

# Diversification of Caribbean Tourism Experience

## Training Manual



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## NOTES

Welcome to the training manual for the final PowerPoint deliverable covering Community-Based Tourism in the Caribbean.

This training manual mirrors the structure of the PPT. It is organized by the main sections on the PPT, and refers to the number of the slide as well as the description to facilitate its reading.

# 1. INTRODUCTION

## Slide 3 About the project

This slide briefly reviews:

- The scope of the study: categories included as well as geographies (on the left)
- Project background and main drivers
- Main objectives and expected outcomes
- Solution provided by Euromonitor International and deliverables

## Slide 4 Definition

Definitions of Community-Based Tourism as provided by Caribbean stakeholders.

## Slide 5 Activity selection process

In order to determine what activities to focus on and conduct in-depth analysis, a selection process was required.

- From a total of 30 different activities, the top 15 were selected by creating a scorecard with different metrics (in agreement with CTO and Compere) as well as weights based on importance that ranked the 30 activities.
- Beach tourism was also added, as it is a relevant activity in the Caribbean, and to compare the offering with the other CBT activities selected.

## Slide 6 Activity definitions

Summarizes the definitions by activity, as well as the logo that represents each activity and repeated throughout the report.

## Slide 7 Activity definitions (Cont'd)

Summarizes the definitions by activity that were used as well as the logo that represents each activity and is repeated throughout the report.

## 2. EXECUTIVE SUMMARY

### Slide 8 Introduction

The executive summary highlights elements of the project process, and highlights research findings, including willingness to pay, for activities with the greatest potential.

### Slide 9 Methodology for Evaluating CBT Activities

This slide summarizes steps of the project process used to identify CBT activities with the greatest potential in the Caribbean.

Left side of slide:

- The scorecard used six criteria to evaluate and rank many CBT activities.
- The scorecard for the top 15 ranking activities that were further evaluated are detailed in the appendix.

Right side of slide:

- Consumer survey results helped determine activities of greatest US interest.
- Thus, upon analysis, four activities were identified as greatest potential for a high level of Caribbean benefit and high level of interest among US tourists.

\*Note: Methodology is further detailed on the 'About the Project' slide (#160)

### Slide 10 Willingness to Pay for High-Benefit and High-Interest CBT Activities

This slide details willingness to pay (WTP) for the top four activities based on the respondents that selected the activity (total survey respondents: 629).

### Slide 11 Additional Insights About the Caribbean

This slide highlights additional insights relevant for MSMEs in the Caribbean.

### Slide 12 General US Tourist Overview

This slide helps understand the US tourist's awareness of and participation in CBT activities based on the survey.

### 3. COMMUNITY-BASED TOURISM ACTIVITIES

#### Slide 13 Introduction

This section analyzes the framework for analysis created to assess the prioritized 15 activities. It contains the in-depth analysis by activity organized by group (or quadrant) from the matrix that is explained on the next slide.

#### Slide 14 Selected CBT activities in the Caribbean

To build the matrix, the activities were tested based on:

- Interest level of US tourists that came from the analysis of the following two survey questions:
  - Select 3 of the following CBT activities in the Caribbean that you find the most appealing.
  - Which of the following CBT activities in the Caribbean are your least favorites?
- **Caribbean benefits** based on the scorecard results built using the following metrics:
  - Price range of the activity
  - Number of businesses offering the CBT experience
  - Community involvement in the activity (based on a qualitative range: low-mid-high)
  - Employment potential throughout the value chain (based on a qualitative range: low-mid-high)
  - Capacity in the Caribbean to implement the activity (based on a qualitative range: low-mid-high)

The matrix is divided into four quadrants (or groups of activities):

- Upper right is called **‘Prioritize’**
  - These activities offer high benefits for the Caribbean, and tourists show high level of interest.
  - Thus, they show the highest relevance.
- Upper left is called **‘Promote internationally’**
  - These activities offer high benefits for the Caribbean but interest levels among tourists are low.
  - As a result, they require repositioning and/or more promotion to catch the attention of US tourists and move to the ‘Prioritize’ quadrant.
- Lower right is called **‘Develop locally’**
  - These activities offer low benefits for the Caribbean but interest levels among tourists are high.

- Thus, efforts for these activities should focus on increasing the benefits for the Caribbean. Some potential strategies: increasing the price range, the number of businesses, community involvement, employment potential and/or the capacity to implement the activity.
- Lower left is called **‘Redefine’**
  - These activities offer low benefits for the Caribbean, and interest levels among tourists are also low.
  - As a result, they require more work to both increase benefits to the Caribbean benefits and interest among US tourists.

### 3.1.1 PRIORITIZE

#### Slide 15 Introduction

This section presents the following information for each activity in the ‘Prioritize’ quadrant (classified based on the activity’s high benefit for the Caribbean and high interest levels among tourists):

- An overview of the activity as currently offered in the Caribbean
- Value proposition (how to position the activity to be attractive to tourists)
- Tourist profile (characteristics of those interested in the CBT activity)
- How tourists describe (and what they expect) from the CBT activity
- Tourist willingness to pay and certain value-add benefits

#### Slide 16 Local Tourism - Activity Overview

This slide provides an overview of Local Tourism as currently offered in the Caribbean – and includes activity definitions, examples in the Caribbean, and both favorable and challenging characteristics of the activity.

- The light blue box provides a definition of Local Tourism.
  - Note the definition includes multiple activities, potentially in other niches and tourism categories, with an aim to offer an authentic local experience.
- The space below the box lists examples of Local Tourism currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Local Tourism in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
- Note: A structured experience (often inclusive of a tour guide) within the local community as offered in Local Tourism instills greater confidence among tourists, especially for those that express concern over safety and hygiene in local communities.

## Slide 17      Local Tourism - Value Proposition

This slide presents the value proposition for Local Tourism, which portrays how the activity should be positioned and where to be promoted to meet tourist interest.

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based on the demographics and travel habits of tourists who selected Local Tourism in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target?
  - Covers demographics and travel habits of tourists with a preference for Local Tourism such as the age of tourists (majority of tourists are over age 50; however, activity is of interest among broad demographics), marital status, and children and age.
  - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Local Tourism among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Local Tourism such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits that tourists are willing to pay extra to have as part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Local Tourism positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities that tourists would like to combine with Local Tourism.



- Where to promote and advertise the activity:
  - Provides information on where Local Tourism should be advertised and with whom to partner in order to reach the target market.
  - Includes where tourists search for information about Local Tourism in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 18      Local Tourism - Tourist Profile

This slide presents a profile of tourists who selected Local Tourism among their top three activities to do in the Caribbean. The insights are based on 230 respondents that selected Local Tourism and were validated with in-depth interviews.

The graphic on the left of the slide highlights survey results and covers the following topics:

- **Age:** 66+ and 56-65 are two age groups with the highest share of respondents with a preference for Local Tourism, contributing to 72% of respondents over age 46.
- **Gender:** Balanced between men and women
- **Education:** 84% of respondents have a college degree or higher level of education.
- **Marital status:** Majority of travelers are married
- **Household income:** US\$105,870 in average household income
- **Kids and age:** Half of tourists have children, and most are over 18 years old.
- **Employment status:** Approximately half of tourists are currently employed.
- **Family in Caribbean:** 7% of respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

### (1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling, and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

### (2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations, and type(s) of activities

### (3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean.
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 19 Local Tourism - How Tourists Describe the Activity

This slide shows tourists' expectations for Local Tourism activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Local Tourism among their top three options.

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Half a day to a full day were most selected for Local Tourism.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected 'partner' as top travel companion for Local Tourism.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of the activity:
  - Respondents favored local guides, local transportation, and town visits as activity characteristics they expect to have as part of the Local Tourism experience.

## Slide 20 Local Tourism - Willingness to Pay

This slide shows how much tourists are willing to pay for Local Tourism in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (prices of current offering are based on packages with varying durations).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Local Tourism offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, when tourists evaluated child care as a value-add characteristic for Local Tourism, 81% of respondents were not willing to pay anything more.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as local transportation, for which 68% of respondents are willing to pay at least 1% more if Local Tourism incorporates these criteria.

The box on the lower left side of the slide lists ways to encourage tourists to pay the higher ticket. These include customized experiences, authenticity of local experience, and offer convenience to tourists.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

### Slide 21      Local Tourism - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

### Slide 22      Food and Beverage Tour - Activity Overview

This slide provides an overview of Food and Beverage Tour as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity.

- The light blue box provides a definition of Food and Beverage Tour.
- The space below the box lists examples of Food and Beverage Tour currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Food and Beverage Tour in the Caribbean.

- These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
- Food and Beverage Tour (like many agro and food tourism activities) is a complementary activity within a tourist itinerary that allows tourists to experience new things, rest, and relax.
- However, there is concern amongst tourists regarding food safety thus needing to be a strong focus for CBT providers.

### Slide 23      Food and Beverage Tour - Value Proposition

This slide presents the value proposition for Food and Beverage Tour, which portrays how the activity should be positioned and where to be promoted in order to meet tourist interest.

- The value propositions are based off the triangulation of information obtained from the customer survey in the US, and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Food and Beverage Tour in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Food and Beverage Tour such as age of tourists (generally tourists age 55+ with above-average interest from 26 to 35 years old relative to interest in other activities), marital status, and children and age.
  - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected food and beverage among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Food and Beverage Tours such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits

for which tourists are willing to pay extra to have as a part of the offering.

- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Food and Beverage Tours positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Food and Beverage Tours.
- Where to promote and advertise the activity:
  - Provides information on where Food and Beverage Tours should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about Food and Beverage Tours in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 24      Food and Beverage Tour - Tourist Profile

This slide presents a profile of tourists who selected Food and Beverage Tour among their top three activities to do in the Caribbean. The insights are based on 292 respondents that selected Food and Beverage Tour, and were validated with in-depth interviews.

The graphic on the left of the slide highlights survey results and covers the following topics:

- **Age:** 66+ and 56-65 are the two age groups with the greatest share of survey respondents with a preference for Food and Beverage Tours contributing to the 69% of respondents over the age of 46.
  - Note: Millennials showed above-average interest in this activity, confirmed also through 30+ trade interviews with key industry stakeholders in the US and Caribbean.
- **Gender:** Slightly over 50% of respondents that selected Food and Beverage Tours are women.
- **Education:** 80% of respondents have a college degree or higher level of education.
- **Marital status:** Majority of travelers are married
- **Household income:** US\$107,877 in average household income
- **Kids and age:** Only 45% of tourists have children, and many of them are over 18 years old.
- **Employment status:** Slightly over half of travelers are currently employed.
- **Family in Caribbean:** 8% of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

### (1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours

- How far in advance tourists plan vacations, and main factors considered when selecting a destination

(2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations,, and type(s) of activities

(3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 25 Food and Beverage Tour - How Tourists Describe the Activity

This slide shows tourists' expectations for Food and Beverage Tour activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Food and Beverage Tour among their top three options (292 respondents that selected Food and Beverage Tour).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - A few hours to half day were most selected for Food and Beverage Tour.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner as top travel companion for Food and Beverage Tour.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of the activity:

- Respondents favored local guides, local transportation, and all entry fees paid as characteristics they expect to have as part of the Food and Beverage Tour experience.

