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HOTEL & TOURISM  
ASSOCIATION



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**ASSOCIATION OF CARIBBEAN STATES (ACS)**  
**13<sup>TH</sup> BUSINESS FORUM OF THE GREATER CARIBBEAN**  
*Overall Theme: Integrating the Greater Caribbean - Building Partnerships towards a Common Future*

***Session: Sustainability as a Core Business:  
Reshaping Tourism in the Greater Caribbean***

Thursday, October 29

CHTA CEO/Director General

Frank J. Comito

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# *Sustainability Is Not Just About the Natural Environment*

## THE GLOBAL GOALS For Sustainable Development





## ***The Upside of Tourism: A Driver for Positive Change....***

- Major Revenue and Employment Generator
- Drives Infrastructure Development
- Builds Human Resource Capacity and Develops People
- Compatible with Caribbean Culture of Hospitality
- Supports and Creates Local Entrepreneurial Activity
- Enhances Safety and Security
- Promotes Cultures...Celebrates Uniqueness...Differentiates Market
- Attracts Added Airlift for Travel by Visitors and Residents
- Protects and Enhances the Environment
- Facilitator of Recovery Following Crisis
- Standards Bearer – Challenges Us to Do Our Best
- Promotes Peace, Understanding, Unity





# *The Upside of Tourism.... Often Misunderstood Socio-Economic Development Tool...*

Indirect and Induced Impact of Direct Tourism Expenditures





# ***Challenges Tourism Presents to Countries/Destinations***

- **Vulnerable to Economic Cycles...Crisis Situations**
- **Managing Growth** – *Overcrowding...Over-Building...Congestion ...Demands on Utilities, Infrastructure and Support Services with Limited Resources*
- **Competing in a High Cost Environment** – *High cost...inconsistent productivity... transportation and utility costs*
- **Revenue Leakage** – *Reliance on imports...Linkages Support Needed...Insufficient development and support for local entrepreneurs...*
- **Compromising Cultural Identity**
- **Creating Greater Balance Between Foreign and Local Ownership**
- **Airlift and Access** – *Facilitating ease and cost*
- **Human Resource Development** – *Greater public-private investment in people needed, particularly supervisor and above*
- **Compromises the Environment** – *Inconsistent practices by some*





**Challenges:** *The world is changing and so must we. Caribbean tourism (its model and value proposition) faces significant challenges, profoundly limiting its development and growth prospects.*

### ENVIRONMENTAL

- ✓ HURRICANES
- ✓ OTHER NATURAL CHALLENGES
- ✓ POLLUTION/WASTE/ GROWTH MANAGEMENT
- ✓ DEGRADATION AND DESTRUCTION OF LAND AND SEA RESOURCES

#### IMPACT:

Harmful environmental factors contribute to the *increasing loss of market share to other regions and the erosion of the Caribbean's brand promise.*

### GLOBAL TRENDS

- ✓ CONSUMER TRENDS “DEEP TRAVEL”

*Movement towards “multi-faceted travel” - i.e.: highly experiential, authenticity, culturally driven, and purpose-based travel (eco-tourism, humanitarian, agro-tourism).*

- ✓ CONSUMER EMPOWERMENT & SHARING ECONOMY

*Customers increasingly less dependent on traditional travel putting financial pressure on traditional investments*

- ✓ COMPETITION

### PERCEPTION

- ✓ UNI-DIMENSIONAL

*World travelers (leisure) see the Caribbean's offering and experience largely in a uni-dimensional way (sea, sun, sand).*

- ✓ SAFETY
- ✓ VALUE FOR MONEY
- ✓ CONTAGION

*What affects one part of the region affects all. By example, the 2017 the 2017 hurricanes, directly affected one-quarter of the region, but impacted the entire region, as consumers and media perceived the entire region was devastated.*



## ***The Business Case for Sustainability:***



**It Must Make \$ and Sense**



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## Sustainability as a Core Business: Reshaping Tourism in the Greater Caribbean



### TRAVEL & TOURISM RECOVERY SCENARIOS 2020 & ECONOMIC IMPACT FROM COVID-19

CARIBBEAN DATA



Travel & Tourism jobs 2019:

**2.8 MILLION**



Travel & Tourism GDP 2019:

**\$59 BILLION**

**3.4% GROWTH**

#### BEST CASE SCENARIO

Travel & Tourism jobs:

**1.2 MILLION**  
job losses

↓ **44% vs 2019**

Travel & Tourism GDP:

**\$27 BILLION**  
loss

↓ **45% vs 2019**

Visitor Arrivals:

↓ **45% international**

↓ **25% domestic**

#### BASELINE SCENARIO

Travel & Tourism jobs:

**1.6 MILLION**  
job losses

↓ **57% vs 2019**

Travel & Tourism GDP:

**\$34 BILLION**  
loss

↓ **58% vs 2019**

Visitor Arrivals:

↓ **59% international**

↓ **34% domestic**

#### WORST CASE SCENARIO

Travel & Tourism jobs:

**2.0 MILLION**  
job losses

↓ **73% vs 2019**

Travel & Tourism GDP:

**\$44 BILLION**  
loss

↓ **74% vs 2019**

Visitor Arrivals:

↓ **71% international**

↓ **63% domestic**

Worst-case scenario can be avoided if countries follow WTTC's five-point plan for recovery:

1. Immediate removal and replacement of any quarantine measures, with 'air corridors' to countries with similar circumstances, as well as the removal of travel advisories and bans on non-essential international travel, which prevent insurance protection cover for travellers.

2. Adoption of global health and safety protocols to provide assurance to travellers that it is safe to travel again.

3. Implementation of a rapid test and trace strategy to help contain the spread of the virus.

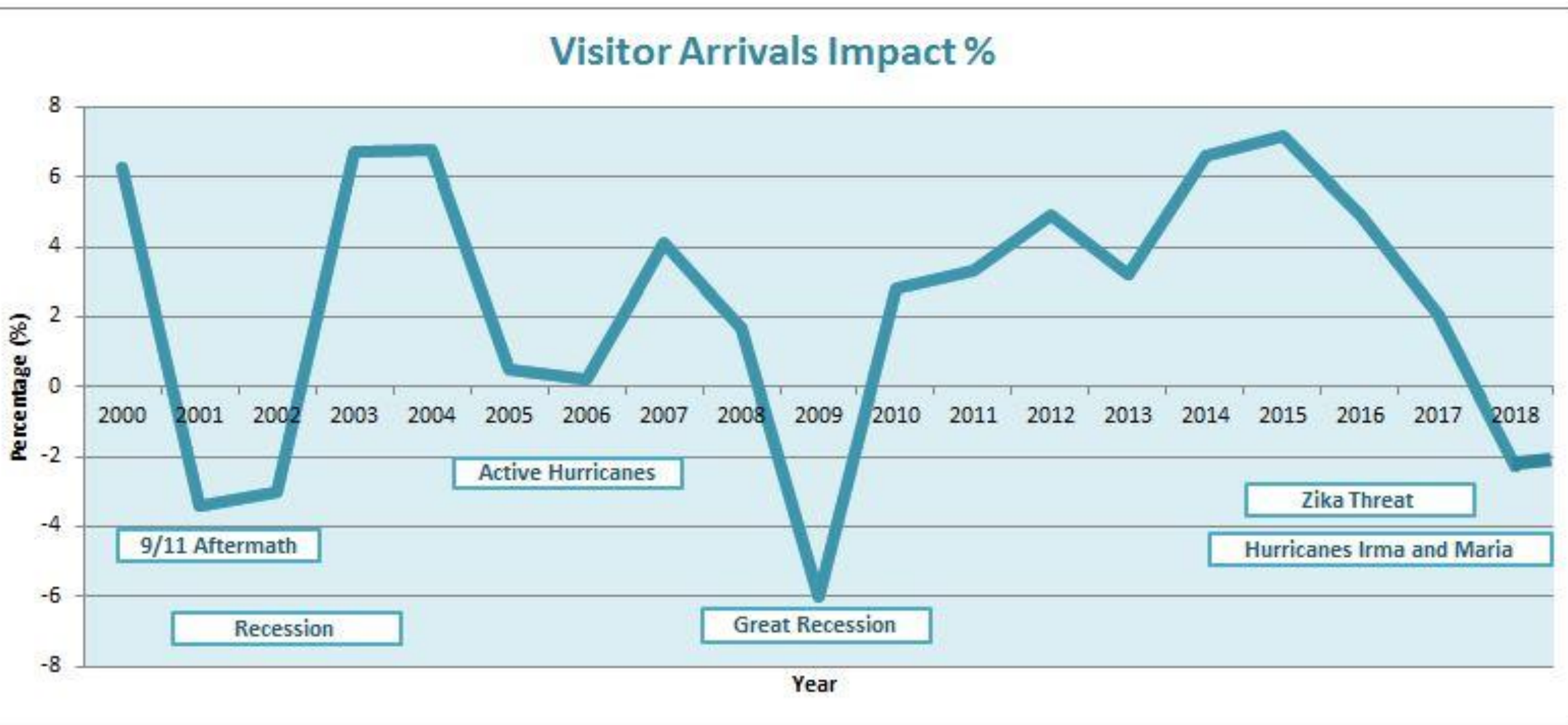
4. Greater collaboration between the public & private sectors to ensure a standardised, global approach to the crisis.

