because they can relax at its beautiful beaches and enjoy the tropical weather.
- Interested in Festival participation as an additional activity together with experiencing local food, while their main interest in the Caribbean is beach or cruise tourism.

About Community-Based Tourism

- Low familiarity with CBT, which they believe relates to engaging with people in the community while on vacation, or a community that encourages tourists to celebrate traditional culture, music, etc.
- Some might be interested in doing CBT in the Caribbean, mainly motivated by seeing it as a unique opportunity to learn new things.

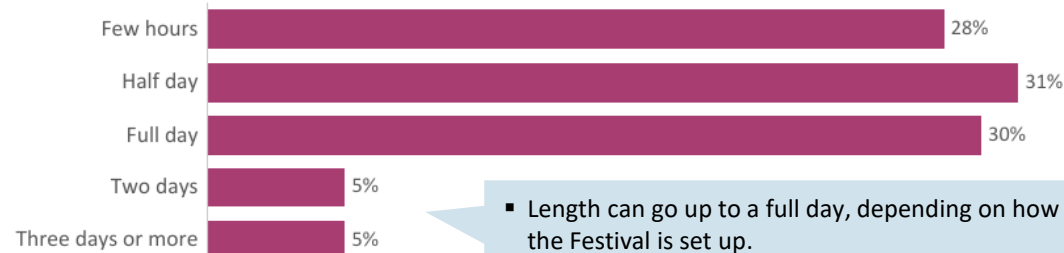
HOW THE TOURIST DESCRIBES THE ACTIVITY

From several hours to a full day spent with their partners at a music Festival



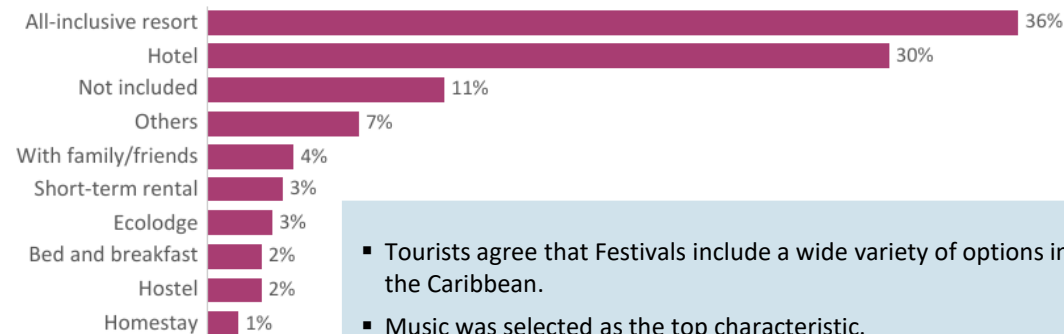
75

Length of the activity



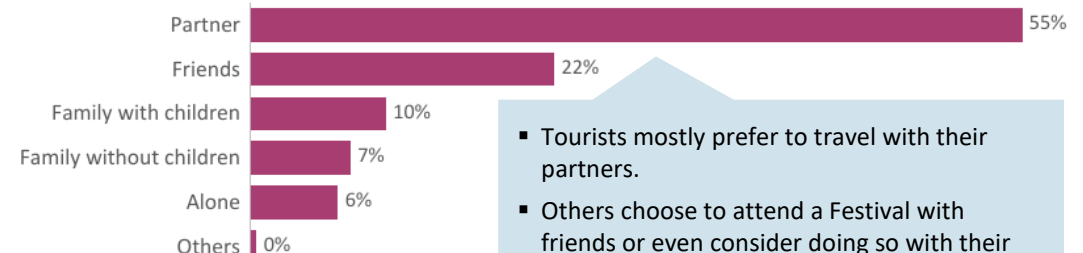
- Length can go up to a full day, depending on how the Festival is set up.
- The preferred accommodation are either resorts or hotels.

Preferred accommodation



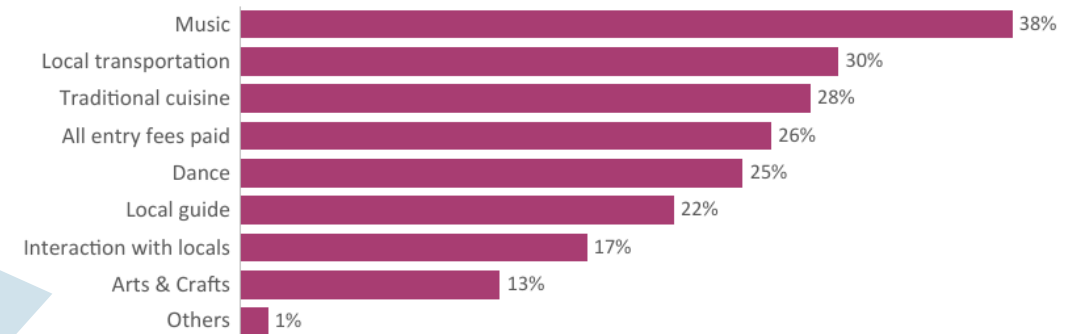
- Tourists agree that Festivals include a wide variety of options in the Caribbean.
- Music was selected as the top characteristic.
- Tourists also value Festivals where they can try local food, dance with their partners or friends, or even meet locals.
- Arts and crafts are not as popular as other options.
- They prefer to pay for everything in advance (if there are entry fees) as well as adding the option of local transportation to and from their resort or hotel, for greater convenience.

Travel companions



- Tourists mostly prefer to travel with their partners.
- Others choose to attend a Festival with friends or even consider doing so with their children as it tends to be a lively, social, and interactive event.

Characteristics of the activity





WILLINGNESS TO PAY

Tourists might not be willing to pay for Festivals unless they include value-added options

US\$31-300

Price range that **tourists are willing to pay** based on their description

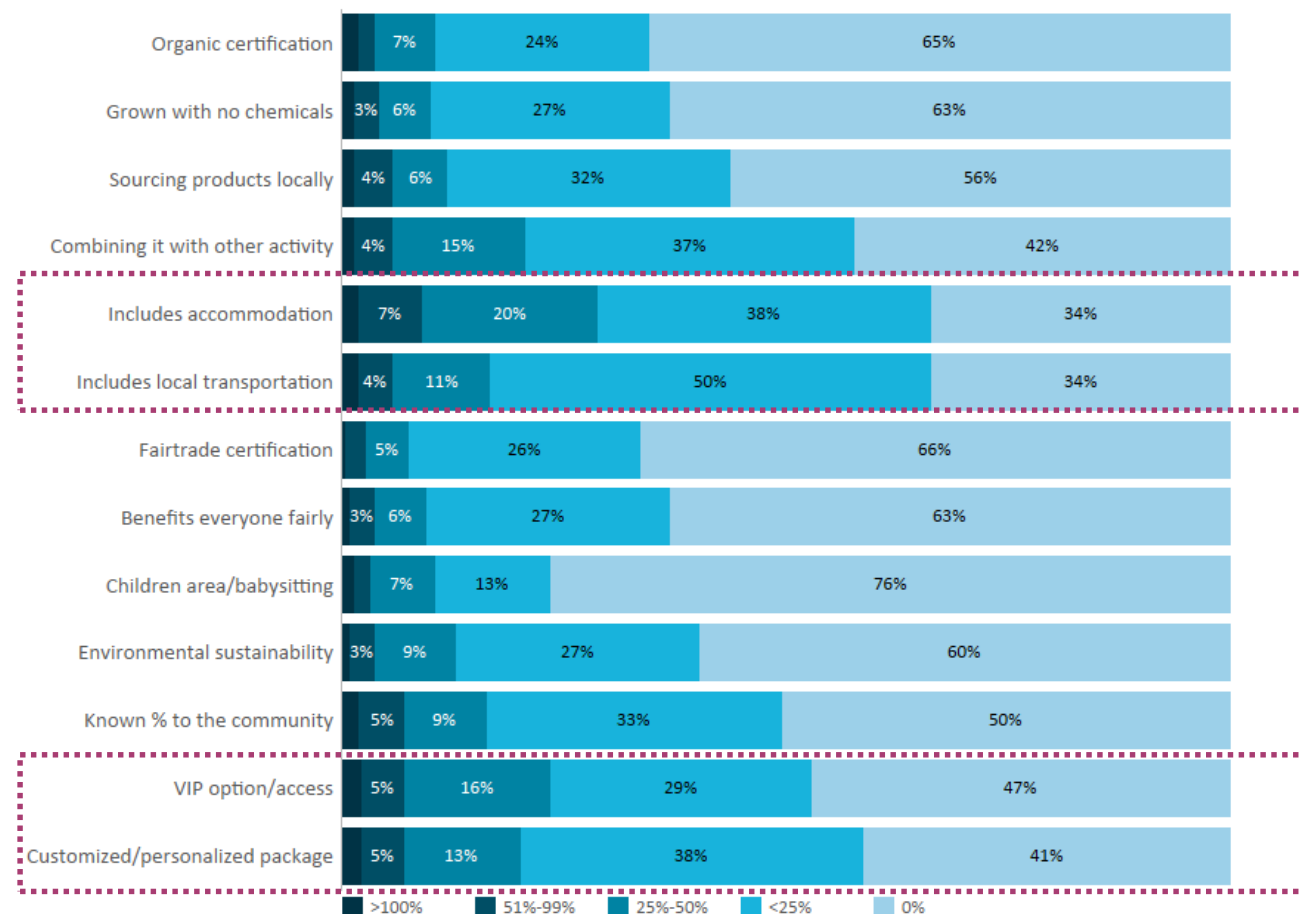
US\$ NA

Price range **currently offered** in the Caribbean

Tourists expect to get packages that allow them to purchase 'convenience'.

- Offer **promotions on resorts and hotels** during Festival season to encourage people to visit the country at this time; even promote multi-destination trips to attend other Festivals at a more accessible price.
- **Launch a VIP option** that includes transportation to and from the Festival and preferential options such as seating space, backstage passes to meet artists, unlimited drinks/food, special shows/events, etc.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

77



Tourists value accommodations and VIP access; at least 24% are willing to pay 25%+ more

1

Greatest share of tourists willing to pay more

- 66% of tourists are willing to pay more for a Festival that includes local transportation; 50% are willing to pay up to 25% more.
- 66% of tourists are willing to pay more for a Festival with accommodations; 28% are willing to pay at least 25% more.
- At least 53% of tourists are willing to pay more for a Festival combined with another activity, VIP access, or offered as a customized package; 24% of tourists are willing to pay at least 25% more for a Festival and VIP access.

2

Middle share of tourists willing to pay more

- 35-50% of tourists are willing to pay for a Festival that includes Organic and Fairtrade certification, with ingredients grown without chemicals, locally sourced products, environmentally sustainable, and benefits community fairly/gives back to the community.
- While the majority of **them** are willing to pay up to 25% more for these extras. 17% **of respondents** are willing to pay at least 25% more if a known percent of the ticket price of the Festival goes back to the community.

3

Least share of tourists willing to pay more

- 24% of tourists are willing to pay more for a Festival with children's area/child care services; 11% of tourists are willing to pay at least 25% more.

D) Redefine

- These activities offer low benefits for the Caribbean
- Level of interest among tourists is also low
- Activities include:
 - Ecolodge
 - Farm Tour
 - Traditional Health and Wellness
 - Wellness
 - Indigenous Tourism



ECOLOGDE OVERVIEW IN THE CARIBBEAN

Alternative accommodations that embrace sustainable practices and preserve environment



A tourist **accommodation** facility that is **ecologically designed** and managed to have a **minimal negative impact on the natural environment** and host community in which it is situated. **Ecolodges** are mainly located in a remote destination in nature, and are often built from natural materials.

Examples in the Caribbean

- Offered throughout the Caribbean, often positioned as **sustainable** and **socially conscious** alternative accommodations.
- Rosalie Forest and 3 Rivers offers **Ecolodge** accommodations **within natural landscape** and **locally prepared meals**, and offers access to community tourism activities.
- Jungle Bay Resort on Dominica offers a **luxury Ecolodge** experience with additional CBT activities based on **sustainable tourism** practices.
- In the Rio Grande Valley of Jamaica, the Ecolodge experience includes an interaction with **Maroon culture**.
- Citris Lodge is an Ecolodge in Dominica that **hires and trains local employees**.

Favorable characteristics for Ecolodge

- Environmental conservation that results from sustainable efforts.
- Personalized and unique experience in natural and outdoor setting.
- Gratitude-generating experience living within community with fewer amenities (desire for simplicity and digital detox).
- Sustainable tourism and ecotourism policies and standards as support by local governments in certain geographies.
- Multi-day tours like S.A.V.E.* choose an Ecolodge as accommodations.

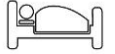
Challenges for Ecolodge

- Perception of limited regulation for safety and hygiene.
- Less promotion as distinction when compared to other regions of the world (e.g. Costa Rica) limit awareness of Caribbean offering.
- Limited sustainable tourism policies and support by third-party stakeholders.
- High costs to purchase land and construct eco-friendly Ecolodge in line with tourist expectations including aesthetics and sustainable practices.

Source: Euromonitor International based on consumer surveys in the US (38 respondents for Ecolodge) and trade interviews in the US and the Caribbean

Activity definition source: Caribbean Tourism Organization, United Nations World Tourism Organization, and Euromonitor International

*S.A.V.E. refers to Scientific, Academic, Volunteer and Educational tourism

VALUE PROPOSITION FOR ECOLOGDE**Eco-friendly and comfortable experience for travelers who like to be in contact with nature****Who to target**

- Both younger (25-35 years old) and mature adults over 50.
- See themselves as someone who prefers to try, see, and learn new things, as well as someone who likes to be outdoors and in contact with nature. That is why the majority has participated in CBT before, and show a high interest in overall CBT activities.
- Prioritize the experience and main attractions when deciding the travel destination, while trip cost is less important if the experience is unique and a full learning experience.

What tourists expect to get

- Usually lasts 3+ days and can also be combined with other types of accommodations such as hotels or all-inclusive resorts.
- Offers tourists a unique, relaxing eco-friendly experience, allows them to enjoy the nature all around (e.g. listening to wildlife sounds at night) and may also include organic and natural local dishes.
- A natural setting is tourists' top expectation, as well as sustainable hotel practices and certifications (e.g. Fairtrade, Green Tourism certificate).
- They expect Ecolodge to provide security to protect guests from crime/theft.

How the activity should be positioned

- Chance to live in pure unspoiled natural setting that can also be premium and comfortable not only for nature enthusiasts but for a wider audience.
- 'Green hotel', eco-friendly, but is also safe, hygienic and prepared in case of emergency. Allows travelers to be involved in nature conservation.
- Opportunity to enjoy unique natural resources- special plant life, wildlife, natural geographical features in the vicinity, trails, lakes, etc.
- Positioned together with wildlife and/or Local Tourism as travelers are willing to pay more if combined with other activities.

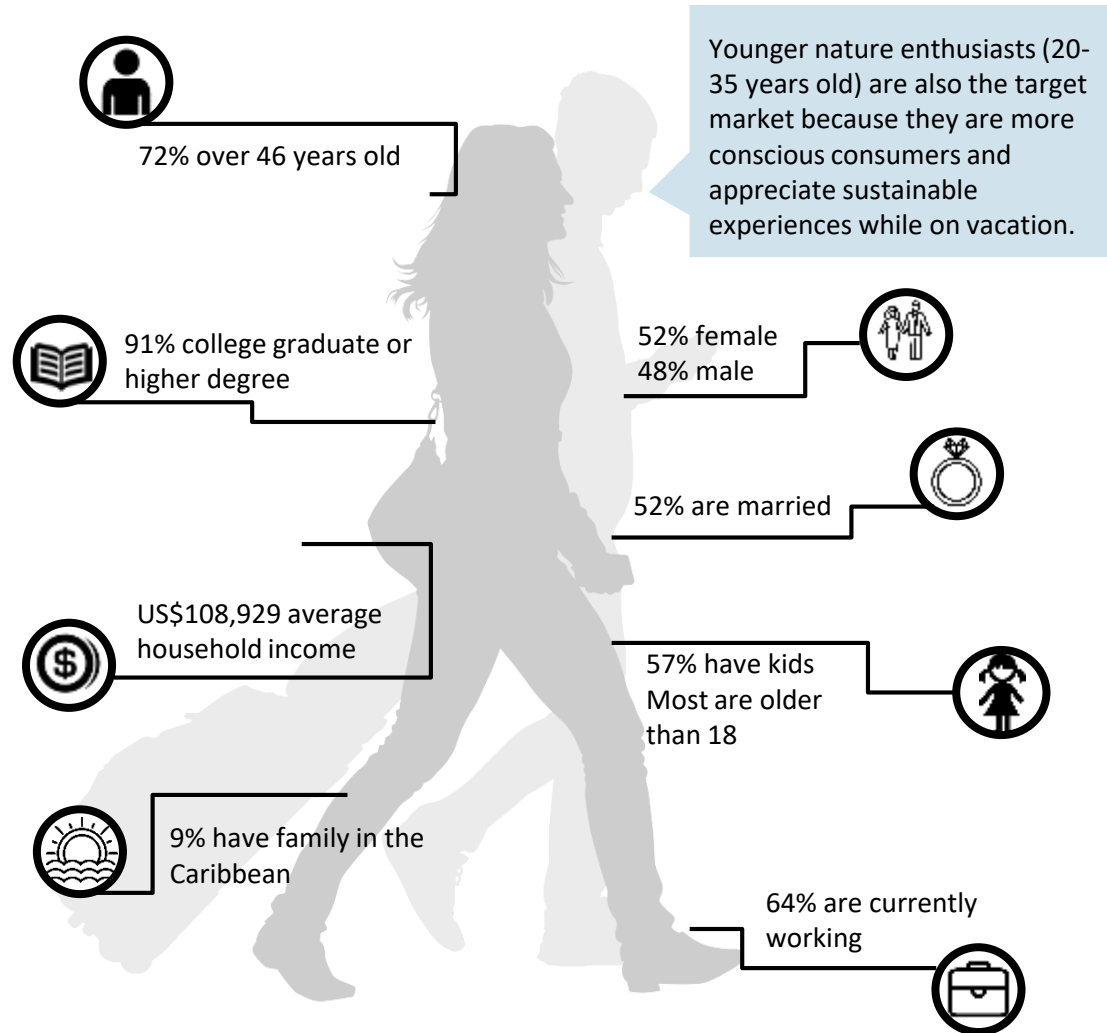
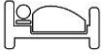
Where to promote and advertise the activity

- On hotel booking websites such as hotels.com and trivago.com, as these are where most tourists go to find out their options for accommodations.
- Reviews from visitors are also important as they help travelers choose among different options, commonly picking those with the best reviews.
- Foster partnerships with faculty and universities, and voluntourism providers that are more likely to choose Ecolodge as an alternative to hotels.
- Promote with travel agents as they recommend tried and tested places to tourists, offering a discounted price for reservations made through them.

TOURIST PROFILE

81

Middle-aged, 'greener' tourists that want to learn more about what CBT entails



General travel habits

- Nature enthusiasts that seek unique experiences different from home.
- Plan their trips no more than six months in advance but some decide which activities to do at the destination based on recommendations.
- Destination and travel websites, as well as hotel and airline websites, are the main source for research and informing themselves.

About the Caribbean

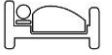
- Would like to visit the Caribbean to enjoy the tropical weather and beaches, and get some time to relax with their partners.
- The trip would last 1-2 weeks and they would choose an Ecolodge if the experience combines enjoying the natural setting with being in contact with nature, as well as time spent at the beach.

About Community-Based Tourism

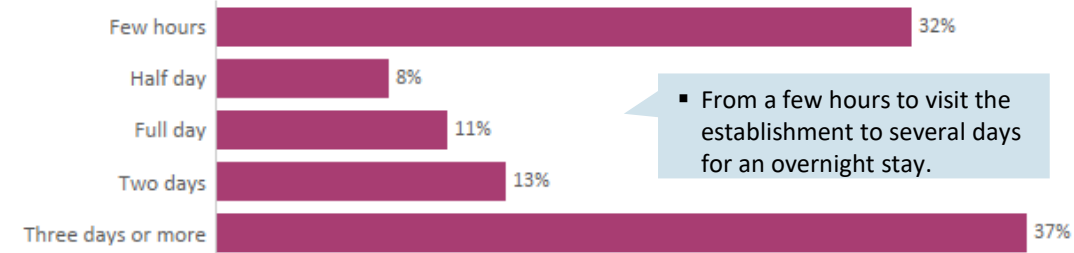
- They have some familiarity with the term CBT and believe it refers to local communities that guide tourists to explore and learn about the area.
- They show high interest in doing CBT because they think it would be an interesting learning experience, but they need to find out more about it.
- They want to know what it entails but also how it benefits the community.

HOW THE TOURIST DESCRIBES THE ACTIVITY

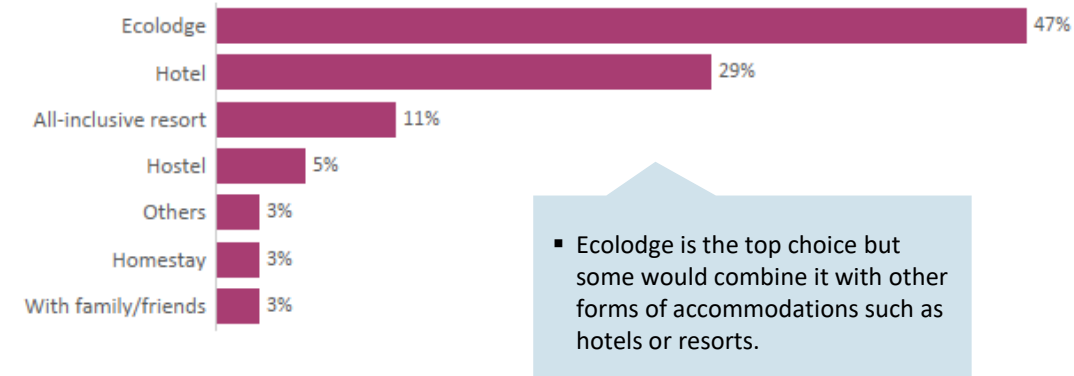
3+ days with their partners in an Ecolodge with possibility to also stay at hotel



Length of the activity



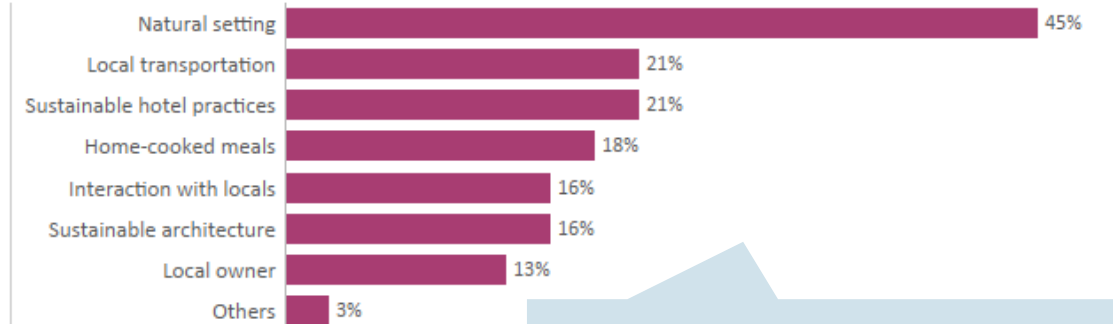
Preferred accommodation



Travel companions



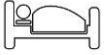
Characteristics of the activity



WILLINGNESS TO PAY

83

Price range is in alignment with tourist expectations, but they are willing to pay more



US\$51-1,000

Price range that tourists are willing to pay based on their description

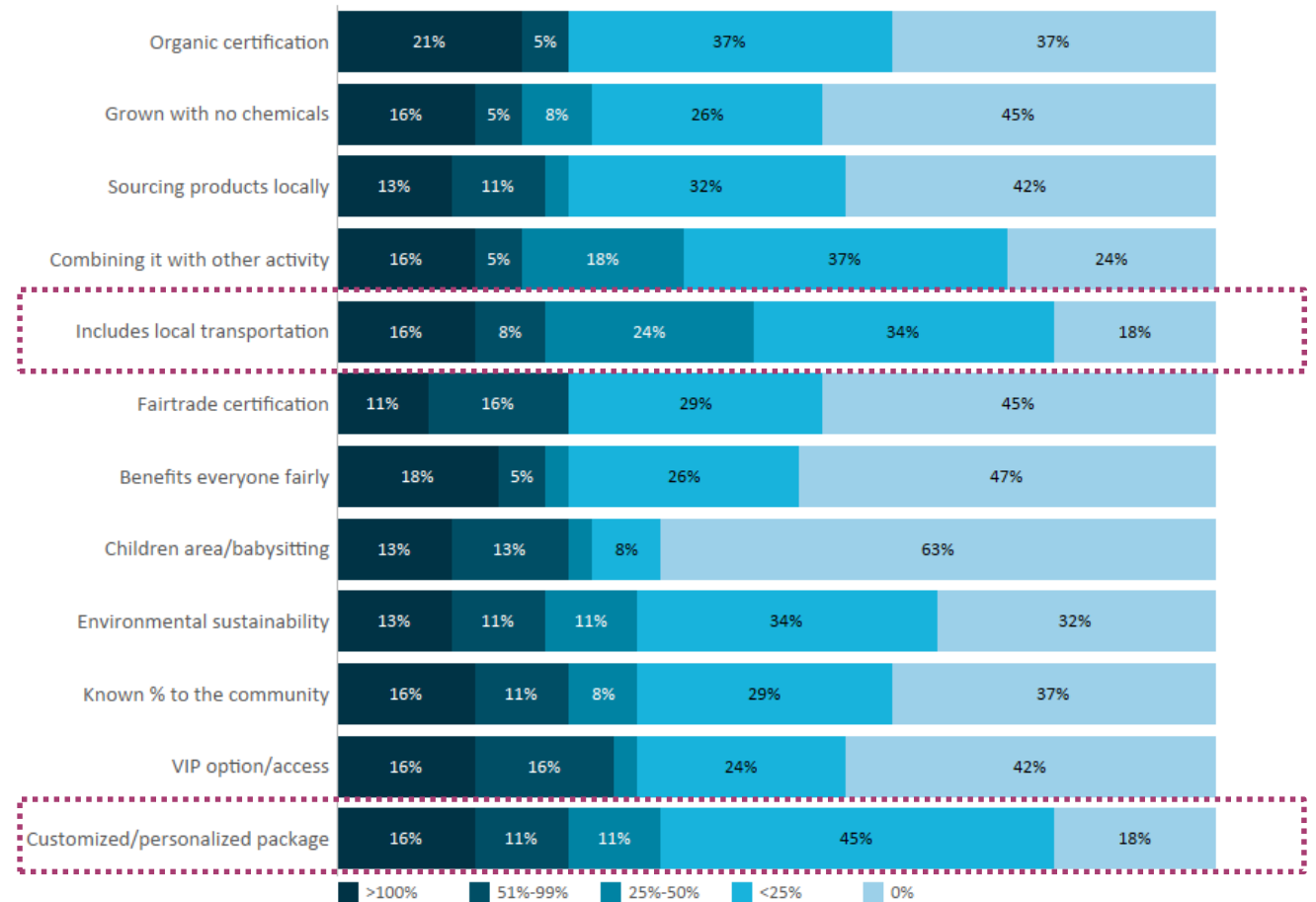
US\$80-1,200

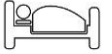
Price range **currently offered** in the Caribbean

How to encourage tourists to pay for a higher ticket:

- **Diversify Ecolodge by offering a premium alternative** for hesitant tourists that want to be comfortable and pampered, such as with hotels or all-inclusive resorts, but also who enjoy sustainable and socially responsible accommodations.
- Provide a **customized experience** by allowing them to purchase add-ons such as other CBT activities, local transportation, discounts at local restaurants, or local foods that are also sustainable and grown with no chemicals.
- Promote **ecotourism certifications** as a high number of Ecolodge enthusiasts are willing to pay 50% or more.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS**Organic certification generates greatest share (21%) of tourists willing to pay 100%+ price**

1

Greatest share of tourists willing to pay more

- 82% of tourists are willing to pay more for Ecolodge that include local transportation or personalized packages; 48% are willing to pay at least 25% more for transportation; 37% are willing to pay at least 25% more for personalized packages.
- 63-76% of tourists are willing to pay more for Ecolodge that includes environmental sustainability, Organic certification, gives a known percent of ticket price back to community, and combined with other activities.
- 21% of tourists are willing to pay at least 100% more than the ticket price for Ecolodge if includes Organic certification.

