The T &T Foresight Project

NIHERST

Sector Foresight Project:

TOURISM

Chapter 2:

T&T Capability & 'Best Bets'

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INTRODUCTION

These sector foresight projects are proceeding through a 5 Chapter Process. Chapter 1 focused on using global foresight to identify potential niche growth opportunities in each sector.

In Chapter 2, we examine the capabilities T&T has available to match selected global niche opportunities and any gaps that need to be addressed to be able to convert these opportunities into a commercial business investment proposition that will provide longer term economic benefits for T&T and help advance the country towards the Vision 2020 goal of achieving developed nation status.

As part of this Chapter 2 work, a number of 'Best Bet' areas were selected by specialist Trinidad and Tobago consultants who researched the capabilities and gaps associated with them. This document is a synthesis of the work done by the local consultants and the sector workshop outcomes compiled by NEXT.

In late July, these Best Bet areas were discussed and refined into more specific first draft 'Best Bet' business cases by a number of key stakeholders from both the public and private sectors at sector foresighting workshops.

In Chapter 3 of the sector projects, the first draft 'Best Bet' business cases from all the five sectors being researched will be short-listed further into more defined propositions. In Chapter 4 these propositions will be developed into detailed business cases that can be put in front of investors. The final Chapter involves a process which endeavours to convert at least some of these detailed business cases into commercial ventures.

SECTION A

This section contains edited content from report material compiled by Mr ColinDale Marcelle from Ideas 2 Business based in Trinidad and Tobago.

1 Global Tourist Trends, the Caribbean and T&T

1.1 Tourist Industry Patterns in the Caribbean

The Caribbean region is a major global destination of choice among the developed countries of Europe and North America and represents one of the few industries, if not only major industry, in which the region can be said to enjoy a leadership position.

Within the Caribbean the dilemma that many countries face is the need to achieve economic growth on the one hand and to meet the challenges of sustainable development on the other. Issues impacting on the competitiveness and sustainability of Caribbean tourism include the following.

1. An increasingly competitive industry internationally; the Caribbean is losing market share - it has lost 3% since 1975.
2. The region is classed as a high priced destination relative to other sub-regions (Caribbean Tourism Organisation).
3. Increasing competition from cruise ships with the land based industry. This is particularly alarming as the contribution of cruise ships to the region is negligible (Caribbean Tourism Organisation).
4. Revenue retention is generally low due to high import propensity of the region, the fact that maintenance of the tourism industry is based on imported goods and raw materials, and the predominance of pre-sold and pre-packaged tours.
5. Low hotel profitability due to high labour costs (in some destinations) low productivity, low occupancy rates, high costs of utilities, and in some cases high import duties (Caribbean Development Bank).
6. The provision of investment incentives that do not effectively ensure the use of indigenous materials. Even where policy leans in the direction of indigenous purchasing, a significant percentage of goods and materials used to support the tourism industry in most countries in the region are imported. This problem is exacerbated, at least in part, by a weak manufacturing sector.
7. Untargeted investment incentives that play a minor role in the decision of investors to establish operations.
8. Security issues
9. Inadequate and generally high cost air transportation
10. Coastal water pollution, littering and inadequate solid waste management, cruise -ship dumping at sea

Forces impacting on the Caribbean region's competitiveness are very much in tune with the factors that are impacting on global tourism. The region, having traditionally received most of its arrivals from Europe and North America, will be directly affected by demographic shifts as populations in the developed Western World are ageing and this will shift their priorities when it comes to decision-making.

1.2 Future Growth Niches- Opportunities for Trinidad and Tobago

Any assessment of the future of the global tourism and travel markets must take into account the emergent shifts in travel patterns and the choices that people make. Consequently any scenario building exercise must pay heed to the emergence of new tourism. What impact will the shift to this new model have on destinations like Trinidad and Tobago?

Adventure tourism, - This niche enjoyed explosive growth during the 1990s and is forecasted by the WTO to remain an increasingly popular niche in future. Media coverage and adventure / extreme action based television presence are indicative of a growing audience among today's younger generation and also, in turn, generate interest in extreme sport and new adventure sports.

Cruise: Forecasted to continue it s growth trend but with very little economic benefit to the islands of the region - this sector should not be given top priority in Trinidad and Tobago.

Eco-tourism - Fuelled by the increased awareness by people around the world to issues of pollution, global warming and impact on the environment, the environmentally conscious will choose nature based leisure activities. Travel, which contains a nature component, is expected to continue to gain in popularity.

Culture based tourism - People are expressing a greater interest in the historical facet of a destination as part of their planning considerations. Interest is also increasing in cultural traditions and customs. Consequently this sector too has experienced strong growth. Eastern Europe, the Middle East and Asia are forecasted to enjoy strong growth in arrivals as increasingly these formerly restricted markets open up and tourists are able to exercise easier choices in select travel packages.

Theme based tourism – Where a special interest is the primary motivation for travel is referred to as theme based travel.

2 Challenges for Caribbean Tourism

2.1 The Traditional Tourist Offer

There are a number of factors to consider when considering the history of the tourist industry in the Caribbean:

- The Caribbean has been indelibly associated during the modern boom of tourism from the post war years with facets such as 'exotic, island, white sand, warm waters, tropical, and music'.
- The history of the region has left key connections between particular islands and colonial countries such as UK, France, USA, Denmark, Netherlands, etc. Historical ties have meant that tourist channels and air travel links have successfully focussed on maintaining the links between the historical coloniser, and the island nation e.g. Martinique is focussed on French tourists, Barbados is focussed on the British.
- The rise of the cruise business, and also the yachting business in the Caribbean is based on the wide variety and close proximity of attractive harbours.
- The carnivals provide an event attraction for a segment of the tourist market.
- Exotic culture is also an attraction- this has supported the rise of the Cuban Tourist business for example

Trinidad and Tobago obviously offers different tourist products. Tobago has good air links with the UK, and has supplied a 'small, unspoiled island with beaches, and scuba' offer. Trinidad has very little in the ways of beaches and instead depends on its eco- attractions, carnival, and tourist add-ons for the large 'VFR' (visiting friends and relatives) market, and the rapidly expanding expatriate visitor market which supports the energy sector.

2.2 The Challenge for the Region

World tourism has expanded rapidly over the past ten years and most forecasts suggest even more rapid growth ahead. This is driven by three factors:

- The cheapness of the discount air fares– which opens up all geographical markets to the mass market of low budget people.
- The rise of the middle class in China and India who are coming into the market of international tourism for the first time in history.

- The aging population of well-off and healthy 'old people' who want to spend their savings on as much travel as possible before they die.

However there are some cautions:

- World crises will continue to occur over the next ten years which will always have a cataclysmic, though short term, impact on travel.
- There are broadly two types of market - 'mass, commodity market', and 'high value, niche market'. The niche market tourists do not want to go to the destinations that are mass markets! Also over time the niche markets become commoditised and so new niches need to be opened up.
- Marketing and strategic planning expertise is paramount in an industry with almost every country able to compete in the world tourism market.
- Airline tourism is a major polluter of the world's atmosphere through CO_2 emissions - at some point this will be have to be curtailed, either through major technology innovation, or regulation, or increased prices.

The Caribbean, and Trinidad and Tobago, will need to sharpen up its act to be able to earn a slice of the growth. Some of the issues include:

- The need to instil a proper understanding of the tourism industry in either economic or social terms within these societies.
- The need to overcome tendencies of insularity in marketing and promoting the countries of the Caribbean as a single destination.
- Caribbean tourism product needs to transform itself from its traditional mass appeal toward more scientifically based, information driven development of specific niches within its product mix.
- Transforming traditional institutions and agencies to embrace new approaches and techniques in promoting and developing the regional tourism product.
- Assuring its sustainability and achieving the right balanced approach to development.
- A policy or statement on HIV/AIDS.
- Avoiding the damage that is always done by the mass market
- Attracting the 'new tourist' who demands a far more personally customised offer, not the traditional mass tourism offer.

The next section will identify the actions required by Trinidad and Tobago, beginning with an initial assessment of its capabilities.

3 Capabilities and Enablers in T&T

3.1 <u>The Current State of TT Tourism</u>

In this section we look at the capabilities the local T&T tourism sector and how they relate to the trends described in the previous sections. A vast amount of work has already been done and published on T and T tourism strategy.

We initially assessed various studies undertaken in recent years that have guided the development and marketing of Trinidad and Tobago as a destination. These include sector appraisals undertaken by TIDCO (Tourism and Industrial Development Company of Trinidad and Tobago Limited) which, until 2005, had responsibility for implanting destination policy. Next we looked at the Tourism Master Plan which was referred to by most of the sector officials who work in the industry, and the World

Travel and Tourism Council report produced in 2005, which represents the first tourism satellite account for Trinidad and Tobago.

It is worth mentioning that recent national indicators all suggest the tourism sector is expanding. Notwithstanding these developments, the present administration plans to give attention to planning for the future period. This report assesses the industry's capability within the context of regional and global scenarios. It provides an overall SWOT (strength, weaknesses, opportunities, threats) analysis of various tourism products and sector niches.

3.2 Tourism Sector Performance in Trinidad and Tobago

The state continues to have an indisputable ongoing role as a sector facilitator. For this reason the government's developmental Vision 2020 for the tourism sector formally presents the goals to which it is committed, and commences with a statement of its broad vision for the sub-sector, and the resulting developmental goals for the tourism sector.

Trinidad and Tobago's stated 2020 vision for the sector has been identified as follows:

> *"By the year 2020, the Trinidad and Tobago tourism product will be a significant economic sector contributing significantly to the nation's GDP, through job creation and increased revenues, driven by a uniquely differentiated, internationally competitive product, complemented by comprehensive, fully functional physical infrastructure, modern, competitive institutional framework and supported by the people of Trinidad and Tobago. The sector will be anchored by properly marketed flagship products with brands names that are globally well-known."*

The work-programme required to realise these goals is informed by both local regional and global considerations, and for this reason the country's path is one which recognises the value of certain tourism niche markets, driven by the 'new tourist' who is a reflection of the new e-based tourism paradigm.

Trinidad and Tobago has identified as its mission

> *"To fully develop Trinidad and Tobago's tourism industry by the sustainable development and aggressive promotion of an innovative, differentiated, high value, internationally competitive visitor experience, supported by strong brand recognition, public and private sector partnership and a positive cultural transformation"*

3.3 Situation and Needs Analysis

The recommendations presented here begin with a summary of the status of the tourism industry in Trinidad and Tobago, before concluding which niches can be of strategic importance. In examining key indicators such as tourist / visitor arrivals and expenditure, Trinidad and Tobago's percentage share by main markets, yacht arrivals and hotel occupancy levels, it confirms that the tourism industry is well poised for continued growth and continues to display encouraging trends.

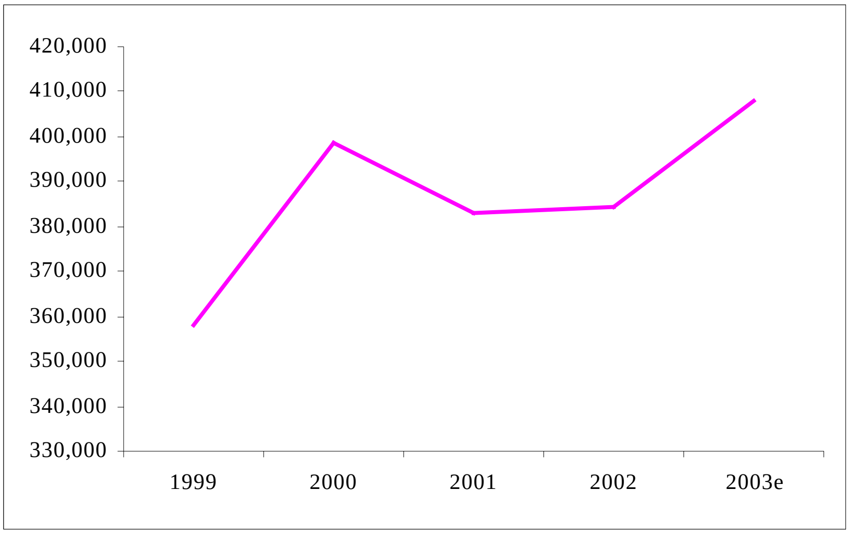
That said however, issues of crime, especially those against visitors, can tarnish the destination's image. The product standards need improving, the visitor experiences need to be enhanced and marketed better, and airlift capacity needs to be strengthened between the islands.