## Slide 26 Food and Beverage Tour - Willingness to Pay

This slide shows how much tourists are willing to pay for a Food and Beverage Tour in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (for varying durations).

- The price range tourists are willing to pay is based on the results of the survey in the US.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Food and Beverage Tour offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for Food and Beverage Tours, 65% of respondents are not willing to pay anything more for products grown with no chemicals, as they expect this to be something already included in the price (minimum requirement for activity to be considered).

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as local transportation, for which 63% of respondents are willing to pay at least 1% more if Food and Beverage Tours incorporate these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include combining tours with other activities, including transportation to make the experience more convenient, and highlighting the activity as a learning experience that gives a percentage of the costs back to the community.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

## Slide 27 Food and Beverage Tour - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

## Slide 28 Traditional Cuisine - Activity Overview

This slide provides an overview of Traditional Cuisine as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity.

- The light blue box provides a definition of Traditional Cuisine
  - Note that this can be offered at a family restaurant or on a community scale.
- The space below the box lists examples of Traditional Cuisine currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Traditional Cuisine in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
  - Tourists often feel more comfortable participating in Traditional Cuisine as they can experience local flavors and interact with the community in a situation of relatively low commitment and expectations, with themselves as visitors.
  - Like other agro and food tourism activities, there is concern for food safety and hygiene among tourists. Thus, it is crucial that CBT providers work to ensure safety and hygiene to sustain tourism.

Note: The term 'Less invasive' refers to a less intensive cultural immersion experience, where tourists can engage with the local community for a shorter duration with a lower level of commitment. This specific activity experience allows them to try local flavors, and then return to their all-inclusive resort experience.

## Slide 29 Traditional Cuisine - Value Proposition

This slide presents the value proposition for Traditional Cuisine, which shows how the activity should be positioned and where it should be promoted in order to match the interest of tourists.

- The value propositions are based off the triangulation of information obtained from the customer survey and in-depth trade interviews with Caribbean representatives linked to the industry, and US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Traditional Cuisine in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.



The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Traditional Cuisine such as age of tourists, marital status, and children and age.
    - While 70% of survey respondents are over the age of 46, Traditional Cuisine appeals to a broad demographic, especially Millennial foodies wishing to experience unique and authentic food (often coupled with posting on social media).
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Traditional Cuisine among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Traditional Cuisine such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Traditional Cuisine positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Traditional Cuisine.
- Where to promote and advertise the activity:
  - Provides information on where Traditional Cuisine should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about Traditional Cuisine in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

### Slide 30      Traditional Cuisine - Tourist Profile

This slide presents a profile of tourists who selected Traditional Cuisine among their top three activities to do in the Caribbean. The insights are based on 293 respondents that selected Traditional Cuisine, and were validated with in-depth interviews.

The graphic on the left of the slide highlights survey results and covers the following topics:

- **Age:** 66+ and 56-65 are the top two age groups with the greatest share of respondents with a preference for Traditional Cuisine.
- **Gender:** Slightly more than 50% of respondents who chose Traditional Cuisine are women.
- **Education:** 86% of respondents have a college degree or higher level of education.
- **Marital status:** Approximately half of travelers are married.
- **Household income:** US\$102,645 in average household income.
- **Kids and age:** 44% of tourists have children, and most of them are over 18.
- **Employment status:** More than half of all travelers are currently working.
- **Family in Caribbean:** 10% of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

#### (1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

#### (2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations,, and type(s) of activities

#### (3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

### Slide 31      Traditional Cuisine - How Tourists Describe the Activity

This slide shows tourists' expectations for Traditional Cuisine activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Traditional Cuisine among their top three options.

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Few hours were most selected for Traditional Cuisine.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner as top travel companion for Traditional Cuisine.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of the activity:
  - Respondents favored local authenticity, local guides, and local transportation as characteristics they expect to have as part of a Traditional Cuisine experience.

### Slide 32      Traditional Cuisine - Willingness to Pay

This slide shows how much tourists are willing to pay for Traditional Cuisine in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Traditional Cuisine offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more

- (4) Willing to pay between 51% and 99% more
- (5) Willing to pay 100% or more

For example, for Traditional Cuisine, 61% of respondents are not willing to pay anything more for food made with products that have organic certification.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as customization to tourist preference, for which 61% of respondents are willing to pay at least 1% more if Traditional Cuisine incorporates these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include authenticity of Traditional Cuisine, partnering with local farms, and offering additional activities such as cooking classes.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

### Slide 33      Traditional Cuisine - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

### Slide 34      Farm to Table - Activity Overview

This slide provides an overview of Farm to Table as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity

- The light blue box provides a definition of Farm to Table
  - Note this is a culinary experience that often includes locally grown or sourced produce and ingredients.
- The space below the box lists examples of Farm to Table currently offered in the Caribbean region
  - These examples were identified through secondary research and interviews with industry stakeholders
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Farm to Table in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources
  - This is another activity that is popular among foodies and the increasingly conscious tourist often deemed as credible activities when recognized with awards.
  - CBT providers will likely face the challenge of negative tourist perception regarding local food safety and hygiene thus must work to establish practices and procedures to ensure safety and hygiene imperative for long-term success.

## Slide 35 Farm to Table - Value Proposition

This slide presents the value proposition for Farm to Table, which portrays how the activity should be positioned and where to be promoted to meet tourist interest

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Farm to Table in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to include.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Farm to Table such as age of tourists, marital status, and children and age.
    - While survey results showed popularity among all segments with a higher share of those ages 46+, trade interviews also confirmed the necessity to target those with gastronomic interests that might be considered 'foodies' or 'food enthusiasts'
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Farm to Table among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Farm to Table such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Farm to Table positioned to attract more tourists.

- This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Farm to Table.
- Where to promote and advertise the activity:
  - Provides information on where Farm to Table should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about Farm to Table in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

### Slide 36 Farm to Table - Tourist Profile

This slide presents a profile of tourists who selected Farm to Table among their top three activities to do in the Caribbean. The insights are based on 106 respondents that selected Farm to Table, and were validated with in-depth interviews.

The graphic on the left of the slide highlights survey results and covers the following topics:

- **Age:** 66+ and 56-65 are top two age groups with the highest share of respondents with a preference for Farm to Table.
  - Note: 70% of respondents are ages 46+ yet this activity resonates with a broader audience that includes foodies and food enthusiasts.
- **Gender:** Approximately 60% of respondents who chose Farm to Table are women.
- **Education:** 86% of respondents have a college degree or higher level of education.
- **Marital status:** Majority of travelers are married
- **Household income:** US\$118,868 in average household income.
- **Kids and age:** Less than half of tourists have children, and those who have are mostly over 18 years old.
- **Employment status:** Majority of tourists are currently employed.
- **Family in Caribbean:** 7% of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

#### (1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

#### (2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations,, and type(s) of activities

#### (3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

### Slide 37 Farm to Table - How Tourists Describe the Activity

This slide shows tourists' expectations for Farm to Table activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Traditional Cuisine among their top three options (106 respondents that selected Farm to Table).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Few hours to half day was most selected for Farm to Table.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner as top travel companion for Farm to Table.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of activity:
  - Respondents favored locally sourced ingredients, local guide, local transportation, and Farm Tour as characteristics they expect to have as part of a Farm to Table experience.

### Slide 38 Farm to Table - Willingness to Pay

This slide shows how much tourists are willing to pay for Farm to Table in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Farm to Table offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, 61% of respondents are not willing to pay anything more for Fairtrade certification.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as local transportation for which 65% of respondents are willing to pay at least 1% more if Farm to Table incorporates these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include advertising online, positioning the activity as a learning experience, and encouraging positive reviews and recommendations to attract more tourists.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

### Slide 39 Farm to Table - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

#### 3.1.2 PROMOTE INTERNATIONALLY

### Slide 40 Introduction

This section presents the following information for each activity in the 'promote internationally' quadrant (classified based on activity's high benefit for the Caribbean and low interest levels among tourists):

- An overview of the activity as currently offered in the Caribbean
- Value proposition (how to position the activity to be attractive to tourists)
- Tourist profile (characteristics of those interested in the CBT activity)
- How tourists describe (and what they expect) from the CBT activity
- Tourist willingness to pay and certain value-add benefits



## Slide 41 Homestay - Activity Overview

This slide provides an overview of homestays as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity.

- The light blue box provides a definition of homestays
  - Note the definition used in this research includes both homestays offered by individuals and their families and those offered by structured organizations.
- The space below the box lists examples of homestays currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of homestays in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
  - Voluntourism mentioned in favorable characteristics corresponds to a form of tourism in which travelers participate in voluntary work, typically for charity, and often include homestays.
  - In the list of challenges, technological literacy refers to the difficulty homestay owners might have in the use of technology and accommodations sharing platforms like Airbnb, therefore limiting the growth of homestay options for tourists.
  - The second to last challenge relates to tourists' preferences for accommodations in the Caribbean. In the consumer survey, travelers were asked what type of accommodations they would likely choose when traveling to the Caribbean, and in the majority of cases, they would prefer all-inclusive resorts and hotels over alternative types such as homestays.

## Slide 42 Homestay - Value Proposition

This slide presents the value proposition for homestays, which portrays how the activity should be positioned and where to be promoted to meet tourist interest.

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected homestays in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for homestays such as age of tourists (mature adults are highlighted because 64% of respondents with a preference for homestays are 56 or older), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected homestays among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from homestays such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and homestays positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with homestays.
- Where to promote and advertise the activity:
  - Provides information on where homestays should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about homestays in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 43      Homestay - Tourist Profile

This slide presents a profile of tourists who selected homestay among their top three activities to do in the Caribbean. The insights are based on 25 survey respondents that selected homestay and were validated with in-depth interviews.

The graphic on the left of the slide highlights survey results and covers the following topics:

- **Age:** 56-65 and 66+ are the top two age groups with the highest share of respondents with a preference for homestays.
- **Gender:** More than 50% of respondents who chose homestays are women.
- **Education:** Majority of respondents have a college degree or higher level of education.
- **Marital status:** Skewed towards married couples
- **Household income:** US\$103,000 in average household income
- **Kids and age:** Majority of tourists have children; many of them are over 18 years old.

- **Employment status:** Less than half are currently working.
- **Family in Caribbean:** Just a few of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

(1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

(2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations,, and type(s) of activities

(3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 44      Homestay - How Tourists Describe the Activity

This slide shows tourists' expectations for homestays in the Caribbean according to the survey results. The data shown corresponds to those who selected homestays among their top three options (25 respondents that selected homestay).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.

- Three days or more was the most selected option by tourists interested in homestays.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner as top travel companion for homestays.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with homestays being the top choices.
  - Hotels were the second most selected option for accommodations, noting the preference for some tourists to have multiple types of accommodations while on vacation.
- Characteristics of the activity:
  - Respondents favored home-cooked meals, local transportation, and local guide as characteristics they expect to have as part of a Traditional Cuisine experience.