5. Continued government support for the sector in terms of fiscal and liquidity incentives as well as measures to protect workers.





## Tourism's Resilience....





- *In Today's Covid-19 Environment Some Say It's Time to Diversify Away From Tourism....*
- *Tourism Presents the Caribbean With Its Greatest Opportunity to Recover and Renew*
- *Diversifying With and Within Tourism Should Guide Our Reshaping*

## **Successful Nations Play to Their Strengths....**

*“Geographical factors played a large role in the patterns of national development, and that some areas had advantages due to climate and natural resources, that enabled them to develop sooner than others.”*

“The Wealth and Poverty of Nations: Why Some are So Rich and Some So Poor”  
David S. Landes, 1998

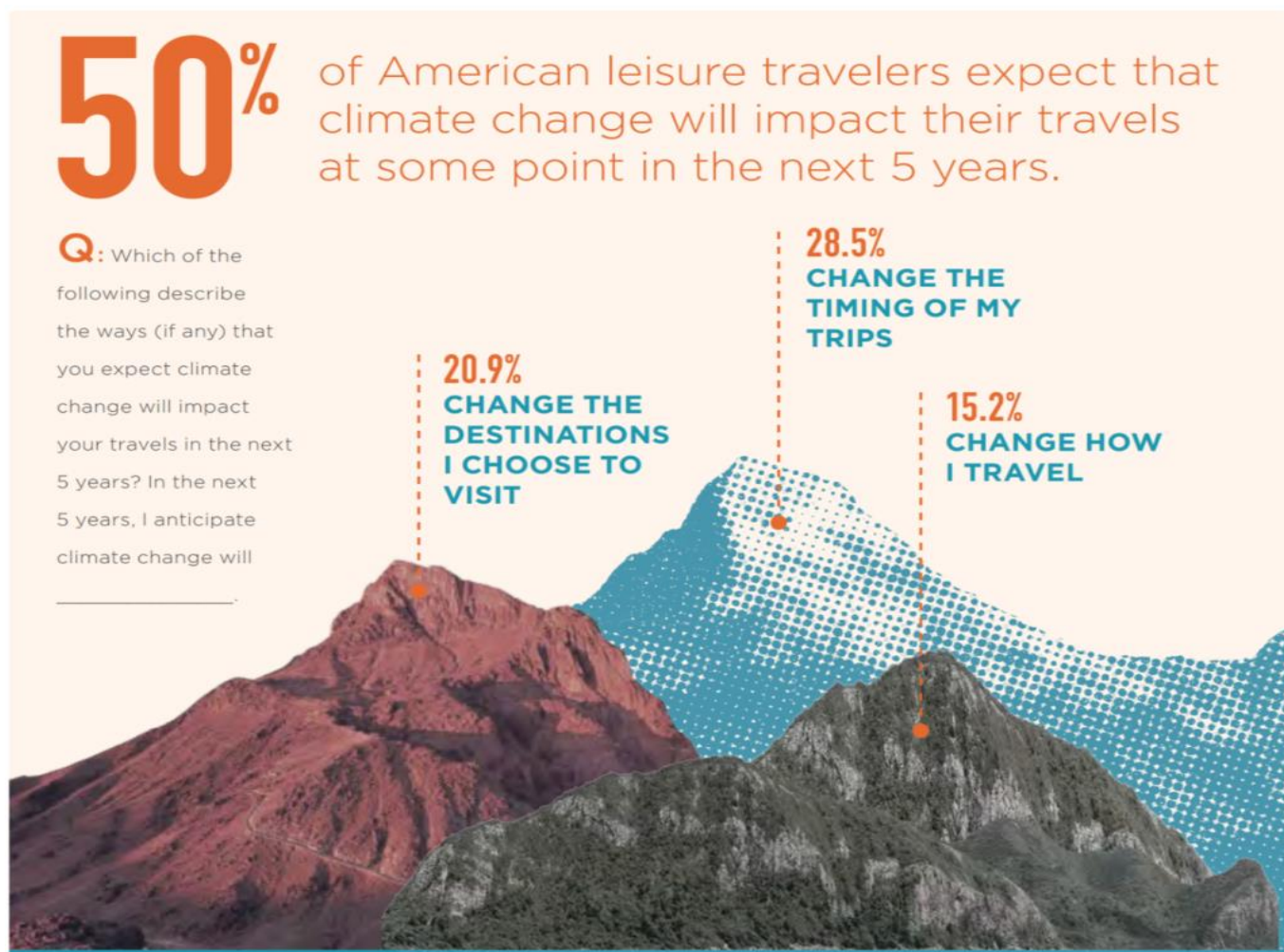