3.4 T&T facts & figures

3.4.1 Visitor trends

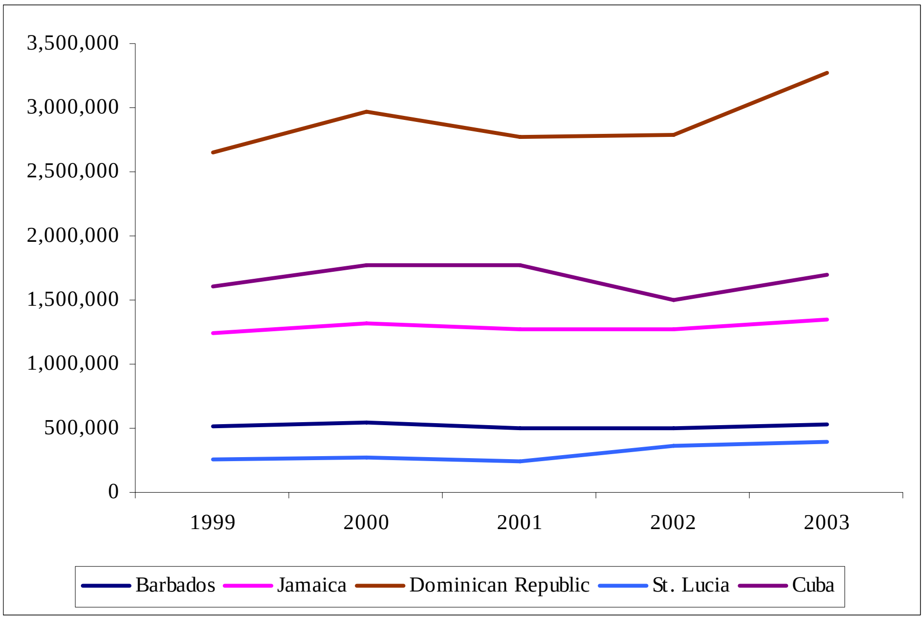
Arrivals for 2005 were recorded at 459,000 the highest number recorded to date and continues the rebound of the travel and tourism market since 2001.

Fig. 1: Visitor arrivals to Trinidad and Tobago 1999-2003



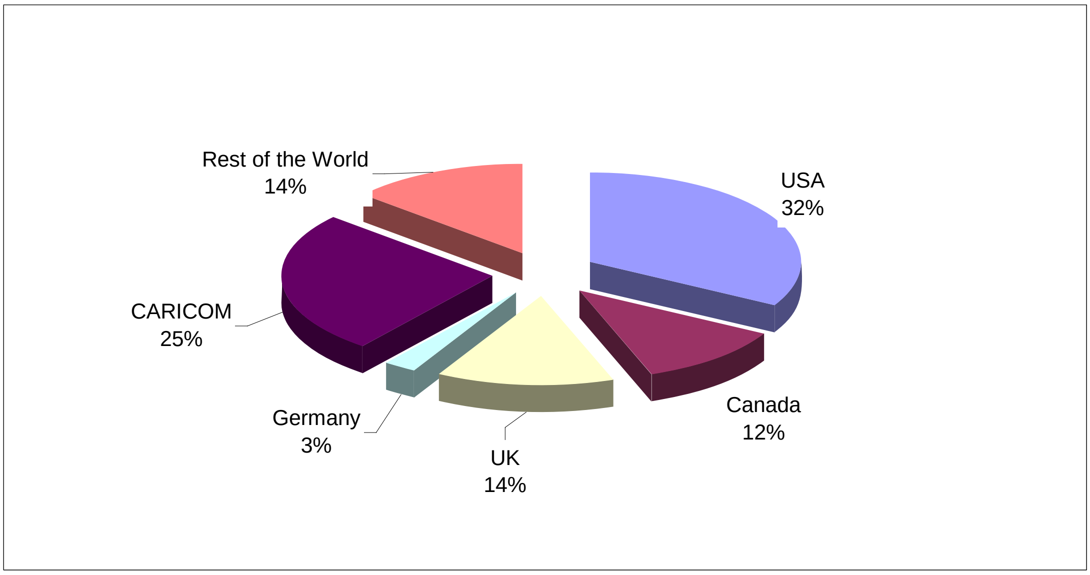
Figures for other Caribbean destinations show a similar pattern, as there was a marked decrease in arrivals in 2001 followed by a recovery.

Fig. 2: Visitor arrivals to selected Caribbean Destinations 1999-2003



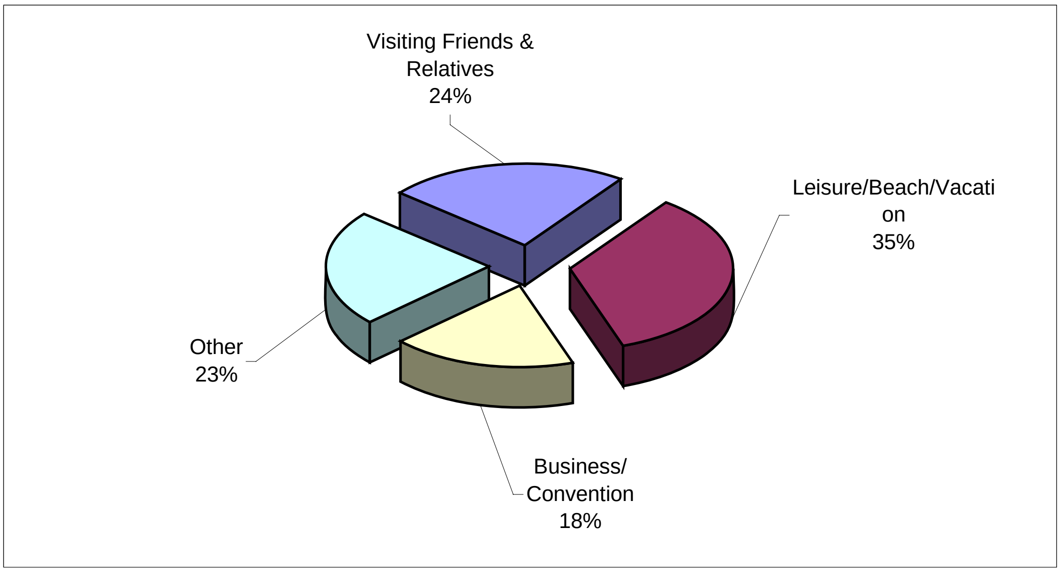
Trinidad and Tobago's main markets remain the U.S. the Caribbean, the UK (United Kingdom) and Canada. These markets together accounted for 83% of all visitor arrivals in 2003.

Fig. 3: Visitor arrivals by main markets: 2003



Traditionally, the majority of visitors have been classified as Visiting Friends and Relatives (VFR's). There was a marked change in this trend as vacation or leisure travel accounted for the majority of all stay-over arrivals - 35%. Business travel maintained a constant proportion of all visitors at 18%. Attempts to disaggregate the 'other' category are being made. This level of detail will facilitate analysis of the performance of the various tourism niche markets including: dive, sports, eco and weddings and honeymoon.

Fig. 4: Visitor arrivals by purpose of visit: 2003



3.4.2 Hotel Room Stock

The stagnation in hotel room numbers was arrested with the addition of new stock both in Trinidad and Tobago. From a constant 7% increase in hotel room stock, the 2003 data revealed a double-digit increase of 14.5 % over the previous year.

Several business opportunities have been highlighted for hotel development and legislative as well as bureaucratic challenges are being addressed. The start up of the Marriott Courtyard to cater to the business traveller will no doubt pave the way for additional business and convention centre hotel development.

Table 1: Number of rooms in Trinidad and Tobago 1998-2003

Year	Trinidad	Tobago	Total
1998	2,087	1,884	3,971
1999	2,062	2,174	4,236
2000	2,207	2,325	4,532
2001	2,362	2,488	4,850
2002	2,528	2,662	5,190
2003	2,528	3,415	5,943

Source: CSO

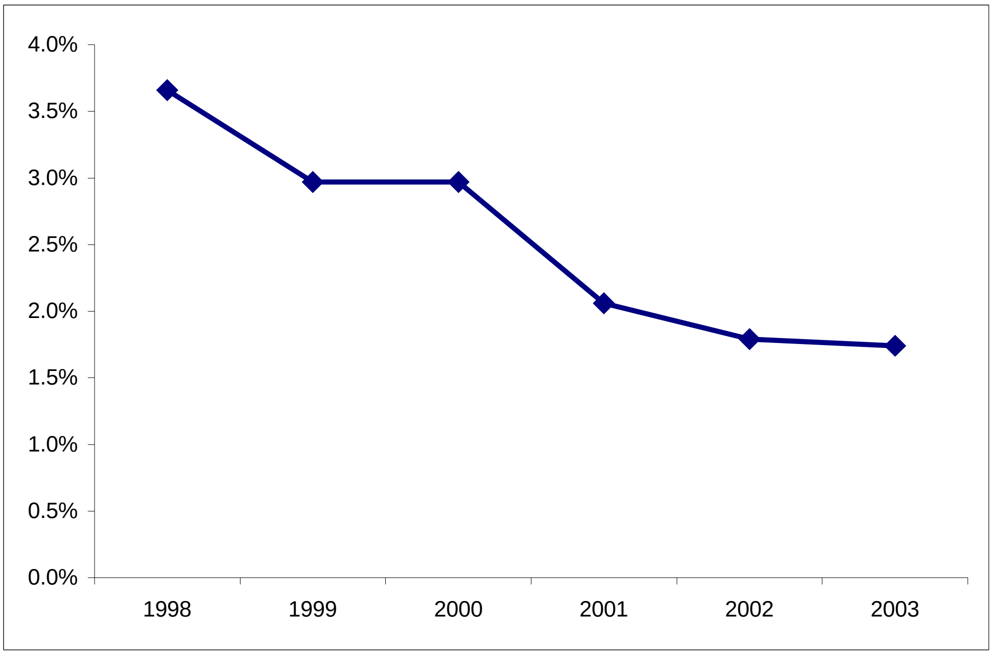
3.4.3 Employment

The CSO currently captures the employment levels in the tourism industry for only a few categories of workers. Consequently, current statistics do not accurately reflect the employment generated in the sector. The 2003 data from the World Tourism and Travel Council estimates that in Trinidad and Tobago some 10,460 people were directly involved in the industry. Indirect employment is estimated to be four times this amount.