#### Slide 45 Homestay - Willingness to Pay

This slide shows how much tourists are willing to pay for homestays in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the homestays offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for homestays, 56% of respondents are not willing to pay anything more for organic certification.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as combining with other activities for which 64% of respondents are willing to pay at least 1% more if homestays incorporate these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include providing a VIP treatment to tourists, combining homestays with other activities to provide a full learning experience, and customization of homestays for tourists to choose if they would like homemade meals, local transportation, and local guides.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

#### Slide 46 Homestay - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

#### Slide 47 School Exchanges and Cultural Immersion - Activity Overview

This slide provides an overview of school exchanges and cultural immersion as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity

- The light blue box provides a definition of school exchanges and cultural immersion.
  - Note the definition used in this research includes experiences at formal universities, high schools, middle schools, or as extra-curricular for travelers from middle-school age to adults.
- The space below the box lists examples of school exchanges and cultural immersion currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of school exchanges and cultural immersion in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
  - While there are numerous potential cultural experiences, the current offering tends to be more structured educational experiences, which are of lesser interest to US tourists.

#### Slide 48 School Exchanges and Cultural Immersion - Value Proposition

This slide presents the value proposition for school exchanges and cultural immersion, which portrays how the activity should be positioned and where to be promoted to meet tourist interest.

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.

- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected school exchanges and cultural immersion in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for school exchanges and cultural immersion such as age of tourists (mature adults over age 50 and aged 26-45 with above-average interest in this activity), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected school exchanges and cultural immersion among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from school exchanges and cultural immersion such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and school exchanges and cultural immersion positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with school exchanges and cultural immersion.
- Where to promote and advertise the activity:
  - Provides information on where school exchanges and cultural immersion should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about school exchanges and cultural immersion in the Caribbean, preferred

methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 49      School Exchanges and Cultural Immersion - Tourist Profile

This slide presents a profile of tourists who selected school exchange and cultural immersion among their top three activities to do in the Caribbean. The insights are based on 16 survey respondents that selected school exchanges and cultural immersion, and were validated with in-depth interviews.

The graphic on the left of the slide highlights survey results and covers the following topics:

- **Age:** 66+ and 26-35 are the top two age groups with the highest share of respondents with a preference for school exchanges and cultural immersion.
- **Gender:** 75% of respondents who chose school exchanges and cultural immersion are women.
- **Education:** Majority of respondents have a college degree or higher level of education.
- **Marital status:** Married travelers account for 50%.
- **Household income:** US\$134,375 in average household income.
- **Kids and age:** A few tourists have children, and most of them are over 18 years old
- **Employment status:** Over half are currently working.
- **Family in Caribbean:** Less than 10% of respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

### (1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

### (2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations,, and type(s) of activities

### (3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 50 School Exchanges and Cultural Immersion - How Tourists Describe the Activity

This slide shows tourists' expectations for school exchange and cultural immersion activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Traditional Cuisine among their top three options [16 respondents that selected school exchange and cultural immersion].

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - A few hours and full day were most selected for school exchange and cultural immersion; meanwhile, much of the current offering is multi-day itineraries targeted towards group travel.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected alone and with their partner as top travel companion for Traditional Cuisine for school exchange and cultural immersion.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels being the top choice while homestay is the second.
- Characteristics of the activity:
  - Respondents favored having a local guide and local transportation as characteristics they expect to have as part of school exchange and cultural immersion experience.

## Slide 51 School Exchanges and Cultural Immersion - Willingness to Pay

This slide shows how much tourists are willing to pay for school exchange and cultural immersion in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.



- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the school exchange and cultural immersion offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for school exchanges and cultural immersion, 69% of respondents are not willing to pay anything more for combining it with other activities.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as accommodations for which 56% of respondents are willing to pay at least 1% more if school exchange and cultural immersion incorporate these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include providing shorter packages at lower prices and combining them with other activities.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

## Slide 52      School Exchanges and Cultural Immersion - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

## Slide 53      Volunteer with Local Experience - Activity Overview

This slide provides an overview of Volunteer with Local Experience as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity.

- The light blue box provides a definition of Volunteer with Local Experience.
  - Note this activity combines travel with social cause as primary motivation.
  - Recently, post-hurricane destruction, there has been greater emphasis on these experiences and opportunities to rebuild island infrastructure and maintain tourist arrivals.

- The space below the box lists examples of Volunteer with Local Experience currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Volunteer with Local Experience in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
  - These experiences provide a valuable learning experience for tourists and often also include other highly popular activities such as Local Tourism and Traditional Cuisine.
  - However, there is still a large segment of tourists that might be interested in volunteering at home, yet while on vacation they prefer to relax and experience new things as opposed to “give their time.”

## Slide 54 Volunteer with Local Experience - Value Proposition

This slide presents the value proposition for Volunteer with Local Experience, which portrays how the activity should be positioned and where to be promoted to meet tourist interest.

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Volunteer with Local Experience in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Volunteer with Local Experience such as age of tourists (adults 26-45 correspond to 27% of respondents with a preference for Volunteer with Local Experience), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Volunteer with Local Experience among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.

- This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Volunteer with Local Experience such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Volunteer with Local Experience positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Volunteer with Local Experience.
- Where to promote and advertise the activity:
  - Provides information on where Volunteer with Local Experience should be advertised and with whom to partner to reach the target market.
- Includes where tourists search for information about Volunteer with Local Experience in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 55 Volunteer with Local Experience - Tourist Profile

This slide presents a profile of tourists who selected Volunteer with Local Experience among their top three activities to do in the Caribbean. The insights are based on 56 respondents that selected Volunteer with Local Experience, and were validated with in-depth interviews.

The graphic on the left of the slide highlights survey results and covers the following topics:

- **Age:** 56-65 and 66+ are the top two age groups with the highest share of respondents with a preference for Volunteer with Local Experience.
- **Gender:** Slightly over 50% of respondents who chose Volunteer with Local Experience are women.
- **Education:** Majority of respondents have a college degree or higher level of education.
- **Marital status:** Skewed towards married travelers
- **Household income:** US\$108,929 in average household income
- **Kids and age:** Majority of tourists have children, and many of them are over 18 years old
- **Employment status:** Over 60% of tourists are currently working.
- **Family in Caribbean:** Close to 10% of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

(1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

(2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations,, and type(s) of activities

(3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 56 Volunteer with Local Experience - How Tourists Describe the Activity

This slide shows tourists' expectations for Volunteer with Local Experience activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Traditional Cuisine among their top three options (56 respondents that selected Volunteer with Local Experience).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Few hours to a full day were most selected for Volunteer with Local Experience
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.

- Majority of respondents selected their partner as top travel companion for Volunteer with Local Experience
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels followed by bed and breakfasts being the top choices.
- Characteristics of the activity:
  - Respondents favored having a local guide, interaction with locals and local transportation as characteristics they expect to have as part of Volunteer with Local Experience.

## Slide 57 Volunteer with Local Experience - Willingness to Pay

This slide shows how much tourists are willing to pay for volunteer with a local experience in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results
- Current price range is based on secondary research where such activities were identified and validated through trade interviews

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Volunteer with Local Experience offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for Volunteer with Local Experience, 34% of respondents are not willing to pay anything more to combine it with other activities.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as accommodations for which 87% of respondents are willing to pay at least 1% more if Volunteer with Local Experience incorporate these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include repositioning Volunteer with Local Experience with primary focus on tourists' personal benefits and secondary focus on community impact, including transportation and accommodations, and highlighting that a % goes to the community.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

## Slide 58 Volunteer with Local Experience - Willingness to Pay for Additional Activity Characteristics

This slide details the results of tourists' willingness to pay among those that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

### 3.1.3 DEVELOP LOCALLY

## Slide 59 Introduction

This section presents the following information for each activity in the 'develop locally' quadrant (classified based on activity's low benefit for the Caribbean and high interest levels among tourists):

- An overview of the activity as currently offered in the Caribbean
- Value proposition (how to position the activity to be attractive to tourists)
- Tourist profile (characteristics of those interested in the CBT activity)
- How tourists describe (and what they expect) from the CBT activity
- Tourist willingness to pay and certain value-add benefits

## Slide 60 Heritage Site - Activity Overview

This slide provides an overview of Heritage Site as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity

- The light blue box provides a definition of Heritage Site
  - Note the definition includes visits to ruins and historical sites such as churches or cemeteries.
- The space below the box lists examples of Heritage Site currently offered in the Caribbean region
  - This activity is often encompassing of one-day city tours to heritage and cultural sites
  - These examples were identified through secondary research and interviews with industry stakeholders
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Heritage Site in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources
- Note: UNESCO sites are defined as landmarks or area which is selected by the United Nations Educational, Scientific and Cultural Organization (UNESCO) as having cultural, historical, scientific or other form of significance, and are legally protected by international treaties.

## Slide 61 Heritage Site - Value Proposition

This slide presents the value proposition for Heritage Site, which portrays how the activity should be positioned and where to be promoted to meet tourist interest

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Heritage Site in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Heritage Site such as age of tourists (Heritage Sites is popular among many demographics), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Heritage Site among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Heritage Site such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Heritage Site positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with v.
- Where to promote and advertise the activity:
  - Provides information on where Heritage Site should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about Heritage Site in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 62 Heritage Site - Tourist Profile

This slide presents a profile of tourists who selected Heritage Site among their top three activities to do in the Caribbean. The insights are based on 179 survey respondents that selected Heritage Site and were validated with in-depth interviews.

The image on the left of the slide highlights survey results and covers the following topics:

- **Age:** 66+ and 56-65 are the top two age groups with the highest share of respondents with a preference for Heritage Sites accounting for 65% of respondents
- **Gender:** More than 50% of respondents who chose Heritage Sites are men
- **Education:** 85% of respondents have a college degree or higher level of education
- **Marital status:** Majority of travelers are married
- **Household income:** US\$111,034 average household income
- **Kids and age:** Majority of tourists do not have children
- **Employment status:** Over 50% of tourists are currently working
- **Family in Caribbean:** 8% the respondents have family in the Caribbean

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

### (1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

### (2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations, and type(s) of activities

### (3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 63 Heritage Site - How Tourists Describe the Activity

This slide shows tourists' expectations for Heritage Site activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Traditional Cuisine among their top three options (179 respondents that selected Heritage Sites).

The slide presents four bar charts with information about:

- Expected length of the activity



- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Few hours to half day were most selected for Heritage Sites.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner as top travel companion for Heritage Sites.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of the activity:
  - Respondents favored local guides, local transportation ruins, all entry fees paid, and UNESCO sites as characteristics they expect to have as part of Heritage Site experiences.

## Slide 64      Heritage Site - Willingness to Pay

This slide shows how much tourists are willing to pay for Heritage Sites in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Heritage Sites offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for Heritage Sites, 86% of respondents are not willing to pay anything more for child care.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as accommodations for which 69% of respondents are willing to pay at least 1% more if Heritage Sites incorporate these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include offering a full educational experience, transportation to/from hotel, and customizing experience.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

## Slide 65      Heritage Site - Wildlife Tourism in Natural Habitat - Activity Overview

This slide provides an overview of Wildlife Tourism in Natural Habitat as currently offered in the Caribbean, and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity

- The light blue box provides a definition of Wildlife Tourism in Natural Habitat.
  - Note the definition does not include reserves or sanctuaries.
- The space below the box lists examples of Wildlife Tourism in Natural Habitat currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Wildlife Tourism in Natural Habitat in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
  - Wildlife Tourism in Natural Habitat is gaining popularity, especially considered for environmentally friendly and animal-friendly practices.
  - CBT providers should be aware that tourists can view Wildlife Tourism in Natural Habitat as a less safe alternative.
- Note: Natural assets correspond to assets of the natural environment. These consist of biological assets (produced or wild), land and water areas with their ecosystems, subsoil assets, and air.