## ***Focal Points to Reshape Tourism in the Caribbean....***

1. Adapt to Changing Customer Behaviors
2. Build a Culture of Standards and Guidelines
3. Improve Energy Efficiencies
4. Protect and Enhance the Environment
5. Train and Empower Our People
6. Strengthen Socio-Econ-Eco Linkages...Close Leakages
7. Embrace New Technologies
8. Accentuate and Differentiate Our Culture and Diversity
9. Partner...Collaborate...Coordinate
10. Market and Communicate



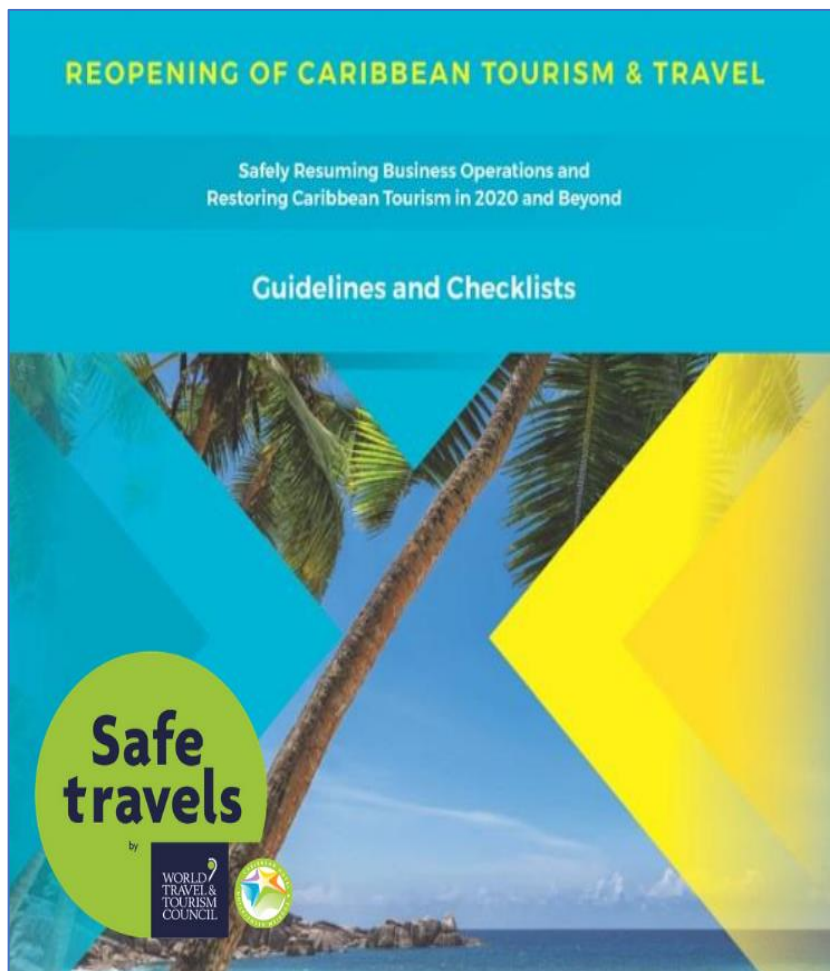
# 1. *Focal Point:* Adapt to Changing Customer Behaviors







## 2. *Focal Point:* Build a Culture of Standards and Guidelines



### Health & Safety Guidelines & Checklists

For Reopening of Caribbean Tourism & Travel



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### 3. *Focal Point:* Improve Energy Efficiencies