3.4.4 Contribution to GDP

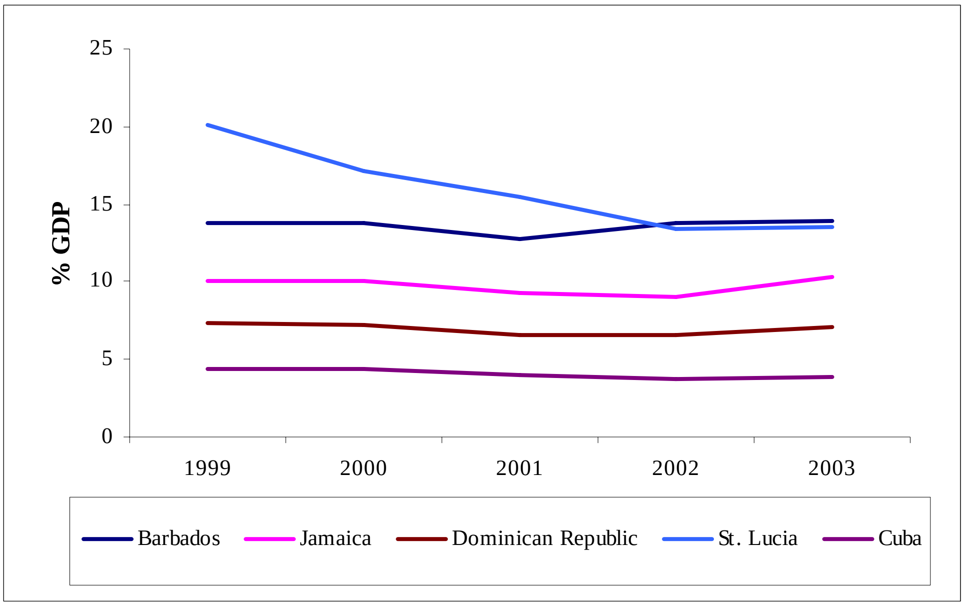
Given that the CSO's measurement of the tourism sector is confined to hotel and guesthouses, data from the World Tourism and Travel Council were used to give a more accurate estimate of the sector's contribution to national output. Contribution to GDP has been on the decline from almost 4% in 1998 to approximately 2% in 2003. This is not unexpected given the dominance of the energy and services sector to the Trinidad and Tobago economy and new initiatives, particularly in the gas sector.

Fig. 5: Tourism's direct contribution to GDP: 1998-2003



Using the WTTC data for selected Caribbean countries shows that tourism's contribution to their economies has remained relatively steady, with the exception of St. Lucia which exhibits a decline.

Fig. 6: Tourism's direct contribution to GDP: Selected Caribbean countries: 1999-2003



3.4.5 Yachting

Table 2: Yacht arrivals to Trinidad & Tobago: 2001 – 2003

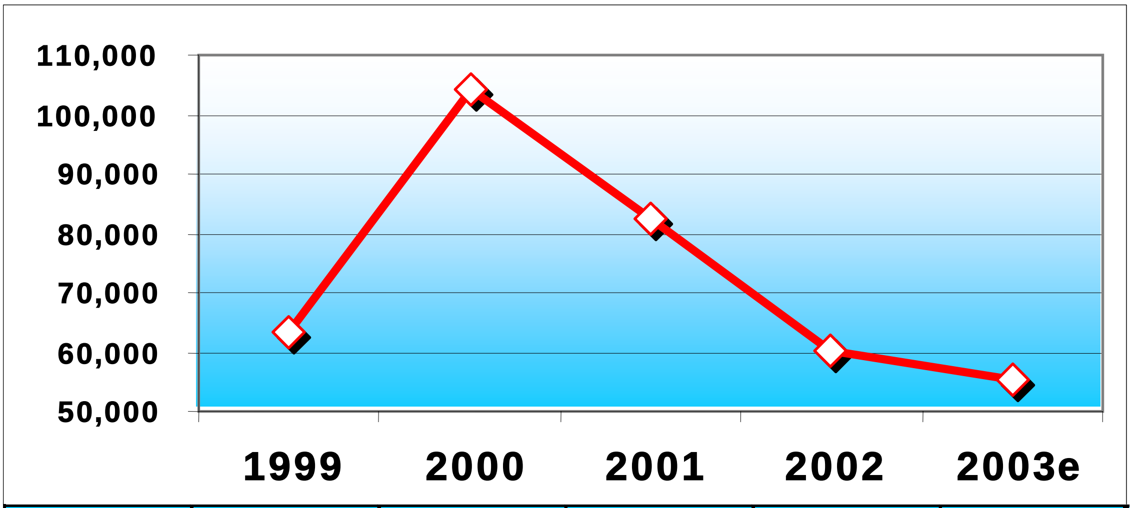
Year	Trinidad	Tobago	Total
2001	**1998**	**737**	**2735**
2002	**1694**	**607**	**2301**
2003	**1346**	**632**	**1978**

The yachting sector experienced phenomenal growth over the period 1990 - 2000, but since November 2000 there has been a significant decline in the arrivals, the overall yacht population, and 'active' yachts. Arrivals in 2003 declined by 14%. However there have been signs of a resurgence over the past two years as a result of insurance premiums moving higher following the hurricanes of 2004 and 2005. The contribution of the niche to the country's national output will also be measured by the Central Statistical Office in future.

3.4.6 Cruise

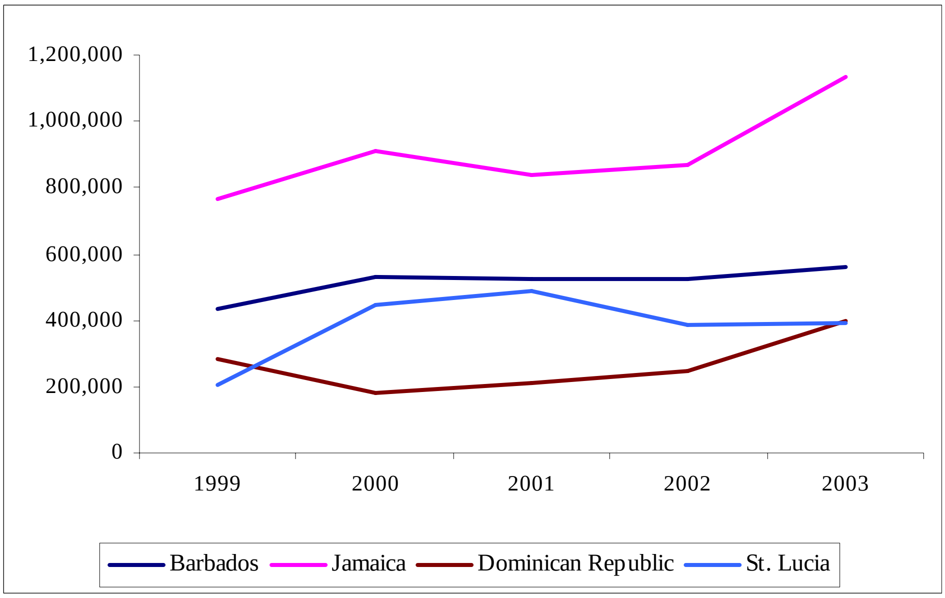
The Caribbean is currently the leading destination for cruise ships in the world, enjoying roughly 47% of the world's traffic, yet Trinidad and Tobago receives only 0.4% of the total market share. Cruise passengers account for 15% of the visitors to Trinidad & Tobago. The downward trend since 2000 has been attributed to a number of issues including shorter itineraries that mean calls at ports closer to the US Mainland, and the consequences of the terrorism attacks of September 2001. There has been an increase in cruise ships calling from Europe, in particular from Germany. On average cruise visitors spend US $42.25 or TT $253.54. This is much lower than in most other countries in the region.

Fig. 7: Cruise arrivals 1999-2003



	1999	2000	2001	2002	2003e
#	63,251	104,061	82,272	60,047	55,532
% change	47%	65%	-21%	-27%	-8%

Fig. 8: Cruise arrivals: Selected Caribbean countries 1999-2003



Cruise arrivals for the selected Caribbean countries show steady increases over the period, although St. Lucia exhibits a decline from 2001.

3.5 Tourism outlook for 2006 and 2007

The outlook for 2006 and the short term is positive with a 5% increase expected in stay-over arrivals, although there has been some slackening in demand for Tobago this year. This may be attributable in large part to potential visitors who may have opted to forego their winter vacation in favour of the football World Cup. This event, which was hosted in Germany (one of our primary European markets), is evidence of one of the megatrends in the tourism and travel industry - the move towards participation in megasport events.

However, demand is expected to resume its general upward trend and the resultant effect will be demonstrated in increased visitor expenditure and employment. As demand continues to be strong, a more targeted marketing strategy becomes adopted, and new investment in hotel plant takes place, some bullishness will become increasingly evident in the industry, especially in light of the heightened profile Trinidad and Tobago is expected to enjoy since their participation in the World Cup.

The cruise and yachting sectors will continue to show improvement this year and will recover in the medium term, provided that competitiveness and sector specific challenges are addressed.

A fledgling calendar of cultural events stands to give fillip to an already culturally and ecologically diverse product with the perennial seasonal peak in February for Carnival.

3.6 Competitive Position Analysis and Strategies

In assessing the country's tourism competitiveness relative to other destinations an analysis of strengths, weaknesses, opportunities and threats was undertaken for various aspects of Trinidad and Tobago's Tourism Industry. The analysis reveals that Trinidad and Tobago is well positioned to provide an exceptional tourism product based on a combination of environmental, structural, cultural and economic sound elements.

However, it identifies a number of institutional weaknesses and some environmental setbacks which may hinder development of the sector and, in so doing, highlights a number of tools upon which the country can build competitive advantages.

The overall strategy that emerges for Trinidad and Tobago is to take advantage of its environmental and cultural attributes with a focus on culture and business tourism for Trinidad, and culture and leisure-based tourism for Tobago. Whatever the focus, developing tourism within the current social, environmental and economic framework will depend on the adherence to a number of important guidelines including:

- Focus on high value added tourism.
- Ensuring environmental sensitivity.
- Recognising the need for authenticity.
- Developing an effective institutional structure.
- Proactive approach to destination marketing.
- Sustained investment in human resources development.
- Ensuring sustained asset management.

3.7 The Trinidad and Tobago Offer

Trinidad and Tobago is more than just the classic Caribbean vision of powdery sand beaches, colourful cocktails under the sun, and scantily clad Carnival masqueraders featured on glossy magazines and tempting brochures, a view that many potential tourists may share.

Rather the islands are a confluence of culture unlike anywhere else on earth where traditions handed down from generations still remain in a people who can trace their roots and influences to every corner of the world. More diverse than most countries, its multicultural influences have grown into a cosmopolitan cornucopia of festivals, food, music, religion, rituals and artistry. At the same time, Trinidad and Tobago's duality only begins at its geographical separation.

3.7.1 Trinidad

Trinidad stands poised to become the commercial capital of the Caribbean region. Buoyed by a vibrant oil and gas industry, this island is host to a number of multinational companies that have found the republic an ideal investment ground. It is also home to one of the largest manufacturing bases in the Caribbean and is strategically located to take advantage of business opportunities with both its Caribbean counterparts to the north and its Latin American neighbours to the south.

An increasingly vibrant financial sector has fuelled investments in banking, insurance, real estate and property development. Skilled technical and professional services are also contributing increasingly to economic growth as evidenced by substantial earnings in the non-tradable account of the country's national income (GDP).

It is for these reasons that Trinidad has been positioned as the 'Gateway to Latin America' to foreign investment seeking a home base within the Caribbean and Latin American region. Coupled with Port of Spain's appeal as a shopping centre for the Eastern and Southern Caribbean, and the capital city of choice for the headquarters for reputable regional and international companies, regional organisations and diplomatic missions, it is easy to see why the capital is being positioned as the commercial hub of the Caribbean.

3.7.2 Tobago

On the other hand, Tobago is endowed with an enviable array of sandy beaches and coves, barrier reefs, a cultural vibrancy steeped in African traditions, and historic intrigue. Endowed with one of the most pristine environments in the Western hemisphere, Tobago's Main Ridge is the oldest forest reserve in the western hemisphere (1776); awarded Best Eco Destination by the World Travel Market for three successive years.

The pace of life is definitely slower as the people maintain close ties to more traditional sectors of agriculture and fishing. More recently tourism has become the major employer for the relatively small population, and it is expected to become more important as the island, through its THA, promotes itself by capitalizing on the initial awareness created by Trinidad and Tobago's qualification for the World Cup finals in Germany 2006.

However even prior to this event the island had been lauded for its unspoilt ecological state, one of the primary factors which maintains the island's physical appeal. Opportunities abound in the tourism sector, specifically in accommodation and related hospitality and service industries.