## Slide 66      Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

## Slide 67      Wildlife Tourism in Natural Habitat - Value Proposition

This slide presents the value proposition for Wildlife Tourism in Natural Habitat, which portrays how the activity should be positioned and where to be promoted to meet tourist interest.

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Wildlife Tourism in Natural Habitat in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Wildlife Tourism in Natural Habitat such as age of tourists (typically more mature tourists ages 50+ while this activity has also gained popularity with younger nature enthusiasts), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Wildlife Tourism in Natural Habitat among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Wildlife Tourism in Natural Habitat such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Wildlife Tourism in Natural Habitat positioned to attract more tourists.

- This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Wildlife Tourism in Natural Habitat.
- Where to promote and advertise the activity:
  - Provides information on where Wildlife Tourism in Natural Habitat should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about Wildlife Tourism in Natural Habitat in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 68      Wildlife Tourism in Natural Habitat - Tourist Profile

This slide presents a profile of tourists who selected Wildlife Tourism in Natural Habitat among their top three activities to do in the Caribbean. The insights are based on 222 survey respondents that selected Wildlife Tourism in Natural Habitat and were validated with in-depth interviews.

The image on the left of the slide highlights survey results and covers the following topics:

- **Age:** 66+ and 56-65 are the top two age groups with the highest share of respondents with a preference for Wildlife Tourism in Natural Habitat.
- **Gender:** Equally balanced between men and women.
- **Education:** 86% of respondents have a college degree or higher level of education.
- **Marital status:** Majority of travelers are married.
- **Household income:** US\$107,208 in average household income
- **Kids and age:** Majority of tourists do not have children; among those who do, they are usually over 18 years old.
- **Employment status:** Employed tourists account for almost 50%
- **Family in Caribbean:** Just 3% of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

### (1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

### (2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations, and type(s) of activities

(3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 69 Wildlife Tourism in Natural Habitat - How Tourists Describe the Activity

This slide shows tourists' expectations for wildlife in natural habitat activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Traditional Cuisine among their top three options (222 respondents that selected Wildlife Tourism in Natural Habitat).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Half day to full day were most selected for Wildlife Tourism in Natural Habitat.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner as top travel companion for Wildlife Tourism in Natural Habitat.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of the activity:
  - Respondents favored local guides, local transportation, all entry fees paid and walking as characteristics they expect to have as part of Traditional Cuisine experience.

## Slide 70 Wildlife Tourism in Natural Habitat - Willingness to Pay

This slide shows how much tourists are willing to pay for Wildlife Tourism in Natural Habitat in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Wildlife Tourism in Natural Habitat offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for Wildlife Tourism in Natural Habitat, 63% of respondents are not willing to pay anything more for Fairtrade certification.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as giving a share of the income received back to the local community for which 62% of respondents are willing to pay at least 1% more if Wildlife Tourism in Natural Habitat incorporates these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include making the experience convenient, promote the activity as an enhanced learning experience and offering customized packages.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

## Slide 71 Wildlife Tourism in Natural Habitat - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

## Slide 72 Festival - Activity Overview

This slide provides an overview of Festivals as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity.

- The light blue box provides a definition of Festivals.

- The space below the box lists examples of Festivals currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Festivals in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
  - Caribbean is well-recognized for annual Festivals that showcase unique heritage, music, dancing and traditional food
  - Most Festivals are free of charge, limiting potential revenues for community; additionally, high-volume Festivals means a risk of limited accommodations for all visitors.

### Slide 73      Festival - Value Proposition

This slide presents the value proposition for Festivals, which portrays how the activity should be positioned and where to be promoted to meet tourist interest.

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews. with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Festivals in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Festivals such as age of tourists (while a greater share of mature tourists show interest, Festivals appeal to broad demographics including segments of tourists aged 18 to 35), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Festivals among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their



destination, and the main attractions they normally look for in a vacation abroad.

- What tourists expect to get:
  - Information on what tourists expect from Festivals such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Festivals positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Festivals.
- Where to promote and advertise the activity:
  - Provides information on where Festivals should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about Festivals in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 74      Festival - Tourist Profile

This slide presents a profile of tourists who selected Festivals among their top three activities to do in the Caribbean. The insights are based on 208 survey respondents that selected Festival and were validated with in-depth interviews.

The image on the left of the slide highlights survey results and covers the following topics:

- **Age:** 66+ and 56-65 are the top two age groups with the highest share of respondents with a preference for Festivals.
- **Gender:** slightly over 50% of respondents who chose Festivals are women.
- **Education:** 80% of respondents have a college degree or higher level of education.
- **Marital status:** Just over 50% of tourists are married.
- **Household income:** US\$93,991 in average household income.
- **Kids and age:** Majority of tourists do not have children, and those who do are mostly over 18 years old.
- **Employment status:** Approximately half of respondents are currently working.
- **Family in Caribbean:** 12% of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

### (1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination



(2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations, and type(s) of activities

(3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 75 Festival - How Tourists Describe the Activity

This slide shows tourists' expectations for Festival activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Traditional Cuisine among their top three options (208 respondents that selected Festivals).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Half day to full day were most selected for Festivals.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner as top travel companion for Festivals, followed by friends.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of the activity:
  - Respondents favored music, local transportation, Traditional Cuisine, all entry fees paid and dance as characteristics they expect to have as part of Traditional Cuisine experience.

## Slide 76 Festival - Willingness to Pay

This slide shows how much tourists are willing to pay for Festivals in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Festival offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for Food and Beverage Tours, 76% of respondents are not willing to pay anything more for child care as they expect this to be a family-friendly activity, or they do not have children (minimum requirement just to be considered).

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as accommodations for which 66% of respondents are willing to pay at least 1% more if Festivals incorporate these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include offer promotions on resorts and launching a VIP option that includes transportation and other value-add benefits.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

## Slide 77 Festival - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

### 3.1.4 REDEFINE

#### Slide 78 Introduction

This section presents the following information for each activity in the 'redefine' quadrant (classified based on activity's low benefit for the Caribbean and low interest levels among tourists):

- An overview of the activity as currently offered in the Caribbean
- Value proposition (how to position the activity to be attractive to tourists)
- Tourist profile (characteristics of those interested in the CBT activity)
- How tourists describe (and what they expect) from the CBT activity
- Tourist willingness to pay and certain value-add benefits

#### Slide 79 Ecolodge - Activity Overview

This slide provides an overview of Ecolodge as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity.

- The light blue box provides a definition of Ecolodge
  - This is an alternative accommodations that embraces sustainable practices
- The space below the box lists examples of Ecolodge currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Ecolodge in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
- Note: Sustainable tourism refers to tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.

#### Slide 80 Ecolodge - Value Proposition

This slide presents the value proposition for Ecolodge, which portrays how the activity should be positioned and where to be promoted to meet tourist interest.

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Ecolodge in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Ecolodge such as age of tourists (segments aged 25-35 and mature adults over 50), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Ecolodge among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Ecolodge such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Ecolodge positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Ecolodge.
- Where to promote and advertise the activity:
  - Provides information on where Ecolodge should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about Ecolodge in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 81      Ecolodge - Tourist Profile

This slide presents a profile of tourists who selected Ecolodge among their top three activities to do in the Caribbean. The insights are based on 38 respondents that selected Ecolodge and were validated with in-depth interviews.

The image on the left of the slide highlights survey results and covers the following topics:

- **Age:** 66+ and 26-35 are the top two age groups with the highest share of respondents with a preference for Ecolodge.

- **Gender:** More than 50% of respondents who chose Ecolodge are women.
- **Education:** Majority of respondents have a college degree or higher level of education.
- **Marital status:** Skewed towards married couples
- **Household income:** US\$108,929 in average household income
- **Kids and age:** Majority of tourists have children, and many of them are over 18 years old.
- **Employment status:** Majority are currently working.
- **Family in Caribbean:** Less than 10% of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

(1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

(2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations, and type(s) of activities

(3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 82      Ecolodge - How Tourists Describe the Activity

This slide shows tourists' expectations for Ecolodge activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Traditional Cuisine among their top three options (38 respondents selected Ecolodge).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Three or more days was most selected for Ecolodge.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner or travel alone for Ecolodge.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation was Ecolodge with some opting to combine with hotels.
- Characteristics of the activity:
  - Respondents favored natural setting, local transportation and sustainable hotel practices as characteristics that they expect to have as a part of the Ecolodge experience.

### Slide 83      Ecolodge - Willingness to Pay

This slide shows how much tourists are willing to pay for Ecolodges in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Ecolodge offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for Ecolodges, 63% of respondents are not willing to pay anything more for child care.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as combining with other activities, for which 82% of respondents are willing to pay at least 1% more if the Ecolodge incorporates these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include providing a VIP experience, ecotourism certifications, and personalization options to combine it with other activities.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

### Slide 84      Ecolodge - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included'.

### Slide 85      Farm Tour - Activity Overview

This slide provides an overview of Farm Tour as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity.

- The light blue box provides a definition of Farm Tour.
  - Note that these can be organic farms and/or specialized crop farms with and without animals.
- The space below the box lists examples of Farm Tour currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Farm Tour in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
  - Farm Tours can be a complementary activity to other agro and food tourism activities as source of ingredients; however, safety and biohazards (affecting return travel) need to be thought through to generate greater tourist interest and participation.

### Slide 86      Farm Tour - Value Proposition

This slide presents the value proposition for Farm Tour, which portrays how the activity should be positioned and where to be promoted to meet tourist interest

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Farm Tour in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Farm Tour such as age of tourists (mature couples over 55 and families with children six years and older), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Farm Tour among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Farm Tour such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Farm Tour positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Farm Tour.
- Where to promote and advertise the activity:
  - Provides information on where Farm Tour should be advertised and with whom to partner to reach the target market.

## Slide 87      Farm Tour - Tourist Profile

This slide presents a profile of tourists who selected Farm Tours among their top three activities to do in the Caribbean. The insights are based on 58 respondents that selected Farm Tour and were validated with in-depth interviews.

The image on the left of the slide highlights survey results and covers the following topics:

- **Age:** 56-65 and 66+ are the top two age groups with the highest share of respondents with a preference for Farm Tour.
  - Note: this activity is popular among families with children ages 6+ as confirmed by trade interviews



- **Gender:** More than 50% of respondents who chose Farm Tours are women.
- **Education:** Majority of respondents have a college degree or higher level of education.
- **Marital status:** Skewed towards married couples
- **Household income:** US\$102,587 in average household income.
- **Kids and age:** Majority of tourists have children, and many of them are over 12 years old.
- **Employment status:** Over than half are currently working.
- **Family in Caribbean:** Just a few of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

(1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

(2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations, and type(s) of activities

(3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 88      Farm Tour - How Tourists Describe the Activity

This slide shows tourists' expectations for Farm Tour activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Traditional Cuisine among their top three options (58 respondents selected Farm Tour).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Few hours to half day were most selected for Farm Tours.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner as top travel companion for Farm Tours.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of the activity:
  - Respondents favored local guides, local transportation and home-cooked meals as characteristics they expect to have as part of a Farm Tour experience.