2

Middle share of tourists willing to pay more

- 53-58% of tourists are willing to pay more for Ecolodge that benefits everyone fairly, includes VIP access, is Fairtrade certified, and includes products that are grown with no chemicals and sourced locally; the majority are willing to pay up to 25% more for these extras.

3

Least share of tourists willing to pay more

- 37% of tourists are willing to pay more for Ecolodge with a children's area/child care; 26% of tourists are willing to pay at least 50% more.



FARM TOUR OVERVIEW IN THE CARIBBEAN

Live agro-learning experience that provides insight into livelihood

Farm Tour is an activity linked to a tour/visit to an **agricultural farm**. This can include **organic** farm tours, or tours of **specialized crops** such as coffee and cacao plantations, spice farms and medicinal herbs. Farm tours may include meals, food tastings, and/or accommodations.

Examples in the Caribbean

- Farm Tours can be offered by **specialized crop farms** like coffee, cacao, fruits and nuts, etc; some may include **livestock**.
- Experiences could highlight **certifications** such as **Fairtrade** or **Organic** like Bellevue Chopin Organic Farms Experience in Dominica.
- Other Farm Tours highlight **unique horticulture processes** such as the Maya Organic Farm Tour offered by Chaa Creek in Belize conserving traditional Maya farming techniques.
- Can be offered in **multi-activity itineraries** that may include horseback riding, local cuisine, cultivation and cuisine preparation, transportation and some, yet more rare, include accommodation on site or nearby.
- **Community associations of farmers** offer local Farm Tours.

Favorable characteristics for Farm Tour

- Provides a learning experience in a natural setting, fostering a true appreciation for local crops and farming techniques.
- Complementary to food tourism as source of ingredients with potential to offer full experience (including tasting) on farm site.
- Perception of being child-friendly experience, with animals.
- Linkage to Traditional Health and Wellness, and Local Tourism, activities growing in popularity or already see high interest.
- Community employment opportunity (guides, chefs, drivers).

Challenges for Farm Tour

- Limited demand due to low awareness about activity.
- Lack of infrastructure that makes it hard to reach the site.
- Natural disasters can destroy farms, limiting multiple revenue streams for community.
- Deterrents include biohazards and requiring disclosure when returning to source market.
- Certifications can be costly, yet are essential to differentiate among other Farm Tours and generate tourist participation.

VALUE PROPOSITION FOR FARM TOUR**Interactive and family-friendly experience to visit a working farm using local techniques****Who to target**

- Mature couples (over 55 years of age), but also families with children (age 6 and above) with at least a college degree and without family in the Caribbean.
- Usually plan six months in advance and search for information on direct supplier websites for airlines and hotels, but rely on destination or travel websites to learn about the destination and search for activities.
- Choose destinations based on the activities they offer; even better if they are outdoors, family friendly and in a safe environment for their families. Price is also a factor influencing the final decision.

What tourists expect to get

- Visit a working farm for a few hours and learn about agricultural practices and products that are unique to the destination.
- Expect to have a true local experience, with a guide from the local community and doing or seeing something that is different from what they have at home.
- Tourists also want to try the local food, with the possibility of tasting the products grown or made on the farm.
- Willing to pay more for convenience if it includes local transportation and an experienced local guide that walks them through.

How the activity should be positioned

- A different experience compared to the typical farms back at home. An educational and immersive experience into the community that is also fun, interactive and for a wide audience, from kids to curious adults.
- A visit to a working farm or plantation with local and unique agricultural processes and techniques that are part of the heritage of the destination country. Available certifications should also be highlighted.
- Potentially combining it with other hands-on CBT experiences such as Farm to Table so that they can try the end result.

Where to promote and advertise the activity

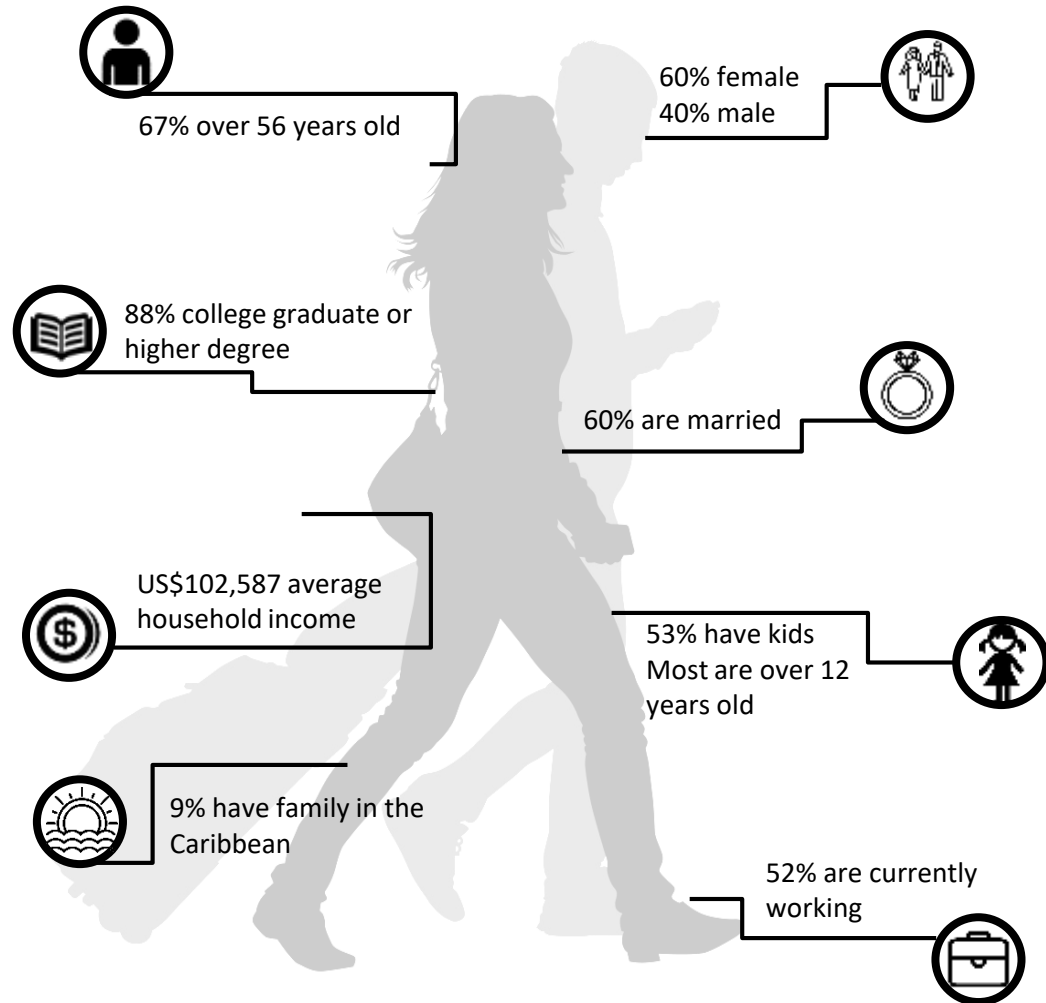
- Online, on travel or destination websites such as TripAdvisor or Expedia, with the option of including the activity in a pre-booked package that can be paid for by card, perhaps even with a discount for booking in advance.
- Leading food and travel websites, agro-tourism websites, travel guides and ads on social media and blogs to create awareness among travelers.
- At the hotel or resort, allowing tourists to book the tour through their hotel, and even include the cost in their hotel bill.

TOURIST PROFILE

87



Tourists that plan their vacations around their family and what each can do affordably



General travel habits

- Likely to travel with partner and children if they have any.
- They are price-driven and not spontaneous, as they take 3-6 months to plan and rely on online hotel, airline and travel websites to decide.
- Activities offered at the destination are key because they need to find activities for all the travelers and some that they can also enjoy together.

About the Caribbean

- Consider the Caribbean an attractive region since it is affordable for the family, the weather is extraordinary, and there are activities for everybody.
- Convenience is key, so for a weekly Caribbean family or couple getaway, they choose an all-inclusive hotel with access to the beach or a cruise that offers fun activities for the kids and relaxing time for adults.

About Community-Based Tourism

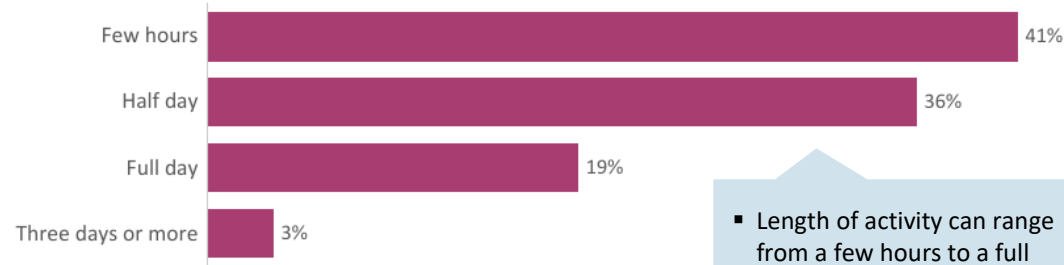
- Low familiarity with the term CBT and unsure whether it means just engaging with locals while on vacation or taking guided tours by locals.
- The need for more exposure to shift travelers from just being interested to actually doing it.
- If they can learn what type of activities are offered within CBT, they will consider it because they appreciate that the benefits go to the community.



HOW THE TOURIST DESCRIBES THE ACTIVITY

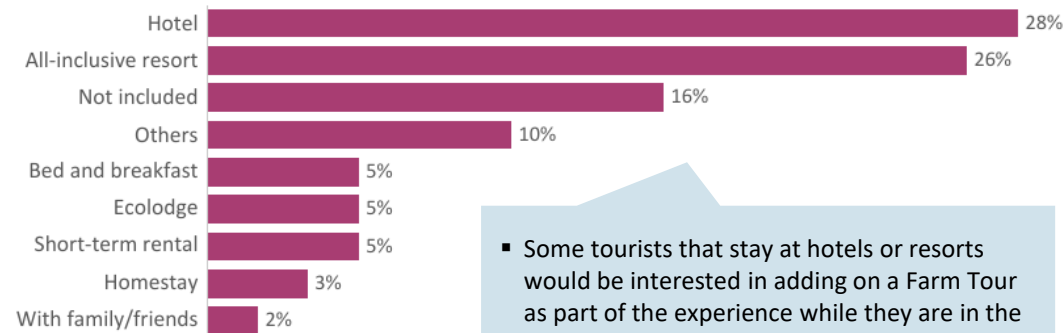
A guided visit that takes a few hours, done with at least one other person

Length of the activity



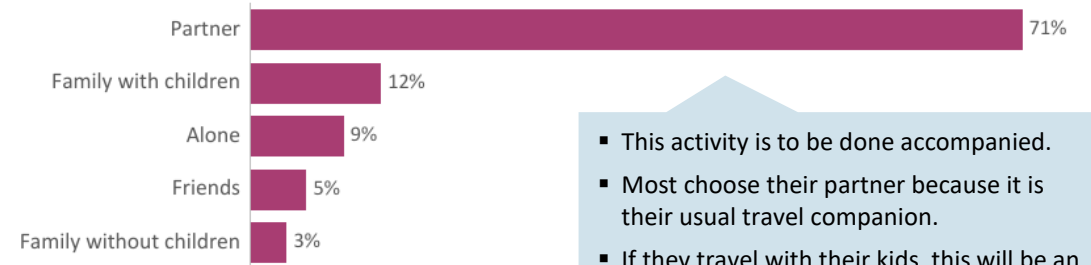
- Length of activity can range from a few hours to a full day, depending on how immersive it is.

Preferred accommodation



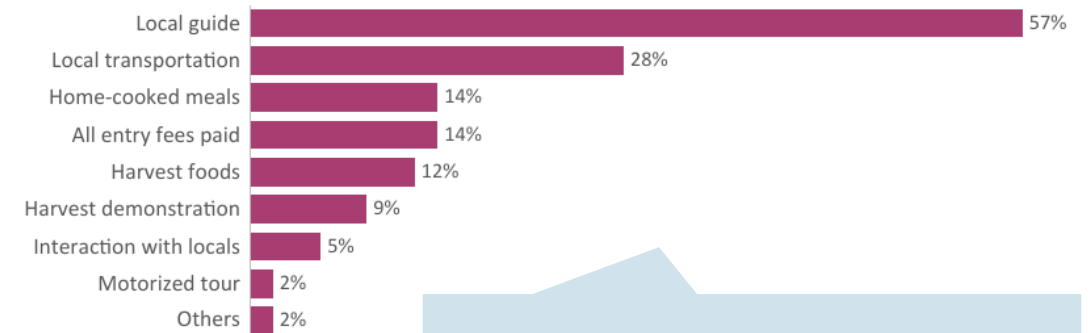
- Some tourists that stay at hotels or resorts would be interested in adding on a Farm Tour as part of the experience while they are in the Caribbean.
- Otherwise, they would book it independently.

Travel companions



- This activity is to be done accompanied.
- Most choose their partner because it is their usual travel companion.
- If they travel with their kids, this will be an ideal activity to do together.

Characteristics of the activity



- Visiting the farm is not enough if they do not get a local guide to walk them around and explain the stories and traditions at the farm.
- Especially when farms are located away from the hotel, tourists expect to have transportation included.

**WILLINGNESS TO PAY**

There is room to charge more if tourists receive packages that seem more convenient

US\$31-300

Price range that
**tourists are willing to
pay** based on their
description

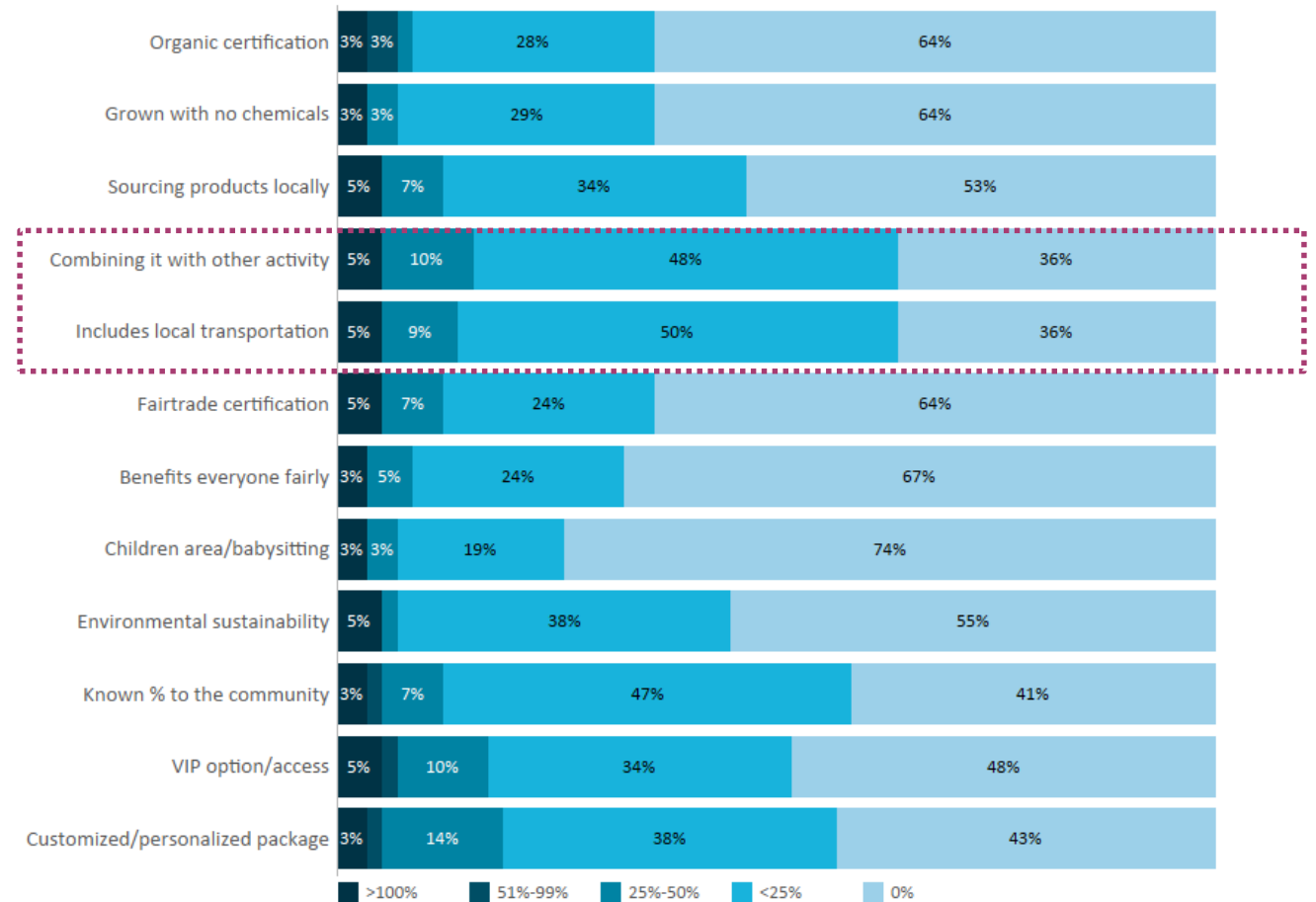
US\$20-150

Price range **currently
offered** in the
Caribbean

How to encourage tourists to pay for a higher ticket:

- Create **customized packages** with wider price ranges.
 - **Premium/VIP options** with different durations, that can be personalized and allow for combination with other preferred activities such as gastronomic tours, turning the Farm Tour into a Farm to Table experience.
- Pre-established group **alternatives that are more economical** and require a certain number of attendees.
- Provide an option for private and group transportation that not only offers convenience but also allows for more personalized and premium options for price discrimination.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

90



Largest share of tourists willing to pay more than 25% price for customized Farm Tour

1

Greatest share of tourists willing to pay more

- 64% of tourists are willing to pay more for a Farm Tour with local transportation and combined with other activities; the majority are willing to pay up to 25% more.
- 59% of tourists are willing to pay more for a Farm Tour that gives a known percent of the ticket price back to the community or that includes customized packages or VIP access; 19% are willing to pay at least 25% more for customized packages.

2

Middle share of tourists willing to pay more

- 33-47% of respondents are willing to pay more for a Farm Tour that is environmentally sustainable, benefits everyone fairly, Fairtrade certified, includes organic products, grown with no chemicals or sourced locally.
- Less than 13% are willing to pay more than 25% for these.

3

Least share of tourists willing to pay more

- 26% of tourists are willing to pay for a Farm Tour with a children's area/child care.
- 6% are willing to pay more than 25% for this service.

TRADITIONAL HEALTH AND WELLNESS OVERVIEW IN THE CARIBBEAN

Unique cultural beliefs and practices transmitted in personalized experience



Traditional Health and Wellness is tourism that is based on **locally significant** wellness activities, done by tourists with the principal purpose of improving their health and wellbeing. Examples may include mineral baths, spa treatments, courses on ancient herbs and their uses, etc.

Examples in the Caribbean

- **Full-day excursions** such as Wotten Waven Spa in Dominica includes a **natural spa, sulfur baths**, local cuisine, transport, and an optional Ecolodge for accommodations.
- Milk River Baths as promoted by Jamaica's Country Style network offers **mineral paths, and spa treatments** within **natural setting**.
- Sineku L'Escalier tete Chien Tour, classified as **indigenous tourism** for principle characteristic, offers Traditional Health and Wellness elements including **medicinal herbs**.
- Belvedere Community Nature and Heritage Woodlands Walk highlights **herbal remedies** as part of a great, nature-based, Local Tourism experience.
- Jamaica is an attractive Traditional Health and Wellness tourism destination with local knowledge of cannabis.

Favorable characteristics for Traditional Health and Wellness

- Opportunity to train local community members on cultural ancestral knowledge, ultimately preserving unique beliefs.
- Emerging trend in source market and greater global market especially as wellness relates to ancestral beliefs, medicinal plants and ingredients, and local techniques.
- Tourists can have a personalized educational experience in line with their desire to experience something new, and relaxation.
- Environmental sustainability and conservation efforts can ensure protection of natural assets required for traditional techniques.

Challenges for Traditional Health and Wellness

- Limited knowledge among tourists and less established products in Caribbean generate lower demand, yet it is emerging.
- Tourists tend to associate spas with luxury, and see CBT offerings as not luxurious.
- Unlike Asian countries, the Caribbean lacks positioning and global awareness as a destination.
- Limited development and offering by qualified healers reduces overall community involvement and employment potential.

VALUE PROPOSITION FOR TRADITIONAL HEALTH AND WELLNESS**Opportunity for niche market to enjoy a traditional and cultural mind-body experience****Who to target**

- Female adult tourists of a wide range of ages (26-65 years old) who seek a relaxing vacation with activities for them and their travel companions.
- They usually seek beach vacations at destinations that allow for relaxation but also are drawn to more sophisticated and luxury tourism.
- Although they are price-driven, they would rather spend more if they felt it was safer for themselves and their loved ones.
- When they think about Traditional Health and Wellness, they often consider Asian countries as their top destinations, or Costa Rica, for a shorter trip.

What tourists expect to get

- Tourists expect a fully relaxing experience such as sulfur baths, hot springs, volcanic mud baths, local plant-based therapies, etc.
- Each treatment would last between a few hours and half a day and it could be either done with their partners or alone while their family is busy doing other activities.
- The top experience are massages, especially if they use “ancestral” techniques for deep relaxation. They are also interested in alternative therapies that they cannot find at home such as the ‘fish spa’ which is a fish pedicure method.

How the activity should be positioned

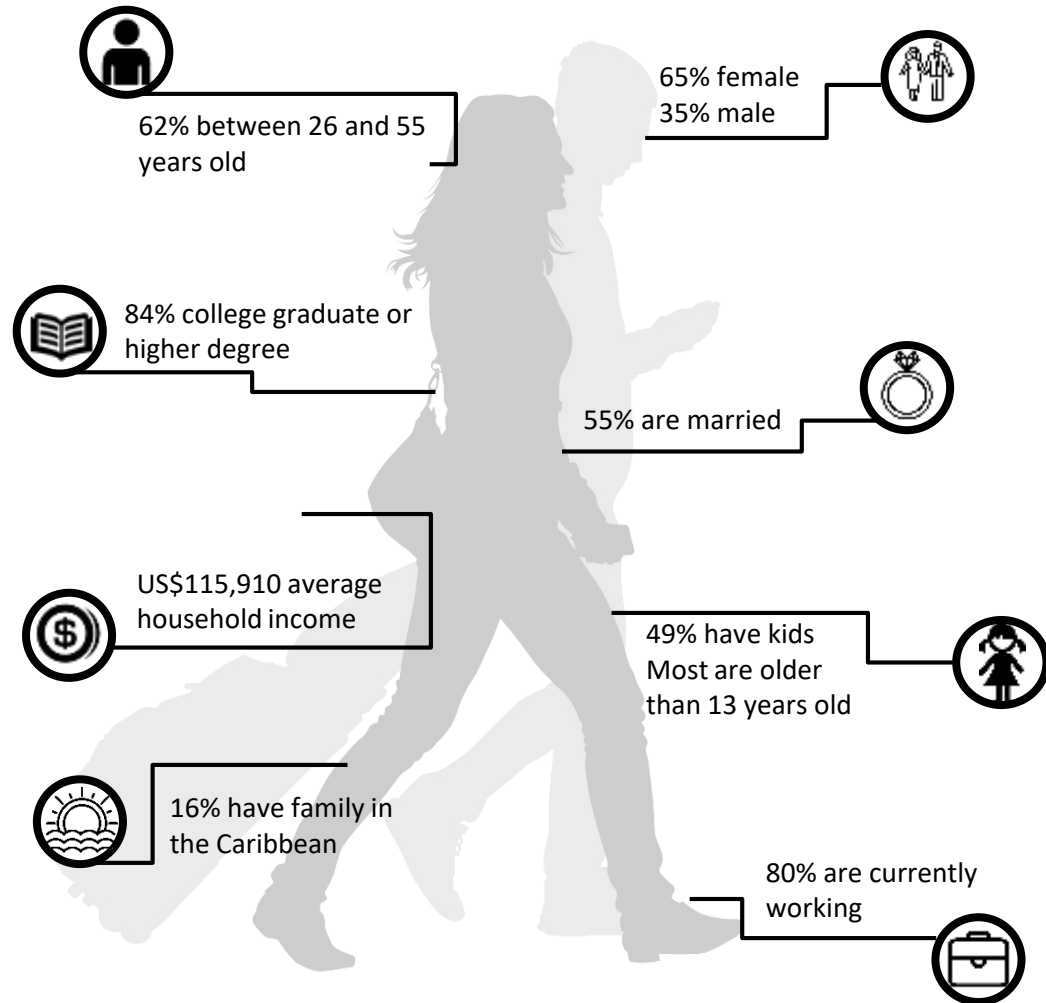
- A niche activity: an immersive mind-body experience but accessible.
- Described as an investment in oneself for pampering, while their travel companions are safe and busy elsewhere also enjoying themselves.
- A ‘digital detox’ for at least a few hours, to disconnect from everyday stresses and avoid using digital devices.
- Highlight unique offering of a wide variety of treatments done by qualified healers using local techniques that are different from the health and wellness offerings available to them back home.

Where to promote and advertise the activity

- Promote on travel websites such as TripAdvisor, as well as on lifestyle and women’s health and wellness magazines.
- Online reviews and comments on websites as well as influencers and wellness bloggers can also help promote the destination, as these sorts of recommendations are among the top sources of information.
- Hotels play a key role as they can offer the treatments in-house or have an arrangement to promote them as part of their retreat/resort experience and also contribute to boosting tourist awareness.

TOURIST PROFILE

Female tourists who want to unplug and enjoy beach but at a reasonable cost



General travel habits

- Enjoy exploring new things, especially if they can relax and enjoy them at an affordable and fair price.
- Usually travel with their partners and sometimes with children, if they have them.
- Are more likely to plan get the flights and hotels 3-6 months in advance but the activities are more likely to be decided closer to the trip date.

About the Caribbean

- The tropical weather and beaches make the Caribbean a interesting destination where they can relax but also explore with their companions.
- Beach Tourism is the top activity that comes to mind when they think about vacations to the Caribbean, but they are also interested in luxury tourism at an all-inclusive resort where they can be pampered.

About Community-Based Tourism

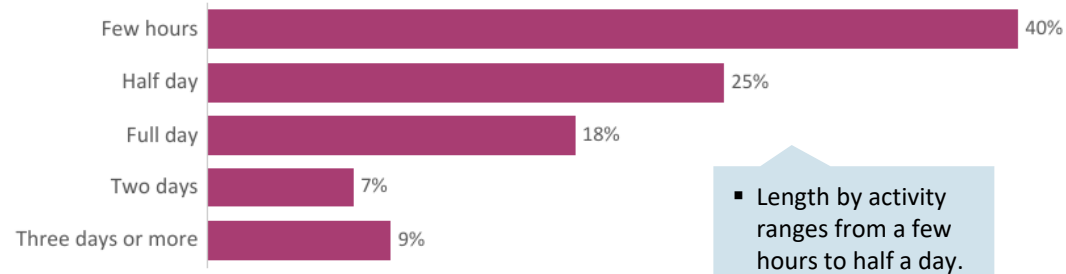
- They have some knowledge of or have heard about CBT, and understand that it offers a unique local feeling of the community through interactions.
- They might be interested because they see it as unique learning experience, but first they need to learn what it entails and some might also need to be exposed to it to raise awareness.