3.7.3 The fundamentals

The importance of travel and tourism to Trinidad and Tobago is a now recognized fact. However the potential benefits which can accrue to the country remain relatively unrealised even though the sector has become increasingly organised and managed over the past decade.

Endowed with substantial oil and gas resource base, the country has developed a successful and buoyant energy and manufacturing sectors and is recognized in global commodity markets for petroleum, natural gas, ammonia and methanol and regionally in services and manufacturing. As a consequence Trinidad and Tobago is much less dependent on travel and tourism than many neighbouring Caribbean countries.

However as successive administrations have sought to diversify the economy, tourism has received increasing attention, principally because of its significant potential for job creation and revenue generation. Until recently tourism has been guided by the Tourism Master Plan[1], which was adopted in 1995 and has been the broad strategic framework that has guided public and private sector action.

This plan proposed a focus on low volume, high value tourism utilising sun, sand and sea resorts, eco-tourism and eco-lodges and niche products such as diving, heritage and culture. One of the primary objectives of the tourism master plan was to have the industry contribute 10% to GDP. At the time of is finalization in 1995 tourism arrivals stood at 259,800 arrivals and cruise ship arrivals stood at les than 22,000. Altogether the CSO estimated that the sector accounted for 1.5% of GDP

Over the past ten years or so the tourism agency responsible, TIDCO (since replaced by the Tourism Development Company - TDC) had the primary responsibility for promotional and marketing activities and ensuring the creation and deepening of linkages between tourism and other economic sectors, especially manufacturing and trade.

The tourism thrust included a number of product development projects including environmental protection measures in specifically designated areas, upgrading cultural, historical and recreational sites, road improvement work leading to the north and east coast resort areas, and site enhancement at the Chaguaramas peninsula.

Today the country's marketing approach is still based on the 4T concept- Terrific Trinidad and Tranquil Tobago. In Tobago the emphasis is on the tranquil nature and peacefulness of the island whereas in Trinidad it is on the vitality of the city of Port of Spain. The city itself is in the midst of an expansive rehabilitation and urban renewal programme, projected to continue to 2012. On completion, a number of new facilities would have been added to the urban centre including conference facilities and an arts centre.

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[1] Developed by ARA Consulting Group 1995

The cruise ship industry is also central to this approach, and culture and heritage have also been major planks to the campaign (in particular the St. James district has benefited from restoration work as the area is deemed to be a renaissance district. Port of Spain is actively promoted in many national promotional materials as the financial centre of the Caribbean and **THE** gateway to the Americas.

3.8 Strategy for future growth and development.

3.8.1 The basic needs

A substantial percentage of the visitor arrivals are classified as 'VFR's' (Visiting Friends & Relatives). The required growth of the tourism industry must come as a result of sustainable increased business in the accommodation sector, - hotels, inns, guest houses and host homes - and cannot come from only increasing the numbers of tourists visiting friends and relatives staying in private homes.

In order for the additional room stock to be built and to be profitable, sufficient demand must be created to fill the existing room stock profitably.

As a consequence, the focus of the TDC is on destination marketing, sensitising the local population to the importance of tourism and the role each person within the community can play to successfully grow the product, as well as improving the tourism infrastructure.

3.8.2 Constraints to growth

The key constraints to the growth of Trinidad and Tobago tourism product are:

- The destination's image is increasingly at risk, a consequence resulting from external reports of crime and increased access via internet to news reports available online.
- Much of the product and the visitor experience is not up to international standards.
- The tourism investment climate is not competitive vis a vis the investment practices and policies of competing destinations.
- Insufficient infrastructure to support the industry's goals and objectives.
- Lack of public awareness programmes on tourism.

3.8.3 The mandate to deliver

The mandate to improve the country's tourism industry falls to the TDC, which is organized to deliver services in the following key areas.

(a) Marketing.
(b) Product development:
  - Sites and attractions.
  - Quality control & standards.
  - Destination information services.
(c) Research and planning.
(d) Investment promotion.

3.9 SWOT analysis of the overall T&T tourism sector

In assessing the country's tourism competitiveness relative to other destinations a SWOT Analysis for Trinidad and Tobago's tourism industry was done by the Subcommittee for Tourism. Here are the findings.

Table 3: SWOT –Trinidad and Tobago's Tourism Industry[2]

Strengths	Weaknesses
• A new and modern airport in Trinidad and an extensive upgrade for the Tobago Airport. • Waterfront development project to support increased cruise tourism, cultural and business tourism • A diverse tourism product complemented by a strategy of differentiation. • High awareness of Carnival and commensurate visitorship. • Growing awareness regionally as an attractive shopping destination. • Favourable investment grade rating by Standard and Poor's and Moody's. • Strong manufacturing sector re: the Caribbean. • Destination situated outside the hurricane belt making it an ideal location for cruise tourism and yachting. • Diverse cultural heritage and tradition; events and festivals. • Modern cultural/business centre at Port of Spain. • Globally known personalities especially in the sporting arena. • Globally admired visual/performing arts. • Culinary diversity.	• Inconsistent and inadequate funding for state agencies with responsibility for tourism. • Shifting of government priorities away from tourism. • Poor compensation schemes and exploitative working hours for industry workers. • Creation of a negative perception of the destination through the high incidence of HIV/AIDS. • Lack of coordination among public sector agencies responsible for tourism. • Increased incidence of crime and threat of terrorism. • Incidence of terrestrial and marine environmental degradation has been increasing. • There is no online booking engine. • The destination is inadequately branded. • Lack of coordinated approach to product development that includes utilizing the destinations' rich cultural and heritage resources. • Absence of duty-free legislation to allow for duty-free shopping outside the major ports of entry. • Aesthetically unappealing environment in some key tourism areas. • Inadequate and untimely operational data on the performance of the industry and tourist motivations and perceptions. • Insufficient tourism public awareness programmes. • Lack of a coordinated approach to managing, maintaining and developing local sites and attractions. • Lack of National Tourism Vision. • Unclear roles and responsibilities of government agencies (THA, MOT, TDA).

[2] Modified from TIDCO's Draft Tourism Sector Profile 2003

Opportunities	Threats
- Expansion of intra-regional tourism market. - Construction of internationally recognized four and five star hotels. - Strong manufacturing sector with potential for inter-sectoral linkages in other sectors with the tourism industry. - Development of Diasporic tourism given Trinidad and Tobago's ethnic diversity. - Trinidad and Tobago as a major hub to South and Central America. - Increasing oil and gas revenues to assist in tourism development programmes. - Adoption of an internationally recognized sustainable tourism certification model. - Port of Spain as a differentiated product. - Development of fine dining sector.	- Increased vertical integration with the Travel and Tourism industry. - Shrinking Caribbean market share of international tourist arrivals. - Consolidation within the airline industry. - Aggressive marketing of mature tourism destinations. - Long-term competition is intensifying as destinations such as the Dominican Republic are adjusting their product to capture more of the US Market; and Cuba adjusting their product to capture more of the European Market. - Continued environmental degradation and lack of enforcement of environmental laws and lack of environmental protection. - Extensive discounting attracting the lower end of the tourism market and resulting in lower profitability in the tourism industry.

3.10 Market Segmentation - Specialised niches

3.10.1 What are the niches?

New emerging markets for which products are currently or potentially available in Trinidad and Tobago and with strong and/or growing international appeal include:

- Culture-History /Festivals/Cuisine/Music.
- Sport.
- Eco-tourism - Bird watching.
- Conference & Business.
- Scuba Diving.
- Shopping.
- Soft Adventure.
- Sailing.
- Cruise - port of call and home porting.
- Weddings and honeymoons.
- Sea, sun, and sand leisure.

Based on the assessments of general trends and characteristics of the market, assessing the product quality in both islands and the state of product development, the selected niches are categorized as follows:

Priority	Focus	Where
First	• Cultural • Sport • Eco-tourism – including bird-watching • Business meetings and conferences • Scuba diving • Sailing (yachting)	• Trinidad & Tobago • Trinidad • Trinidad & Tobago • Trinidad & Tobago • Tobago • Trinidad & Tobago
Second	• Shopping • Soft adventure and new generation sport • Educational • Weddings and honeymoons • Cruise – port of call	• Trinidad • Trinidad & Tobago • Trinidad • Tobago • Trinidad & Tobago
Third	• Cruise – home port • Sun, sea, sand and leisure • Visiting friends and relatives	• Trinidad • Tobago • Trinidad & Tobago

3.10.2 What are market opportunities?

Trinidad and Tobago possesses some definite opportunities to cater to and upscale emergent and new market niches. These include nature, scuba diving, sport, and cultural tourism. The conference and business travel market niche is a relatively long standing niche in which the country has managed to be reasonably successful and is supported by business travel that is spun off from the major energy and manufactured goods sectors and services such as banking, accounting, and insurance services.

Marketing of sea sun and sand leisure in North America is basically done on price. And will be particularly so for a destination as far away as Trinidad and Tobago.

There is a deliberate desire, by both government and industry stakeholders to identify Trinidad and Tobago as an 'upscale' destination which promotes its uniqueness, rather than as a 'low cost' mass market destination.

The European market is especially important as these vacationers travel longer distances and will seek to combine some niche interests such as bird watching, golf or scuba diving with general sun sea sand leisure activities.

3.10.3 Seasonality of demand

In spite of the year round nature of the specialized niches most business will be attracted during the winter period, with some overlap to fall and spring. This seasonal trend has given rise to what the industry refers to as the high season and low season and accommodation costs vary accordingly.

3.11 Specialist T&T niches in detail

In this section we have looked at some of the niche sectors and developed a more detailed view of what they are and the possible strengths, weaknesses, opportunities and threats associated with them.

3.11.1 Eco tourism

Trinidad and Tobago's natural assets lend themselves to tourism which is partly based on ecology. In developing the eco-tourism market in the past few years, there has been a careful approach to avoiding destruction of habitat, and ensuring that the local communities are integrated to the niches development.

Eco-tourism in Trinidad and Tobago embraces hiking, bird watching (dealt with in greater detail) educational ecology tours, national park visits and nature based activities such as camping.

In this niche bird watching possesses particular appeal.

- Bird Watching- Travellers whose main activity is the observation of birds in their habitat.

Market Size – 30 million Americans consider themselves active birders, of which 2, million are highly committed and travel.

Demographics:

Average age:	40-50 years
Income:	$20,000-50,000 - (70%)
	$50,000 and over - (17%)

Travel Attitude: In North America avid birders spend an average of 2 weeks of vacation birding and an average of 22-day trips a year.
Package prices of USD 2000-5000 are usual for rare bird destinations.
Trends: Bird watching is a growing pastime. Travelling birders though is a slow growing segment.

However the future of this niche will also involve a move to more significant community based eco-tourism, education and permaculture (self dependent organic supplies of fruit and vegetables for use by the community)

Fast growing eco destinations include Costa Rica, due to its policy on nature preservation and Belize due to its 'off the beaten path' pure and virgin image. The Amazon's appeal has been in decline due largely to the impact of deforestation on bird communities

Activity features:	Numbers and variety of birds that can be seen daily.
	Natural scenic value of the site.
	Security.
	A good mix of nature and cultural historical opportunities.