## Slide 89 Farm Tour - Willingness to Pay

This slide shows how much tourists are willing to pay for Farm Tour in the Caribbean (according to the characteristics described in the previous slide) each day compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Farm Tour offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for Farm Tours, 64% of respondents are not willing to pay anything more for organic certification.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as combining with other activities for which 64% of respondents are willing to pay at least 1% more if Farm Tours incorporate these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include customized packages, premium/VIP options, and more economical options for tourists.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

### Slide 90      Farm Tour - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

### Slide 91      Traditional Health and Wellness - Activity Overview

This slide provides an overview of Traditional Health and Wellness as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity

- The light blue box provides a definition of Traditional Health and Wellness.
- The space below the box lists examples of Traditional Health and Wellness currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Traditional Health and Wellness in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
  - There is an emerging trend in Wellness, and Traditional Health and Wellness in the source market relative to ancestral knowledge. While interest is relatively low as measured in the current survey, this trend will likely drive growth and tourist interest over time.

### Slide 92      Traditional Health and Wellness - Value Proposition

This slide presents the value proposition for Traditional Health and Wellness, which portrays how the activity should be positioned and where to be promoted to meet tourist interest.

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Traditional Health and Wellness in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Traditional Health and Wellness such as age of tourists (females aged 26 to 65), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Traditional Health and Wellness among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Traditional Health and Wellness such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Traditional Health and Wellness positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Traditional Health and Wellness.
- Where to promote and advertise the activity:
  - Provides information on where Traditional Health and Wellness should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about Traditional Health and Wellness in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 93      Traditional Health and Wellness - Tourist Profile

This slide presents a profile of tourists who selected Traditional Health and Wellness among their top three activities to do in the Caribbean. The insights are based on 55 respondents that selected Traditional Health and Wellness and were validated with in-depth interviews.

The image on the left of the slide highlights survey results and covers the following topics:

- **Age:** 46-55 and 56-65 are the top two age groups with the highest share of respondents with a preference for Traditional Health and Wellness.
- **Gender:** Majority of respondents who chose Traditional Health and Wellness are women.
- **Education:** 84% of respondents have a college degree or higher level of education
- **Marital status:** Majority of travelers are married.
- **Household income:** US\$115,910 in average household income.
- **Kids and age:** Almost half of tourists have children, and many of them over 13 years old.
- **Employment status:** 80% of tourists are currently employed.
- **Family in Caribbean:** 16% of the respondents have family in the Caribbean

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception of and interest in the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

(1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

(2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations, and type(s) of activities

(3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 94      Traditional Health and Wellness - How Tourists Describe the Activity

This slide shows tourists' expectations for Traditional Health and Wellness activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Traditional Health and Wellness among their top three options (55 respondents that selected Traditional Health and Wellness).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations

- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - A few hours to a half day were most selected for Traditional Health and Wellness.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner and doing activity alone for Traditional Health and Wellness.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of the activity:
  - Respondents favored local guide, local transportation, massages and home-cooked meals as characteristics they expect to have as part of a Traditional Health And Wellness experience.

## Slide 95      Traditional Health and Wellness - Willingness to Pay

This slide shows how much tourists are willing to pay for Traditional Health and Wellness in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Traditional Health and Wellness offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for Traditional Health and Wellness, 45% of respondents are not willing to pay anything more for Fairtrade certification.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as combining with other activities for which 69% of respondents are willing to pay at least 1% more if Traditional Health and Wellness incorporates these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include offering a Traditional Health and Wellness package that comes together with the hotel reservation, use of treatments that are rising in popularity worldwide, and providing customized or VIP options to tourists that are looking for a more premium experience.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

### Slide 96      Traditional Health and Wellness - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled ‘How much more tourists would be willing to pay if the activity included.’

### Slide 97      Wellness - Activity Overview

This slide provides an overview of Wellness as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity.

- The light blue box provides a definition of Wellness
  - Note the definition includes yoga, mindfulness, and meditation retreats including detox retreats, and retreats guided by expert nutritionists among other specialists.
- The space below the box lists examples of Wellness currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Wellness in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
  - There is an emerging trend in Wellness in the source market and while there is relatively low interest as measured in the current survey, this trend will likely drive growth and tourist interest over time.



## Slide 98 Wellness - Value Proposition

This slide presents the value proposition for Wellness, which portrays how the activity should be positioned and where to be promoted to meet tourist interest

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Wellness in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Wellness such as age of tourists (females ages 26 to 55), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Wellness among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Wellness such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering.
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Wellness positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Wellness.
- Where to promote and advertise the activity:
  - Provides information on where Wellness should be advertised and with whom to partner to reach the target market.



- Includes where tourists search for information about Wellness in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 99 Wellness - Tourist Profile

This slide presents a profile of tourists who selected Wellness among their top three activities to do in the Caribbean. The insights are based on 42 survey respondents that selected Wellness and were validated with in-depth interviews.

The image on the left of the slide highlights survey results and covers the following topics:

- **Age:** 36-45 and 46-55 are the top two age groups with the highest share of respondents with a preference for Wellness.
- **Gender:** More than 70% of respondents who chose Wellness are women.
- **Education:** 87% of respondents have a college degree or higher level of education.
- **Marital status:** Half of travelers are married
- **Household income:** US\$117,858 in average household income.
- **Kids and age:** Majority of tourists have children, and many of them are over 6 years old.
- **Employment status:** Large majority of tourists are currently employed.
- **Family in Caribbean:** 17% of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

### (1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

### (2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations, and type(s) of activities

### (3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 100 Wellness - How Tourists Describe the Activity

This slide shows tourists' expectations for Wellness activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Wellness among their top three options (42 respondents that selected Wellness).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Few hours to half day were most selected for Wellness.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner as top travel companion for Wellness, yet many would also participate alone.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of the activity:
  - Respondents favored local instructors, physical movement (exercise), and local transportation as characteristics they expect to have as part of a Wellness experience.

## Slide 101      Wellness - Willingness to Pay

This slide shows how much tourists are willing to pay for Wellness in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Wellness offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.
- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more

- (4) Willing to pay between 51% and 99% more
- (5) Willing to pay 100% or more

For example, for Wellness, 45% of respondents are not willing to pay anything more for Fairtrade certification.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as accommodations or combining it with other activities for which 74% of respondents are willing to pay at least 1% more if Wellness incorporates these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include offering a package that combines Wellness with transportation and accommodations, offering VIP treatments and highlighting the activity is environmentally sustainable and contributes with the development of the local community.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

### Slide 102 Wellness - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

### Slide 103 Indigenous Tourism - Activity Overview

This slide provides an overview of Indigenous Tourism as currently offered in the Caribbean – and includes activity definition, examples in the Caribbean, and both favorable and challenging characteristics of the activity.

- The light blue box provides a definition of Indigenous Tourism
- The space below the box lists examples of Wellness currently offered in the Caribbean region.
  - These examples were identified through secondary research and interviews with industry stakeholders.
- The right side of the slide details favorable characteristics and challenges that may contribute to the development or limit the growth of Wellness in the Caribbean.
  - These favorable characteristics and challenges are based on the results of the consumer survey, tourist opinions, and industry sources.
  - This activity is not an offering for all islands in the Caribbean as not all have indigenous cultures present.

### Slide 104 Indigenous Tourism - Value Proposition

This slide presents the value proposition for Indigenous Tourism, which portrays how the activity should be positioned and where to be promoted to meet tourist interest.

- The value propositions are based off the triangulation of information obtained from the customer survey in the US and in-depth trade interviews with Caribbean representatives linked to the industry as well as US contacts such as travel agencies and cruise ship operators.
- The activity-specific analysis is heavily based off the demographics and travel habits of tourists who selected Indigenous Tourism in their top three choices of activities to do in the Caribbean, as well as the characteristics they expect the activity to have.

The value proposition consists of four elements: (1) who to target, (2) what tourists expect to get, (3) how the activity should be positioned, and (4) where to promote and advertise the activity.

Information included in each of the four elements:

- Who to target:
  - Covers demographics and travel habits of tourists with a preference for Indigenous Tourism such as age of tourists (married couples over age 46 and younger travelers typically less than 25 years), marital status, and children and age.
    - Note: Demographics only correspond to the characteristics most shared by the respondents, and therefore do not reflect the entire population of travelers who selected Indigenous Tourism among their top three options.
  - This section also covers travel habits such as with whom they would usually travel to the Caribbean, how much in advance they plan their vacations and activities, and where they search for information about tours and activities.
  - This also includes information on how tourists describe themselves when on vacation, the main factors considered when deciding their destination, and the main attractions they normally look for in a vacation abroad.
- What tourists expect to get:
  - Information on what tourists expect from Indigenous Tourism such as expectations on the duration of the activity, activity characteristics that tourists find appealing, and value-add benefits for which tourists are willing to pay extra to have as a part of the offering
- How the activity should be positioned:
  - Refers to how the marketing and sales message should be crafted and Indigenous Tourism positioned to attract more tourists.
  - This includes activity characteristics that tourists find appealing, main elements considered when choosing this activity, and other tours/activities tourists would like to combine with Indigenous Tourism.
- Where to promote and advertise the activity:
  - Provides information on where Indigenous Tourism should be advertised and with whom to partner to reach the target market.
  - Includes where tourists search for information about Indigenous Tourism in the Caribbean, preferred methods of payment, and potential partnerships that could be beneficial for tour operators.

## Slide 105 Indigenous Tourism - Tourist Profile

This slide presents a profile of tourists who selected Indigenous Tourism among their top three activities to do in the Caribbean. The insights are based on 67 respondents that selected Indigenous Tourism, and were validated with in-depth interviews.

The image on the left of the slide highlights survey results and covers the following topics:

- **Age:** 66+ and 56-65 are the top two age groups with the highest share of respondents with a preference for Indigenous Tourism.
  - Note: another segment that this activity resonates well with is students that are studying about Caribbean heritage and/or culture as confirmed during in-depth trade interviews.
- **Gender:** Almost 50% of respondents who chose Indigenous Tourism are women.
- **Education:** 91% of respondents have a college degree or higher level of education.
- **Marital status:** Over 50% of travelers are married.
- **Household income:** US\$109,329 in average household income.
- **Kids and age:** Majority of tourists do not have children; among those who do, most are over 18 years old.
- **Employment status:** Majority of tourists are currently employed.
- **Family in Caribbean:** 9% of the respondents have family in the Caribbean.