HOW THE TOURIST DESCRIBES THE ACTIVITY

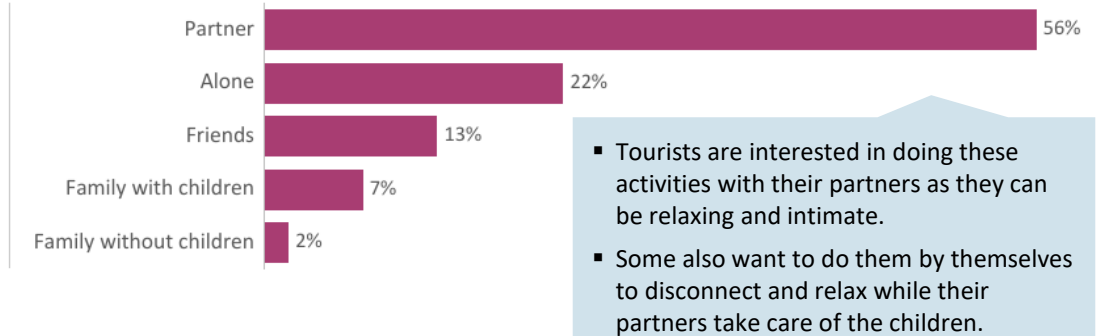
A relaxing experience to enjoy for a few hours with a partner or alone



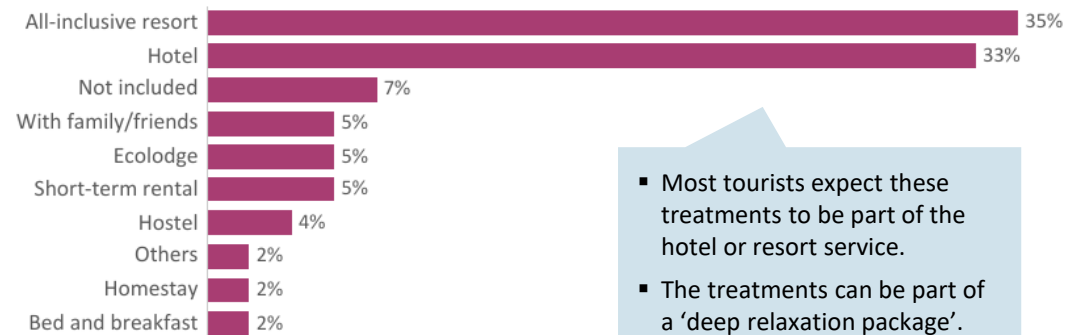
Length of the activity



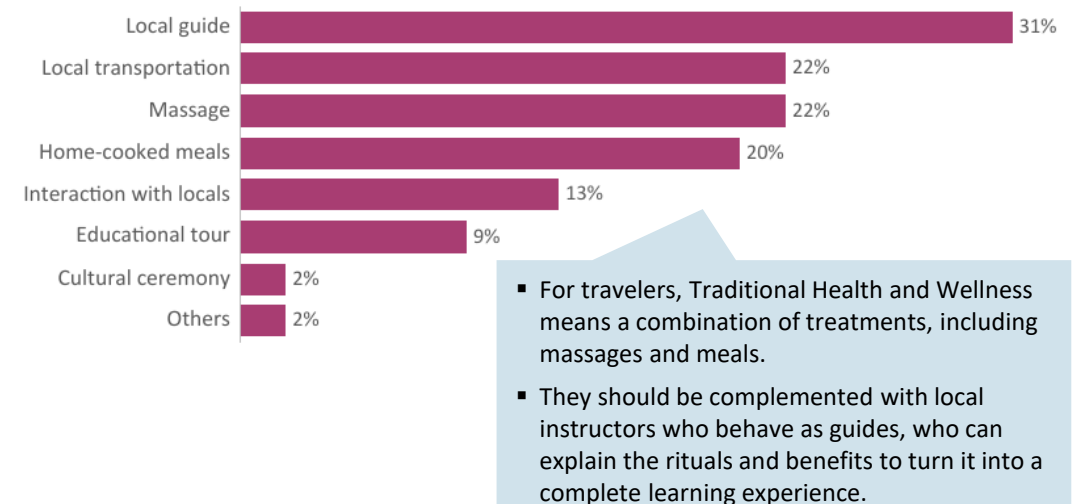
Travel companions



Preferred accommodation



Characteristics of the activity



WILLINGNESS TO PAY

Alignment between price of treatment and what tourists expect to pay



US\$31-300

Price range that **tourists are willing to pay** based on their description

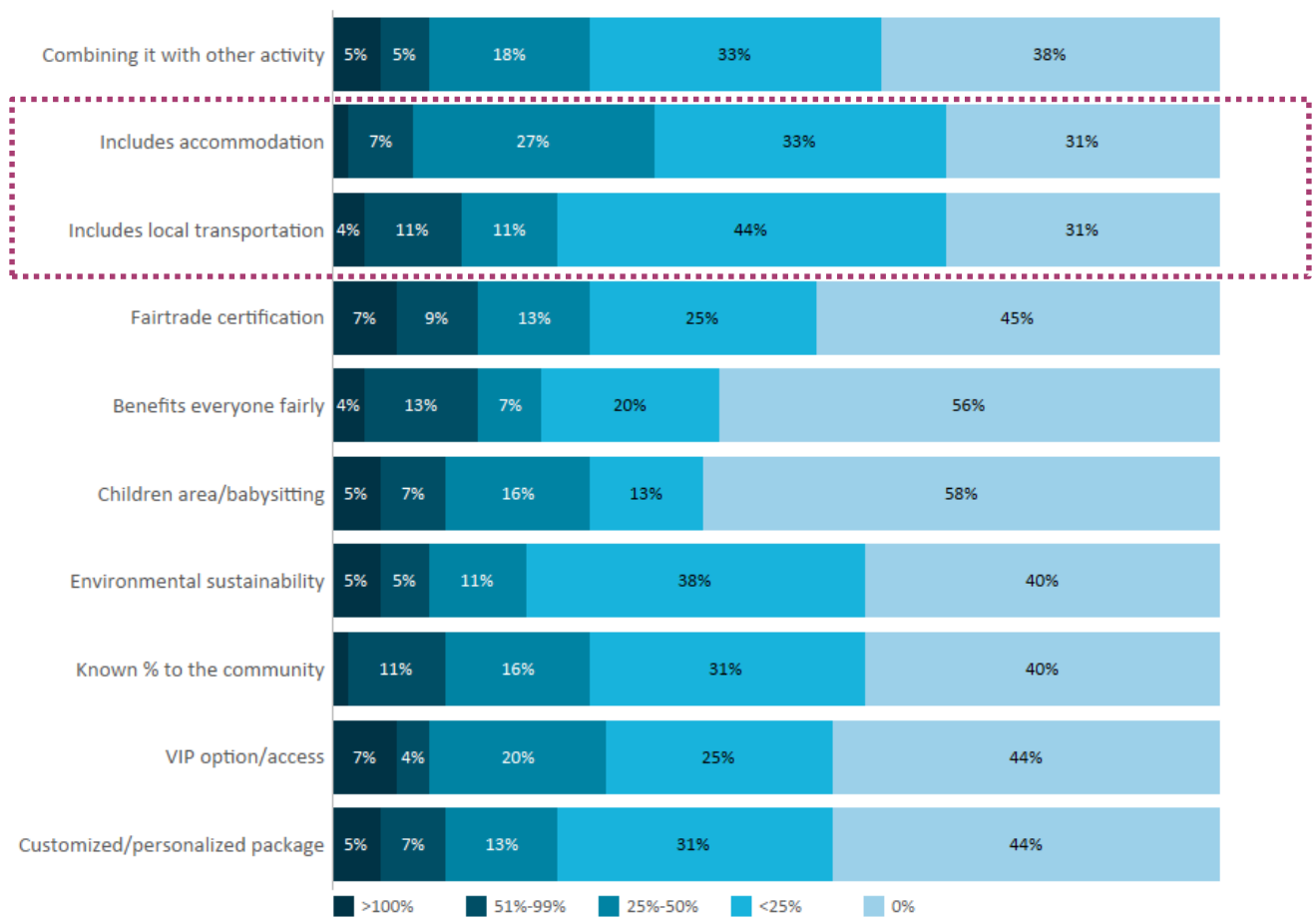
US\$30-250

Price range **currently offered** in the Caribbean

How to encourage tourists to engage on this activity:

- Offer a health and wellness **package as part of the resort and hotel experience** (either on site or with transportation to the establishment if needed) with activities that focus on the use of herbs and treatments that are **environmentally sustainable, socially responsible** and certified, if available.
- Add **treatments that are rising in popularity** at a global level such as the use of cannabis for pain and skin treatments, PTSD, and other health purposes.
- **Customized and exclusive options** are opportunities to charge a little more among those with a higher willingness to pay.

How much more tourists would be willing to pay if the activity included:



Source: Euromonitor International based on consumer surveys in the US (55 respondents for Traditional Health and Wellness) and trade interviews in the US and the Caribbean

WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

While majority will not pay more for child care, a large share is willing to pay 25%+ more



1

Greatest share of tourists willing to pay more

- 69% of tourists are willing to pay more for Traditional Health and Wellness that includes local transportation and accommodations; 36% of tourists are willing to pay more than 25% for accommodations compared to 25% of tourists for transportation.
- More than 60% of tourists are willing to pay more for Traditional Health and Wellness that is environmentally sustainable, combined with other activities, and gives a known percent back to the community; 29% of tourists are willing to pay 25%+ more for the latter two.
- At least 55% of tourists are willing to pay more if Fairtrade certified, with VIP access or customization; 25% are willing to pay 25%+.

2

Middle share of tourists willing to pay more

- 33-47% of respondents are willing to pay more for Traditional Health and Wellness, environmentally sustainable, benefits everyone fairly, is Fairtrade certified, includes products that are organic, and/or grown with no chemicals or sourced locally.
- Most of these tourists are willing to pay up to 25% more.
- 28% of tourists are willing to pay at least 25% more for Fairtrade certification.

3

Least share of tourists willing to pay more

- 42% of tourists are willing to pay more for Traditional Health and Wellness with access to children's area/child care; 28% of tourists are willing to pay at least 25% more for these services.
- 44% of respondents are willing to pay more for Traditional Health and Wellness that benefits everyone fairly.



WELLNESS OVERVIEW IN THE CARIBBEAN

Rejuvenating mind and body experiences that are personalized and affordable

Wellness is activities that offer **preventive, lifestyle-enhancing, relaxing, pampering and healing treatments**. Experiences can include yoga, mindfulness, and meditation retreats including detox retreats, and retreats guided by expert nutritionists among other specialists.

Examples in the Caribbean

- Wellness activities include **health and nutrition classes** such as yoga, nutrition and meditation.
- Other wellness classes include **creative arts and gastronomic experiences** aimed at relaxation and being present.
- Wellness activities can be offered in the form of **multi-day retreats often employing community for positions other than instructors of retreats** (e.g., at accommodations, food preparation, transportation, etc.).
- A variety of therapies including mud massages, light therapy and crystal healing can be offered within the spa or natural landscape.
- The abundance of nature and tranquil natural surroundings place many Caribbean islands in an ideal position for wellness activities that are offered within the **natural environment** and/or **Ecolodges, resorts, and cultural centers**.

Favorable characteristics for wellness

- Emerging trend in source market and greater global market, especially among females.
- Travelers' perception that Caribbean wellness is affordable.
- Complementary activity for tourists that seek relaxation during tropical beach vacation (relax, balance, rejuvenate).
- Conscious tourists embracing ethical living prefer environmental sustainability efforts including local and organic agricultural practices, natural setting (appropriate for digital detox), etc.

Challenges for wellness

- Often led outside of the community, especially in retreat settings.
- Class format dominates current Caribbean offering generating a lower willingness to pay, limiting potential community revenues.
- Travelers' lack of clarity on expectations for wellness activity and CBT in general (particularly varying degrees of luxury and limit in qualified healers).
- Limited knowledge among tourists and less established products in Caribbean generate lower demand (yet emerging).

VALUE PROPOSITION FOR WELLNESS**An addition to Traditional Health and Wellness niche for female tourists seeking a detox****Who to target**

- Female adults aged 26-55 that are either married or single and seek out lively spots to meet new people but that also allow for rest and relaxation.
- They normally travel accompanied by family or friends but are more likely to enjoy the activity by themselves as they seek a unique getaway that is a learning experience that 'nourishes the body and mind'.
- Destination and travel magazines, recommendations from friends and family, as well as social media, influencers and blogs play a significant role in the decision-making process.

What tourists expect to get

- A relaxing experience for the mind and body provided by local instructors that can also include a retreat and healthy organic meals.
- The activity also includes classes that involve physical movement with the aid of expert instructors who can also teach cultural/religious practices that have a positive influence on personal growth and stability.
- It lasts from a few hours to half a day and can be done with travel companions as well as alone, as long as their companions are safe and have other activities to do.

How the activity should be positioned

- Personalized experience with unique practices as well as healthy foods and drinks, offering a local and nourishing experience different from home. Affordability compared to other regions can be a big selling point.
- The target market is more attracted to specific wording to describe these activities such as relaxation, balance, rejuvenation, nourishing (wording to be selected according to the treatment provided).
- The Ecolodge experience can also be combined with wellness activities to add a premium feel and offer more value for the nature enthusiasts.

Where to promote and advertise the activity

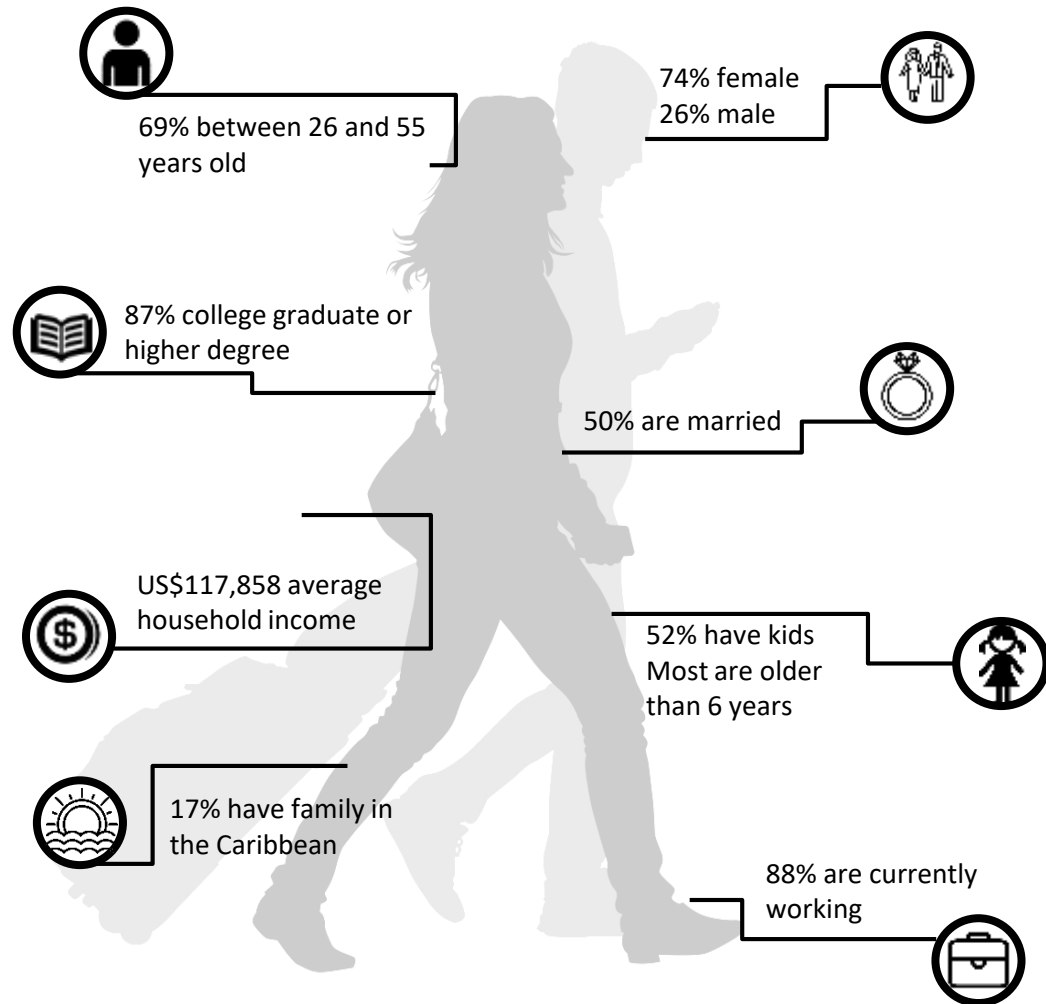
- Online promotions on travel websites (e.g. pop-up ad space on spa forums on TripAdvisor) and on wellness magazine and forums to create awareness and attract tourists that seek affordable but memorable experiences.
- Reviews and endorsements on activity-specific and destination websites.
- Hotels play a key role, as they can offer the treatments in-house or have an arrangement to promote them as part of their retreat/resort experience and also contribute to boosting awareness among tourists.

TOURIST PROFILE

Female travelers looking to relax and socialize while having a fulfilling experience



99



General travel habits

- Enjoy exploring new things but also socializing and meeting new people, which is why they could travel accompanied or alone.
- They take around 6 months to decide their flight and accommodations, and rely heavily on the direct supplier websites.
- Activities can be determined on the spot based on recommendations.

About the Caribbean

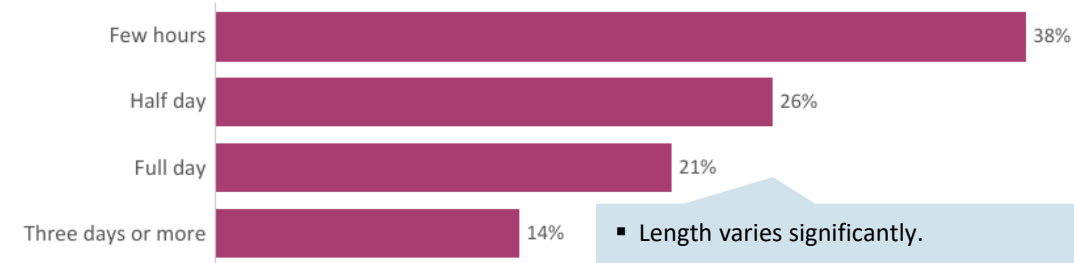
- The Caribbean is on their travel list for the next 18 months because they look forward to relaxing and enjoying the tropical weather with a partner.
- The trip will last for a week at an all-inclusive resort with access to the beach and beach activities and/or a 5-star hotel that offers luxury tourism packages and VIP options.

About Community-Based Tourism

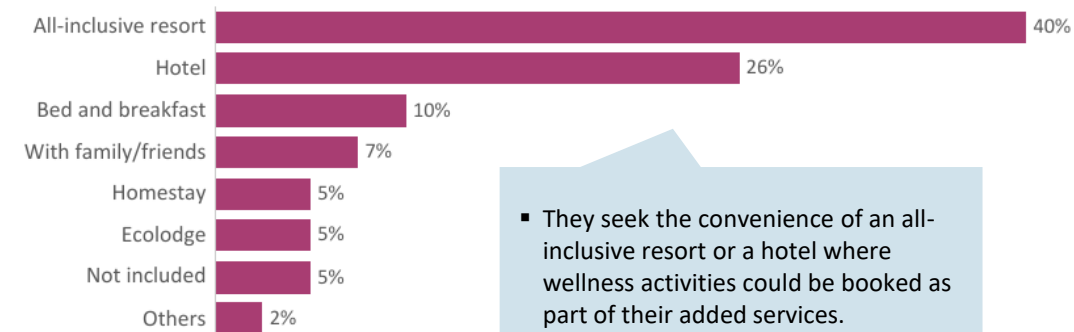
- CBT knowledge is limited; some define it as sustainable tourism while others say that it is a type of tourism unique to the community visited.
- After learning what CBT entails, these tourists would consider doing some CBT activities the next time they visit the Caribbean, to try something different and have a unique experience where they meet and connect with others.

HOW THE TOURIST DESCRIBES THE ACTIVITY**Value-added guided activity offered at resort for full relaxation for several hours**

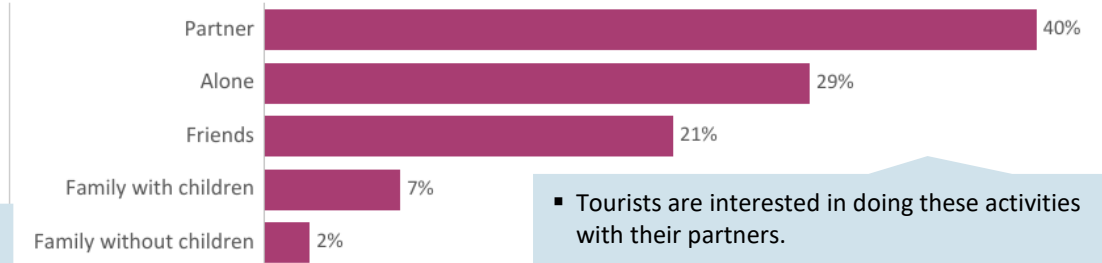
100

Length of the activity

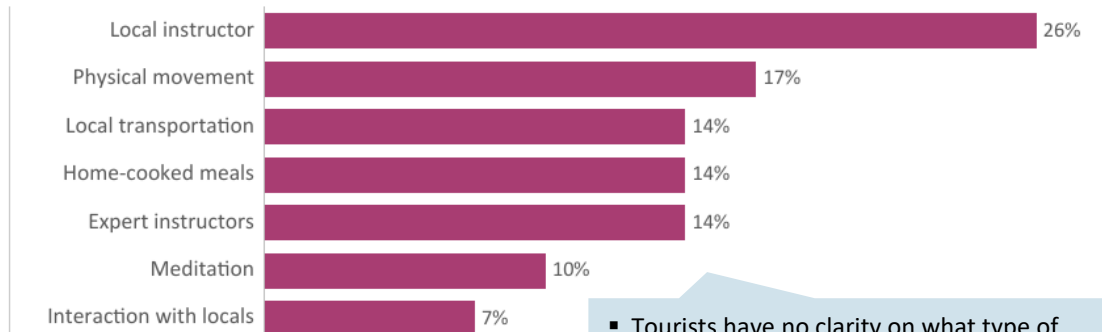
- Length varies significantly.
- An independent activity can last for a few hours while whole packages in a hotel can last a full day or several days.

Preferred accommodation

- They seek the convenience of an all-inclusive resort or a hotel where wellness activities could be booked as part of their added services.

Travel companions

- Tourists are interested in doing these activities with their partners.
- Some also want to do them with friends or by themselves to disconnect and relax while their partners take care of the children.

Characteristics of the activity

- Tourists have no clarity on what type of activities they expect to do.
- Physical movement stands out slightly.
- They are willing to be surprised if the offering includes a local instructor that will guide them through the activity.
- The ultimate goal is to reach full relaxation from everyday life, worries, and stress.

WILLINGNESS TO PAY

As a niche activity, tourists are willing to pay more if they can fully detox conveniently



101

US\$31-1,000

Price range that **tourists are willing to pay** based on their description

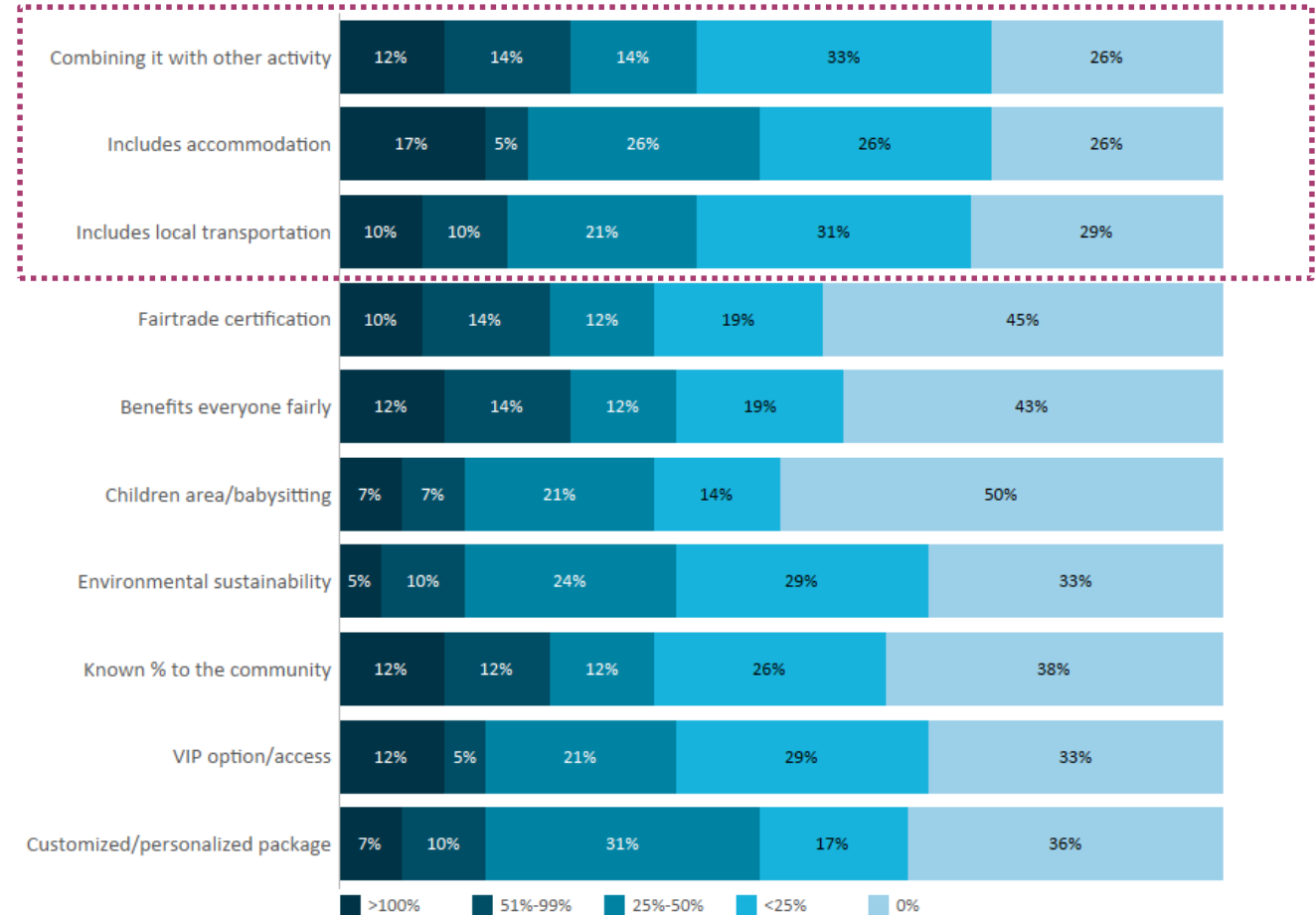
US\$20-40

Price range **currently offered** in the Caribbean

How to encourage tourists to pay for a higher ticket:

- Guarantee that the individual has only one responsibility, enjoying the experience, by **offering a package** that includes accommodations and transportation to where the activity will take place, if needed. Other activities can be part of a **multi-day retreat or a multi-activity experience**.
- Allow tourists to feel special by offering **VIP treatments** such as private sessions or retreats guided by international experts.
- Promote wellness treatments as **environmentally sustainable** and **benefiting the community**.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS

102



Most tourists are willing to pay more for combining activities, including those WTP 50%+

1

Greatest share of tourists willing to pay more

- 74% of tourists are willing to pay more for activities that include accommodations and are combined with other activities; 26% of respondents are willing to pay at least 50% more for the latter (e.g., Food and Beverage Tour and/or Traditional Cuisine)
- 71% of tourists are willing to pay more for activities that include transportation; 41% of tourists are willing to pay at least 25% more.
- Between 60% and 70% of tourists are willing to pay more for activities that are environmentally sustainable and offers VIP access, for personalized packages, or for activities that give back to the community.

2

Middle share of tourists willing to pay more

- 55-57% of respondents are willing to pay more for activities that benefit everyone fairly or are Fairtrade certified.
- The majority are willing to pay up to 25% more for these extras.

3

Least share of tourists willing to pay more

- 50% of tourists said they are willing to pay extra for Wellness with child care.
- 35% of tourists are willing to pay at least 25% more for Wellness with child care.