Accommodation	It can be expensive due to the remoteness of sites, but they should be up to acceptable standards.
Duration of stay:	Five to seven days is the average for the travelling birder, and two weeks for the avid birder.
Special factors:	Good field guides, knowledgeable on birds and flora and fauna in general.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ Strong biodiversity- one of the most densely populated birding destinations anywhere in the world. ▪ Regionally possesses species not found on other Caribbean islands due to its connection to South America approximately 1 million years ago -430 bird species, 620 species of butterflies, 2300 different flowering plants and shrubs. ▪ Good facilities located in close proximity to Tobago's Main Ridge Forest Reserve, Arima and Aripo Valleys in Trinidad and St Giles and Little Tobago Bird Sanctuaries. ▪ Easy access to most sites in less than 2 hours. ▪ The Wild Fowl Trust and Caroni Bird Sanctuary. ▪ Growing investment in the sector. ▪ Knowledgeable and trained guides. ▪ For couples who buy packages, Trinidad offers substantial diversity of attractions. ▪ Strong growth niche globally. ▪ Needs only small numbers of high value visitors. ▪ Low impact on the environment.	▪ Insufficient trained and knowledgeable guides. ▪ Slow rate of implementing special training programmes. ▪ Slow rates of implementation and enforcement of regulatory and institutional framework for management of protected areas and wildlife. ▪ Not as well known as Brazil, Belize, Venezuela and Costa Rica. ▪ Lack of a global niche strategy. ▪ Low rate of global connectedness- in particular broadband. ▪ Poor facilities and low rate of infrastructure development. ▪ Low rate of e-based market opportunities.
OPPORTUNITIES	**THREATS**
▪ Recently introduced tour guide courses at Trinidad and Tobago Hospitality Institute can improve cadre of skilled persons. ▪ Trails being cleared and maintained with greater frequency with markers and signage. ▪ Legislation by the Tobago House of Assembly will encourage planned developments within appropriate standards with appropriate investment concessions. ▪ Possibility to combine with other attractions into a 'combo' product. ▪ Direct connection via Internet removes importance of the tour operator thus reducing cost and enhancing stakeholder capabilities at home. ▪ To develop further sites and attractions with greater community involvement and organically foods.	▪ Water borne pollution in the wetlands and swamps. ▪ Loss of habitat to other areas of economic activity including housing, agriculture and quarrying. ▪ Strong competition emerging from Dominica, Costa Rica and other smart regional and global players firmly establishing themselves as eco destinations of choice in the region. ▪ Social problems which jeopardize the tourist experience. ▪ Poor interconnectedness. ▪ Lack of regulation, enforcement and support incentives for the sector. ▪ Lack of appreciation of niche by administrative and regulatory bodies responsible.

3.11.2 Scuba Diving

Exploration of underwater environments, usually coral reefs and other sites using self contained underwater breathing apparatus (SCUBA).

Average age: 20-40 years.

Income: 45% posses a household income above $50,000.
Travel attitude: 60% travel with family and friends.
15% travel in organized or informal groups.

Travel arrangements: Scuba magazine reports.
40% book travel independently.
30% with a travel agent.
30% dive shops.

Trends: Market is stable but with some growth in the upscale category.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ Strong array of dive sites for drift dives allowing for beginners to advanced divers. ▪ Good visibility and water temperature. ▪ Good safety standards, hyperbaric chamber. ▪ Some skills available through a network of certified dive operators. ▪ A strong niche globally and growing as more people become certified. ▪ Needs only small numbers of visitors. ▪ This niche is usually more environmentally aware vis a vis walking on coral at Buccoo Reef.	▪ Many boats are pirogues – limited live aboard facilities to cater to group dives over the course of more than one day. ▪ Weak regulation of the industry ▪ Competition from other smart regional and global players- Micronesia in the Pacific. ▪ Lack of a clear strategy. ▪ Varying standards of professionalism. ▪ Not many certified divers regionally with the profile to engage in regular dives.
OPPORTUNITIES	**THREATS**
▪ To develop diverse sites such as wreck and manmade reefs. ▪ To significantly grow a market which is still relatively ‘off the beaten track’. ▪ Growing sophistication by stakeholders in marketing, planning of dives and standards. ▪ To grow educational based diving- students learning firsthand the marine environment.	▪ Siltation of surrounding coastal waters from run off generated by land-based development. ▪ Global warming killing of coral polyps. ▪ Continued lax regulation can do damage by improper mooring over reef areas, bilge discharge from more boats and ships can pollute bays and impact negatively on the marine environment. ▪ Spear fishing by sailors can decrease numbers of fish in natural coral ecosystems.

3.11.3 Sailing

Travellers who spend their vacations sailing from island to island.

Market size:	1000000 trips/year.
Demographics:	Majority are between 25 and 45 years. Income in excess of $105,000.
Travel destinations:	While regionally the islands enjoy significant numbers of boats some destinations have experienced faster growth including St Kitts, Dominican Republic and Cozumel due to low prices and good advertising. Popular destinations include Jamaica, Cancun, US Virgin Islands, Aruba, Antigua and the Grenadines.
Activity features:	Proximity of islands. Good sailing conditions. Wind-secure areas for night stops. Ease of access to the shore.

The creation and financing of a multi-functional training institute at which individuals may receive certification in maritime trades to support the development of the maritime leisure sector will assist.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ Recognised sailing regatta in the Angostura Sailing Week held in Tobago. ▪ Trinidad has a very strong support and related industries with good infrastructure base. ▪ The cluster of marinas and boatyards, and support facilities at Chaguaramas enables all services to be accessed within a short distance reducing hassle and travel costs. ▪ Cost advantages for out-hauling and services viz a viz the Caribbean region, due to a local manufacturing sector which supplies inputs at good exchange rate price competitiveness. ▪ Teak is readily available for boat repairs. ▪ Trinidad and Tobago has not been struck by major hurricanes in many years and is on the southern fringe of established hurricane paths.	▪ Coastal environment not well monitored allowing boats to moor over reefs which damage coral formation in bays. ▪ There is a shortage of skilled and specialized people in trades and maritime skills to properly support the development of the maritime leisure sector.
OPPORTUNITIES	**THREATS**
▪ Tobago has numerous bays with calm waters, which can be developed in similar cluster based industry location. ▪ Trinidad has its five islands which have secluded bays. ▪ Growth rate is strong prompting improved berthing capacities. ▪ Labour intensive niche – able to employ skilled and semiskilled labour.	▪ Unregulated sailboats can do damage by improper mooring over reef areas, bilge discharge from more boats can pollute bays and impact negatively on the marine environment. ▪ Spear fishing by sailors can decrease numbers of fish in natural habitats. ▪ Lower numbers of yacht arrivals in recent years indicate a weakening competitive position.

3.11.4 Cultural

History/Festivals/Music/Cuisine.

Travellers whose main activity is the visiting of historical sites, museums and participation in cultural events. Growing market niche as evidenced by the 20% growth in travel to major European cities. This upward trend is expected to continue.

Demographics:	Average age is over 40, mainly mature travellers. Substantial income.
Travel destinations:	Fast growing destinations include Asia, Eastern Europe and Central and South America. Western Europe has remained stable.
Product features:	Historical sites and museums. Cultural events, festivals and religious holidays and events. Experienced and well-trained guides or information centres.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ Both islands possess a rich history and multicultural aspects, diversity of religion, holidays, cuisine, and architectural heritage reflective of diverse colonial influences. ▪ Growing list of events: Carnival, Heritage Festival, Jazz Festival. ▪ Calypso and Steelpan originated here. ▪ Growing awareness of Trinidad Carnival and export of 'Trini' style carnivals to major metropolitan areas.	▪ Poor promotion of travel packages tailored to this niche. ▪ Low rate of e-commerce opportunities for tradeables generated from culture. ▪ Low rate of marketing cultural products via the Internet. ▪ Low broadband capability. ▪ Lack of a global focus and skills for the niche. ▪ R& D funding for market research in particular is low. ▪ Lack of recognition of the potential value and contribution of the sector. ▪ Leadership and organisation by different agencies. ▪ Lack of high standard venues.
OPPORTUNITIES	**THREATS**
▪ To further develop and market a growing calendar of events. ▪ Growing niche- fastest growing in Europe-20% increase in 2004. ▪ To use host homes and guesthouses to complement the existing capacity in hotel accommodation. ▪ To establish direct connection with potential visitors via Internet and e-commerce for tradeable goods. ▪ To piggyback on the awareness created in metropolitan areas of North America and Europe by Trini-styled carnivals. ▪ To develop a Cultural Theme Park, to properly package and promote national festivals and attractions.	▪ Lack of high standard experiences that fulfil visitor expectations. ▪ Social problems in Trinidad and Tobago that mar the tourist experience. ▪ Competition from other smart regional and global players.

3.11.5 Business Meetings & Conferences

Travel for the purpose of engaging in professional meetings or during the course of performing duties. Groups travelling with common professional interests sharing their time in professional meetings and leisure activities.

Market size:	Generally a large market as the Caribbean is a region of choice for meetings and conventions.
Trends:	This market continues to be robust for Trinidad and Tobago due to significant business activity in other areas including financial services, energy and manufacturing. However the growth has experienced a slowdown within recent time. Generally this is an off-season market.
Demographics:	Usually an over 35 market.
Product features:	Luxury accommodation with meeting facilities. Political and economic stability. New and/or exotic destinations. Variety in activities.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ Both islands possess a rich history and multicultural aspects, diversity of religion. ▪ Politically stable. ▪ Trinidad is economically diverse. ▪ Strong product appeal in the areas of golfing, scuba and eco-tourism activities. ▪ Base business travel is consistent throughout the year. ▪ Capacity for groups in full service mid priced and upscale hotels in excess of 100-150 people in several hotels and in excess of 450 at the Hilton. ▪ Significant foreign investment in accommodation for this sector. ▪ Construction of new facilities which will boost capacity significantly in the downtown area – 438 rooms. ▪ Good support activities that can occupy family members.	▪ Available room stock of accommodation with conference facilities is still limited. ▪ Niche facilities are often at full capacity.
OPPORTUNITIES	**THREATS**
▪ To target major conferences and conventions which would engage bookings in several facilities. ▪ To target the major groups associations with tailored packages with appropriate incentives. ▪ New facilities under construction in the downtown area of Port of Spain enable the country to handle larger groups and improve the entrances to Port of Spain via the Beetham Highway and Lady Young Road to provide an	▪ Emergence of new competitive market entrants. ▪ Socio economic instability will deter business investment and associated travel.

appropriate aesthetics. ▪ To participate at American & European investment conferences, and most importantly to host regional conferences, so as to deepen the positioning of the city as a major regional city and improve the high profile investment image for the country. ▪ Through upgrade of port of Port of Spain currently underway to strategically establish Port of Spain as the key container port of the South Eastern Caribbean.	

3.11.6 Cruise (home port)

Home porting is where the ship takes on or discharges passengers and is re-supplied. This generates substantially more ship related services, and offers opportunities for increased passenger revenues to the country. At present both Trinidad and Tobago's ports, Port of Spain and Scarborough respectively are ports of call, as the cruise ships usually spend a few hours. This offers relatively limited opportunities for tourists to enjoy the sites and attractions.

Nevertheless the World Travel and Tourism Council (WTTC) concluded that cruise visitors spend an average of US$42.25 in Trinidad and Tobago, which is much lower than for most other countries in the region.

Home porting when compared to the 'port of call' yield benefits that are commensurately higher. Being a home port encourages passengers to stay longer in the country either en-route to/from home or as an add-on to their cruise. Indeed, many lines offer cruise/land packages involving a one-week cruise and one week on land. Revenues are also generated through crew recreation and ship re-supply.

In selecting a home port, the cruise line will consider many factors, summarized as follows:

Air lift capacity:	The cruise line has to be assured that a sufficient flow of air traffic is available to access their ships.
Security:	Security from the airport to the port, as well as at the dockside must be assured.
Supply services:	The port must provide all necessary supplies on an ongoing basis.
Bunkering facilities:	Availability of fuel is essential.
Accommodation:	Sufficient good class accommodation should be available to take care of passengers whose flight schedules require them to overnight, or spend a few days.