On the right of the slide, the three boxes detail analysis on (1) general travel habits, (2) tourist perception and interests about the Caribbean, and (3) knowledge of and preferences for Community-Based Tourism (CBT):

### (1) General travel habits:

- Tourist preferences and considerations when choosing to go on vacation
- How tourists describe themselves when traveling and where they search for information about lodging, flights, and activities/tours
- How far in advance tourists plan vacations, and main factors considered when selecting a destination

### (2) About the Caribbean:

- Information about tourist preferences when vacationing in the Caribbean
- When they would consider traveling to the Caribbean and reasons why
- Expected trip duration, preferred accommodations, and type(s) of activities

### (3) About Community-Based Tourism (CBT):

- Knowledge of and interest in taking part in CBT in the Caribbean
- Familiarity of respondents with the term CBT
- Top-of-mind thoughts when they think about CBT
- Reasons why they would consider doing CBT

## Slide 106 Indigenous Tourism - How Tourists Describe the Activity

This slide shows tourists' expectations for Indigenous Tourism activities in the Caribbean according to the survey results. The data shown corresponds to those who selected Indigenous Tourism among their top three options (67 respondents selected Indigenous Tourism).

The slide presents four bar charts with information about:

- Expected length of the activity
- Travel companions
- Preferred accommodations
- Expected characteristics of the activity

Note: Consumers surveyed were given closed questions, and the bars on each graph show the percentage of respondents that selected that option during the survey. Except for activity characteristics, all the bars on each graph add up to 100%.

Information included in each activity:

- Length of the activity:
  - Time or duration tourists expect the activity to last, with options ranging from a few hours up to three days or more.
  - Half day to full day were most selected for Indigenous Tourism.
- Travel companions:
  - Individuals with whom the respondent expects to do the activity while on vacation.
  - Majority of respondents selected partner as top travel companion for Indigenous Tourism.
- Preferred accommodations:
  - Types of lodging the respondent prefers while on vacation, with hotels and all-inclusive resorts being the top choices.
- Characteristics of the activity:
  - Respondents favored local guides, interaction with locals and local transportation as characteristics they expect to have as a part of the Indigenous Tourism experience.

## Slide 107 Indigenous Tourism - Willingness to Pay

This slide shows how much tourists are willing to pay for Indigenous Tourism in the Caribbean (according to the characteristics described in the previous slide) compared to the current price range at which they are being offered in the region (of varying duration).

- The price range tourists are willing to pay is based on the survey results.
- Current price range is based on secondary research where such activities were identified and validated through trade interviews.

The graph on the right side of the slide shows how much more tourists are willing to pay for certain characteristics if part of the Indigenous Tourism offering.

- The survey was designed with closed options; the graph lists benefits that were evaluated.

- The horizontal bar shows the percentage of respondents willing to pay a more based on adding the specific characteristic to the activity offering. Respondents could select from choices including:
  - (1) Not willing to pay more for that benefit
  - (2) Willing to pay up to 25% more
  - (3) Willing to pay between 25% and 50% more
  - (4) Willing to pay between 51% and 99% more
  - (5) Willing to pay 100% or more

For example, for Indigenous Tourism, 52% of respondents are not willing to pay anything more for a VIP option/access.

According to survey results, some tourists are willing to pay more for certain value-add characteristics such as giving a percent of tourism dollars back to community for which 66% of respondents are willing to pay at least 1% more if Indigenous Tourism incorporates these criteria.

The box on the lower left side of the slide notes ways to encourage tourists to pay the higher ticket. These include partnering with an indigenous community for the organization of the activities, offer a more immersive experience combined with homestay, and offering a personalized experience.

Recommendations were developed based on the results shown in the graph, results evaluated for the content on previous slides, and opinions from industry stakeholders gathered through trade interviews.

## Slide 108 Wellness - Willingness to Pay for Additional Activity Characteristics

This slide details the results of willingness to pay by tourists that selected this activity. The results reference the graph on the previous slide titled 'How much more tourists would be willing to pay if the activity included.'

## 4. TOURIST PROFILES

### Slide 109 Introduction

This section provides an overview for the tourist profiles.

### Slide 110 US Tourist Profiles

This slide is used to compare the three US tourist profiles:

1. Caribbean Explorers
  - a. US tourists that have traveled to the Caribbean for leisure
2. CBT Connoisseurs
  - a. US tourists that have traveled abroad and done CBT

### Slide 111 Guyanese in the Diaspora that Traveled to Guyana in the Last Three Years

This slide examines the tourists of the third profile (Guyanese in the Diaspora) that have traveled to Guyana in the last three years. These findings are from a sample of 11 respondents.

### Slide 112 Preferred Activities for Guyanese in the Diaspora that Travelled to Guyana in the Last Three Years

This slide evaluates the willingness to pay of the profile that was detailed in the previous slide: Guyanese in the Diaspora that have traveled to Guyana in the last three years (N=11).



## 5. CBT TRENDS

### Slide 113 Introduction

This section offers an overview of global insights on tourism that also have an impact on CBT. It also includes key factors to consider for successful CBT at a global level.

### Slide 114 Main Global Trends in Travel and CBT

These four global trends are affecting travel and leisure, often aligned with successful CBT experiences:

- Experience More
  - Overall, tourists want to experience more rather than just observe and sightsee - they want to be part of it all.
  - For example, instead of just buying a handmade pot, tourists today are interested in the experience that allows them to meet the artisan, learn to make the pot with the artisan, and then potentially purchase beautifully handmade pottery with a greater appreciation and a tangible item to help them remember their experience.
  - The engagement with the local community is key to moving the activity from observation to experience.
- Ethical Living
  - Tourists are increasingly more mindful of their surroundings when traveling abroad; this can include the local community in addition to the natural environment.
  - Tourists are more likely to choose experiences that align with and embrace their values.
    - If concerned about the environment, they may choose to stay at an Ec lodge or participate in a wildlife or nature tour that uses funds to rebuild and conserve the natural space.
  - Note: Tourists interested in sustainable tourism, ecotourism, impact tourism and responsible tourism are those interested in CBT. These other terms are more commonly known and searched for among US tourists and tourism providers as opposed to the specific CBT term.
- Personalization
  - Tourists look for a personal experience that is different from the one another tourist will experience, and they also want to find experiences that align with their interests.
  - For example, for a small group Farm Tour, tourists can spend more time talking about farming techniques, which appeals to people with a farming background interested in growing unique crops, or to foodies who are interested in the sensory pleasure of food.
  - Engagement between community members and guides with the tourists can easily generate this desired experience.

- Trip Planning & Booking Reinvented
  - Tourists have been accustomed to booking flights and accommodations online for some time; however, the whole digital planning and booking process continues to evolve.
    - There is a growing influence from different digital sources, including social media.
  - Most tourists expect to book online with a credit or debit card prior to or during their trip; paying with cash is not common in their home country so increasingly rare when traveling abroad.
    - Additionally, mobile wallet and digital payments are growing within their home country so this is likely an expectation travelers will have of tourism providers over the longer term.
  - To achieve greatest success, CBT activities need to be searchable online and allow for seamless booking and payment experiences.

## Slide 115      Characteristics of Successful CBT

To understand the four pillars necessary for CBT success:

- CBT should be based on community assets (natural or cultural).
  - For example, a natural asset is a unique ecosystem such as a rainforest or the number of species of wildlife in an area.
  - Cultural assets can include language, type of dance, beliefs, folklore, artisan crafts, etc.
  - Having an activity focused on these aspects help ensure that the community is already knowledgeable about the activity and that the tourist will have an authentic experience.
- CBT activities are often smaller in scale and reach; thus, to amplify that and encourage growth, the support of public and private organizations is essential.
  - For example, a community looking to build an Ecolodge within its unique natural landscape may need access to financing which can come from governmental and nonprofit grants, private sector, etc.
  - Additionally, for some CBT activities in remote areas, establishing the necessary physical infrastructure such as roads requires governmental support.
  - Promoting a regional and national brand that ultimately fosters awareness of the destination is dependent on tourism boards.
- Tourists must have their interests and needs met for them to visit, participate, and continue to encourage others to participate in the future (both via word of mouth to friends and family and via online reviews).
  - Consumers want to experience something unique and authentic to the destination they are visiting, distinct from one they can experience in their home country

- While the personal experience they will have as a tourist often comes first, social causes and positive impact on the local community are often favorable attributes for tourists.
- Lastly, part of what tourists expect is to book online.
  - Tourists have been accustomed to booking flights and accommodations online for some time; however, the whole digital planning and booking process continues to evolve.
  - There is a growing influence from different digital sources, including social media.
  - Most tourists expect to book online with a credit or debit card prior to or during their trip; paying with cash is not common in their home country so this practice is increasingly rare when traveling abroad.
  - Additionally, mobile wallet and digital payments are growing within their home country so this is likely a longer-term expectation when traveling abroad.
  - To achieve greatest success, CBT activities need to be searchable online and allow for seamless booking and payment experiences.
  - Note: Economy sites refers to online search engine platforms that allow tourists to search for the best deals across providers.

#### Slide 116      Global Cases – Coffee Tour with Café de Monteverde in Costa Rica

This is one of three global cases that highlight CBT around the world and exemplify the megatrends that are affecting CBT on a global scale. The goal is not to mimic these activities (in some cases, the Caribbean does not have the same natural assets) but to leverage the key takeaways and learnings to apply to the CBT offerings in the Caribbean.

#### Slide 117      Global Cases – Global Himalayan Expedition in India

This is one of three global cases that highlight CBT around the world and exemplify the megatrends that are affecting CBT on a global scale. The goal is not to mimic these activities (in some cases, the Caribbean does not have the same natural assets) but to leverage key takeaways and learnings in CBT offerings in the Caribbean.

#### Slide 118      Global Cases – Eat with a Local, Available Globally

This is one of three global cases that highlight CBT around the world and exemplify the megatrends that are affecting CBT on a global scale. The goal is not to mimic these activities (in some cases, the Caribbean does not have the same natural assets) but to leverage the key takeaways and learnings to apply to the CBT offerings in the Caribbean.

#### Slide 119      The Caribbean

The subsequent slides will focus on CBT within the Caribbean region.

## Slide 120      Tourist Perception About the Caribbean As a Travel Destination

The main objective is to explain how tourists perceive the Caribbean as a travel destination. The main source is the US survey along with trade interviews conducted with stakeholders in the Caribbean and the US.

92% of surveyed participants would consider traveling for leisure to the Caribbean.

- Respondents selected either 'it is my next destination', 'I plan to in the next 12 to 18 months', 'it is on my bucket list', 'might be interested' or 'I have never thought about it' (share of responses noted in pie chart in top middle of page).
- They were also asked why they would consider traveling to the Caribbean and their responses are on the chart on the bottom left. The most common responses were tropical climate, ability to relax (relaxing destination), and its well-known beaches (as noted in the chart on the lower left).

The other 8% were asked why they would not consider the Caribbean (chart on the bottom right). Their primary response was that they prefer other destinations.

## Slide 121      Tourist Interest in and Familiarity with CBT in the Caribbean

The slide analyzes CBT in the Caribbean and it is divided into two parts:

- The first column refers to level of familiarity with CBT as people were asked whether they know the meaning of the term CBT (yes or no). 21% corresponds to those that said 'yes'.
  - The light blue box below describes what they said in response and their perception of the meaning of CBT.
- In the middle, tourists were asked whether they would consider doing CBT in the Caribbean through a selection of options.
  - Those that selected either 'in my next trip', 'it is on my bucket list', 'might be interested', or 'never thought about it' are the 79% of respondents that would be interested in doing CBT.
  - These 79% were asked why they show interest, which is the upper right graph. while the remaining 21% were asked why they would not consider doing CBT in the Caribbean. The options can be read from the graph on the lower right.