INDIGENOUS TOURISM OVERVIEW IN THE CARIBBEAN

Immersive firsthand experience generating knowledge of indigenous culture and beliefs

Indigenous Tourism is a tourism activity that is **owned, operated, and/or managed** by members of indigenous communities, and offers unique and authentic experiences to visitors while also contributing to sustaining local livelihoods, **protecting valued socio-cultural traditions, and the natural and cultural heritage resources** of the community.

Examples in the Caribbean

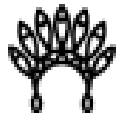
- Tri-Lake Tourism Experience as offered in Guyana exposes travelers to indigenous culture in an **immersive and multi-sensorial experience** including a nature tour, lake tour, birdwatching, and culinary experience.
- **Community developed and run** Kalinago territory offers **multiple indigenous experiences** including homestays, cultural center with live demonstrations of historically important crafts and way of life, local cuisine and nature tours even showcasing culture and dance at an annual Festival.
- Sineku L'Escalier tete Chien Tour is another Kalinago indigenous product offering, consisting of a multi-activity experience with **medicinal herbs, waterfalls, swimming, hiking (including in national parks), and local cuisine.**

Favorable characteristics for indigenous tourism

- Cultural preservation of unique destination-specific assets such as language, beliefs, traditions, food, lifestyle.
- Employment potential and opportunity for indigenous community that can otherwise have limited access.
- Educational learning experience for travelers, including families, and school and volunteer groups.
- Firsthand interaction with community via multiple activities that develop the traveler's authentic appreciation for the community.

Challenges for indigenous tourism

- Not all areas are open to bringing tourists into their communities.
- Limited geographies with indigenous people in the Caribbean keeping potential businesses and capacity low.
- Low awareness and understanding of activities offered, resulting in travelers choosing to participate in other activities.
- Tourists may perceive rural communities as less safe.

**VALUE PROPOSITION FOR INDIGENOUS TOURISM**

Embodies CBT and targets those who seek a more in-depth and immersive experience

Who to target

- Married adults over 46 years old, and people younger than 25, usually students interested in immersive learning experiences.
- Planning time ranges from less than three months to six months or more. Destination and travel sites are the main sources of information.
- When on vacation, they prefer to try, see, and learn new things and that is why they have participated in CBT before and show a high interests on CBT.
- They are price-driven but they pay attention to the activity offering. Historical attractions and sightseeing are a must have to choose the destination.

What tourists expect to get

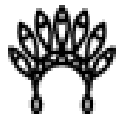
- A cultural experience to meet, learn from and interact with local/indigenous people in their communities and understand their way of life. Can be combined with a homestay for a more complete and rewarding experience.
- The activity alone lasts up to a full day. But combined with a homestay, tourists expect it to be a longer and immersive experience of 3+ days.
- An appealing activity needs a local guide that can be also be part of the family that is hosting the tourists. Local interaction with the community is highly appreciated to get firsthand exposure to rituals, habits and traditions.

How the activity should be positioned

- A unique cultural exchange that is a deeply immersive local experience that offers a more complete image of the tradition and origins of the Caribbean.
- Highlight it as an educational experience, where they will be able to connect with community members and have fun. They can also live the community's unique practices by combining it with a homestay for immersion.
- Emphasize safety, knowledgeable guides, emergency preparedness, easy connections to mainstream transport such as airports or to large cities. Also highlight any responsible tourism certifications for credibility.

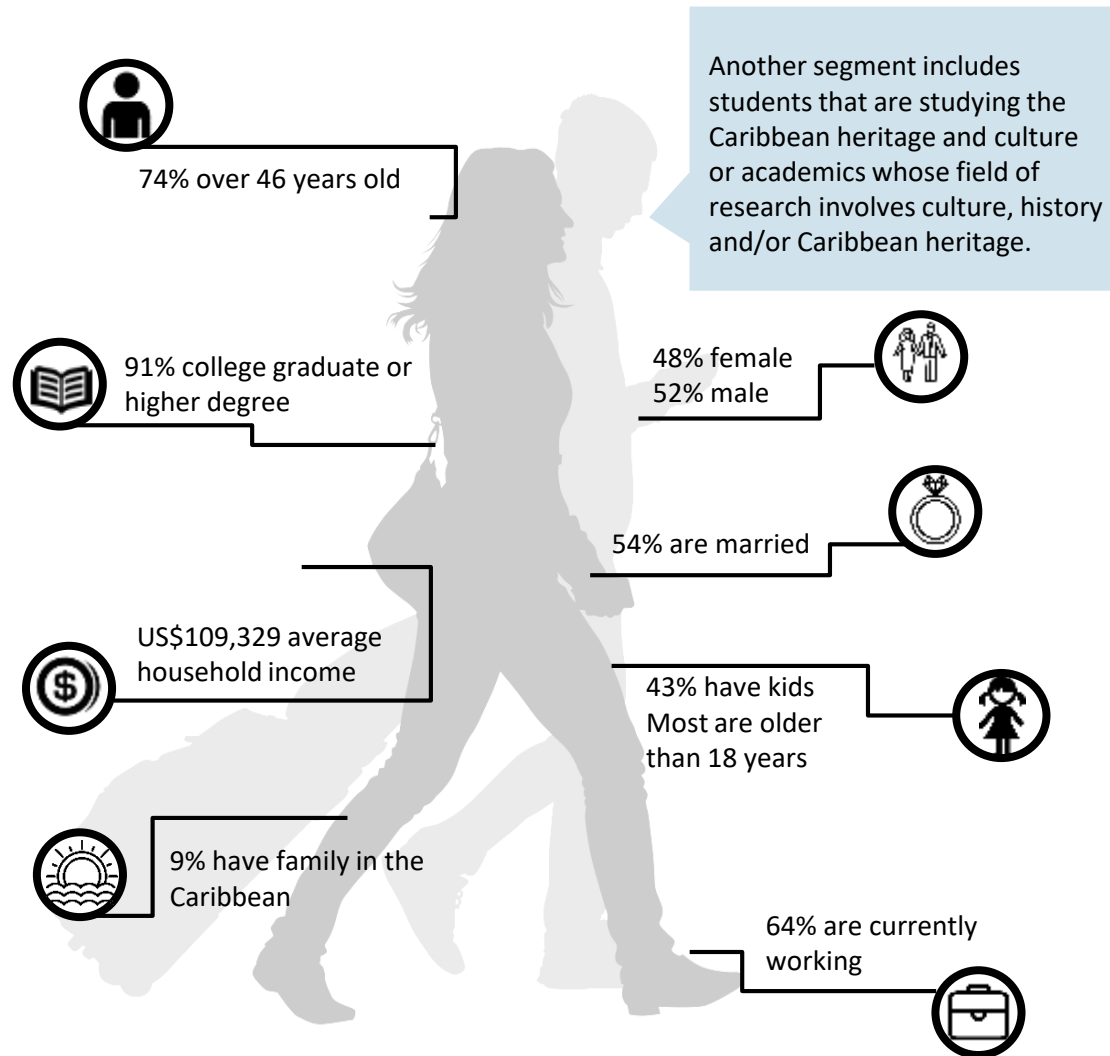
Where to promote and advertise the activity

- Advertised online via booking websites to attract tourists when they are researching, send them to the direct supplier or destination website where they can pre-book the activity and/or the homestay (or vice versa).
- Tourists expect to book online and pay by card, therefore, the activity should be able to accept credit card payments at least by partnering with suppliers.
- Foster partnerships with universities and faculty that focus research on specific indigenous cultures to promote indigenous tourism also as an academic experience for students.



TOURIST PROFILE

Social and adventurous tourists that appreciate CBT and learning also on vacation



General travel habits

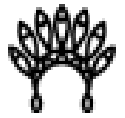
- Choose to travel with partner or friends to explore destination together.
- Start thinking about their trip at least three months in advance by looking for information on destination or travel websites or magazines.
- The main attractions, especially historical and cultural, are key to select the destination, closely followed by the price.

About the Caribbean

- The tropical weather is attractive for vacations in the Caribbean, where tourists can relax at the beach with their partner at an affordable price.
- Tourists prefer to stay for a week at a hotel or all-inclusive resort.
- Although going to the beach is the preferred activity, they enjoy socializing with locals to experience music, food, and lifestyle as a local would do.

About Community-Based Tourism

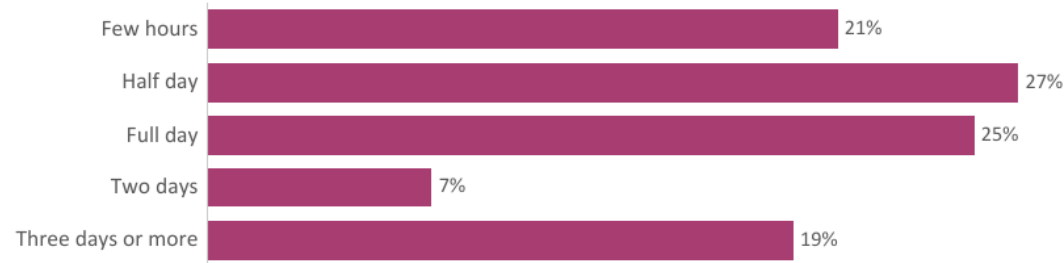
- They are interested in CBT and most have done it before, but some do not know that these activities that they find appealing belong to the CBT category.
- CBT is highly attractive and in line with their vacation goals: learning new things, interacting with locals and living a unique experience that cannot be found anywhere else.



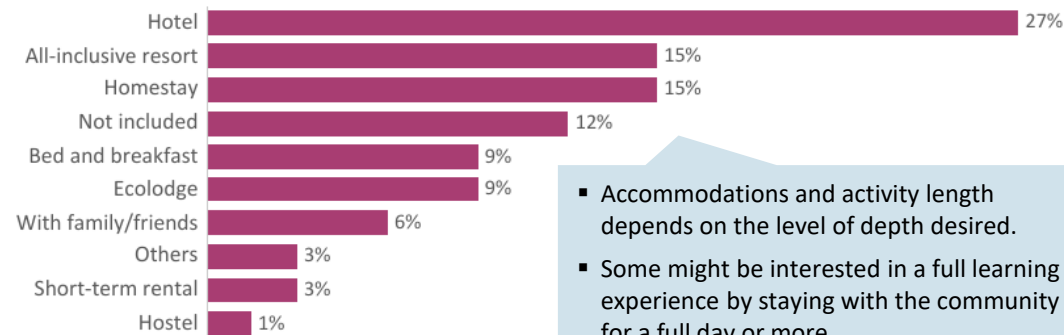
HOW THE TOURIST DESCRIBES THE ACTIVITY

From a short visit to a community to a 3+ day homestay to practice rituals and traditions

Length of the activity

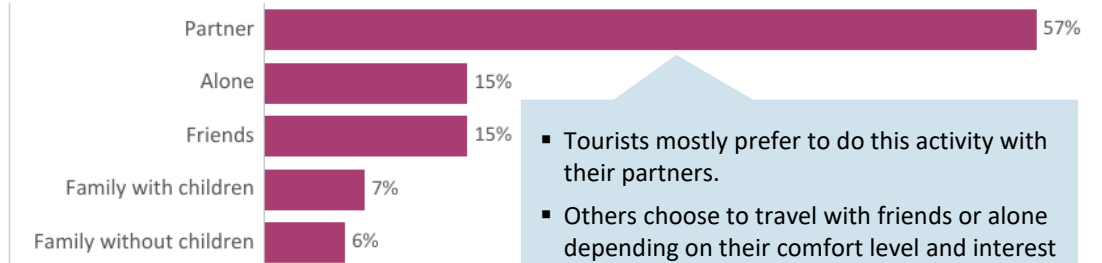


Preferred accommodation



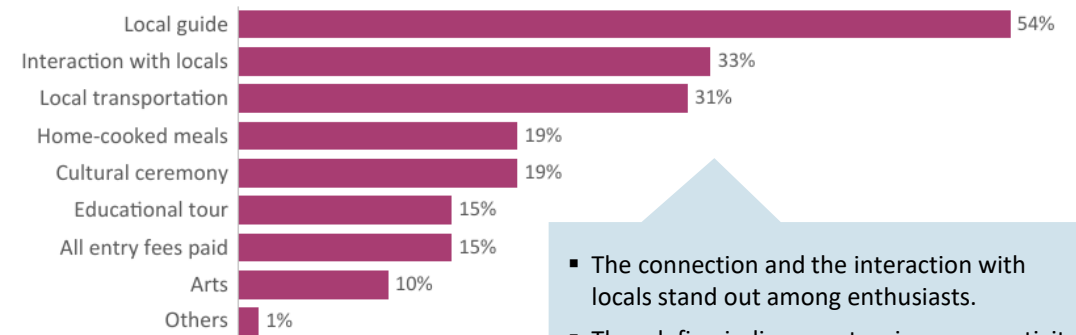
- Accommodations and activity length depends on the level of depth desired.
- Some might be interested in a full learning experience by staying with the community for a full day or more.
- Others might choose to spend a few hours and stay at a hotel or a combination between homestay and hotel.

Travel companions

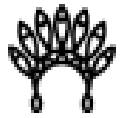


- Tourists mostly prefer to do this activity with their partners.
- Others choose to travel with friends or alone depending on their comfort level and interest in direct and authentic engagement with local community.

Characteristics of the activity



- The connection and the interaction with locals stand out among enthusiasts.
- They define indigenous tourism as an activity that is done and experienced firsthand.
- Some also show interest in trying their food (assuming it is characteristic of the community).
- Participating in the ceremonies also make the activity more immersive.



WILLINGNESS TO PAY

Travelers are willing to pay more for real experiences, and those that benefit community

US\$51-300

Price range that **tourists are willing to pay** based on their description

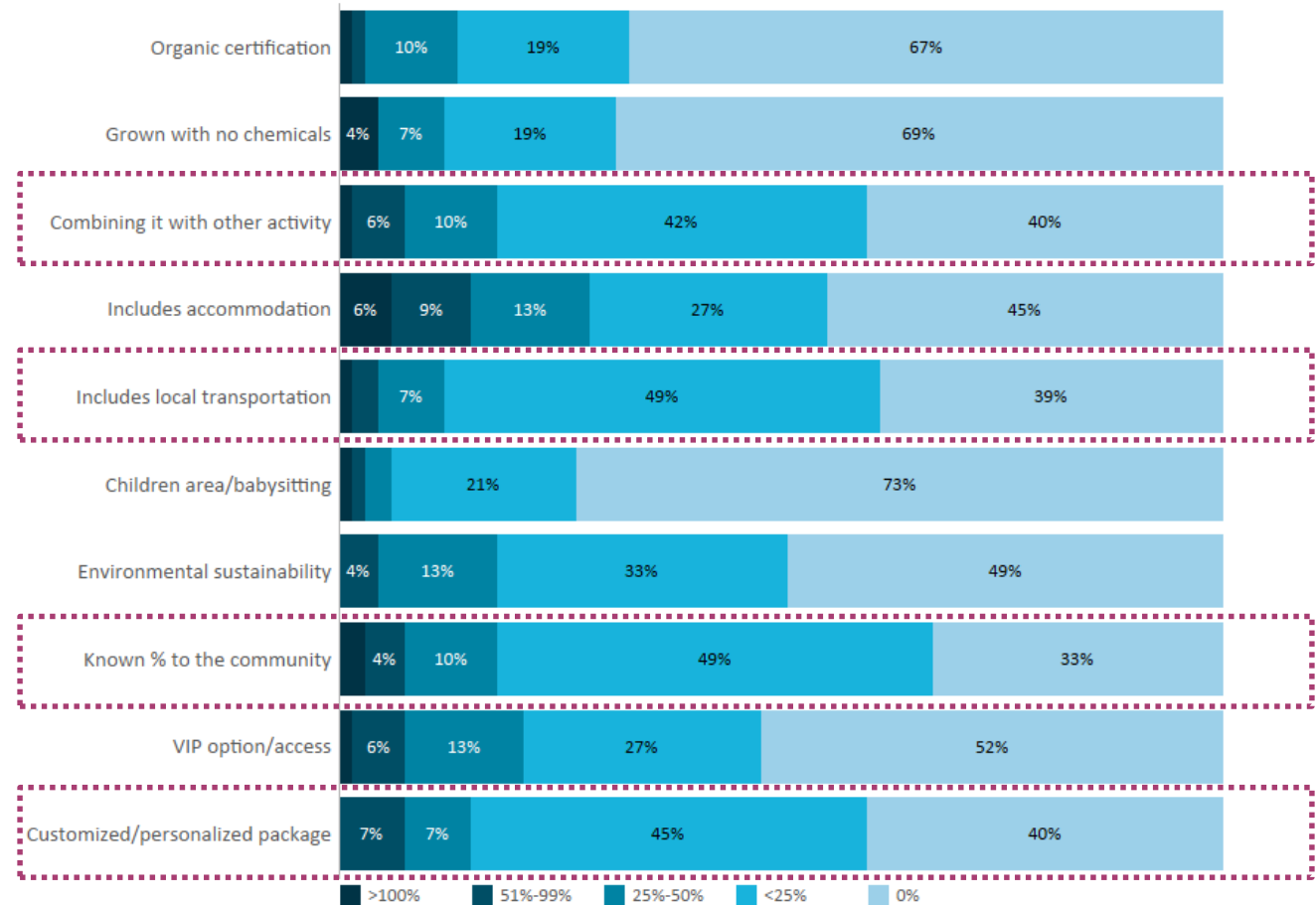
US\$30-110

Price range **currently offered** in the Caribbean

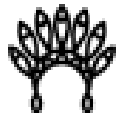
How to encourage tourists to pay for a higher ticket:

- Promote the activity as something **organized by or in partnership with the indigenous community** to attract tourists willing to pay more in order to benefit the local community.
- Offer the more immersive option with **short- or long-term homestay** and include **local transportation** for convenience if diverse communities are visited.
- Give tourists a **personalized experience** by allowing them to select if they would like to include other activities such as food tasting or making crafts.

How much more tourists would be willing to pay if the activity included:



WILLINGNESS TO PAY FOR ADDITIONAL ACTIVITY CHARACTERISTICS



108

Indigenous Tourism participants care about giving back to communities

1

Greatest share of tourists willing to pay more

- 67% of tourists are willing to pay more for Indigenous Tourism if a known percentage goes back to the community, most up to 25% more.
- 60-61% of tourists are willing to pay more for Indigenous Tourism combined with other activities, includes transportation and gives personalized packages, the majority up to 25% more.
- 48-56% of tourists are willing to pay more for Indigenous Tourism with environmental sustainability, VIP access, or accommodations.

2

Middle share of tourists willing to pay more

- At least 31% of tourists are willing to pay more for Indigenous Tourism that includes Organic certification or ingredients grown with no chemicals.
- Most tourists are willing to pay up to 25% more for these characteristics, whereas only 11-14% of tourists are willing to pay more than 25%.

3

Least share of tourists willing to pay more

- 27% of tourists are willing to pay more for Indigenous Tourism with access to children's area/child care, although 21% of tourists are only willing to pay up to 25% more for these services.

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US TOURIST PROFILES**Positioning of Caribbean CBT activities should be tailored to target profile****Caribbean Explorers**

Have traveled to the Caribbean for leisure

- Mature, married adults that travel with their partners to relax but also want to discover new destinations.
- CBT has potential as they also seek authentic experiences during travel.
- What to do to engage them:
 - **Be present** during their research phase
 - Position the **Caribbean experience** as relaxing getaway + unique local activities to be added
 - Leverage **affordability**, ideal offer at the right price

CBT Connoisseurs

Have traveled abroad and done CBT

- Mature, married adults who are more interested in adventure and affordable learning experiences on holidays.
- CBT show higher potential as they are more interested in immersive educational experiences and not just relaxing.
- What to do to engage them:
 - Highlight **value-for-price** with
 - A **menu** with CBT options to complement Beach Tourism
 - Activity **authenticity** and **localness**
 - **Be present** to influence consumer decisions during research process

'Caribbean Explorers' profile is based on survey conducted in the US. N = 467

'CBT Connoisseurs' profile is based on survey conducted in the US. N = 262

'Guyanese in the Diaspora' profile is based on survey conducted in the US. N = 33

GUYANESE IN THE DIASPORA THAT TRAVELLED TO GUYANA IN THE LAST THREE YEARS

Guyanese are interested in easy, fulfilling CBT activities that allow them to get away

1

Guyanese in the Diaspora that traveled to Guyana in last three years*

- They either go alone (64%) or with a partner or friends for a week or two.
- Generally select a mix between water activities and gastronomic experiences.
- Overall there is lower interest in sightseeing than among those Guyanese in the Diaspora that have not traveled to Guyana.

2

Familiarity and interest in Community-Based Tourism

- 55% of respondents are familiar with the term Community-Based Tourism (CBT).
- All respondents would be interested in doing CBT as it is a getaway activity and a unique, fulfilling, and easy experience.
- Approximately half have already done all CBT activities surveyed, either in the Caribbean or in other regions.

3

Most popular CBT activities

- Local Tourism is most popular as it provides a true appreciation for the community.
- Traditional Cuisine is second most popular it is an opportunity to try authentic local food and beverage and can fill time.
- Festival and Traditional Health and Wellness are third and fourth most popular as it is an opportunity to get away.

4

Least popular CBT activities

- Volunteer with Local Experience is the least popular CBT experience (36% of Guyanese that traveled to Guyana in last three years).
- Wellness is the second least popular CBT experience (27% of Guyanese that traveled to Guyana in last three years).
- Farm to Table and Ecolodge are equally lower in popularity (27% of Guyanese that traveled to Guyana in last three years).

Source: Euromonitor International

*Guyanese in the Diaspora that have traveled to Guyana in the last three years, consumer survey, N = 11

PREFERRED ACTIVITIES FOR GUYANESE IN THE DIASPORA THAT TRAVELLED TO GUYANA IN LAST THREE YEARS**Environmental sustainability and child care could encourage higher tickets among Guyanese****55%**

of Guyanese in the Diaspora
that have traveled to Guyana in
the last three years*

Local Tourism

- More than half of respondents that selected Local Tourism are willing to pay 100% more for environmental sustainability, VIP options, Organic certifications, and combining it with other activities.
- All are willing to pay more than 50% for child care and combining activities.

45%

of Guyanese in the Diaspora
that have traveled to Guyana in
the last three years*

Traditional Cuisine

- The largest share of travelers is willing to pay 100% more if Traditional Cuisine benefits everyone fairly.
- Over half of respondents are willing to pay at least 50% more for additional activity attributes.

36%

of Guyanese in the Diaspora
that have traveled to Guyana in
the last three years*

Festival

- An equal number of respondents selected Festival and Traditional Health and Wellness as popular activities.
- Half of respondents are willing to pay at least 100% more for customized and personalized Festival packages.

36%

of Guyanese in the Diaspora
that have traveled to Guyana in
the last three years*

Traditional Health and Wellness

- An equal number of respondents selected Festival and Traditional Health and Wellness as popular activities.
- Traditional Health and Wellness generates greater WTP and additional attributes can increase tourist WTP; 75% are WTP at least 50% more for activities that benefit everyone fairly and include environmental sustainability.

Source: Euromonitor International

*Guyanese in the Diaspora that have traveled to Guyana in the last three years, consumer survey, N = 11

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MAIN GLOBAL TRENDS IN TRAVEL AND COMMUNITY-BASED TOURISM**Tourists seek authentic, unique and socially responsible experiences planned digitally****Experience More**

- Tourists strive to **experience more** during travel; for example, tourists seek **all-encompassing experiences** such as creating their own ceramic pot with an artisan as opposed to simply purchasing a pot.
- **Direct engagement with the community** enhances the CBT experience creating an **authentic and unique interaction** for tourists that they cannot get anywhere else.

43%

of global consumers prefer spending money on experiences*

Ethical Living

- People are becoming more **mindful of others, including the environment**.
- More mindful tourists seek out niche tourism **experiences that align with their values**.
- Examples include sustainable tourism, ecotourism, impact tourism, and responsible tourism.

44%

of consumers trust claims of supporting a charitable cause*

Personalization

- More tourists are seeking for **one-of-a-kind experiences** that are **exclusive** to the destination and **align with their interests**.
- For example, direct community involvement allows for inherently **personalized experience**.
- Activities positioned this way, providing a "VIP experience", are perceived as more **premium**.

23%

of consumers prefer personalized experiences*

Trip Planning & Booking Reinvented

- Tourists use of a **myriad of online information** (TripAdvisor, social media, economy booking sites, etc.).
- Tourists can **plan, reserve and pay** for all aspects of trip online **prior to trip departure**.
- Tourist providers must have **digital payment options** to allow credit card purchase; as mobile wallets continue to gain traction in source markets, tourism providers will need to incorporate this method quickly, and sustain it over the long term.

31%

of global consumers purchase travel via smartphone *

*Source: Global Survey conducted by Euromonitor International

43% of global consumers prefer spending money on experiences, up from 39% in 2017

44% of consumers agree or strongly agree to trust claims of supporting a charitable cause in 2019, up from 43% in 2017

31% of global consumers purchase travel via smartphone in 2019, up from 22% in 2017

CHARACTERISTICS OF SUCCESSFUL COMMUNITY-BASED TOURISM

Activities should be unique to destination, supported by key stakeholders, and accessible online

Community assets

- Community assets include natural and cultural characteristics of community.
- Examples include unique species of wildlife and/or cultural beliefs and practices.
- Community members already have the necessary familiarity, knowledge, and capacity to lead CBT activities that focus on their community assets.
- Remember what is considered common to the community may be unique for tourists.



Leverage existing natural and cultural assets, as these are unique to tourists

Public and private organizations

- CBT providers need the support of governments, tourism boards, and other third-party players for:
 - Access to financing
 - Policy and regulation
 - Physical infrastructure
 - Capacity-building
- This is essential for:
 - Starting and developing a CBT initiative
 - Logistics and employment



Develop workforce and infrastructure through policy, regulation, and investment

Tourist interests

- Tourists seek unique and authentic experiences such as:
 - Engage with the community
 - Taste local, Traditional Cuisine
 - Learn new languages
 - Discover endangered species
- Causes such as sustainability, wildlife protection, access to health and education, cultural preservation, food security, basic needs, etc., resonate well with the socially responsible tourist.



Position towards tourist interest in authentic experiences and social responsibility

Digital booking

- New digital platforms disrupt trip planning and booking processes:
 - Tourists learn about destinations on social media
 - Research flights on economy sites*
 - Read activity reviews on Trip Advisor
- Almost all platforms allow for consumers to:
 - Book online
 - Include credit card payment



Promote and offer digital booking options to stay relevant for evolving trip-planning process

*Economy sites refers to online search engine platforms that allow tourists to search for the best deals across providers.

GLOBAL CASES – COFFEE TOUR WITH CAFÉ DE MONTEVERDE IN COSTA RICA**Multi-activity experiential tour embracing ethical living appeals to multiple tourist segments**

Source: <https://www.lokaltravel.com/go/cafe-de-monteverde-coffee-tour> and <https://cafedemonteverde.com/life-monteverde/about-us/>

Activity

“Exciting and immersive tour” (**2-3 hours long**) offered by a **locally owned community cooperative** and led by a **local guide** within **rainforest**

- Tourists can harvest coffee in fields (seasonally dependent)
- Observe coffee in various stages in educational center on site
- See roasting demonstration
- Taste different coffees that underwent different techniques
- Spend time with farm animals
- Explore organic gardens
- Spot rare wildlife

Key Takeaways

- Tourists look to **experience more** – Instead of just buying Costa Rican coffee to bring home, they also learn about community assets (coffee cultivation) in an experiential way from growing the crop to consumption.
- The certified and award-winning sustainable agricultural practices capture the attention of **ethical living** tourists (e.g., reforestation efforts)
- Successfully blends CBT activities that resonate with **multiple tourist segments** (e.g., S.A.V.E, group tours, families, partners) **both foreign and domestic** while also generating greater community impact.