In developing this niche we recognize that the city of Port of Spain is undergoing an extensive urban renewal project, a major plank in the country's developmental strategy to position the city as a major regional centre. As part of this effort, the infrastructure at the port is being enhanced, the downtown area beautified and major hotel and conference facilities installed.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ High degree of satisfaction among cruise passengers with the destinations visited in the Caribbean. ▪ Fuel supplies are processed on island and can be made available at port at competitive cost ▪ Caribbean region is possesses the typical warmth and ambience sought by cruise vacationers. (warm weather activity)	▪ Insufficient volume in passengers. ▪ Location is farthest south in the Caribbean. ▪ Port configuration and size not appropriate to handling logistics of all supplies required to supply lines on an ongoing basis. ▪ Poor broadband capability for handling large amounts of data and access. ▪ Lack of a strong tourism cluster.
OPPORTUNITIES	**THREATS**
▪ To carve out a new cruise route throughout the Southern Caribbean, with Trinidad and Tobago at the hub. ▪ To form closer alliances commercially and foster greater cooperation between the countries of the Southern Caribbean and Latin America. ▪ Grow the share of tourism receipts to the country which is lower than many member states of the FCCA.	▪ Global terrorism fears escalate and reinforce 'cocooning' behaviour.

3.11.7 <u>Cruise (port of call)</u>

Cruise visitors spend an average of US$42.25 in Trinidad and Tobago, which is much lower than for most other countries in the region. Cruise arrivals in 2004 totalled 54,000, 52% of the number arrivals in 2000, which was the peak year for cruise arrivals.

In developing this niche we recognize that the city of Port of Spain is undergoing an extensive urban renewal project, a major plank in the country's developmental strategy to position the city as a major regional centre. As part of this effort, the infrastructure at the port is being enhanced, the downtown area beautified and major hotel and conference facilities installed.

Market size:	Generally a large market as the Caribbean is a region of choice for cruise- warm weather activity.
Trends:	This market continues to be robust for Trinidad and Tobago due to significant business activity in other areas including financial services, energy and manufacturing. However the growth has experienced a slowdown within recent time. Generally this is an off-season market.
Demographics:	Usually an over 35 market.
Product features:	Luxury accommodation with meeting facilities. Political and economic stability. New and/or exotic destinations. Variety in activities.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ High degree of satisfaction among cruise passengers with Port of Spain as a destination. ▪ Caribbean is a perennial destination of choice for cruise. ▪ Diverse places of interest in the capital, a credible basis for tours.	▪ Poor quality of port facilities and organisation of amenities and saleable merchandise to tourists. ▪ Low rate of spending by those coming on-shore. ▪ A lack of development of unique land based product offers to complement port visits.
OPPORTUNITIES	**THREATS**
▪ Most passengers who travel to the Caribbean via cruise lines express an interest in returning to the ports of call on a land-based vacation because of their cruise visit. ▪ To increase revenues from existing levels to accepted industry norm for the Caribbean destinations. ▪ Urban renewal in the city of Port of Spain including improved port facilities, modernization of downtown shopping area, with 438 rooms and conference areas, display areas and restaurants, strengthen array of commercial opportunities, safety and onshore appeal. ▪ To re-site the landfill allowing port ability to separate cargo and passenger traffic. Allowing for more attractive surroundings. ▪ To improve and expand the Port of Spain, Charlotteville and Scarborough cruise facilities, and investigate the viability of Chagaramas as an alternative port of call, in keeping with increased demand from the cruise lines.	

3.11.8 Sport Tourism

Sport based tourism is the movement of people (usually in groups) and is usually driven by events, to a country primarily to be involved as a participation, support staff or spectator. This niche has been receiving heightened emphasis in Trinidad as many sport activities are governed by associations with international affiliations and that helps to achieve market reach.

The global trend of heightened interest in sport events has generated substantial expenditure on marketing and development of sporting facilities and support and related infrastructure. Major events are increasingly being used to focus attention, renew interest and provide a fillip to development in areas with the hope of stimulating sustainable tourist inflow.

This niche is definitely poised for growth given the recent participation of Trinidad and Tobago in the FIFA World Cup. As the smallest nation to do so and with substantial investment in infrastructure in the past eight years and more facilities under construction, the country can target team based sports events and off season camps.

The approach by government in collaboration with the various sporting associations has been to arrange for as many sporting events to take place in Trinidad and Tobago either on a one-off basis or at a fixed time in the calendar year. In addition, there is significant scope for increased flows which can accrue from heightened publicity and support to the marketing efforts to existing events which are already international in its participation – an opportunity for heightened spectator appeal.

Market size: Generally a large market as the Caribbean is a region of choice for meetings and conventions.

Trends: This market niche is becoming increasingly important to Trinidad and Tobago due to its investment in facility and growing calendar of events.
Growth is high.
Generally this is a year round market.

Demographics: Usually an over 25 market.

Product features: Variety in accommodation.
Political stability.
Variety in activities.

3.11.9 Soft adventure

Travellers in this niche travel to a destination primarily for recreation. Activities in this emergent niche include kayaking, climbing and rappelling, paragliding, biking, windsurfing, water-skiing, hashing.

Market size: Generally a large market as the Caribbean is a region of choice for meetings and conventions.

Trends: This market is relatively underdeveloped with limited integration into eco tourism for Trinidad and Tobago as a means to 'rounding out' the activity itinerary.

Demographics: Usually an over 25-45 market.

Product features: New and/or exotic destinations.
Variety of activities.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ The Caribbean is one of the worlds most physiologically appealing and diverse. ▪ Tobago offers seaside hotels and resorts which cater to the demands of this segment. ▪ There are other activities which can engage the entire family. ▪ Tobago still possesses the appeal of a destination that is undiscovered and unspoilt.	▪ There is inadequate infrastructure in place in both islands. ▪ Does not naturally have a culture of innovation.
OPPORTUNITIES	**THREATS**
▪ To build this market in the face of interest from new e-tourist who is seeking more exotic locations not as well known. ▪ Increase the room stock in both islands, and use this together with the strength of improved brand identity to leverage increased airlift to the country. ▪ Urge the national carrier to focus greater attention on the international leisure markets, and to consider the viability of new geographic markets. ▪ Increase service by regional and sub-regional carriers from other Caribbean destinations to Trinidad & Tobago. ▪ To accelerate prioritising and developing a land usage plan for areas designated for integrated resort development in both islands. ▪ To develop briefs for investment partners with emphasis on upmarket segment of the industry, including luxury resorts with villa and/or condo clusters.	▪ The increasing incidence of crime against visitors. ▪ Increased incidence of HIV/AIDS. ▪ Stresses on water distribution and sewerage disposal system at all resort areas.

3.11.10 <u>Weddings & Honeymoons</u>

Market size:	Generally a small, but significant market, especially Tobago. Caribbean is a region of choice for wedding and honeymoons.
Trends:	This niche market continues to be robust for Trinidad and Tobago due to perception of Tobago as exotic. Generally this is a year round activity market.
Demographics:	Usually an over 30 market.
Product features:	Luxury accommodation. Political and economic stability. New and/or exotic destinations.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ The Caribbean is one of the worlds leading areas for this type of tourism. ▪ Tobago offers seaside hotels and resorts which cater to the demands of this segment. ▪ There are other activities which can engage the entire family. ▪ Tobago still possesses the appeal of a destination that is undiscovered and unspoilt.	▪ There is an inadequate and unreliable (at times) air-bridge between the two islands, which is overloaded at peak times e.g. Great Race.
OPPORTUNITIES	**THREATS**
▪ To build this market in the face of interest from new e-tourist who is seeking more exotic locations not as well known. ▪ Increase the room stock in both islands, and use this together with the strength of improved brand identity to leverage increased airlift to the country. ▪ Urge the national carrier to focus greater attention on the international leisure markets, and to consider the viability of new geographic markets. ▪ Increase service by regional and sub-regional carriers from other Caribbean destinations to Trinidad & Tobago. ▪ To accelerate prioritising and developing a land usage plan for areas designated for integrated resort development in both islands. ▪ To develop briefs for investment partners with emphasis on upmarket segment of the industry, including luxury resorts with villa and/or condo clusters. ▪ To improve the air bridge between Piarco and Crown Point with particular attention to convenient connections to international arrivals and departures, and ensure that flights between Trinidad and Tobago can be booked through the GDS systems and paid for at the point of international departure. ▪ Expansion of terminal facilities at Crown Point to accommodate increased carrier demand and lift into the island.	▪ The increasing incidence of crime against visitors. ▪ Increased incidence of HIV/AIDS. ▪ Stresses on water distribution and sewerage disposal system at all resort areas.

3.11.11 Educational

Expand and raise the competency of, the Hospitality Training Institutes in Trinidad & Tobago to the highest international standards, with full accreditation to all Caribbean and selected International Universities.

Market size:	A small market as the Caribbean is not generally a region of choice for education.
Trends:	This market is a small, but well-established niche for Trinidad. Region marked by brain drain. Intra-regionally UWI has attracted students from other Caribbean territories in its

engineering faculty. UWI's Faculty of Agriculture and School of Tropical Agriculture appeal to students from North America. Destination has appeal as ESL (English as a second language) for Venezuelan students.

Demographics: Usually an 18-30 market.

Product features: Political and economic stability.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ The Caribbean is one of the worlds leading areas for this type of tourism. ▪ Tobago offers seaside hotels and resorts which cater to the demands of this segment. ▪ There are other activities which can engage the entire family. ▪ Tobago still possesses the appeal of a destination that is undiscovered and unspoilt.	▪ There is an inadequate and unreliable (at times) air-bridge between the two islands, which is overloaded at peak times e.g. Great Race.
OPPORTUNITIES	**THREATS**
▪ To build this market in the face of interest from new e-tourist who is seeking more exotic locations not as well known. ▪ Increase the room stock in both islands, and use this together with the strength of improved brand identity to leverage increased airlift to the country. ▪ Urge the national carrier to focus greater attention on the international leisure markets, and to consider the viability of new geographic markets. ▪ Increase service by regional and sub-regional carriers from other Caribbean destinations to Trinidad & Tobago. ▪ To accelerate prioritising and developing a land usage plan for areas designated for integrated resort development in both islands. ▪ To develop briefs for investment partners with emphasis on upmarket segment of the industry, including luxury resorts with villa and/or condo clusters. ▪ To improve the air bridge between Piarco and Crown Point with particular attention to convenient connections to international arrivals and departures, and ensure that flights between Trinidad and Tobago can be booked through the GDS systems and paid for at the point of international departure. ▪ Expansion of terminal facilities at Crown Point to accommodate increased carrier demand and lift into the island.	▪ The increasing incidence of crime against visitors. ▪ Increased incidence of HIV/AIDS. ▪ Stresses on water distribution and sewerage disposal system at all resort areas.

3.11.12 Sea, Sun Sand Leisure

Tourists comprising this market usually travel for beach activities and relaxation. The sun sea sand activities are also dependent on other activities which may fall into other niches, such as bird watching. Travellers engaging in such activities are usually not experts and tend to prefer the variety.

Trends: A growing market which has rebounded after the terrorist attacks on New York in September 2001 and the SARS epidemic of 2002.

Market Size: This market is very large and comprises the majority of arrivals to the region, though of relatively lesser importance for Trinidad.

Product features: Apart from the usual leisure aspect, any form of light physical activity is desirable. Outdoor and water based activities, sports, nature trips and culture and festivals help to round out this market.

SWOT Analysis

STRENGTHS	WEAKNESSES
▪ The Caribbean is one of the worlds leading areas for this type of tourism ▪ Tobago offers seaside hotels and resorts which cater to the demands of this segment. ▪ There are other activities which can engage the entire family. ▪ Tobago still possesses the appeal of a destination that is undiscovered and unspoilt.	▪ There is an inadequate and unreliable (at times) air-bridge between the two islands, which is overloaded at peak times e.g. Great Race. ▪ Limited numbers of quality beaches.
OPPORTUNITIES	**THREATS**
▪ To build this market in the face of interest from new e-tourist who is seeking more exotic locations not as well known. ▪ Increase the room stock in both islands, and use this together with the strength of improved brand identity to leverage increased airlift to the country. ▪ Urge the national carrier to focus greater attention on the international leisure markets, and to consider the viability of new geographic markets. ▪ Increase service by regional and sub-regional carriers from other Caribbean destinations to Trinidad & Tobago. ▪ To accelerate prioritising and developing a land usage plan for areas designated for integrated resort development in both islands.	▪ The increasing incidence of crime against visitors. ▪ Increased incidence of HIV/AIDS. ▪ Stresses on water distribution and sewerage disposal system at all resort areas.