## Slide 122      Drivers and Barriers in the Development of CBT in the Caribbean

Overall, there is a consensus of growing awareness and interest among tourists and private tourism providers of CBT in the Caribbean. Simultaneously, there is continued CBT product development and enhancement also contributing to CBT's growth in the Caribbean.

- Some factors that have contributed to CBT's growth in the Caribbean:
  - Increased promotional efforts (digital platforms/apps, at international tourism fairs, social media, regional community networks).

- Licensing and policy programs that help build credibility of CBT providers and address historical concerns among tourists regarding safety and hygiene in foreign communities.
  - Enhanced CBT activities that incorporate multiple activities and result in a cultural experience for tourists.
- Some factors that have jeopardized CBT's growth in the Caribbean:
  - Despite rising awareness of CBT, CBT awareness remains low among tourists and source market tourism promoters.
  - Travel agents in source markets are not incentivized to offer CBT activities as part of their itineraries since they typically work with lower margins and profitability.

### Slide 123 Beach Tourism

This section summarizes what can be done to promote CBT among beach tourists that already visit the Caribbean and show potential to engage in more activities.

### Slide 124 How to Generate Interest in CBT Among Beach Tourists

The main objective is to understand how these activities can complement a beach tourist itinerary and then offer and promote CBT activities in these ways:

- Promote CBT as add-on secondary activities to beach experience, for example:
  - For tourists that spend all day at the beach, they may be interested in a Traditional Cuisine experience at night.
  - For the family that does not want their children out during the hot/high-UV-radiation hours, a covered wildlife experience offered at that time might interest them.
- Grow the committed CBT tourist segment by first building awareness among tourists (that currently intend to visit beaches and relax) by positioning CBT activities in a way that resonates with them.
  - Remember that low awareness is the greatest inhibitor to CBT interest and participation, so grow this by helping tourists understand what they can get out of the CBT activity and how that is aligned with what they look for.
  - For example, if the tourist wants to sightsee, what about the CBT activity or experience would allow them to do it? Does a local guide tell them about the history of the area in a personalized manner?
- Lastly, help beach tourists understand how they will have a unique new learning experience.
  - Tourists are seeking to 'experience more' while traveling and want personalized, destination-only experiences.
  - Partner with hotels and resorts to promote these activities as a "foot-in-the-door" strategy that also helps portray activities in a less invasive way.

## 6. RECOMMENDATIONS

### Slide 125 Introduction

This section details the recommendations based on the study's results. They are divided by quadrants as shown on slide 14.

### Slide 126 'Prioritize' Recommendations

The slide shows the conclusions and recommendations for the 'Prioritize' quadrant:

- This quadrant is where the focus should be, because the activities have the highest benefits for the Caribbean and the highest interest among tourists
- The message used to promote these activities is key to catching their attention and transforming the interest of tourists into purchasing.
- At the same time, it is key to listen to tourists, understand what can be discouraging them from engaging in these activities, and leverage those as opportunities to attract them even more.

### Slide 127 'Promote Internationally' Recommendations

The slide shows the conclusions and recommendations for the 'Promote Internationally' quadrant:

- This quadrant includes activities important to the Caribbean for their high benefits, yet require greater international promotion to generate more interest among tourists.
- Reposition activities as 'unique cultural experiences' that are reciprocal between tourists and the community.
  - If they contribute their time (e.g., volunteer) and/or money (e.g., added contribution for homestay), ensure they are also receiving a one-of-a-kind personalized experience in return.
  - Offering an activity with a local guide and other activities (e.g., Heritage Sites and Traditional Cuisine) is popular among tourists.
- Access new segments of tourists potentially in these activities via hotel partnerships.
  - These tourists generally are interested in shorter activities that are combined with other activities and a local guide.

### Slide 128 'Develop Locally' Recommendations

The slide shows the conclusions and recommendations for the 'Develop Locally' quadrant:

- Tourists are already interested in these activities, and although the benefit for overall CBT in the Caribbean is low, they are still profitable and worth promoting.
- Local development means creating more interaction opportunities as well as employment potential, greater capacity, and higher price.
  - Capacity is restricted to local offer.

- Interaction as well as employment potential can be further developed by adding guides that are experts and well prepared. (For Festivals, it can be a local community member to show the tourist or tourists around and give them some background).
- Tourists show high interest in having a local guide as part of the experience, and it can be added a part of a more premium package.
- Training programs and professionalization is key to become reliable.

## Slide 129      'Redefine' Recommendations

The slide shows the conclusions and recommendations for the 'Redefine' quadrant:

- These activities require redefining and repositioning to both attract tourists and offer higher benefits to the Caribbean (compared to the other quadrants on the right).
- Raising awareness is key so that tourists know about the existence of these activities and what makes them unique in the Caribbean.
  - This way they will be willing to add them as part of their beach vacation.
- To draw their attention, packages should be tailored to their needs and expectations. There should be a variety of options (different activities, local transportation, size of group, etc.) that they can select to create their own experience.

## Slide 130      Contact Details

Details about the Euromonitor International team dedicated to this study.

## 7. APPENDIX

### Slide 131 Introduction

This section details additional information relative to tourist profiles and multi-source methodology used for this study.

### Slide 132 Tourist Profiles

This section shows the tourist profiles that were evaluated as part of the consumer survey done in the US. It includes a brief overview of what the profiles cover as well as their names. The in-depth analysis follows the slide and the numbers on the top refer to the profile in review.

### Slide 133 Overview of the Tourist Profile (1)

This slide shows the overview of the US tourist profile including the name (in the purple text box), demographics (on the left) and travel characteristics (on the right).

This is based on survey results, and the profile selection was agreed upon between Euromonitor International, Compete Caribbean, and the CTO. The profile description can be found in the purple text box.

Travel characteristics include:

- General travel habits such as what they choose to do on vacation, with whom they travel, how far in advance they plan, and where they look for information.
- Their thoughts about the Caribbean such as how they envision a trip to the Caribbean, what they expect to do and why they would choose the destination.
- Their familiarity with CBT and definition, if they would consider doing CBT, and what kind of activities they show interest in.

The following slides show a deep dive into these three areas.

### Slide 134 Travel Habits of Tourists (1)

The slide shows general travel habits of the tourists when they travel abroad. They include how they plan for the trip, where they look for information and with whom they travel.

- The first chart on the left shows how much time in advance tourists from this segment spend planning for the flight, accommodations, and the activities they do at the destination.
  - For instance, 8% of respondents take more than one year to start planning for the flights, while 38% plan for flights within six months to one year, 40% will take between three and six months and 13% less than six months. 0% said that they would decide flights on the spot.
- The second chart shows whether they do research about the country, activities in the country, flights and lodging, and what sources of information they use.
  - Respondents could select more than one option, and thus, the percentage does not add up to 100%.



- The last graph on the right shows who they normally travel with.
  - In this case, the majority (63%) usually travel with their partner.

The analysis can be found in the purple text box.

### Slide 135 Travel Habits of Tourists (Cont'd) (1)

This slide continues with the analysis on general travel habits, but focuses on the selection of the destination:

- The attractions or activities that are more relevant.
- The determining factors to make the final decision on the destination.

Options were provided and respondents could select more than one option as many could have an impact on their decision.

The analysis can be found in the light blue callouts.

### Slide 136 Experience and Interest in Vacations in the Caribbean (1)

This slide is divided into two topics focusing on travel in the Caribbean:

- On the left is previous experience that travelers have had in the Caribbean:
  - How many have visited the Caribbean in the last three years. As this is one of the main profile characteristics, the entire 100% have been in the Caribbean.
  - The main destinations where they have been (the Bahamas being the top choice visited by 48%, followed by Jamaica with 39% and Puerto Rico with 37%).
  - How they reached their destination (53% selected cruise ship to the Caribbean).
- On the right is whether travelers would consider visiting the Caribbean (returning, for the ones that have already been, and going for the first time, for the newcomers).
  - Those that selected either 'it is my next destination', 'I plan to in the next 12 to 18 months', 'it is on my bucket list', or 'might be interested' are the 97% of respondents that would consider traveling to the Caribbean.
  - These 97% were asked why they show interest, which is the bottom right graph that shows that the majority appreciates the tropical weather (68%), be able to relax (54%) and enjoy the beaches (52%) but other characteristics stand out among these travelers as well.

The analysis can be found in the light blue callouts.

### Slide 137 Vacation Planning in the Caribbean (1)

The slide is a continuation of the previous one. It focuses on vacations in the Caribbean and what kind of trip they would like to have.

- The first graph on the left shows the lodging options that respondents selected, with all-inclusive resort as the one that stood out.

- At the center is a summary of travel companions selected to visit the Caribbean (partner) and trip duration (about a week). They were given a list of potential activities to do as part of their trip to the Caribbean and the top three selected were Beach Tourism, Cruise Tourism, and Socializing with Locals (interact and learn from them).
- The last table on the right summarizes their personal and individual budget when traveling to the Caribbean including:
  - International transportation
  - Daily local transportation
  - Lodging per night
  - Daily activities
  - Daily meals

The analysis can be found in the purple text box.

### Slide 138 Tourist Familiarity with and Interest in CBT (1)

The slide analyzes CBT in the Caribbean and it is divided into two parts:

- The first column refers to level of familiarity with CBT as people were asked whether they know the meaning of the term CBT (yes or no). 17% corresponds to those that said 'yes'.
  - The light blue box below describes what they said the meaning of CBT is.
- In the middle, tourists were asked whether they would consider doing CBT in the Caribbean through a selection of options.
  - Those that selected either 'in my next trip', 'it is on my bucket list', 'might be interested', or 'never thought about it' are the 75% of respondents that would be interested in doing CBT.
  - These 75% were asked why they show interest, which is the upper right graph, while the remaining 25% were asked why they would not consider doing CBT in the Caribbean. The options can be read from the graph.

### Slide 139 CBT Activities in the Caribbean (1)

This final slide shows the most and least preferred CBT activities selected by tourists as well as the final analysis for this profile.

- At the top, respondents were asked to select among the 15 activities which ones were the three most preferred (bubble chart on the left) and the three least (bubble chart on the right).
- At the bottom:
  - The text box on the left summarizes the behavior of these travelers when thinking about the Caribbean as a travel destination for beach tourism as well as for CBT. It also explains why this segment has some potential for choosing to do CBT.

- The purple text box on the right reflects on what actions are required to catch the attention of these travelers, encourage them to travel to the Caribbean, and engage in CBT activities while there.

## Slide 140      Profile #2

CBT Connoisseurs were defined as tourists that live in the US, have travelled abroad, and have done CBT in the last three years.

## Slide 141      Overview of the Tourist Profile (2)

This slide shows the overview of the US tourist profile including the name (in the blue text box), demographics (on the left) and travel characteristics (on the right).

This is based on survey results, and the profile selection was agreed between Euromonitor International, Compete Caribbean and the CTO. The profile description can be found on the blue box.

Travel characteristics include:

- General travel habits such as what they choose to do on vacation, with whom they travel, how far in advance they plan, and where they look for information.
- Their thoughts about the Caribbean such as how they envision a trip to the Caribbean, what they expect to do, and why they would choose the destination.
- Their familiarity with CBT and definition, if they would consider doing CBT, and what kind of activities interest them.