Multi-day impact tourism trek attracts conscious tourists and trekkers seeking a personalized experience



GHE



Source: <https://www.ghe.co.in/>

Activity

Multi-day trek with social impact attracts multiple segments:

- Serious trekkers (solo or groups) looking to hike the Himalayas.
- Corporate and/or student group trips with a focus on leadership, teambuilding and interactive learning.
- Socially conscious tourists hoping to positively affect the visited destination.

Trekkers bring **renewable energy to remote villages**, as well as improving digital education and livelihood in community (impact tourism)

- Impact tourism is positioned as “**less invasive**” than other **voluntourism experiences** which resonates with more tourists.
- Impact is quantified and communicated transparently via the website.

Key Takeaways

- Tourists leave with a **personalized** experience based on their interaction with local communities and their members.
- Growing niche of **conscious tourists** look for activities that positively impact destination communities (e.g., clean energy) demonstrating **ethical living**.
- Global awards and client testimonials **build credibility** for activity offered.

US tourists search for, select, and pay for gastronomic experiences directly with local hosts online



Source: <https://www.eatwith.com/>
<https://blog.eatwith.com/2019/03/26/the-non-profit-cooking-class-in-siem-reap-countryside/>

Activity

- **Digital platform** connects **local hosts** in a destination market with tourists seeking a **gastronomic** experience.
- Functions like Airbnb for gastronomic experiences and utilizes an application process for hosts to ensure **quality** of experience.
- Tourists have **personalized** experiences interacting directly with host
- Tourists search based on geography, experience (meals, cooking classes, food tours), dates and number of guests to view gastronomic experiences available (**trip planning and booking reinvented**).
- Digital payment is processed **by Stripe**.

Key Takeaways

- Global platforms **consolidate activity offerings** on fewer searchable sites improving **convenience for tourists** and allowing for more **focused promotional efforts by CBT providers**.
- Digital platforms allow for **tourist reviews** of experience to be highly **visible**.
- Sites allow for checking availability and online booking/reservation management with a **secure digital payment**.

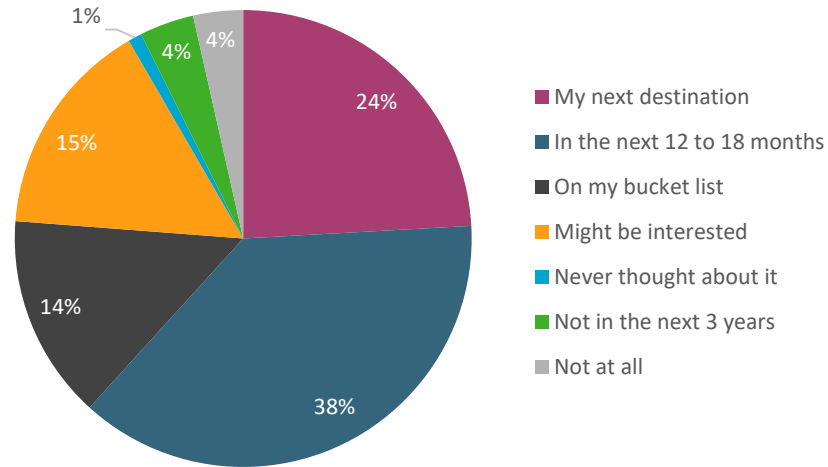
Tourism and Community-Based Tourism in the Caribbean

TOURIST PERCEPTION ABOUT THE CARIBBEAN AS A TRAVEL DESTINATION

A tropical affordable destination where tourists can relax and unwind at beach

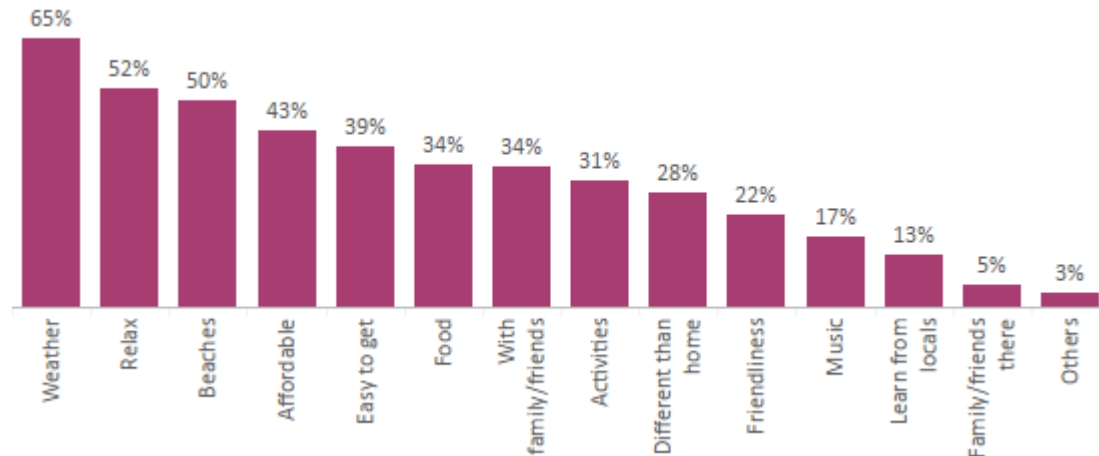
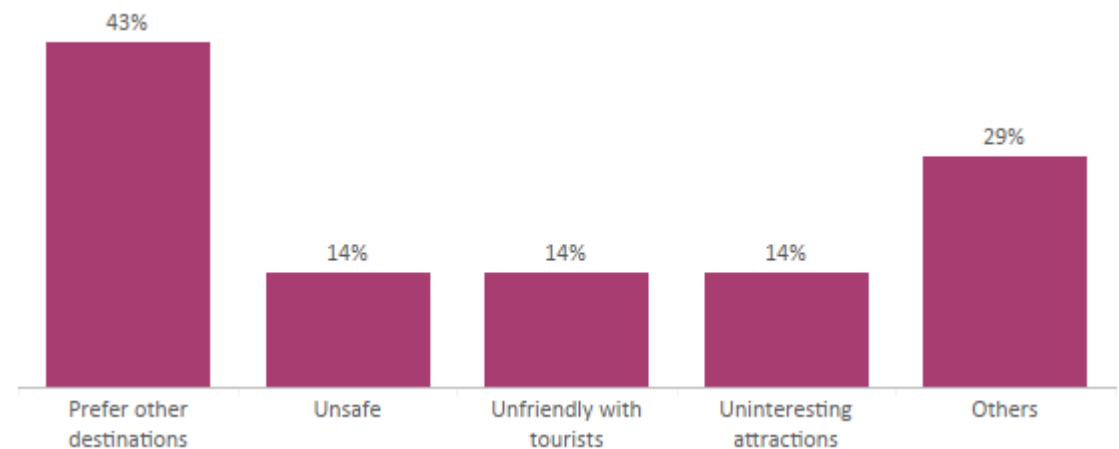
92%

would consider traveling for leisure to the Caribbean



- Most tourists choose the Caribbean for beach and cruise tourism, but many are interested in other activities as well.
- Experts interviewed agree that there are very few tourists that seek only CBT while on vacation.
- However, CBT activities make great add-ons for the tourist that looks to experience unique aspects of the destination not available in their home country.

Reasons why tourists would consider traveling to the Caribbean for leisure

Reasons why tourists would not consider traveling to the Caribbean for leisure

TOURIST INTEREST IN AND FAMILIARITY WITH CBT IN CARIBBEAN

CBT interest is limited by familiarity as people might not be willing to try something unknown

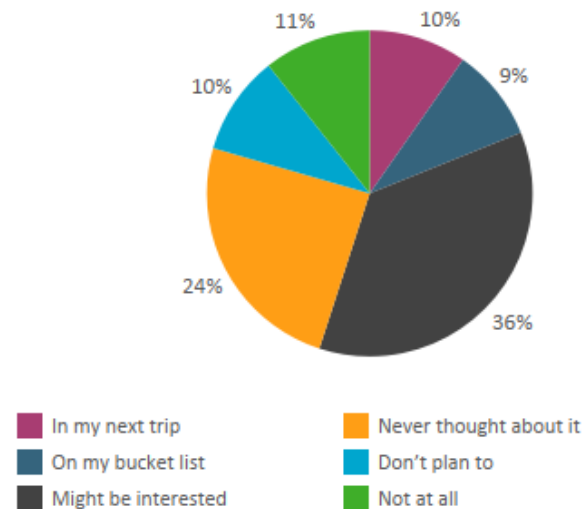
21%

are familiar with CBT

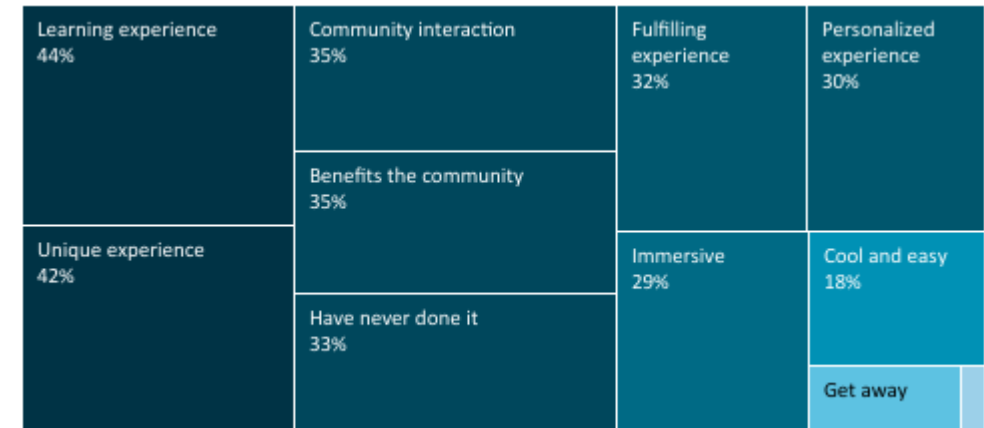
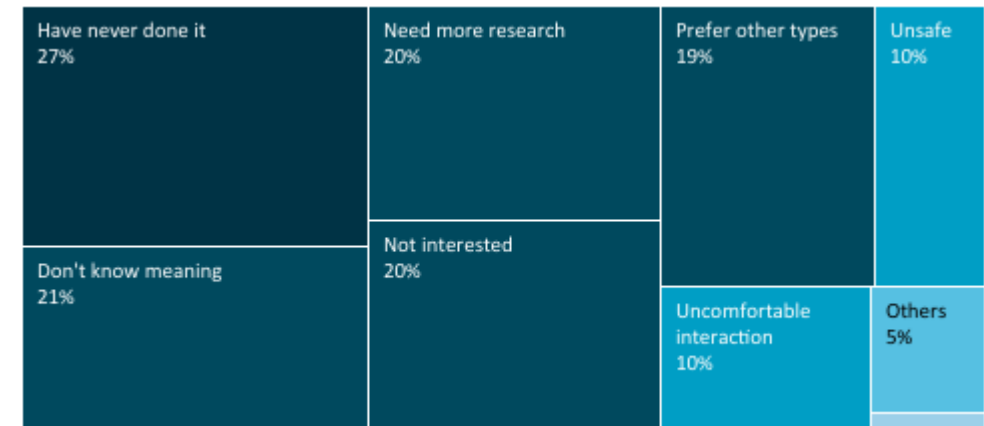
- Most tourists have not done CBT before and are not quite sure what CBT means; over 20% of respondents mentioned they did not know it at all.
- Generally, people think that CBT implies community interaction either by hiring a local guide to learn about the country or engaging with them on vacation to learn about their culture, rituals, and traditions.
- They require more exposure to the benefits of CBT for them and the community in order to boost familiarity and interest.

79%

would be interested in doing CBT in the Caribbean



Reasons why tourists would consider doing CBT in the Caribbean

Reasons why tourists would not consider doing CBT in the Caribbean

DRIVERS AND BARRIERS IN THE DEVELOPMENT OF CBT IN THE CARIBBEAN**Increased digital presence, policies, and product development drive CBT in Caribbean****Caribbean CBT drivers**

- 
- Development of unique and authentic CBT experiences focused on the abundant natural and cultural community assets.
 - Access to public and private financing opportunities aids new CBT initiatives and expansion of existing CBT activities.
 - Licensing programs build credibility among tourists (in health and safety) for nontraditional tourism providers.
 - Travel agencies promote sustainable and responsible travel options in source markets (e.g., [responsibletravel.com](https://www.responsibletravel.com)).
 - Showcasing Caribbean CBT activities at international travel fairs, conferences, and online including social media helps increase international awareness.
 - Caribbean community networks like “Country Style” and “Unique Jamaica” collectively promote CBT activities.
 - Government focus on sustainable tourism with organizational mandates, master plans and policy in support of CBT.
 - Digital platforms like Airbnb and 'Eat with a Local' eliminate intermediaries and allow direct tourist-community contact.
 - Improvements on digital payment structure meet tourist expectations for booking and preferred payment method.

Caribbean CBT barriers

- 
- Lack of transparency and trust in amount of tourism expenditure that goes back to local communities.
 - Limited global standards for CBT providers, and existing negative perception among tourists of safety and hygiene in rural and remote communities.
 - Lack of capacity-building for all required skills (product planning, marketing, accounting, access to capital, operating a business, and customer service) for community members.
 - Lower international promotion, as a result of fewer linkages for CBT providers in source markets, limits CBT awareness.
 - Lack of incentives for travel agents to incorporate CBT in itineraries due to lower margins and profitability of CBT.
 - Natural disasters damage existing infrastructure and food supply, which can pause availability of CBT offerings.
 - Limited digital promotion by CBT providers and low tourist awareness of CBT (and relevant search terms) results in low searchability online for CBT activities.
 - Lack of online booking and digital payment options at time of booking means loss in capturing interest of potential tourists.

How to generate interest in Community-Based Tourism among beach tourists

HOW TO GENERATE INTEREST IN CBT AMONG BEACH TOURISTS

Offer and promote CBT activities as complementary to standard Beach Tourism itinerary

1

Promote CBT as add-on secondary activities that can be planned upon arrival at destination

- Beach Tourism is the primary focus of their one- to two-week trip, yet tourists wish to participate in other activities to complement the time spent at the beach, which averages a few hours to half a day.
- They are interested in other activities such as sightseeing, historical and cultural attractions, and food and restaurants.
- Activities can be offered at complementary times (for example, a few hours mid-day to escape the heat and harsh sun or late afternoon following their beach day) and aligned to their principal interests while on vacation.

2

Grow CBT awareness and benefits to align with tourist interest and eventual CBT participation

- The majority of tourists are not familiar with CBT; the common perception is that this term means engaging with people in the community while on vacation, which does not appeal to all tourists because it requires more 'commitment'.
- Leverage similarities in tourist interest and local Caribbean CBT capabilities as a foundation to diversify the offer.
- For instance, greater interest can be developed by positioning CBT activities primarily towards tourists' interests (historical and cultural attractions, and food and restaurants).

3

Position as a unique, new learning experience

- Leverage the fact that tourists want to 'experience more' while they travel and highlight the unique destination-only attributes and cultural learning experience for tourists from participating in CBT.
- Use Beach Tourism as a 'foot-in-the-door'* strategy by promoting recommendations for these activities at beach tourist hotels (including all-inclusive resorts) by hotel staff.

*Foot-in-the-door refers to a commercial technique in which a person is more likely to agree to a larger request (doing more activities at the destination) by having them agree to a modest request first (visiting the Caribbean for Beach Tourism for their own willingness).

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'PRIORITIZE' RECOMMENDATIONS**Lowest-hanging fruits where efforts should be focused to leverage existing tourist interest****1****Main focus of marketing and promotion efforts**

- Leverage genuine and existing tourist interest in these activities to take advantage of the high benefits they offer by focusing promotion efforts on them.
- Guarantee online presence at the time of research on travel sites, social media (potential partnerships with influencers).
- Allow for online booking either while researching or on site, facilitate online payments and credit card acceptance.
- Partner with hotels and cruise lines to reach a higher number of potential clients.

2**Use the proper message to move from interest to purchase**

- Promote these activities as beneficial for both the tourist and the community.
- Inform and educate tourists to learn about the benefits of engaging in these activities for the community (e.g. % that goes back to the community) as well as everything they will be able to learn and that is unique to that destination.
- Allow tourists to design and build their own experiences by offering a menu of options they can mix and match as well as a guide and additional local transportation, if needed.

3**Pay attention to areas that make tourists hesitant**

- Help tourists relax and enjoy the experience without having to think about potential risks, hygiene, and safety issues.
- Inform tourists about the source of the food ingredients, existing regulations, and certifications to increase credibility.
- Provide guides that are local experts and will both guide and protect tourists from more dangerous areas and keep them from straying off the beaten path.

'PROMOTE INTERNATIONALLY' RECOMMENDATIONS**Strengthen international promotion to grow tourist interest in high Caribbean benefit activities****1**

Promote in source markets to generate greater interest among tourists

- Grow tourist understanding of activity with lifestyle features on travel blogs, social media, and other digital media sites.
- Adapt promotional message to resonate with tourists traveling to the Caribbean to relax, enjoy the weather, and complement their itinerary with authentic cultural experiences.
- Include within multi-activity itinerary offered by travel agents.

2

Reposition activities to highlight 'unique cultural experience' for tourists

- Emphasize 'unique cultural experience' to align with tourist interest in personalized experiences.
- Highlight community impact and benefit, important for the tourist embracing ethical living.
- Allow tourists to sense reciprocity in the experience as opposed to a one-sided 'giving experience' that requires them donate time or money without receiving something in return.

3

Offer shorter experiences at high-traffic accommodations to increase volume and frequency of participation

- Improve access to these activities for tourists that do not typically take part in multi-day group travel experiences.
- Offer shorter multi-activity experiences that interest guests traveling to the Caribbean for its beaches and to relax.
- Partner with hotels and other places of lodging to promote activities while simultaneously building credibility by association in regards to safety, hygiene, and regulations (which currently limit tourist participation).

'DEVELOP LOCALLY' RECOMMENDATIONS

Promote employment and interaction through experienced guides and capture more benefits

1

Capture existing tourist interest

- Leverage existing tourist interest in these activities to capture the most potential profit for the destination.
- Guarantee online presence at the time of research on travel sites and social media (potential partnerships with influencers) and also allow for online booking.
- Motivate tourists to write reviews to reduce hesitation and encourage other travelers to participate in these activities.

2

Increase benefits by adding options with higher added-value for tourists

- Tourists are already interested in these activities, but the benefits for the Caribbean can be improved.
- Increase employment potential and promote community involvement by offering a well-trained and experienced local guide to lead groups of tourists and teach them about the uniqueness and story behind what they are seeing.
- This can also be a differentiating factor and a more premium option for tourists that are willing to pay more.

3

Create training programs to improve capacity of tour operators

- Promote the development of the capacity and expansion of tour availability in higher-traffic areas.
- Focus on areas highly relevant for tourists such as safety, hygiene, sustainability, and customer service to gain their trust and guarantee that these operators meet minimum standards.

'REDEFINE' RECOMMENDATIONS

Further develop offering and raise awareness, promoting local character to draw attention

1

Reposition to increase interest and achieve higher benefits

- Boost interest by leveraging the existing attractiveness of the Caribbean as a beach destination and offer CBT activities to satisfy the curiosity of tourists while on vacation.
- Increase the CBT benefits for the Caribbean by increasing the number of businesses that offer these activities (especially for Traditional Health and Wellness and wellness activities), creating more employment potential.

2

Increase CBT awareness and promote as 'non-invasive' add-ons unique to the Caribbean

- Teach tourists what CBT in the Caribbean means and what authentic activities they can add to their beach vacations.
- Be present and promote CBT in source market through travel websites and social media to attract the interest of tourists influenced by highlighting social responsibility and sustainability as well as community benefits.
- Advertise activities as well at popular hotels in destination market to capture travelers that decide on the spot.

3

Diversify activities to offer a wider price range to capture willingness to pay

- Enhance activities and complimentary services to meet tourist expectations by creating different packages that range from basic to premium, and offer a menu of options from which tourists can mix and match.
- Tourists might be interested in doing these activities for a short period of time or for longer if they are combined.
- Offer convenience at all stages, with online booking, local transportation, and ease of payment.



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Three different profiles were selected to assess tourist preferences and purchasing behavior when they travel in general, to the Caribbean, and when thinking about Community-Based Tourism:

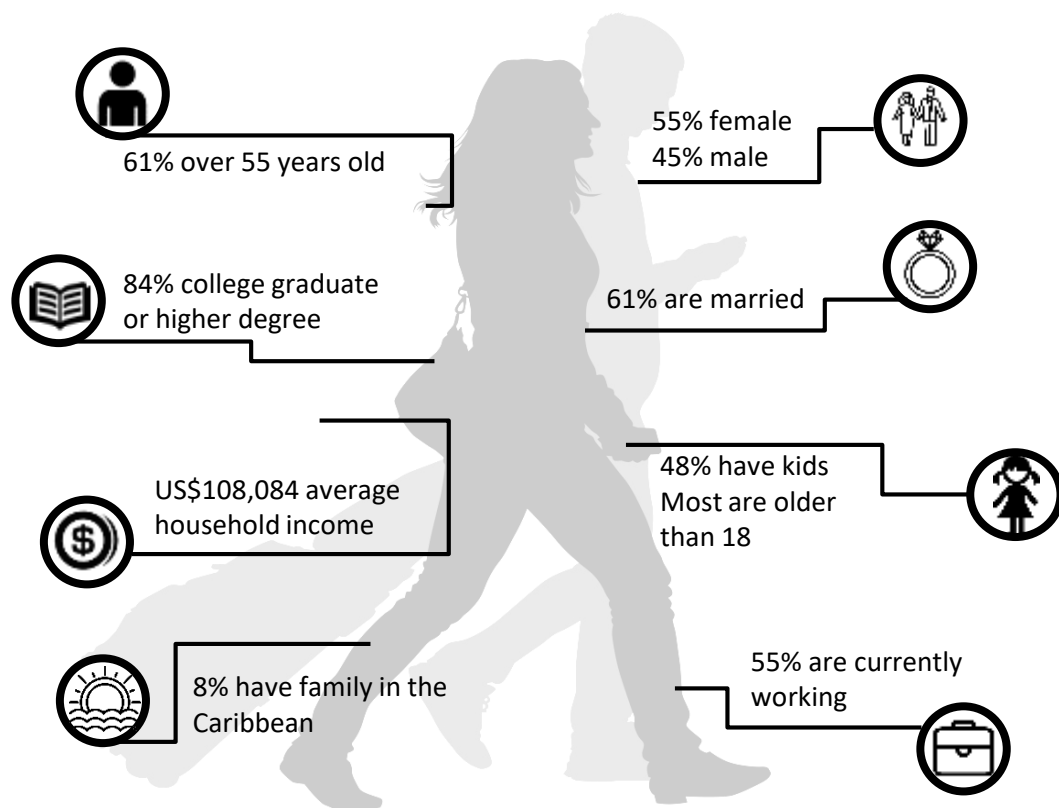
- 1) Caribbean Explorers
- 2) CBT Connoisseurs
- 3) Guyanese in the Diaspora

OVERVIEW OF TOURIST PROFILE

Mature married adults that travel with their partner for destination discovery and to relax

Caribbean Explorers

Have traveled to the Caribbean for leisure in the last three years



General travel habits

- Like to explore and learn new things but also go on vacation to relax.
- Usually travel with their partners and might also consider taking friends.
- Trip planning starts six months in advance, mainly using the internet, but they decide what activities to do closer to the trip or even on the spot.
- Price-driven to select the destination but also pay attention to the offering.

About the Caribbean

- Already know the region and are highly interested in going back; most see it as either their next destination or one they will visit in the next 12-18 months.
- Travel is done with their partners for 1-2 weeks, and staying at a hotel or all-inclusive resort that would allow for beach enjoyment.
- Cruising to the Caribbean is also attractive and highly selected.

About Community-Based Tourism

- Low familiarity with the term and concept of CBT but, if explained, the majority might be interested in CBT or have never thought about it.
- Attracted to CBT for the learning and having a unique new experience.
- Agro and food CBT are the preferred activities to be combined with beach.

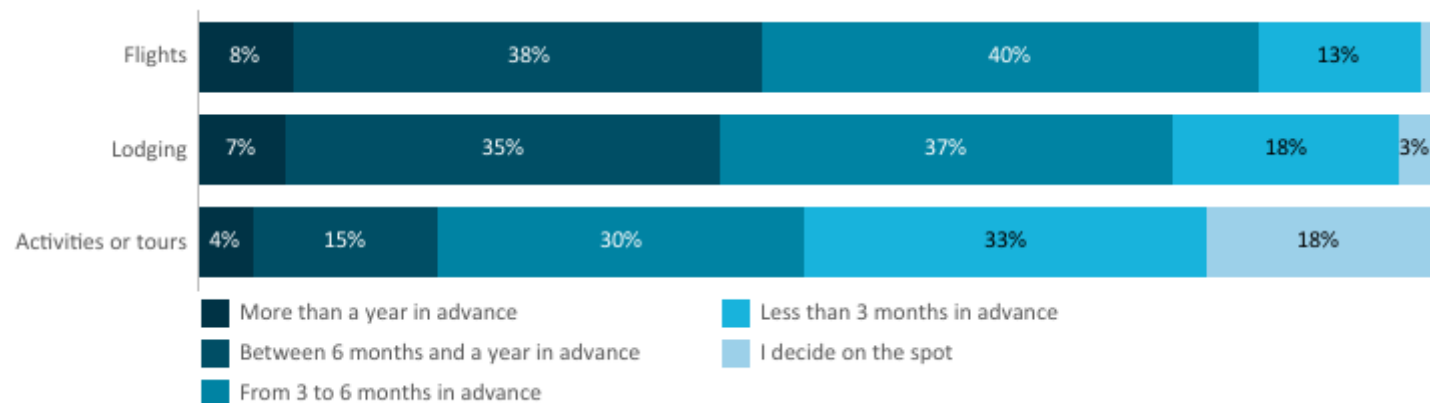
TRAVEL HABITS OF TOURISTS

134

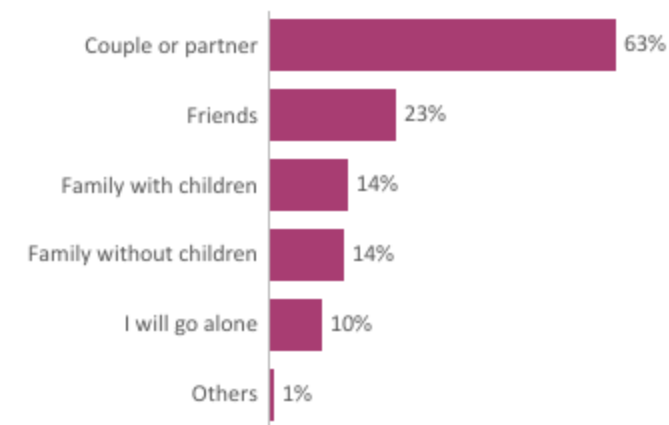
1

Read and refer to travel websites and magazines when in planning stage

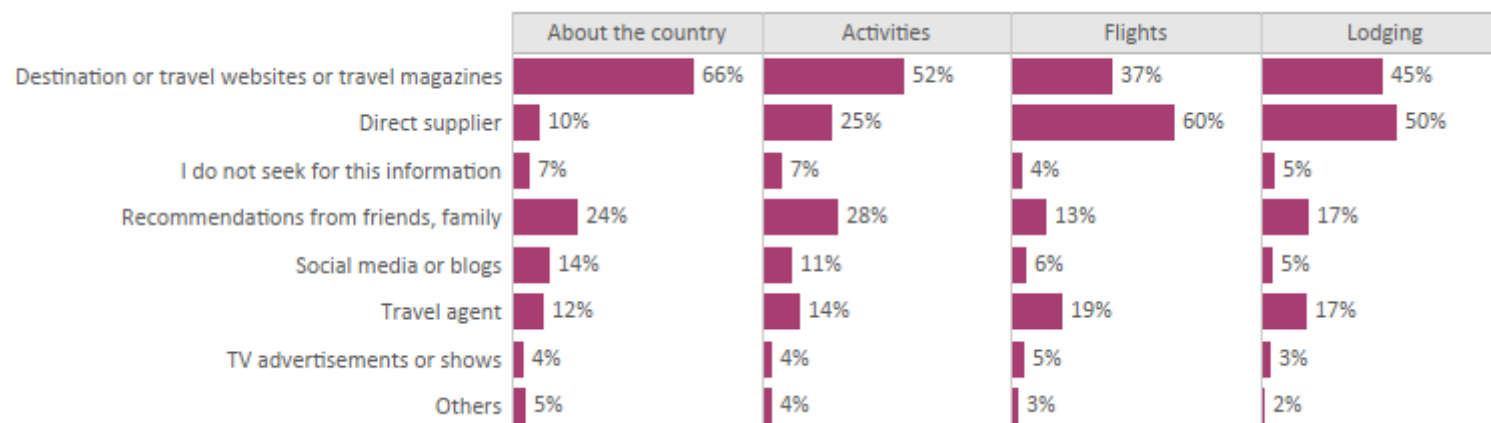
How far in advance they normally plan for the following:



Most frequent travel companions



Where they search for information about the following:

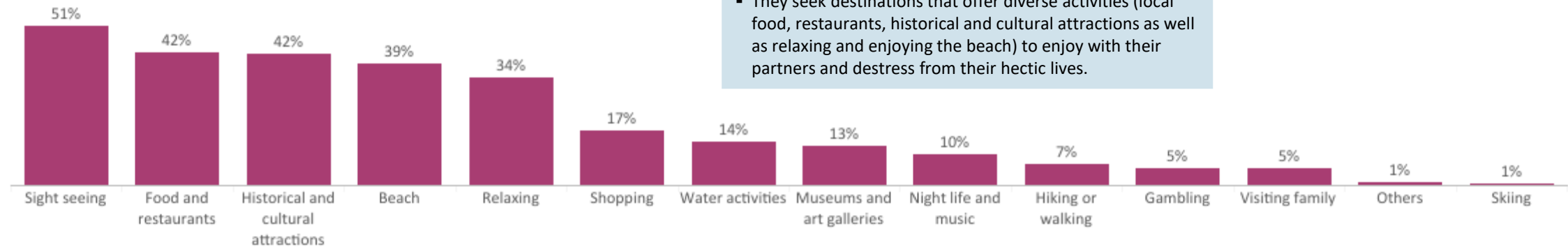


- Usually travel with their partners.
- Planning is important and starts at least three months before departure, especially for transportation and accommodations.
- Although the activity offering is a relevant factor when choosing a destination, Caribbean Explorers tend to be more spontaneous when deciding what activities to select and do.