▪ To develop briefs for investment partners with emphasis on upmarket segment of the industry, including luxury resorts with villa and/or condo clusters. ▪ To improve the air bridge between Piarco and Crown Point with particular attention to convenient connections to international arrivals and departures, and ensure that flights between Trinidad and Tobago can be booked through the GDS systems and paid for at the point of international departure. ▪ Expansion of terminal facilities at Crown Point to accommodate increased carrier demand and lift into the island.	

3.11.13 <u>Wellness or Spa based Tourism</u>

Increasingly esoteric and health awareness, relaxation and rejuvenation has tempered the desire by individuals for material gains. The leisure work balance has fuelled the explosive growth in this niche globally.

Market size: Generally a small, but significant market, especially Tobago. Caribbean is not as well known as a region of choice, but has strong product features.

Trends: This niche market can be strong for Trinidad, and Tobago due to perception of green unspoilt and exotic.
Generally this is a year round activity market.

Demographics: Usually an over 35 market.

Product features: Luxury accommodation.
Uniqueness.
Well-trained and attendant staff.
New and/or exotic destinations.

STRENGTHS	WEAKNESSES
▪ Tobago can be positioned as an exotic, untouched destination.	▪ Not well known as a destination for this type of tourism.
OPPORTUNITIES	**THREATS**
▪ Develop a legislative package of incentives based on research and promote it throughout the international hotel and tourism development community.	

3.12 Government Policy and Agency Infrastructure

In this section we look at public sector aspects of the tourism sector.

3.12.1 Tourism policy

Tourism is regarded by the government as a sector with major potential to contribute to the economic development of the country. Convinced that the country possesses all the basic resources and attractions necessary to sustain a vibrant tourism industry, the government has repeatedly given its commitment to explore this potential with vigour.

In evaluating the overall capability of the country to compete in certain niches, express commitment is being placed on the country's cultural heritage, natural resources and history, and not merely on perpetuating the image of mass marketing appeal factors of sun sea sand. Marketing will stress the uniqueness of the tourism product within the two- island destination.

3.12.2 Marketing Trinidad and Tobago

The basic challenge is to accept that Trinidad and Tobago have significantly different tourism products that appeal to different niche markets. As a consequence, marketing campaigns have been tailored to appeal to those different niches in the respective geographic markets in North America Europe and, to a lesser extent, in the Caribbean..

Specific promotional programmes target the United States, Canada, United Kingdom, Netherlands, Germany, Venezuela, Colombia, Barbados and other Caribbean territories, Scandinavian Countries- Norway, Denmark and Sweden.

Marketing campaigns over the years have been developed which focused on selected areas:

- Meetings, Conferences and Conventions
- Shoppers
- Scuba diving
- Adventure tourists
- Eco-tourists and naturalists
- Weddings and Honeymoons
- Carnival
- Leisure - Sun Sea and Sand

More recently cuisine and events have been receiving greater attention as there is a consistent thrust to develop activities throughout the year as a means of creating sustained interest in the destination and ensuring greater consistency in arrivals to the country as opposed to a seasonal peak and trough cycle which has characterised the pattern of regional tourism in the past.

The campaigns for Tobago focus more on vacationers from Europe and North America.

This marketing strategy focuses on raising the level of awareness of the destination in these key markets thereby increasing the number of hotel visitors and stopovers to Trinidad.

Specific programmes include:

- Promotions through overseas representation in key markets, specifically North America, South America, UK and Germany.
- Development and maintenance of an official website for Trinidad and Tobago
- Implement international public relations, advertising and direct marketing activities.
- Development of promotional print materials (brochures and magazines) for overseas distribution.
- Creating and utilizing strategic marketing opportunities for the destination through various events including Carnival, FIFA World Cup 2006 and ICC Cricket World Cup 2007.

3.12.3 Product Development

The responsibility for product development does not fall in the domain of any one agency in Trinidad and Tobago. The execution of developmental and rehabilitative works on the country's sites of interest, tourism infrastructure and training is done through the collaboration of various governmental agencies. Included in this area are the enhancement of tourism products, the standardisation of tourism infrastructure and amenities, rationalising the ownership of sites and attractions, executing domestic awareness campaigns and training.

Specific programmes include:

- The redesign and reconstruction of the Maracas Bay Beach facility as well as the upgrade of beach facilities located at Las Cuevas, Manzanilla and Vessigny.
- Development of the La Brea Pitch Lake as a tourist attraction including the upgrade of the onsite visitor facility.
- Development of eco-tourism and cultural tourism products.
- Industry training for the tourism sector.
- Awareness initiatives.

3.12.4 Quality Control & Standards

This function is the responsibility of the Ministry of Tourism and the Tourism Development Company and encompasses the development and monitoring of tourism infrastructure and amenities.

Specific attention is paid to:

- Development of standards for the industry.
- The implementation of the Trinidad and Tobago Tourism Industry Certification Programme.
- Industry training.
- Public awareness.

3.12.5 Research & Planning

An area that has undergone improvement in recent years is the area of statistics gathering and data research. This function involves producing accurate and reliable information on the performance of the industry, its competitors, and source markets. All data is collated, interpreted and presented to industry stakeholders. The Central Statistical Office and the TDC are jointly responsible for this function.

Specifics include:

- Implementing an effective, timely reporting system of arrival and departure statistics using immigration card data.
- Undertaking visitor satisfaction and expenditure surveys.
- Assessment of the economic impact of tourism on an ongoing basis.
- Monitoring the performance of niche market segments of the local tourism industry.
- Publishing and distribution of all relevant tourism information.

3.12.6 Investment Promotion

The general investment climate is attractive offering a number of concessions and tax incentives which encourage private enterprise and foreign investment. Investment in the tourism sector is regulated by the Tourism Development Act of 2000 and later Amendments in 2005.

Through the Act, the Government's policy aims to develop a high quality, internationally competitive and sustainable product which maximizes its contribution to the economy, employment generation, and foreign exchange generation. The policy's broad mandate also seeks to maximize linkages through the economy while preserving and protecting the natural and social environment.

The incentives/ benefits that are currently in place can be categorized as incentives, tax benefits and customs and excise exemptions, and apply to all the niche activities which make up the tourism sector.

Incentives

- An accelerated depreciation of depreciable equipment owned and used in an approved project.
- A capital allowance with respect to approved capital expenditure incurred in creating a new tourism project or expansion of an existing one.
- A carry over from a tax-exempt period, if any, of any loss arising from operation or rental of an approved tourism project.

Tax specific benefits

- A tax exemption not exceeding seven years with respect to gains or profits from the approved project;
- A tax exemption on gains or profits derived from the initial sale of a villa or condominium or the site for a villa or condominium that forms part of an Integrated Resort Development, which is approved.
- Tax exemption with respect to any dividend paid to a non-resident shareholder if the recipient is not liable to tax.
- A tax exemption on interest on an approved loan used for a tourism project was *withdrawn on January 01, 2006*. However projects granted interim

approval prior to that date will be granted the incentive and allowed to access it retroactively.

Customs and Excise Concessions

- A permit for the importation or entry into Trinidad and Tobago free of customs duty, and for the purchase locally, with the privilege of a drawback of customs duties or excise duties, such building materials and articles of tourism equipment as may be specified.
- A license to import vehicles with the payment of Customs duty at the rate of 10%.
- Payment of Value Added Tax (VAT) at the rate of 15%.
- Exemption from the Motor Vehicle Tax .

Projects which can benefit from government incentives include accommodation ancillary facilities, infrastructure vehicles and other support projects. A disaggregated listing is as follows:

Tourism Ancillary Facilities (Schedule 2)

Marinas	Golf courses	Film-making
Boatyards	Special events	Tour operations
Dive Operations	Recreational spaces	
Water sports	Theme Parks	
Charter Boats	Cultural centres	

Accommodation

Areas of activity considered tourism projects:

Hotel	Dive Lodge	Eco-lodge
Camp site	Guest house	

Villas and Condominiums which are included and approved as part of an ‘Integrated Resort Development’.

Tourism Infrastructure

Heliport	Sea Ports	Airports
Communication	Dive Recompession / Hyperbaric Chamber	
Public Utilities		

Vehicles

Limousine Taxi service Tour buses
Boats -Dive Boats, Tour Boats, Water Taxis, Sport fishing
All terrain Other Taxis Helicopters

Other Projects

Destination Management Companies		Transportation Service
Convention Centres	Historical Landmarks	Ground Tour operations
Shopping Facilities	Heritage sites	

3.13 Material and Infrastructure Resource Capability

At a time when many of its Caribbean neighbours are faced with structural decline of their agricultural base and declining terms of trade, Trinidad and Tobago has continued to experience robust economic growth across many of its sectors.
Increased revenue accruing to the state has seen significant investment in infrastructure expansion and enhancement as evidenced by burgeoning PSIP expenditures in roadways, water, telecommunications, air and seaport enhancement, housing programmes and education facilities.

3.13.1 Airlift access & airport facilities

Considerable investment has been made in upgrading the Piarco International Airport as part of an overarching vision to position Trinidad and Tobago as the business hub of the Caribbean and gateway to Latin America.

The airport has regained its category 1 status by the US Federal Aviation Authority after being downgraded in 2001. This effectively prevented the national carrier BWIA, from introducing new routes or new aircraft to its largest country of origin for arrivals, the United States. The opportunities offered by this upgrade can benefit both the airport and the national carrier.

BWIA's international gateways are New York, Washington, Miami, Toronto, Manchester and London, with services to and from Trinidad, Tobago, Barbados, St. Lucia, Grenada, Jamaica, Antigua, St. Maarten, Guyana, Suriname, and Venezuela. Partner airlines connect through these gateways to many other North American cities; with Air India for example BWIA offers flights between the Caribbean and India via London or New York.

BWIA operates long-range Airbus A340s and a new fleet of Next Generation Boeing 737-800 aircraft with enhanced in flight facilities.

Despite the presence of a nationally owned carrier the majority of tourist traffic is borne by foreign owned and/or leased aircraft. This lack of control over traffic leaves the industry vulnerable to any decisions that may be taken by externally based carriers regarding cessation or curtailment of service on the route or fare increases.

The airport terminal at Tobago is currently inadequate to service existing airlift demands, though a significant upgrade is planned. This is vital to positioning Tobago as a high value leisure destination. Until such time it will continue to constrain growth, limiting the types of craft and the scheduling of flights to prevent backlogs and bottlenecks in managing passengers.

Air links between Trinidad and Tobago are currently operated by BWIA and Tobago Express. Tobago Express, which is exclusive to this route, is not linked to global booking systems so international visitors are unable to book through tickets if arriving on one island and their destination is the other. The implementation of such a facility would greatly improve visitor connections between the islands.

Tobago Express operates new Dash-8 Q300s and serves the air-bridge between Trinidad and Tobago.

3.13.2 Port Facilities

The port is at present being upgraded to handle increased cargo and passenger traffic in response to continued calls from private sector interest groups to improve inline with current demands. In 2003 imports of goods totalled US$3.9 billion, and is projected in 2006 to record US$5.6 billion as a number of inputs to the country's retail, construction and heavy industry are imported to meet growing demand.

At present the country's main port at Port of Spain 60% of equipment is old and subject to breakdown, and cranes and maintenance systems are inadequate, and the port is plagued by strikes and long bureaucratic delays in goods clearance. The current major upgrade is intended to provide greater cargo storage space, berthing facilities, upgrade loading and off loading logistics and improve the computerized management of the cargo.