The following slides show a deep dive into these three areas.

## Slide 142      Travel Habits of Tourists (2)

The slide shows general travel habits of the tourists when they travel abroad. They include how they plan for the trip, where they look for information, and with whom they travel.

- The first chart on the left shows how much time in advance tourists from this segment spend planning their flight, accommodations, and the activities they do at the destination.
  - For instance, 8% of respondents take more than 1 year to start planning for the flights, while 36% plan for flights within six months to 1 year, 45% will take between three and six months, and 11% less than three months. 0% said that they would decide flights on the spot.
- The second chart shows whether they do research about the country, activities in the country, flights and lodging, and what sources of information they use.
  - Respondents could select more than one option and thus, the percentages do not add up to 100%.
- The last graph on the right shows who they normally travel with.
  - In this case, the majority (59%) usually travels with their couples or partners.

The analysis can be found in the purple text box.

### Slide 143 Travel Habits of Tourists (Cont'd) (2)

This slide continues with the analysis on general travel habits but focuses on the selection of the destination:

- The attractions or activities that are more relevant.
- The determining factors to make the final decision on the destination.

Options were provided and respondents could select more than one option as there many could have an impact on their decision.

The analysis can be found in the light blue callouts.

### Slide 144 Experience and Interest in Vacations in the Caribbean (2)

This slide is divided into two topics focusing on travel in the Caribbean:

- On the left is previous experience that travelers have had in the Caribbean:
  - How many have visited the Caribbean in the last three years (42% said they did, with 110 respondents of 262).
  - The main destinations they have been to (Puerto Rico being the top choice visited by 44% among the 110 respondents that have been to the Caribbean).
  - How they reached their destination (49% of the 110 respondents said they flew to the Caribbean).
- On the right is whether travelers would consider visiting the Caribbean (returning, for the ones that have already been, and going for the first time, for the newcomers).
  - Those that selected either 'it is my next destination', 'I plan to in the next 12 to 18 months', 'it is on my bucket list', or 'might be interested' are the 92% of respondents that would consider traveling to the Caribbean.
  - These 92% were asked why they show interest, which is the bottom right graph that shows that the majority (62%) appreciate the tropical weather but other characteristics stand out among these travelers as well.

The analysis can be found in the light blue callouts.

### Slide 145 Vacation Planning in the Caribbean (2)

The slide is a continuation of the previous one. It focuses on vacations in the Caribbean, and what kind of trip they would like to have.

- The first graph on the left shows the lodging options that respondents selected, with hotel and all-inclusive resort the ones that stood out
- At the center is a summary of travel companions selected to visit the Caribbean (partner) and trip duration (about a week). They were given a list of potential activities

to do as part of their trip to the Caribbean and the top three selected were Beach Tourism, Socializing with Locals (interact and learn from them) and Cruise Tourism.

- The last table on the right summarizes their personal and individual budget when traveling to the Caribbean including
  - International transportation
  - Daily local transportation
  - Lodging per night
  - Daily activities
  - Daily meals

The analysis can be found in the purple text box.

## Slide 146      Tourist Familiarity with and Interest in CBT (2)

The slide analyzes CBT in the Caribbean and it is divided into two parts:

- The first column refers to level of familiarity with CBT as people were asked whether they know the meaning of the term CBT (yes or no). 30% corresponds to those that said 'yes'.
  - The light blue box below describes what they said the meaning of CBT is
- In the middle, tourists were asked whether they would consider doing CBT in the Caribbean through a selection of options.
  - Those that selected either 'in my next trip', 'it is on my bucket list', 'might be interested', or 'never thought about it' are the 90% of respondents that would be interested in doing CBT.
  - These 90% were asked why they show interest, which is the upper right graph, while the remaining 10% were asked why they would not consider doing CBT in the Caribbean. The options can be read from the graph.

## Slide 147      CBT Activities in the Caribbean (2)

This final slide shows the most and least preferred CBT activities selected by tourists as well as the final analysis for this profile.

- At the top, respondents were asked to select among the 15 activities which ones were the three most preferred (bubble chart on the left) and the three least preferred (bubble chart on the right).
- At the bottom,
  - The text box on the left summarizes the behavior of these travelers when thinking about the Caribbean as a travel destination for beach tourism as well as for CBT. It also explains why this segment has a high potential for choosing to do CBT.

- The purple text box on the right reflects on what actions are required to catch the attention of these travelers, encourage them to travel to the Caribbean, and engage in CBT activities while there.

### Slide 148      Profile #3

Guyanese in the Diaspora were defined as tourists that live in the US but travel to the Caribbean.

### Slide 149      Overview of the Tourist Profile (3)

This slide shows the overview of the US tourist profile including the name (in the gray text box), demographics (on the left) and travel characteristics (on the right).

This is based on survey results, and the profile selection was agreed between Euromonitor International, Compete Caribbean and the CTO. The profile description can be found on the gray box.

Travel characteristics include:

- General travel habits such as what they choose to do on vacation, where they had been, with whom they travel, and where they look for information.
- Their thoughts about the Caribbean such as how they envision a trip to the Caribbean, what they expect to do, and why they would choose the destination
- Their familiarity with CBT and definition, if they would consider doing CBT, and what kind of activities they show interest in.

The following slides show a deep dive into these three areas.

### Slide 150      Travel Habits of Tourists (3)

The slide shows general travel habits of tourists when they travel abroad, including how they plan for the trip, where they look for information, and with whom they travel.

- The first chart on the left shows how much time in advance tourists from this segment spend planning for the flight, accommodations, and the activities they do at the destination.
  - For instance, 39% of respondents take more than 1 year to start planning for the flights while 24% plan for flights within six months to a year, 21% will take between three and six months, and 15% less than three months. 0% said that they would decide flights on the spot.
- The second chart shows whether they do research about the country, activities in the country, flights and lodging, and what sources of information they use.
  - Respondents could select more than one option and thus, % do not add up to 100%.
- The last graph on the right shows who they normally travel with.
  - In this case, the majority (55%) usually travels alone.

The analysis can be found in the purple text box.

### Slide 151 Travel Habits of Tourists (Cont'd) (3)

This slide continues with the analysis on general travel habits but focuses on the selection of the destination:

- The attractions or activities that are more relevant.
- The determining factors to make the final decision on the destination.

Options were provided and respondents could select more than one option, as many could have an impact on their decision.

The analysis can be found in the light blue callouts.

### Slide 152 Experience and Interest in Vacations in the Caribbean (3)

This slide is divided into two topics focusing on travel in the Caribbean:

- On the left, the previous experience that travelers have had in the Caribbean:
  - How many have visited the Caribbean in the last three years (100%).
  - The main destinations they have been to (the Bahamas being the top choice visited by 55% among respondents).
  - How they reached their destination (42% of respondents selected cruise ship to the Caribbean).
- On the right is whether travelers would consider visiting the Caribbean.
  - Those that selected either 'it is my next destination', 'I plan to in the next 12 to 18 months' or 'it is on my bucket list' are the 97% of respondents that would consider returning to the Caribbean.
  - These 97% were asked why they show interest, which is the bottom right graph that shows that the majority (55%) appreciate the nice beaches but other characteristics stand out among these travelers as well.

The analysis can be found in the light blue callouts.

### Slide 153 Vacation Planning in the Caribbean (3)

The slide is a continuation of the previous one. It focuses on vacations in the Caribbean and what kind of trip they would like to have.

- The first graph on the left shows the lodging options that respondents selected, with hotel and all-inclusive resort the ones that stood out, and family housing in third place (18%).
- At the center is a summary of travel companions selected to visit the Caribbean (in this case, they travel solo) and trip duration (between one and two weeks). They were given a list of potential activities to do as part of their trip to the Caribbean and the top three selected were Beach Tourism, Socializing with Locals (should explain what this means) and Music, Festivals, and carnivals as well as spiritual or health tourism.

- The last table on the right summarizes their personal and individual budget when traveling to the Caribbean including
  - International transportation
  - Daily local transportation
  - Lodging per night
  - Daily activities
  - Daily meals

The analysis can be found in the purple text box.

### Slide 154 Tourist Familiarity with and Interest in CBT (3)

The slide analyzes CBT in the Caribbean and it is divided into two parts:

- The first column refers to the level of familiarity with CBT as people were asked whether they know the meaning of the term CBT (yes or no). 58% corresponds to those that said 'yes'.
  - The light blue box below describes what they said the meaning of CBT is.
- In the middle, tourists were asked whether they would consider doing CBT in the Caribbean through a selection of options.
  - Those that selected either 'in my next trip', 'it is on my bucket list', 'might be interested', or 'never thought about it' are the 94% of respondents that would be interested in doing CBT.
  - These 94% were asked why they show interest, which is the upper right graph while the remaining 6% were asked why they would not consider doing CBT in the Caribbean. The options can be read from the graph.

### Slide 155 CBT Activities in the Caribbean (3)

This final slide shows the most and least preferred CBT activities selected by tourists as well as the final analysis for this profile.

- At the top, respondents were asked to select among the 15 activities which ones were the three most preferred (bubble chart on the left) and the three least preferred (bubble chart on the right).
- At the bottom:
  - The text box on the left summarizes the behavior of these travelers when thinking about the Caribbean as a travel destination for Beach Tourism as well as for CBT. It also explains why this segment is the ideal one to engage in CBT activities in the Caribbean.
  - The purple text box on the right reflects on what actions are required to catch the attention of these travelers and encourage them to do CBT in their next visit to the Caribbean.



## Slide 156      Scorecard

This section details the scorecard ranking 30 CBT activities in the Caribbean. The 15 top-ranking CBT activities in the Caribbean were then further researched. The six criteria used in the scorecard to evaluate the activities were:

- Price Range
- Number of Businesses
- Community Involvement
- Employment Potential
- Interest/Popularity in the US
- Capacity in the Caribbean

Note: These criteria are noted on the first slide of the Executive Summary.

Scoring was based on a low (red), medium (yellow) and high (green) scale of 1, 3, or 5 points, weighted by the criteria's importance.

## Slide 157      Scorecard

This section details the scorecard for the second portion of the 15 top-ranking CBT activities.

## Slide 158      Scorecard

This section details the scorecard for the lower ranking CBT activities, not tested during the consumer survey.

## Slide 159      Scorecard

This section details the scorecard for the lower ranking CBT activities, not tested during the consumer survey.

## Slide 160      About the Project

This slide details the various steps of this multi-source methodology:

- Secondary Research
- Exploratory Interviews (20 Pulse interviews in the US)
- Scorecard (top 15 ranked activities are shown on slides 156 and 157)
- Online Focus Group (15 completes)
- Consumer Survey (629 completes in the US)
- In-depth Trade Interviews (28 in the US and 17 in the Caribbean)
- Final Delivery

## Slide 161      Sources

Caribbean trade interviews by country

## Slide 162      Sources

US trade interviews

## Slide 163      Sources

US Pulse interviews

## Slide 164      About Euromonitor International

This slide details Euromonitor International's services, network, and expertise.

## Slide 165      About Euromonitor International

This slide further details Euromonitor International's global network.

A custom report compiled by Euromonitor International for  
**Compete Caribbean**

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