TRAVEL HABITS OF TOURISTS

Price-driven but prioritize destinations with attractive offerings and guaranteed safety

Main attractions sought after in a vacation abroad



- Sightseeing is the preferred activity among the majority of tourists.
- They seek destinations that offer diverse activities (local food, restaurants, historical and cultural attractions as well as relaxing and enjoying the beach) to enjoy with their partners and destress from their hectic lives.

Main factors when deciding on the destination



- Although cost is the main factor when deciding on the destination, tourists consider a variety of factors during the planning stage.
- As explorers, they seek interesting and different attractions at a destination with a suitable climate for outdoor fun, and where they feel safe.

EXPERIENCE AND INTEREST IN VACATIONS IN THE CARIBBEAN

136

1

Enjoyed their previous experience in Caribbean and plan to return soon

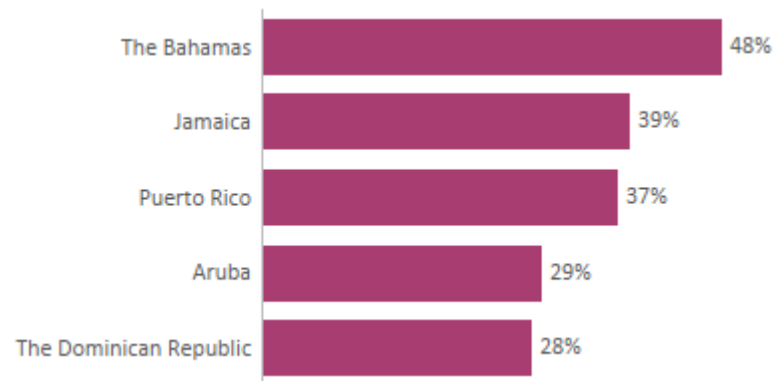
100%

have traveled to the Caribbean for leisure in the last three years

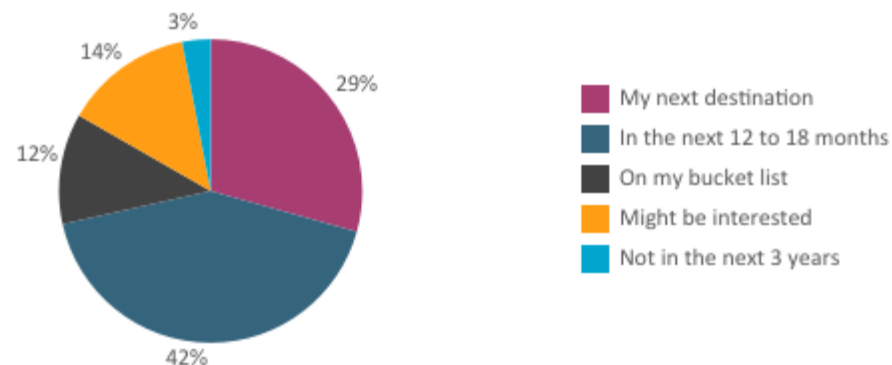
97%

would consider traveling to the Caribbean for leisure

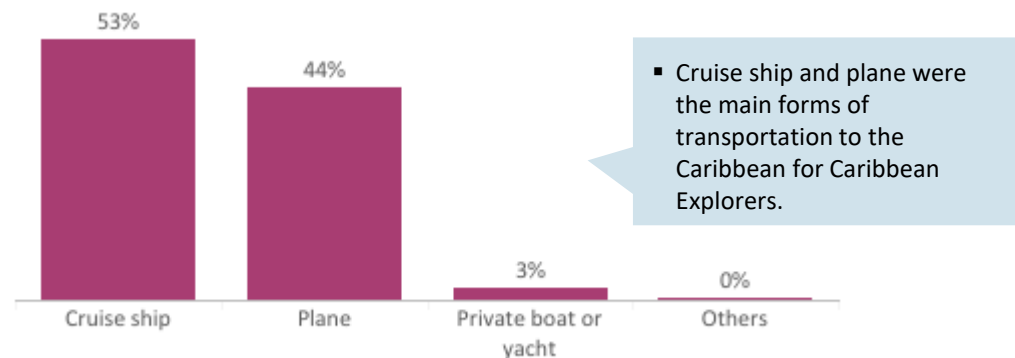
Top 5 destinations visited in the Caribbean



- Most of these travelers want to go back to the Caribbean in the next 18 months.
- This is due to the combination of pleasant time at the beach enjoying the tropical weather and an accessible price.

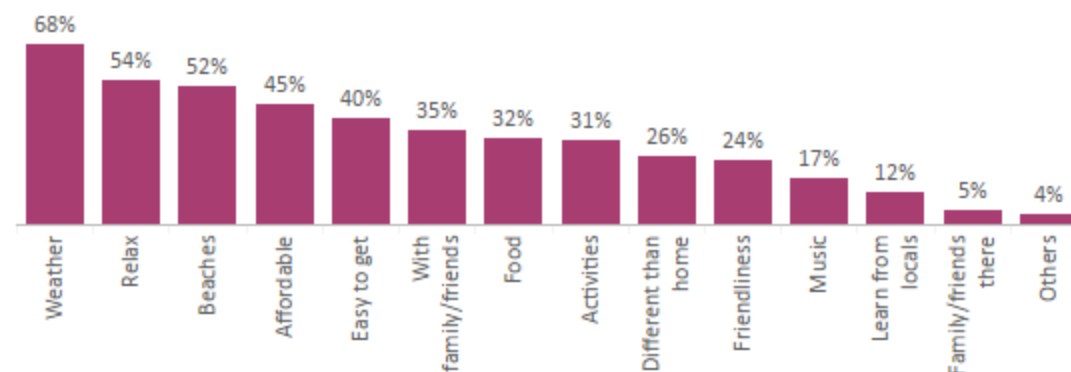


How tourists have traveled to the Caribbean



- Cruise ship and plane were the main forms of transportation to the Caribbean for Caribbean Explorers.

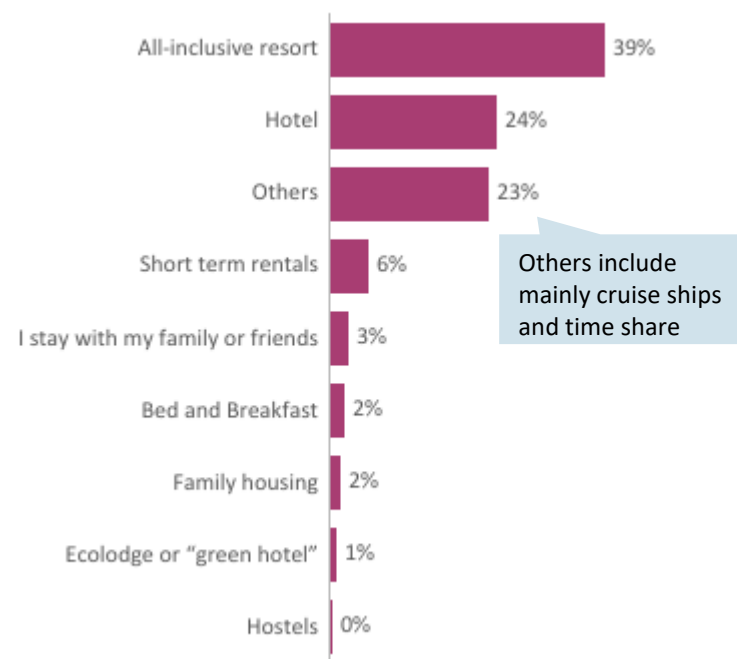
Why tourists would consider the Caribbean as a travel destination



VACATION PLANNING IN THE CARIBBEAN

Weeklong getaway with their partner at a hotel or resort with beach access

Preferred accommodation in the Caribbean



67% choose their **partner** to accompany them on vacation in the Caribbean

50% stay in the Caribbean for 1 week

Top 3 activities selected in the Caribbean

71% Beach Tourism

48% Cruise Tourism

31% Socialize with Locals

- Based on their previous experience, Caribbean Explorers associate the Caribbean with the tropical weather, being at the beach, and/or enjoying a cruise experience in the region.
- However, some of these tourists also show interest in Community-Based Tourism without knowing they are referring to that type of tourism.
- If they were exposed to the different variety of activities that offer interaction with locals and could learn about the community, their willingness to do them would increase.

Individual budget



- Most travelers (70%) are willing to spend **up to US\$900** on transportation (flight or cruise) to the Caribbean.



- 64% of tourists estimate they spend **no more than US\$50 daily** on local transportation; some might consider staying at a hotel and not spending money on transportation.



- The budget for lodging averages **US\$185 per night** and 63% estimate they spend between US\$100-300 per night.



- The majority allocate **less than US\$100 daily** for activities and tours in the destination country in the Caribbean.



- 64% of travelers are willing to spend **up to US\$75 daily** on meals, and the average daily budget for meals is US\$60.

TOURIST FAMILIARITY WITH AND INTEREST IN CBT IN THE CARIBBEAN

138

1

Lack of experience and knowledge of CBT limits interest and willingness of travelers

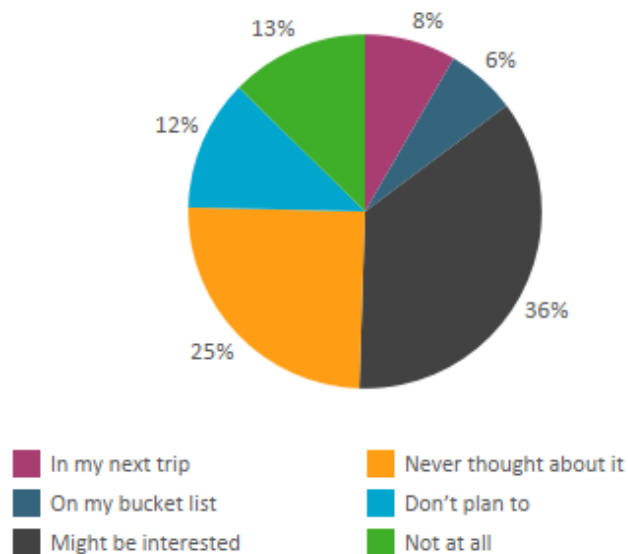
17%

are familiar with CBT

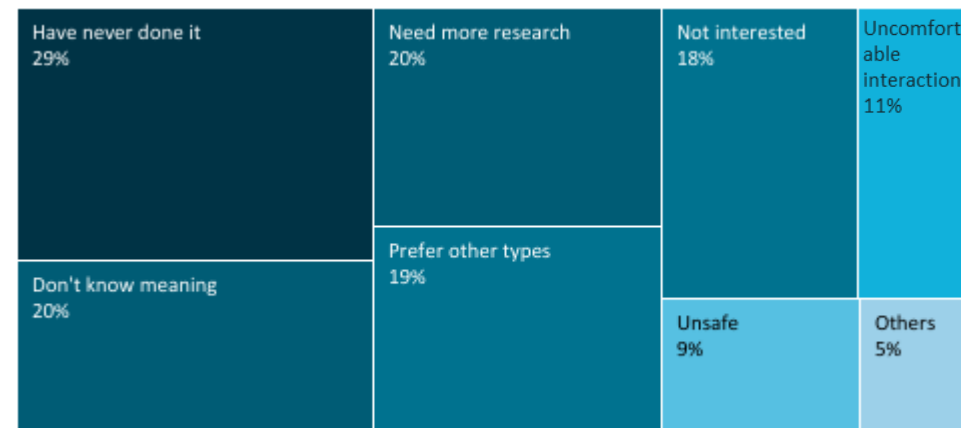
- Most travelers are not familiar with or have never been exposed to the term.
- There are no clear opinions about the definition of CBT.
- 32% think it means engaging with people in the community, while 29% think it pertains to local communities that guide tourists to explore the area.
- More than 25% could not choose a definition and said they did not know.

75%

would be interested in doing CBT in the Caribbean



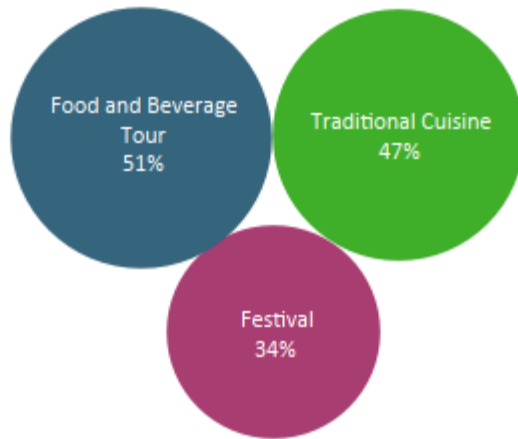
Why tourists would consider doing CBT in the Caribbean (75%)

Why tourists would not consider doing CBT in the Caribbean (25%)

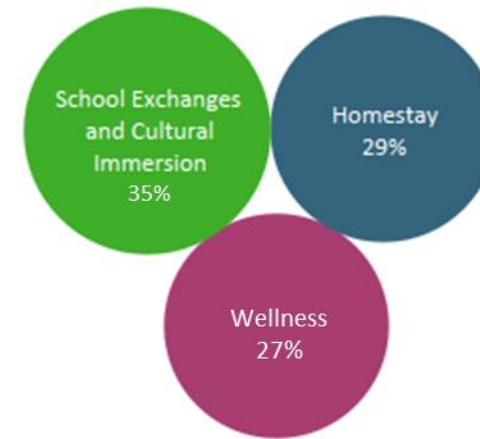
CBT ACTIVITIES IN THE CARIBBEAN

What attracts them to CBT is authenticity and uniqueness of activities offered

Top 3 most appealing CBT activities selected by tourists



Top 3 least appealing CBT activities selected by tourists



CBT has potential among Caribbean Explorers

- Tourists look for learning experiences to add to their beach plans that do not take over their entire vacation time.
- Although they are explorers and enjoy learning, seeing and trying new things, they are not as adventurous as other travelers. Food and Traditional Cuisine is 'less invasive' compared to homestays and it is also considered more authentic in terms of the community.
- They also want to do different activities than those available to them at home. So unless they learn about and understand the benefits of activities such as Health and Wellness, they will not be interested.

What to do to engage these tourists:

- Be present at the research phase when tourists choose a destination and what to do via online search, travel websites and magazines, hotel sites, etc. If they are not exposed to the idea, they might not consider it at all.
- Position the Caribbean experience as a relaxing getaway for couples that includes a variety of interesting activities, so they can explore and learn about the uniqueness of the region from friendly locals.
- Leverage affordability by showing how the Caribbean offers exactly what tourists are looking for at a price they are willing to pay.

CBT Connoisseurs

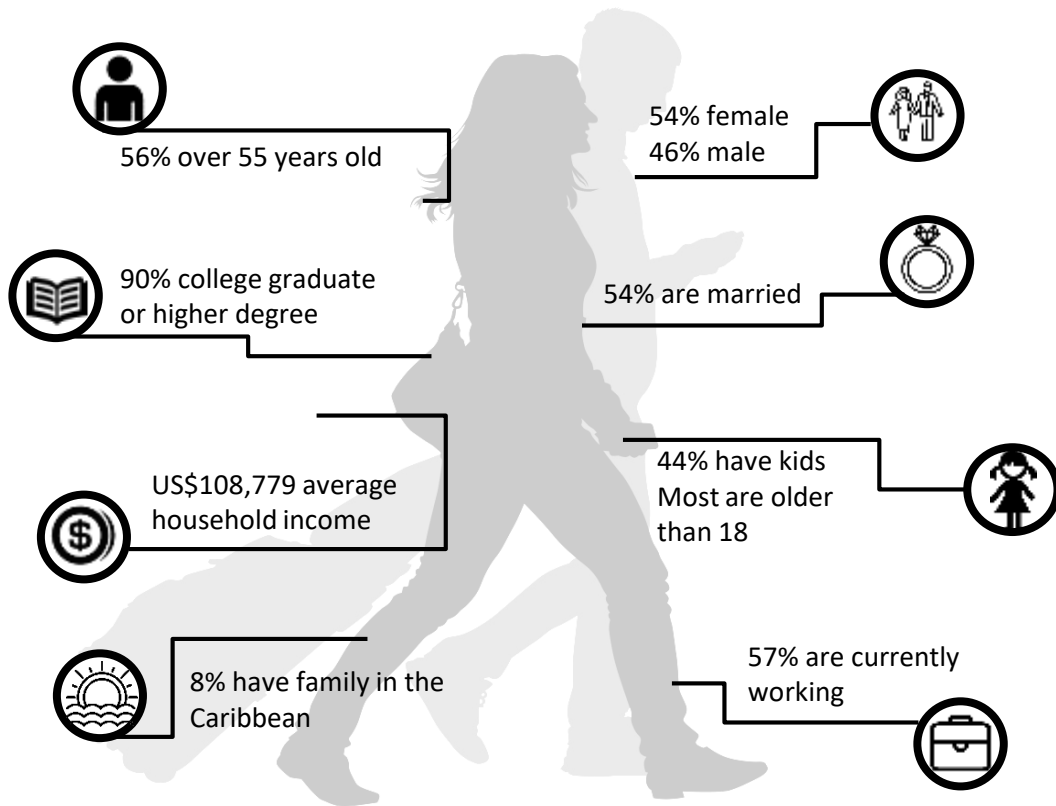
They have traveled abroad and have done CBT in the last three years

OVERVIEW OF TOURIST PROFILE

Mature adult adventurers that seek affordable learning experiences on holidays

CBT Connoisseurs

Have traveled abroad and done CBT in the last three years



General travel habits

- Vacations are times to try, see, and learn new things while in contact with nature. Although they enjoy their time at the beach, they want to experience something different and special.
- Choose their partners as main travel companions and same also friends
- Vacation planning times range from 3–12 months before the trip, mainly researching online travel sites and looking for recommendations.

About the Caribbean

- A week-long trip to the Caribbean, staying at a hotel or resort in pairs.
- Visiting the Caribbean is on their bucket list to relax on the beach, enjoying the tropical weather and at a reasonable price.
- As more experienced CBT tourists, they would choose the Caribbean to hang out with locals and learn about their traditions and culture.

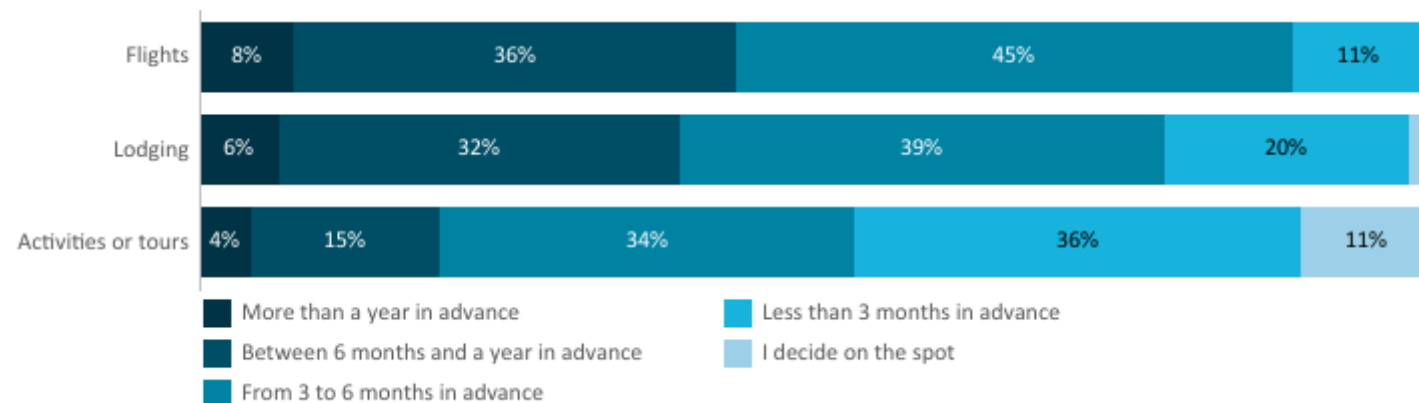
About Community-Based Tourism

- Higher familiarity with CBT but have some difficulties with its definition, They might not be aware they have done activities that are considered CBT.
- Would consider doing CBT as they highly enjoy it as a learning experience that is unique to the Caribbean where they can interact with locals.
- Agro and food CBT are the preferred activities to do in the Caribbean.

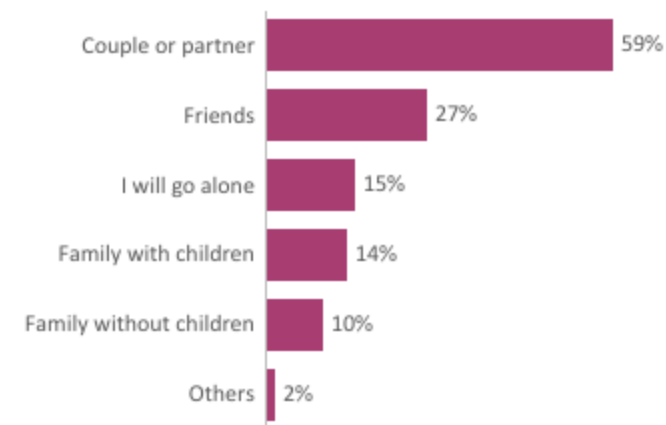
TRAVEL HABITS OF TOURISTS

Generally travel accompanied by their partners but some also choose their friends

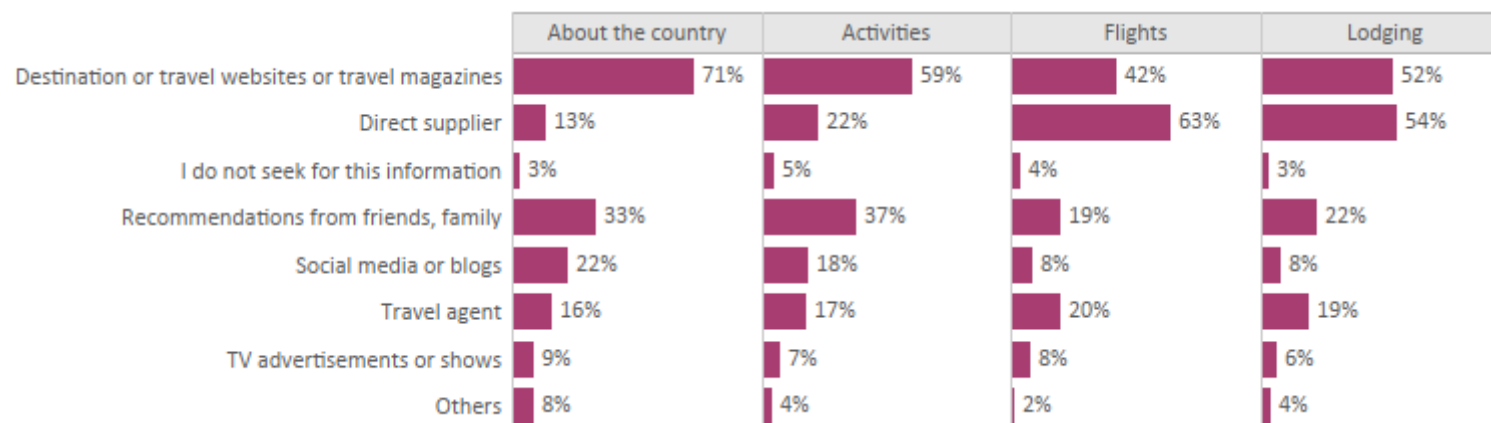
How far in advance they normally plan for the following:



Most frequent travel companions



Where they search for information about the following:



- The planning stage of the trip is important, it can start a year before the departure to select the right destination and to get the best price on hotels and transportation.
- They are likely to collect as much information as possible and consult diverse sources, starting with more generalist travel websites and listening carefully to the recommendations from acquaintances and bloggers/influencers that have been there before.

TRAVEL HABITS OF TOURISTS

Enjoy a more active vacation at destination that offers wide range of activities

Main attractions sought after in a vacation abroad



- Although tourists enjoy spending time at the beach, they are less interested in spending a their whole stay without experiencing other activities.
- They will try to find a good number of activities (e.g. cultural attractions, local restaurants, archeological sites, Heritage Sites, etc.) that are affordable and in line with their budget.

Main factors when deciding on the destination



- Although cost is the main factor when deciding on the destination, tourists look at a wide range of factors during the planning stage.
- They seek different experiences from what they can find back home, and local learning opportunities.
- Feeling safe is also among their top priorities.