This is expected to reduce time and cost to those exporting goods, and ease the congestion associated with importing goods, much of which is intended for the accommodation and transportation sectors.

3.13.3 Conference and meeting facilities

Despite receiving arrivals in excess of 80,000 in the business and conventions niche, representing in excess of 80,000 business and conventions approximately 18% of its arrivals.

3.13.4 Training and educational resources for human resources

While there is recognition of the contribution of the travel and tourism to employment, the training facilities in place are still relatively small and inadequate. Despite these constraints the agencies responsible for undertaking training have been producing well-trained staff in a number of areas who are able to find employment in the local hospitality and accommodation industry.

The primary agency in this regard has been the Trinidad and Tobago Hospitality and Training Institute (TTHTI) which administers an associate degree programme over a two year period and which annually trains and graduates some 40-50 students in the fields of Food and Beverage Management, Culinary Management and Tourism Management.

There is a slowly growing pool of skilled and trained persons in hotels, serving as guides and taxi drivers, tour operators, chefs and bar staff. For many years people entered this industry out of necessity and not as a long-term career option.

The University of the West Indies St. Augustine campus has recently added a Bachelors degree in Hospitality & Tourism Management to its undergraduate programmes. Approximately 25 graduates are expected to complete this course of study this year. This programme was introduced here in T&T in recognition of the growing need for trained professionals to take their place in middle and senior management roles in many of the existing hotel facilities, government agencies, and private sector companies in both islands that have a significant tourist or visitor clientele.

Ancillary services offered include the School of Languages at the National Institute of Higher Education (Research Science and Technology) which can source foreign language translators.

3.13.5 Business and Marketing Skills

Local investment has been low in the sector by locals due in large part to a lack of awareness of the incentives that exist.

3.13.6 Telecommunications & ICT Infrastructure Capabilities.

A long-standing telecommunications monopoly has only recently been broken.

3.14 References

- Copy of the Tourism Development Investment Act.
- Check CTO website.
- Check WTO website.
- Tourism Master Plan.
- Vision 2020 Tourism Subcommittee.
- Poon-Villa Being.

3.15 List of Acronyms

CDA	Chaguaramas Development Authority
CSO	Central Statistical Office
CTO	Caribbean Tourism Organization
CVB	Conventions Visitor Bureau
EU	European Union
GDP	Gross Domestic Product
MOT	Ministry of Tourism
PSIP	Public Sector Investment Programme
SARS	Severe Acute Respiratory Syndrome
SWOT	Strengths, Weaknesses, Opportunities, Threats
THA	Tobago House of Assembly
THRTA	Trinidad Hotel and Restaurant Tourism Association
TIDCO	Tourism and Industrial Development Company of Trinidad and Tobago
TSA	Tourism Satellite Accounting
TTHTA	Trinidad and Tobago Hotel and Tourism Association
UK	United Kingdom
US	United States of America
USD	US Dollars
VFR	Visiting Friends and Relatives
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council
YSATT	Yacht Services Association of Trinidad and Tobago

SECTION B – Outcomes from NEXT Facilitated Sector Workshop

1 Tourism Sector Workshop – T&T, July 18, 2006

The following people participated in this workshop co-facilitated by Mr ColinDale Marcelle of Ideas 2 Business, Dr Nick Marsh and Ian Ivey of NEXT and supported by Joycelyn lee Young and Laura Superville from NIHERST.

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2 Sector Workshop 'Best Bets'

The purpose of the workshop was to evaluate the work done by both NEXT and ColinDale Marcelle prior to the workshop and develop what participant's saw as potential areas that offered a the best opportunities to develop unique tourism offers in T&T that would attract global niche consumers in growth sectors. The following tables summarise the initial 'first cut Best Bet' descriptions developed by the workshop participants.

1	**SECTOR**	**Tourism (Karlene Francois)**
2	**'BEST BET' TITLE**	**1. 'T&T Adventure'**
3	**'BEST BET' DESCRIPTION**	• Sun, sea, sand – Maracas, Las Cuevas, Toco, Waterfalls. • Shopping – POS, Chaganas, Trinity, Gulf City Mall. • Culture – St James, Chutney Show, Steel Pan yard, 'old time' traditions. • Attractions – Pitch Lake, Chaganas Museum. • Eco –tourism – Asa Wright, P & P wildlife trust, Caroni Swamp, Matura, turtle beaches. • Food – Bake & Shark, Roti, Chinese, Creole, fusion, etc.
4	**GLOBAL MARKET NICHE FOCUS**	• The (adventurous) visitor who wants a taste of all that T&T has to offer – a 10 day stay package.
5	**WHAT T&T HAS**	• A wide range of natural and cultural attractions – most importantly including the colourful people who live here.
6	**WHAT T& T NEEDS**	• A proper museum – interpretation, life like demonstrations. • Live entertainment at night – open air. • Open air 'fish fry / barbeque. • Year round attractions that express our traditional culture – how to roast corn on a coal pit, how to make a tassa drum, steel pan, bake in an outdoor oven, make roti, bene ball, sugar cake, tye die.

1	**SECTOR**	**Tourism (ColinDale Marcelle, Acolla Lewis, Laura Superville, Leslie-Ann Jordan)**
2	**'BEST BET' TITLE**	**2. Eco-Experience**
3	**'BEST BET' DESCRIPTION**	• Hike through the rainforest. • Swim in the Argyle waterfall. • Hike to Maracas Bay over the hills. • Different local restaurants every night. • Conservation centre with 'Trin'i wildlife in a natural environment with suitable animals including Lappe, birds, Agouti, etc. • Incorporated is a breeding programme where the wild animal is used in cuisine (wild meat). • Skins of animals used for handbags, shoes etc. • Camp outdoors amongst the wildlife. • Regional or zonal focus linking all natural attractions in one area. • Recreation of traditional village life and community based experiences. • 5 – 10 day eco-immersion – 14 day both islands. • Coffee house and cacao house experiences.
4	**GLOBAL MARKET NICHE FOCUS**	• Cultural tourist. • Eco-tourist. • People seeking immersion in local experiences, escapism.
5	**WHAT T&T HAS**	• TDC. • A wide range of natural and cultural attractions. • Established eco-ventures, such as Asa Wright, which already attract international specialist interest. • Natural attractions such as rain-forests, waterfalls and beaches • Cultural experiences such as pan-yards. • Exotic food – Indian, Creole etc. • Dr Gary Garcia – currently researching wildlife.
6	**WHAT T& T NEEDS**	• Harmonisation between stakeholders. • The right promotional channels – cost effective as advertising is expensive – need Internet and e-network development. • Empowered groups which have responsibilities and profit – a common interest in satisfying and meeting (exceeding) tourist expectations. • Conservation centres and breeding programmes to build stocks of animals. • Proper interpretive centres – interactive centre. • Interlinking of cultural with the eco-network to lend completeness to the concept.

1	**SECTOR**	**Tourism (Michael Phillips, Bernadette Nathaniel, Joycelyn Lee Young)**
2	**'BEST BET' TITLE**	**3. Sports capital of the Caribbean**
3	**'BEST BET' DESCRIPTION**	• Five weeks of cycling and MTB activities and race events that will also include a cultural component. • Integrate environment and culture into the total experience. • Golf (Douglas Gordon), diving Tobago, sailing, cycling (BMX, mountain, road). • Happens at a particular time of year e.g. Easter for two weeks for the overall event – the 5 week event in March April. • Rugby 7's – October has potential – foreign participation beyond the Caribbean – enhance experience with rugby, beer and girls. • Prizes presented by girls in Carnival gear (or guys for the girls!). • Volley ball (Mushtaq Mohammed 623 7637). • Sailing – May – sailing week. • Cricket – (Anthony Halfoup).
4	**GLOBAL MARKET NICHE FOCUS**	• Competitive and recreational cyclists.
5	**WHAT T&T HAS**	• Velodromes, the Queens Park Savannah, trails, hills, rural roads. • The sports passion and famous sports personalities e.g. Lara.
6	**WHAT T& T NEEDS**	• Promotion of the events as a festival internationally via the Internet, bike shops, news coverage. • Connect to cycling magazines, websites, international (sports) TV coverage, British film crews taping event, cyclingtv.com. • Develop into a national asset with residual benefits and a spin off for local industries over 10 years – transport, security, food and beverage – to generate revenue, positive publicity with a niche activity. • Create a positive focal point for T&T people locally and regionally to aspire to the top level in the sport viz the WI Cycling Team. • Increase the overall popularity which will increase the marketing value of the athlete as a product and create better financial possibilities for the individual and the fraternity. • Create permanent and temporary employment in areas such as coaching, cycle merchandise and sales and repairs. • Develop specialist lines of clothing. • Encourage the manufacture of memorabilia. • Establish the brand name of the event. • Become self-sustaining through advertising and merchandising.

1	**SECTOR**	**Tourism (Andrew Welch, Dexter Trim, Chanzo Greenidge)**
2	**'BEST BET' TITLE**	**4. 'Swiss Watches – T&T Pan'**

3	**'BEST BET' DESCRIPTION**	• Groups of 20.
		• 1 day of activity divided into segments:
		    • Learn to make pan
		    • Exposure to cuisine
		    • Learn to play pan
		    • Dinner and pan concert
		    • Creation of video souvenirs
		• Events organized around visits to benefit community.
		• Opportunity to purchase/order instruments and related merchandise.
		• Integration of niche manufacturing, food and beverage, pan production and performance via tourism.

4	**GLOBAL MARKET NICHE FOCUS**	• Activity-Based:
		    • Music schools and universities.
		    • Diaspora (Chinese/Indian/African/Caribbean).
		    • Conference and sporting events.
		• Geographical:
		    • Europe (up to mid-2007).
		    • Football playing nations (esp. Latin America).
		    • Asia (South and East).

5	**WHAT T&T HAS**	• Resident tuners and builders. • Hotels and guesthouses. • Guide services. • Related talent and technology.

6	**WHAT T& T NEEDS**	• Community involvement.
		• Consular presence for steelpan instrument and performance.
		• Targeted global exposure:
		        o Museum exhibits.
		        o Concert performances in global circuit.
		        o Fusion with prominent artistes.
		• Steelband theme restaurant.
		• Dedicated regional pan performance facility (NSO and scheduled rehearsals).
		• Translation and interpretation services for American and Asian markets.
		• Documentation of steelpan history (and technology).

1	**SECTOR**	**Tourism (Ian Ivey)**
2	**'BEST BET' TITLE**	**5. 10,000 home stays**
3	**'BEST BET' DESCRIPTION**	• An offer that complements the hotel sector and offers a chance to stay with local people in an immersion bed and breakfast type experience. • It provides flexibility, intimacy, and a greater range of local stay possibilities right throughout both islands and can be integrated into customized package offers.
4	**GLOBAL MARKET NICHE FOCUS**	• Adventure tourists. • Immersion and cultural experience tourists. • Eco-tourists. • Backpackers. • Individual tourists.
5	**WHAT T&T HAS**	• It has 110 B&B options currently available. • It has potentially up to 10,000 rooms in private households available as a resource. • It has friendly people.
6	**WHAT T& T NEEDS**	• Building a portal to link up the B&B providers through a single interface for both individual tourists and customized tour operators. • Providing 'Trini Host' training for private operators to become certified. • Accessing potential room providers. • Linking with custom tour operators to use the room resource. • Inclusion of people living in the non-gas sector. • Providing extra revenue to households. • Providing stimulation for empty-nesters with no kids at home. • E-commerce set up and management skills.

3 What Happens Next?

These Best Bets will be peer reviewed by both key Trinidad and Tobago stakeholders and other specialists both within T&T and offshore to determine which offer the greatest potential commercial prospects. In some instances there is a degree of overlap with 'Best Bet' propositions from other sectors. This overlap will be integrated into an overall 3-4 'Best Bets' selected for each of the five sectors being examined as part of this foresighting project.