EXPERIENCE AND INTEREST IN VACATIONS IN THE CARIBBEAN

144

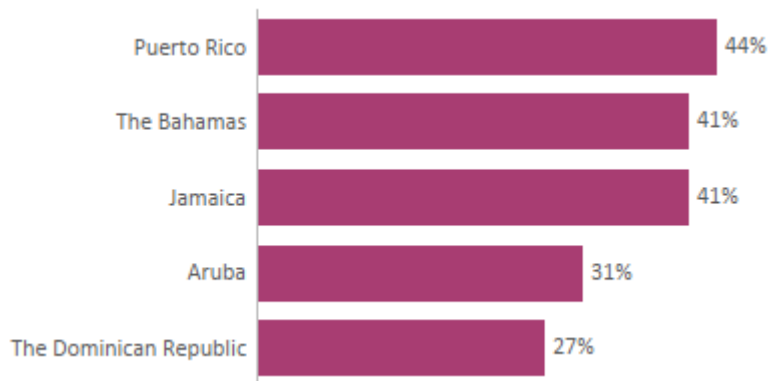
2

Tourists also appreciate some time off at Caribbean beaches to relax and unwind

42%

Have traveled to the Caribbean for leisure in the last three years

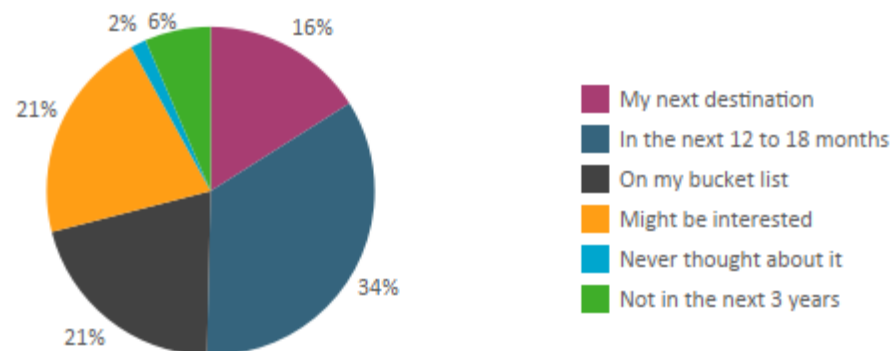
Top 5 destinations visited in the Caribbean



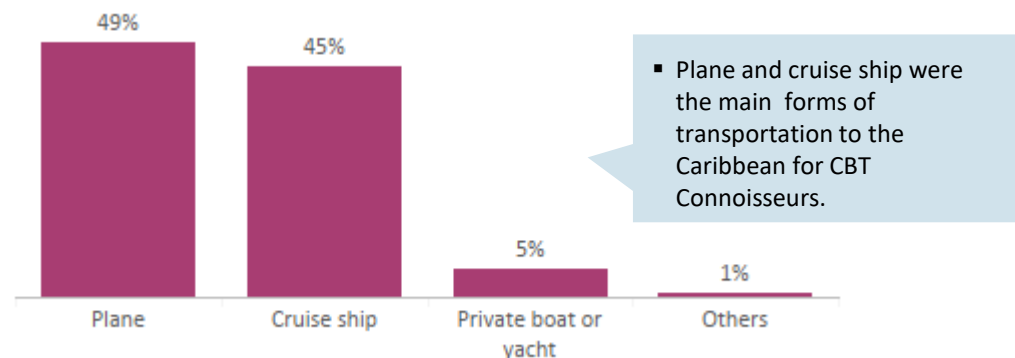
- The majority have not been in the Caribbean and would consider it.
- They perceive it as a beach destination that benefits from the tropical weather making their beaches a pleasant place to visit; it is also affordable and there are several options to get there.

92%

Would consider traveling to the Caribbean for leisure

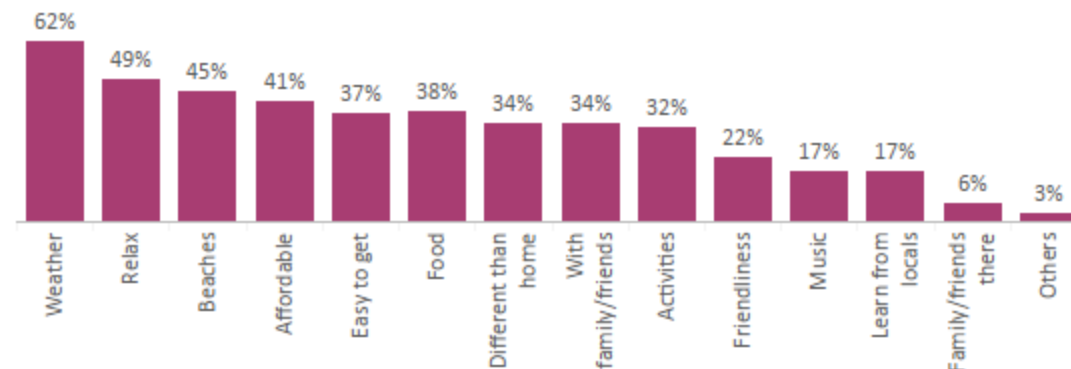


How tourists have traveled to the Caribbean



- Plane and cruise ship were the main forms of transportation to the Caribbean for CBT Connoisseurs.

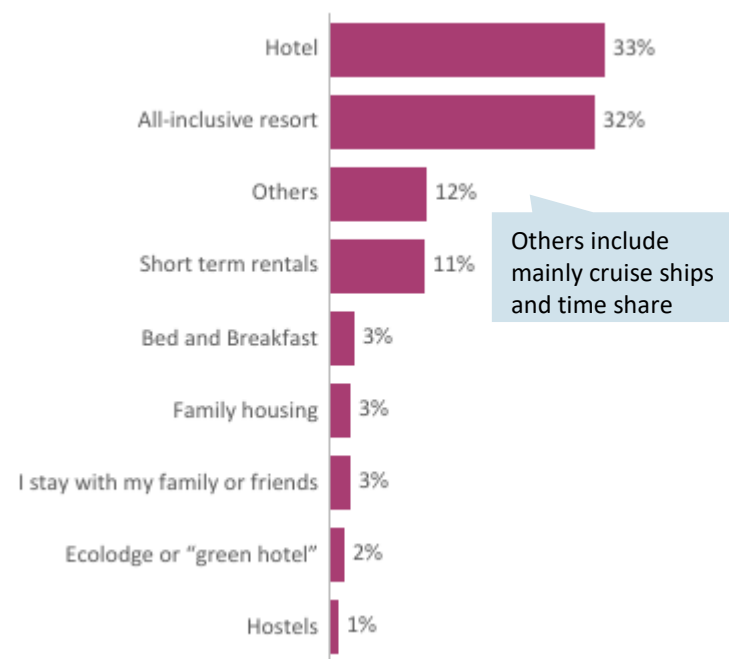
Why tourists would consider the Caribbean as a travel destination



VACATION PLANNING IN THE CARIBBEAN

Weeklong beach vacation to spend time with locals and stay at a hotel or resort

Preferred accommodation in the Caribbean



58% choose their **partner** to accompany them on vacation in the Caribbean

49% stay in the Caribbean for 1 week

Top 3 activities selected in the Caribbean

69% Beach Tourism

52% Socialize with Locals

37% Cruise Tourism

- CBT Connoisseurs are not as familiar with the broad range of what the Caribbean has to offer. They know of it from online, or friends or family, and define the Caribbean by its beaches.
- They are naturally curious and enjoy interacting with locals to have a unique experience as seen from the perspective of people from the community.
- If they are educated about the CBT opportunities in the Caribbean, they will be more willing to do these activities during their next (or first) visit to the region.

Individual budget



- Most travelers (71%) are willing to spend **up to US\$900** on transportation (flight or cruise) to the Caribbean.



- 58% of tourists estimate they spend **no more than US\$50 daily** on local transportation; some might consider staying at a hotel and not spending money on transportation.



- The budget for lodging averages **US\$187 per night** and 63% estimate they spend less than US\$200 per night.



- The majority (63%) assign **less than US\$100 daily** for activities and tours in the destination country in the Caribbean.



- 68% of travelers are willing to spend **up to US\$75 daily** on meals and the average daily budget for meals is US\$60.

TOURIST FAMILIARITY WITH AND INTEREST IN CBT IN THE CARIBBEAN

146

2

Have done CBT but might not be aware of it, as they have not heard of this term

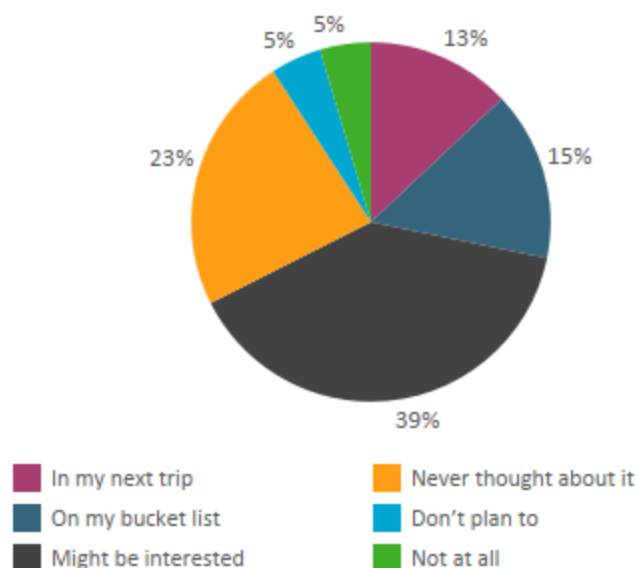
30%

are familiar with CBT

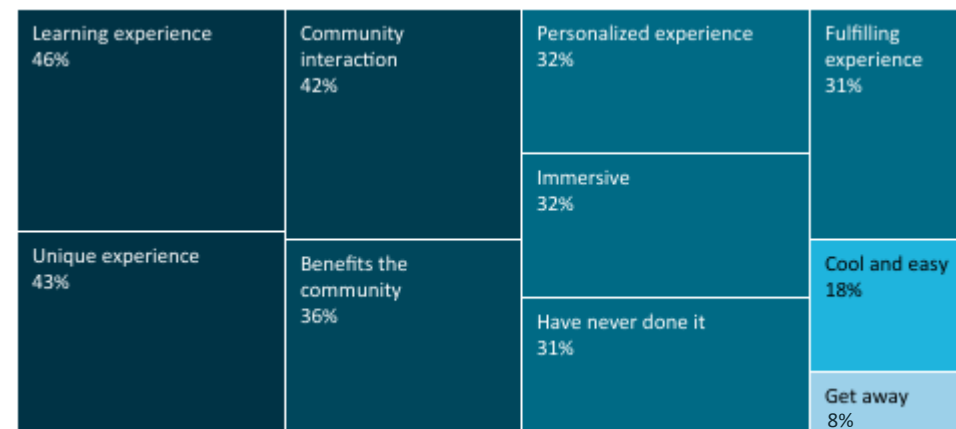
- Almost a third knows or has heard about CBT.
- 39% of tourists believe it refers to local communities that guide tourists to explore the area they are visiting.
- They also think CBT means engaging with people in the community while on vacation (35%) and celebration of the community traditions, culture, rituals, music, and wisdom (31%).
- 16% could not choose a specific definition and said they did not know.

90%

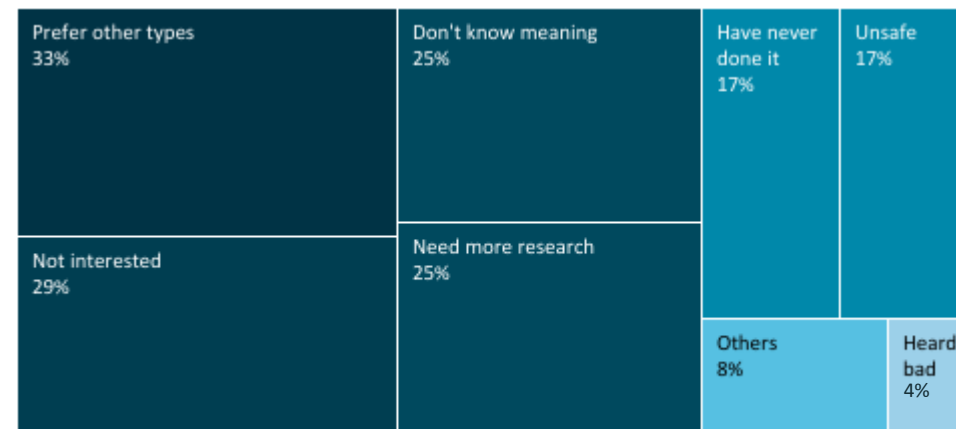
would be interested in doing CBT in the Caribbean



Why tourists would consider doing CBT in the Caribbean (90%)



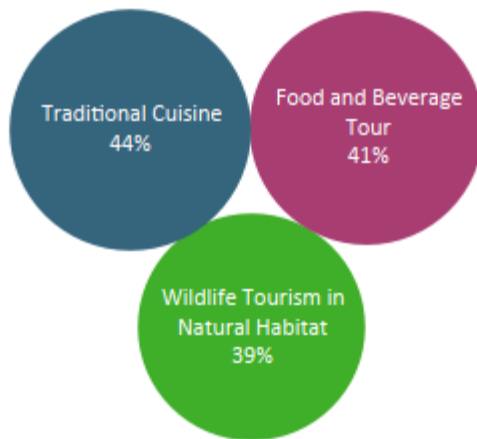
Why tourists would not consider doing CBT in the Caribbean (10%)



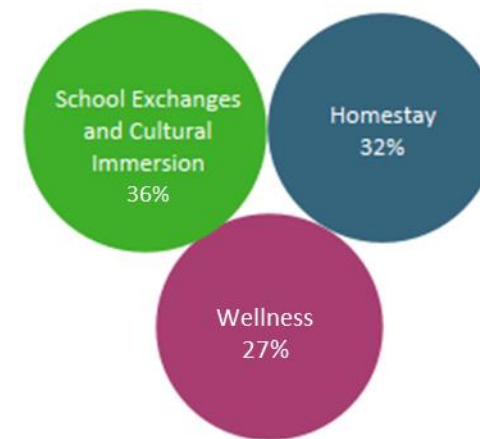
CBT ACTIVITIES IN THE CARIBBEAN

Show higher interest in add-on activities in which they can learn and have interactions

Top 3 most appealing CBT activities selected by tourists



Top 3 least appealing CBT activities selected by tourists



High potential for doing CBT in the Caribbean

- Travelers show high interest in visiting the Caribbean. They want their vacation to combine time relaxing at the beach with visiting local attractions to learn more about the destination.
- Their interest is broad as they seek to combine visits to historic and cultural attractions, museums, local sites and try local food at authentic restaurant while interacting with locals. These are all activities that are part of CBT without them being aware of it.
- If they receive more exposure to the term CBT, they might decide to do it as part of their next trip to the Caribbean.

What to do to engage these tourists:

- Promote by highlighting the value for price of the CBT Caribbean offer:
 - Show them the wide variety of add-on activity options to complement beach activities during their Caribbean vacation.
 - Position them as authentic experiences in which tourists can live something different from home and get firsthand exposure to unique and local practices which they learn directly from the community.
- Have online presence when travelers do their research since the planning stage starts early and has a major impact on destination choice.

Guyanese in the Diaspora

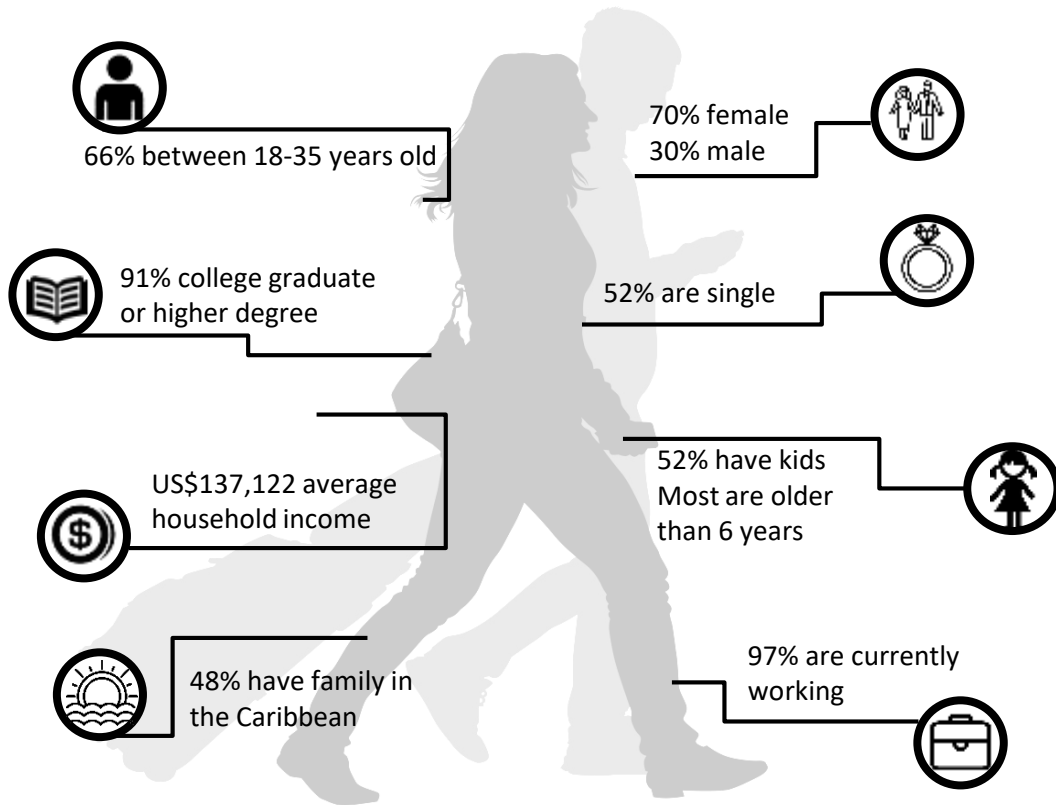
They have Guyanese heritage but live in the US and travel to the Caribbean

OVERVIEW OF TOURIST PROFILE

Young, extroverted, and single tourists who want excitement and to meet new people

Guyanese in the Diaspora

Have Guyanese heritage but live in the US and travel to the Caribbean



General travel habits

- Curious and adventurous by nature, they enjoy traveling alone, being in contact with nature, and meeting new people when they travel abroad.
- Wide range of interests, as they have traveled around the Americas and Europe, and some have also been to Africa and Asia.
- Are likely to travel solo, and rely on travel sites and recommendations.

About the Caribbean

- The Caribbean is among their top vacation destinations to enjoy the unique beaches, tropical weather and local food that 'feels like home'.
- They either go alone or with a partner for a week or two and choose to stay either at a hotel or resort; some would consider family housing.
- Choose a mix between Beach Tourism and Get in touch with local culture.

About Community-Based Tourism

- Are familiar with CBT and are strongly considering it for their next trip because they are always looking for fulfilling and unique experiences.
- Most of them have already done CBT activities either in the Caribbean or in other regions, and they prefer to combine a variety of local experiences such as local cuisine, Festivals, wildlife tourism, and Wellness.

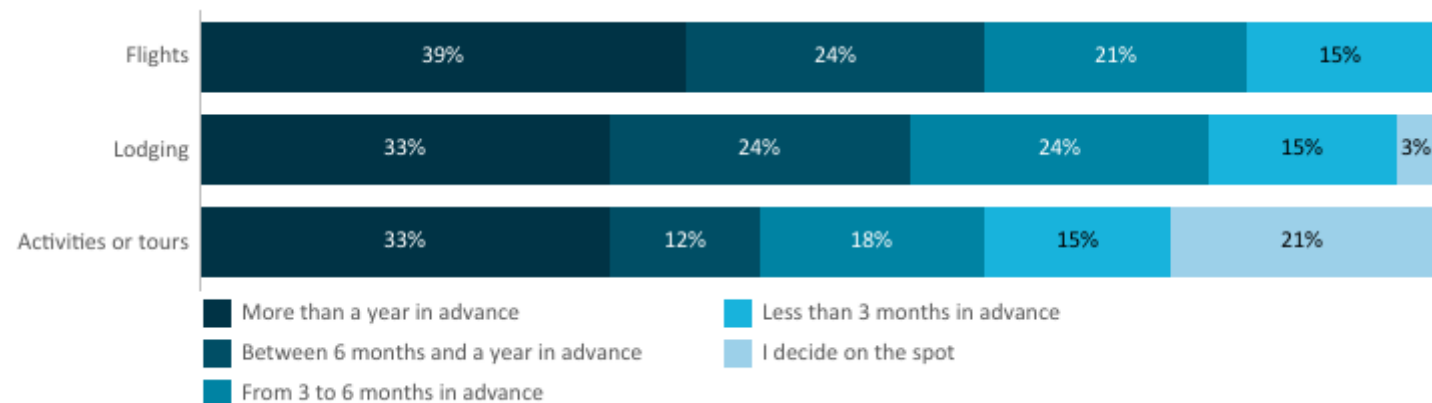
TRAVEL HABITS OF TOURISTS

150

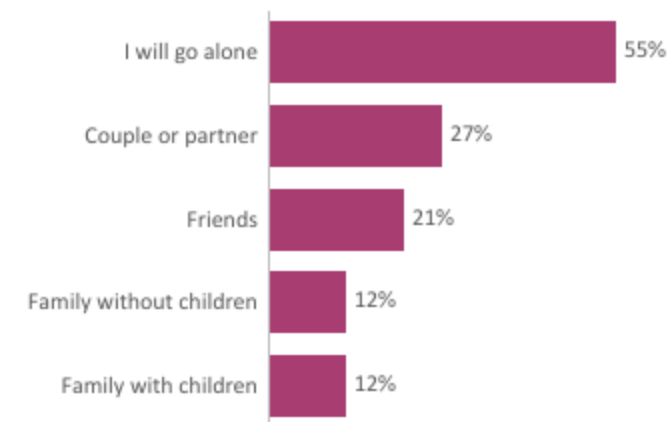
3

They choose to explore new destinations alone but also enjoy traveling with friends

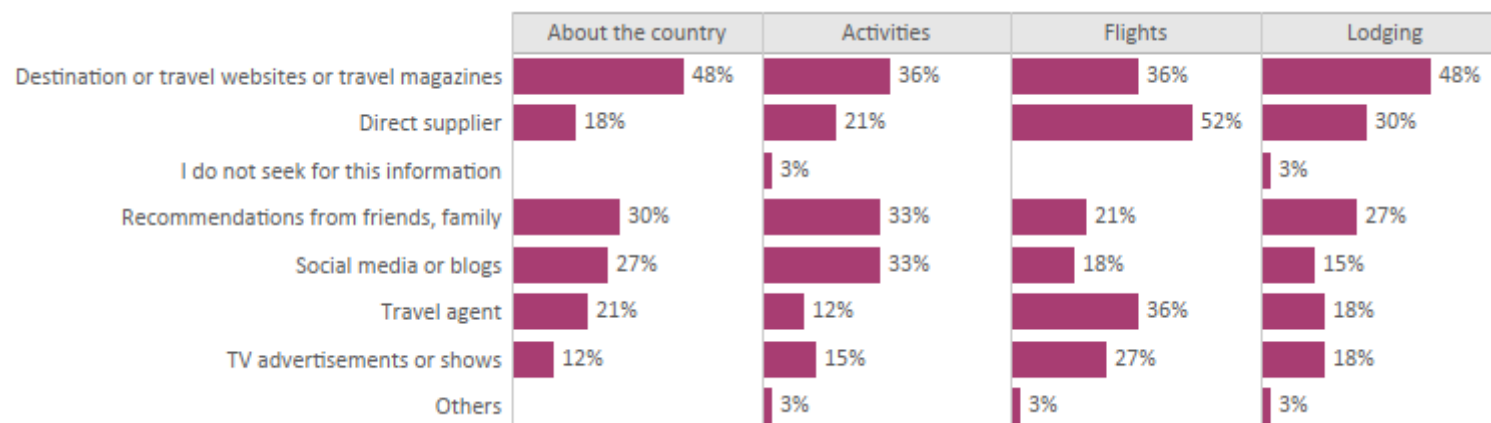
How far in advance they normally plan for the following:



Most frequent travel companions



Where they search for information about the following:

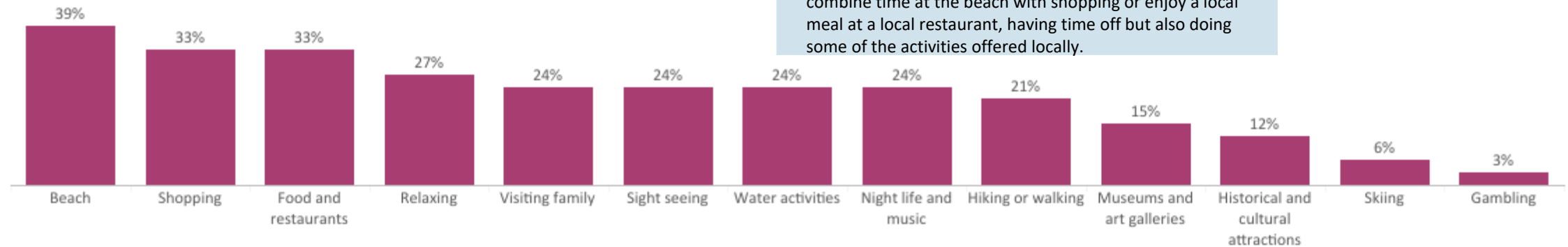


- The planning stage is variable. Some plan for more than a year while others are more spontaneous and take less than 3 months, or even decide what activities to do on the spot.
- They consult a wide variety of sources, especially to get the best deals on flights.
- Although their main sources are travel websites and magazines, they are more likely to rely on social media, and recommendations from acquaintances.

TRAVEL HABITS OF TOURISTS

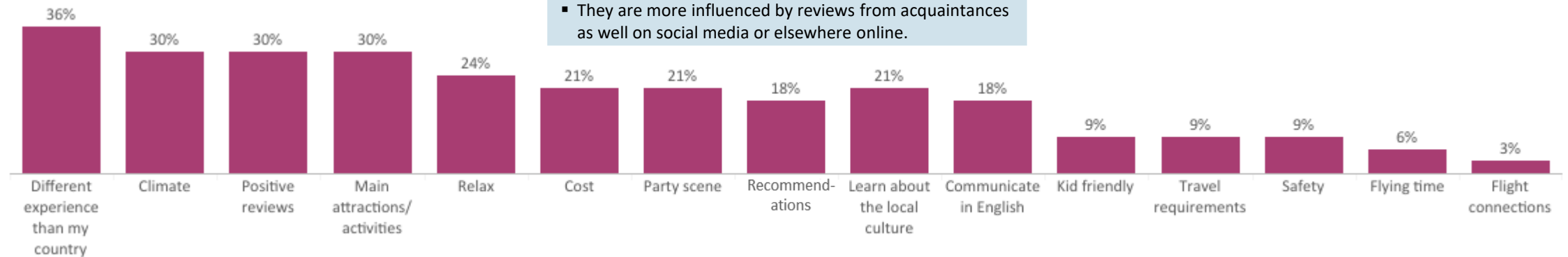
Destination selection depends on activities, as they have to be fresh and different

Main attractions sought after in a vacation abroad



- Beach Tourism slightly stands out but tourists look for diverse activities when they travel for leisure.
- They have 'hunger for full-on' experiences where they can combine time at the beach with shopping or enjoy a local meal at a local restaurant, having time off but also doing some of the activities offered locally.

Main factors when deciding on the destination



- They are less price-driven than other tourists.
- However, determining the destination requires research to understand different aspects such as the climate, and what is offered.
- They are more influenced by reviews from acquaintances as well on social media or elsewhere online.

EXPERIENCE AND INTEREST IN VACATIONS IN THE CARIBBEAN

152

3

Almost everybody wants to return to Caribbean and maybe visit a different country

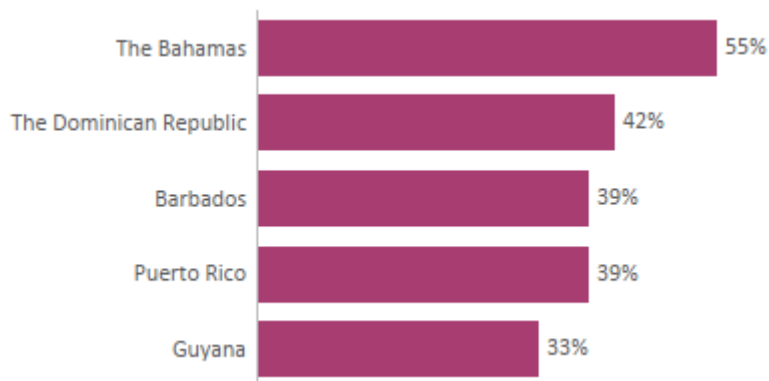
100%

Have traveled to the Caribbean for leisure in the last 3 years

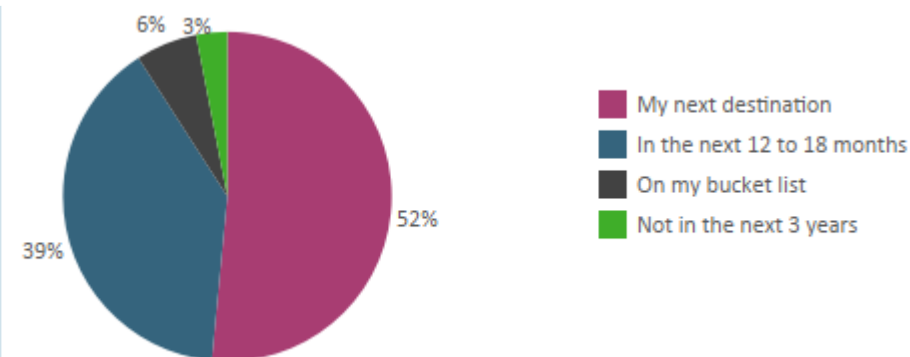
97%

Would consider traveling to the Caribbean for leisure

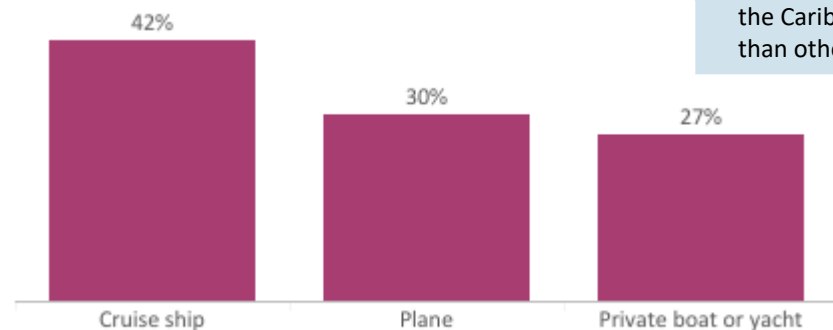
Top 5 destinations visited in the Caribbean



- Tourists are planning to return to enjoy the beaches and the tropical weather, especially when it is winter time at home.
- They can also take advantage of the wide variety of authentic, diverse, and exciting experiences that the region offers.

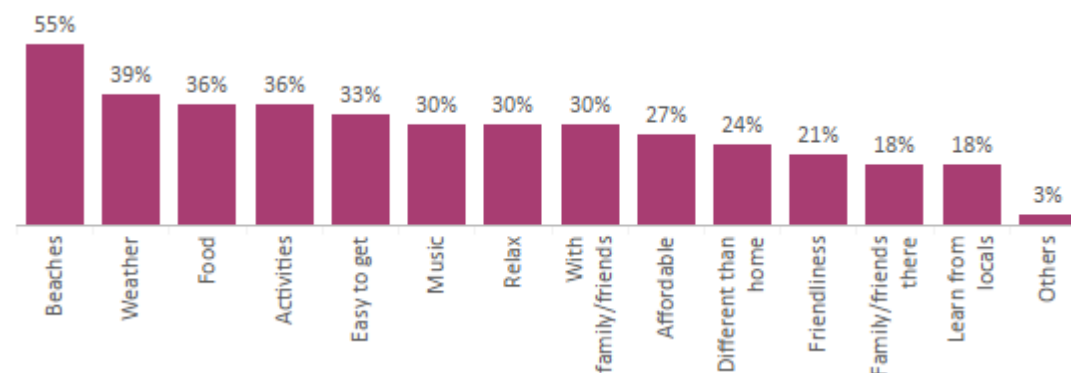


How tourists have traveled to the Caribbean



- More tourists have been to the Caribbean in private boats than other travelers.

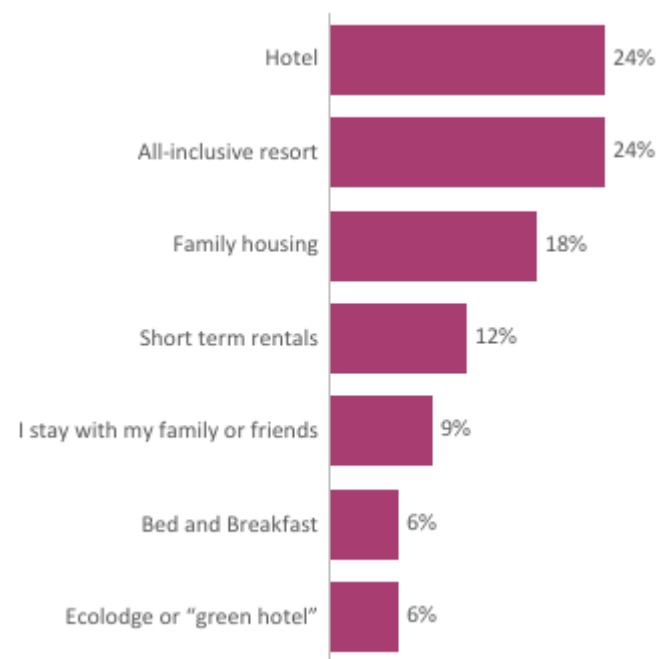
Why tourists would consider the Caribbean as a travel destination



VACATION PLANNING IN THE CARIBBEAN

2 weeks exploring Caribbean, enjoying beaches and socializing with locals

Preferred accommodation in the Caribbean



42% prefer to go alone on vacation in the Caribbean

75% stay in the Caribbean for 1 or 2 weeks

Top 3 activities selected in the Caribbean

61% Beach Tourism

45% Socialize with Locals

42% Music Festivals, carnivals, and spiritual or health tourism

- Beach Tourism in the Caribbean is attractive for most Guyanese but they are mostly interested in experiencing other types of activities.
- CBT is a good fit for these travelers as they can experience something different than what is available at home, with the opportunity to meet and engage with new people.
- Moreover, a higher household income is also reflected in a higher individual budget for vacations in the Caribbean compared to the Caribbean Explorers and CBT Connoisseurs.

Individual budget



- Most travelers (70%) are willing to spend **up to US\$900** on transportation (flights or cruise) to the Caribbean



- 64% of tourists estimate they spend **no more than US\$50 daily** on local transportation; some might consider staying at a hotel and not spending money on transportation.



- The budget for lodging averages **US\$185 per night** and 63% estimate they spend between US\$100-300 per night.



- The majority allocate **less than US\$100 daily** for activities and tours in the destination country in the Caribbean.



- 64% of travelers are willing to spend **up to US\$75 per day** on meals, and the average daily budget for meals is US\$60.

TOURIST FAMILIARITY WITH AND INTEREST IN CBT IN THE CARIBBEAN

154

3

Higher exposure to CBT increases number of tourists interested in doing it

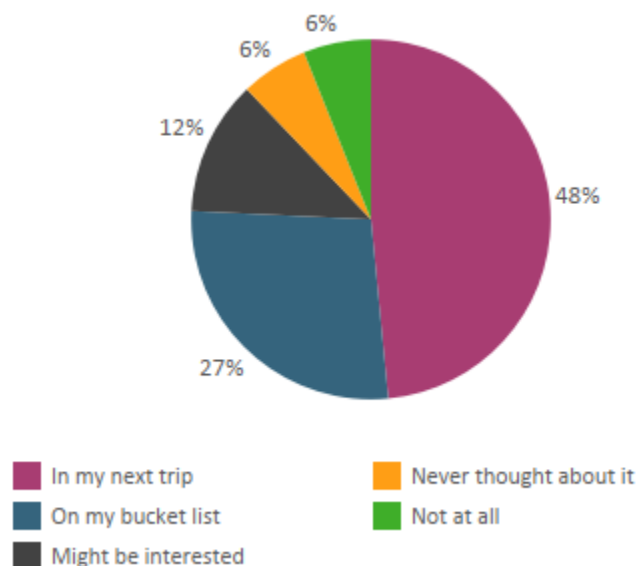
58%

are familiar with CBT

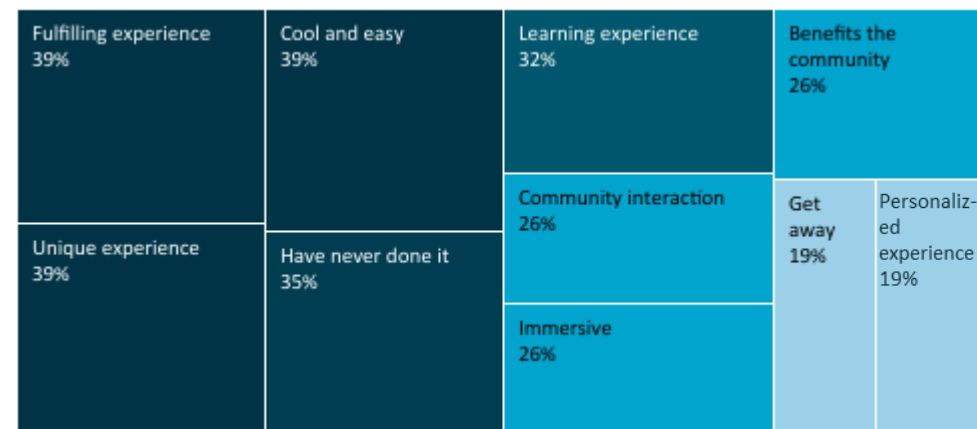
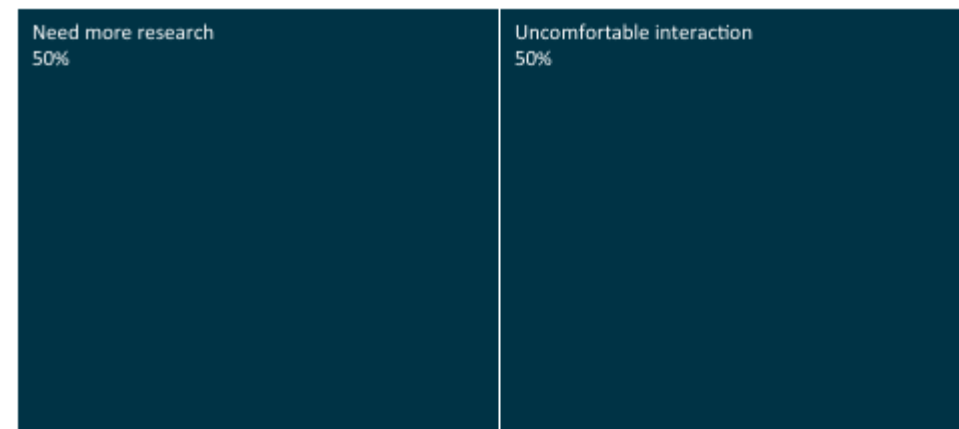
- The majority knows about the term CBT and/or has experience doing CBT.
- Overall, tourists agree that CBT combines the concept of local communities guiding tourists to explore the area they are visiting (39%) that may also provide accommodations for tourists (36%) and is an activity that celebrates community traditions, culture, rituals, music, and wisdom (33%).
- Only 6% could not choose a specific definition.

94%

would be interested in doing CBT in the Caribbean



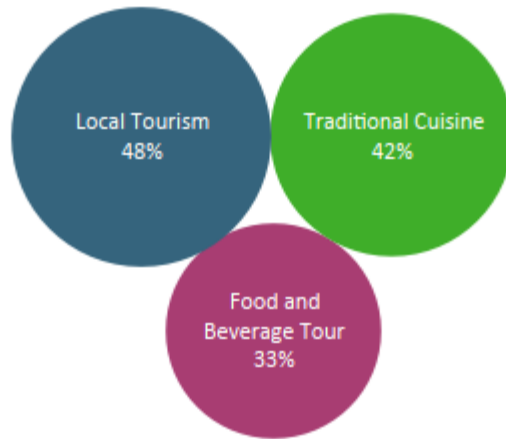
Why tourists would consider doing CBT in the Caribbean (94%)

Why tourists would not consider doing CBT in the Caribbean (6%)

CBT ACTIVITIES IN THE CARIBBEAN

CBT activities selected should be unique to region or different from those at home

Top 3 most appealing CBT activities selected by tourists

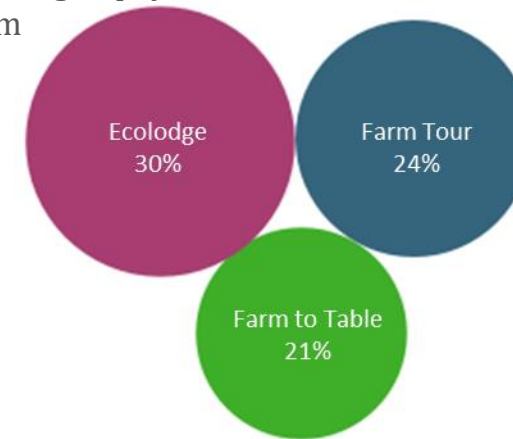


Ideal segment to engage in CBT activities

- Tourists plan their vacation around the attractions and activities at the destination that they find authentic, making them attracted to CBT than the other two segments.
- Overall, they show interest in most of the CBT activities and that is why their top choice is Local Tourism. However, some of them are also foodies and enjoy the local food and Traditional Cuisine available in the region.
- They enjoy being in contact with nature, but Ecolodge is their least favorite activity since they prefer staying at an all-inclusive resort instead.

Top 3 least appealing CBT activities selected by tourists

- Travelers are willing to pay more than double for multiple attributes for Local Tourism



What to do to engage these tourists:

- Promote the activities by leveraging their authenticity and the advantage of doing them in the Caribbean, as well as the opportunity to interact and meet young locals to experience their culture, music and food together.
- These tourists are already interested in visiting the Caribbean, so appeal to them by highlighting Local Tourism, adding CBT activities into a 1 or 2 week immersive experience at a price point they find acceptable.
- Encourage positive word-of-mouth by promoting online reviews by travelers, bloggers, influencers and direct suppliers.

SCORECARD

Scorecard used to assess CBT activities in the Caribbean

#	Category	Price range	Number of businesses	Community involvement	Employment potential	Interest/ Popularity (US)	Capacity in the Caribbean	Score
1	Local Tourism	100-2000+	100+	High	High	High	High	5.00
2	Food and Beverage Tour	30-1200	26-100	High	High	High	High	4.70
3	Homestay	35-110	100+	High	Mid	High	High	4.50
4	School Exchanges and Cultural Immersion	1000-2000+	1-25	High	High	High	High	4.40
5	Traditional Cuisine	10-15	100+	High	Mid	High	High	4.40
6	Farm to Table	25-110	26-100	High	High	High	Mid	4.20
7	Volunteer with Local Experience	800-2000+	1-25	High	High	Mid	High	4.00
8	Indigenous Tourism	30-110	1-25	Mid	Mid	High	High	3.50

SCORECARD

Scorecard used to assess CBT activities in the Caribbean

#	Category	Price range	Number of businesses	Community involvement	Employment potential	Interest/ Popularity (US)	Capacity in the Caribbean	Score
9	Traditional Health and Wellness	30-250	1-25	Mid	Mid	High	High	3.50
10	Ecolodge	80-1200	100+	Mid	Mid	Mid	Mid	3.40
11	Heritage Site	2-300	26-100	Mid	Mid	Mid	High	3.40
12	Farm Tour	20-150	26-100	High	Mid	Mid	Mid	3.40
13	Wellness	20-40	1-25	Mid	Mid	High	High	3.40
14	Festival	NA	1-25	High	Mid	High	Mid	3.40
15	Wildlife Tourism in Natural Habitat	0-100	26-100	Mid	Mid	Mid	High	3.30

SCORECARD

Scorecard used to assess CBT activities in the Caribbean

#	Niche Markets	Price range	Number of businesses	Community involvement	Employment potential	Interest/ Popularity (US)	Capacity in the Caribbean	Score
16	Religious Tourism	40-2000+	1-25	Mid	Mid	Mid	High	3.20
17	Caving	40-160	1-25	Mid	Mid	Mid	High	3.10
18	Waterbased Tours	12-450	1-25	Mid	Mid	High	Mid	3.10
19	Hiking/Trekking	0-2000+	26-100	Mid	Mid	Mid	Mid	3.10
20	Holistic medicine/alternative treatments and therapies	20-150	1-25	Mid	Mid	High	Mid	3.10
21	Wildlife Tourism in Non-Natural Habitat	0-200	26-100	Mid	Mid	Mid	Mid	3.00
22	Cooking Class	25-160	26-100	Mid	Mid	Mid	Mid	3.00

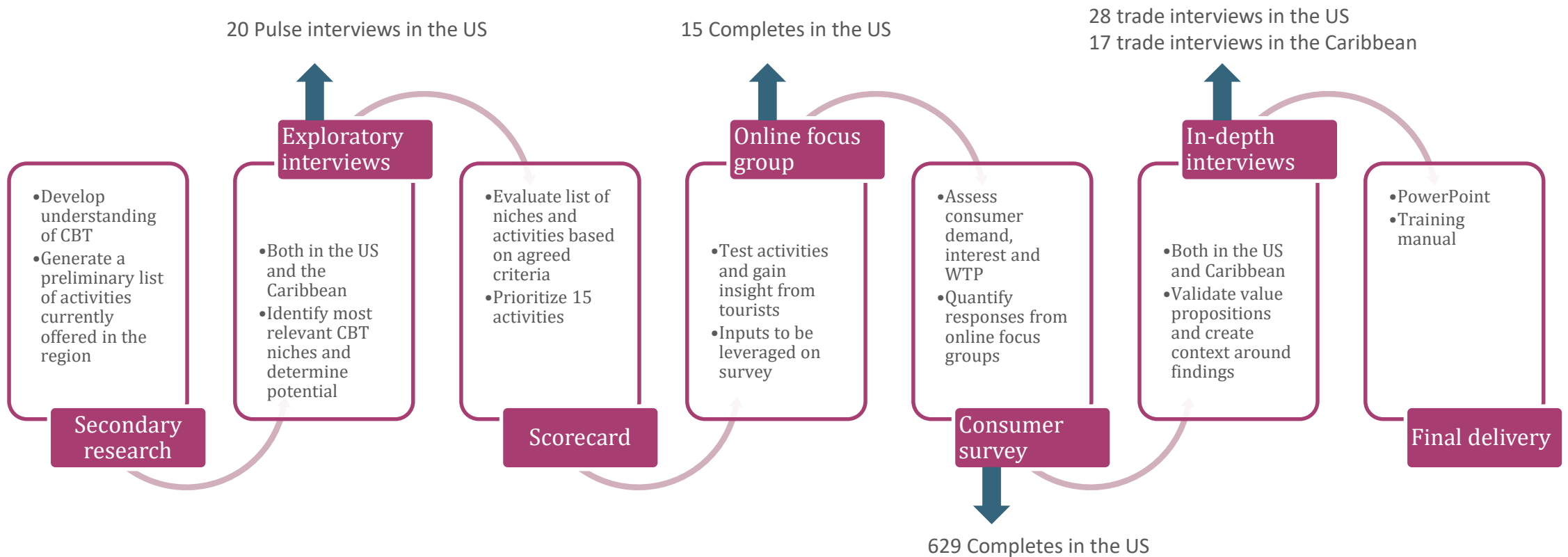
SCORECARD

Scorecard used to assess CBT activities in the Caribbean

#	Niche Markets	Price range	Number of businesses	Community involvement	Employment potential	Interest/ Popularity (US)	Capacity in the Caribbean	Score
23	Waterbased Activities	30-300	26-100	Low	Low	High	High	3.00
24	Cultural Classes	20-100	26-100	Mid	Mid	Mid	Mid	2.90
25	Markets	0-65	26-100	High	Low	Mid	Mid	2.90
26	Museum	0-10	26-100	Mid	Mid	Low	Mid	2.50
27	School Visit	1000-2000+	1-25	Mid	Low	Mid	Mid	2.40
28	Spiritual Experiences	100+	1-25	Low	Mid	Mid	Mid	2.20
29	Garden Tour	20-80	26-100	Low	Low	Low	Low	1.30
30	Horse Riding	15-45	1-25	Low	Low	Low	Low	1.00

ABOUT THE PROJECT

Step-by-step project methodology



SOURCES

List of Pulse and trade interviews by country

#	Country/Region	Type	Organization Name
1	Antigua and Barbuda	In-depth	Ministry of Tourism
2	Barbados	In-depth	Good Fortune Travel
3	Belize	In-depth	Belize Ministry of Tourism and Civil Aviation
4	Caribbean	In-depth	UN Economic Commission for Latin America and the Caribbean
5	Caribbean	In-depth	University of West Indies
6	Dominica	In-depth	Discover Dominica Authority (Ministry of Tourism, Economic Development, Investments and Energy)
7	Dominican Republic	In-depth	Colonial Tours
8	Grenada	In-depth	Belmont Plantations and Agritourism
9	Guyana	In-depth	Guyana Tourism Authority
10	Jamaica	In-depth	Hilton Rose Hall Jamaica
11	Jamaica	In-depth	Island Routes Caribbean Adventures
12	Jamaica	In-depth	Tour Ocho Rios
13	Saint Vincent and the Grenadines	In-depth	Ministry of Tourism
14	St Martin and Caribbean	In-depth	Nature Eco NGO
15	St. Lucia	In-depth	My Kind of Travel
16	St. Lucia	In-depth	Tourism
17	Trinidad and Tobago	In-depth	World Travel Net

SOURCES

List of Pulse and trade interviews by country

#	Country/Region	Type	Organization Name
18	US	In-depth	Allways Travel
19	US	In-depth	Apple Vacations
20	US	In-depth	Caribbean Journey
21	US	In-depth	Carnival Cruises
22	US	In-depth	Casa del Caballo Blanco Eco Lodge
23	US	In-depth	Custom Escapes
24	US	In-depth	Discover Corps
25	US	In-depth	Earthwatch Conservation
26	US	In-depth	Elevate Destinations
27	US	In-depth	Fox Travel
28	US	In-depth	Frontier Gap
29	US	In-depth	Funjet Vacations
30	US	In-depth	G Adventures
31	US	In-depth	Global Leadership Adventures
32	US	In-depth	Go Beyond Travel
33	US	In-depth	Intrepid Travel
34	US	In-depth	Jamaican Volunteer Program
35	US	In-depth	Mountain Sobek
36	US	In-depth	NTTO
37	US	In-depth	Princess Cruise
38	US	In-depth	Royal Caribbean Cruises
39	US	In-depth	Short Term Missions
40	US	In-depth	Travel Leaders
41	US	In-depth	Tropical Sands
42	US	In-depth	Tropical Sands
43	US	In-depth	Tucan Travel
44	US	In-depth	Under 30
45	US	In-depth	Wild Frontiers

SOURCES

List of Pulse and trade interviews by country

#	Country/Region	Type	Organization Name
46	Antigua and Barbuda	Pulse	Ministry of Tourism, Economic Development, Investment and Energy
47	Guyana	Pulse	Department of Tourism, Ministry of Business
48	Jamaica	Pulse	Ministry of Tourism
49	Trinidad and Tobago	Pulse	UN Economic Commission for Latin America and the Caribbean
50	US	Pulse	Allara Travels
51	US	Pulse	Broad Reach Travels
52	US	Pulse	Carnival Cruises
53	US	Pulse	Classic Vacations
54	US	Pulse	Come Travel Today
55	US	Pulse	Connoisseur Travels
56	US	Pulse	Elevate Travel Destinations
57	US	Pulse	Ferraro World Travel
58	US	Pulse	Fox World Travels
59	US	Pulse	Get up and Go Travel
60	US	Pulse	Global Works Travel
61	US	Pulse	Grow with Special Events
62	US	Pulse	Princess Caribbean Cruises
63	US	Pulse	Princess Caribbean Cruises
64	US	Pulse	Royal Caribbean Cruises
65	US	Pulse	Templeton Tours
66	US	Pulse	Travel Leader Network
67	US	Pulse	Travel Leaders Network
68	US	Pulse	Travel Leaders Network Associate Agency
69	US	Pulse	Windstar Cruises
65	US	Pulse	Zensational Journeys

ABOUT EUROMONITOR INTERNATIONAL

Who is Euromonitor International



Our Services

- Syndicated Market Research
- Custom Research and Consulting

Expansive Network

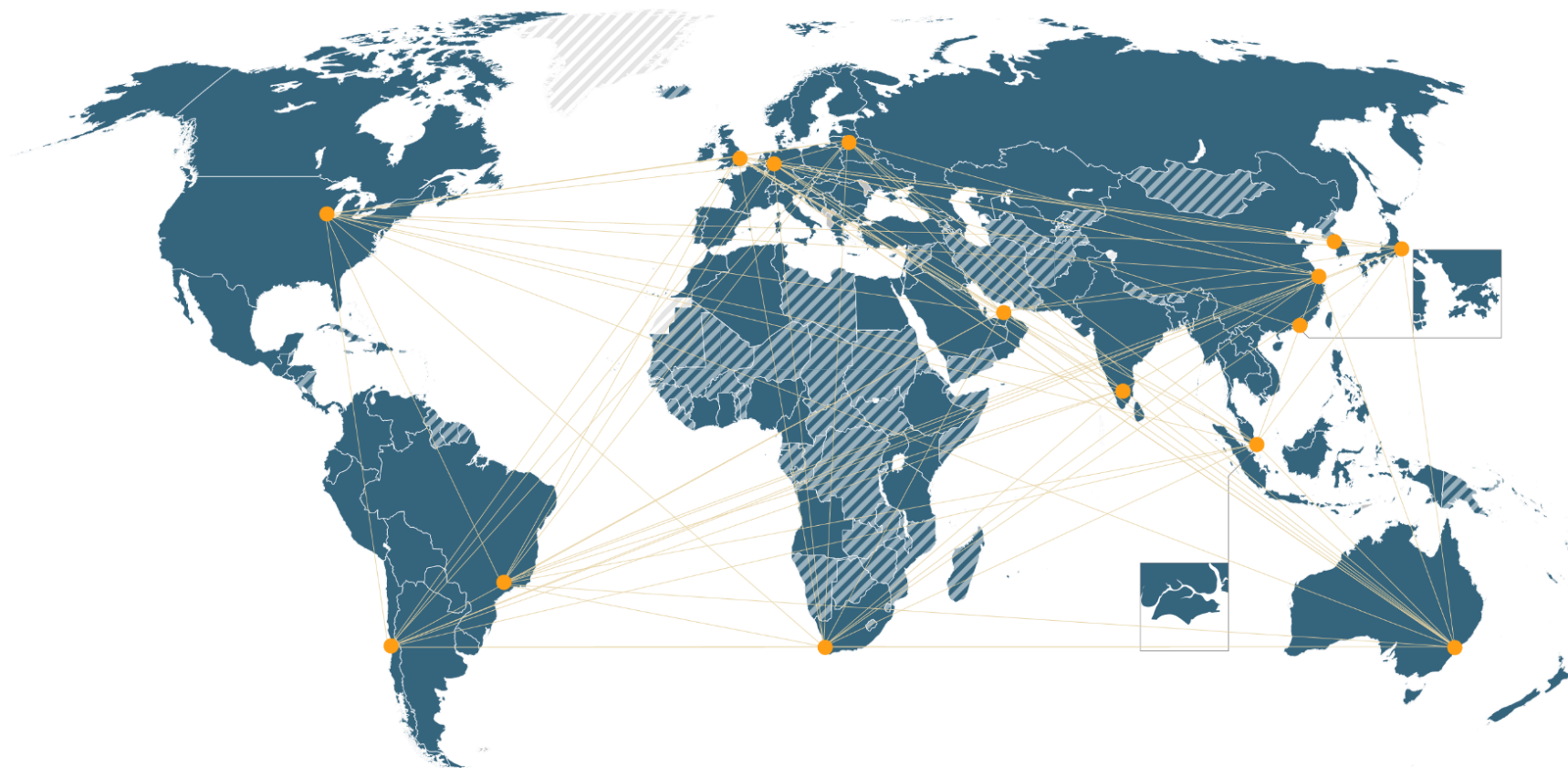
- On the ground researchers in 80 countries
- Complete view of the global marketplace
- Cross-comparable data across every market

Our Expertise

- Consumer trends & lifestyles
- Companies & brands
- Product categories & distribution channels
- Production & supply chains
- Economics & forecasting
- Comparable data across markets

ABOUT EUROMONITOR INTERNATIONAL

Euromonitor International Network



15 OFFICE LOCATIONS

London, Chicago, Singapore, Shanghai, Vilnius, Santiago, Dubai, Cape Town, Tokyo, Sydney, Bangalore, São Paulo, Hong Kong, Seoul and Düsseldorf

100 COUNTRIES

in-depth analysis on consumer goods and service industries

210 COUNTRIES AND TERRITORIES

demographic, macro- and socio-economic data on consumers and economies