#### Caribbean Hotel Energy Efficiency and Renewable Energy Program (CHENACT)

- \* Joint venture of CHTA and CTO, funded primarily by IDB with support from CDE, GIZ, UNEP, CHTA and CTO
- \* 144 detailed efficiency audits, 30 walkthroughs resulted in major efficiencies and savings by most hotels
- \* Hundreds more hotels receive efficiency training
- \* Hotel Clean Energy Policies Drafted for Consideration by Barbados Jamaica and Bahamas
- \* Established [www.chenact.com](http://www.chenact.com) with tools, tips
- \* Institutional strengthening and collaboration with regional programmes
- \* Five Solar Demonstration Projects Established
- \* Recipient at 2018 Caribbean Renewable Energy Forum of Region's Top Energy Efficiency Award



## **4. Focal Point:**

# **Build to Protect and Enhance the Environment**



**Some Training, Policy and Code Review, and Sharing of Best Practices Has Occurred**

- **Workshops and Webinar Training**
- **Reviews of Building Codes**
- **Sharing of Guides and Information**
- **Sharing of Best Practices**

**More Focused Strategies Needed:**

- **Building Code Review**
- **Environmental Protection Assessments as Part of Major Build or Restoration**
- **Build Setbacks for Waterfront Resorts**
- **Adherence to Eco-Friendly Waste Disposal Practices**
- **Protection and Restoration of Reefs, Mangroves, Watersheds, Indigenous Vegetation**





## 5. *Focal Point:* Train and Empower Our People







## 6. *Focal Point:* Strengthening Socio-Econ-Eco Linkages...Close Leakages

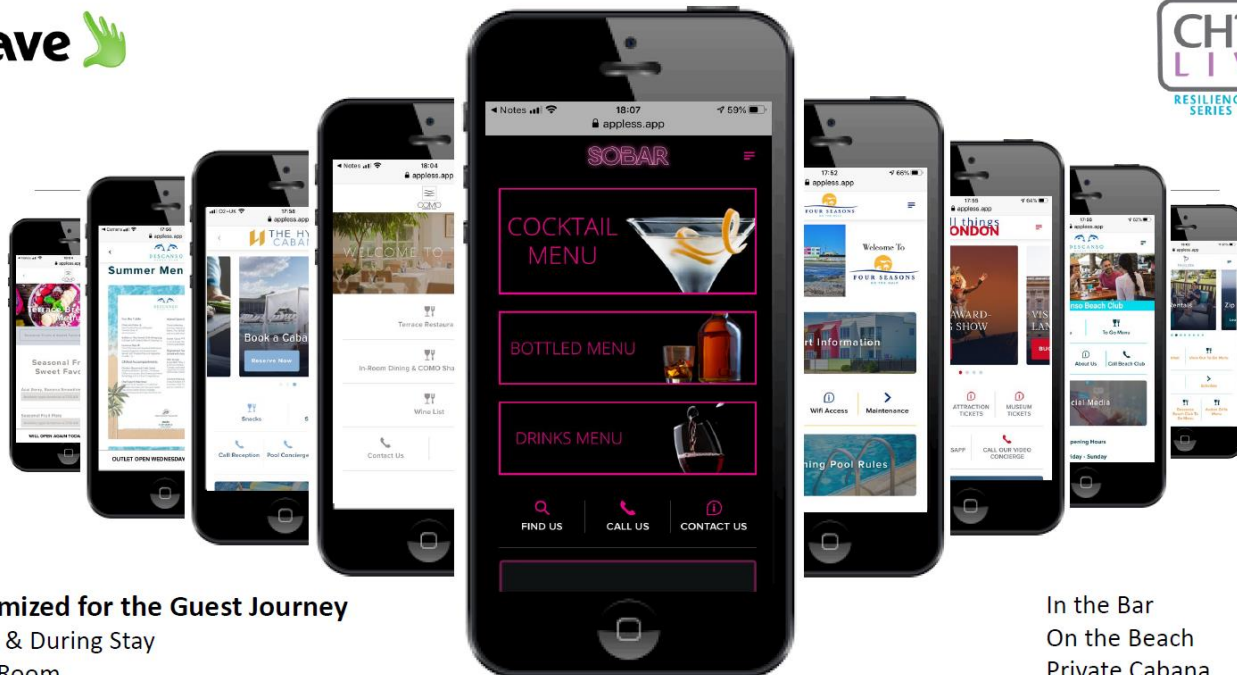






## 7. Focal Point: Embrace New Technologies

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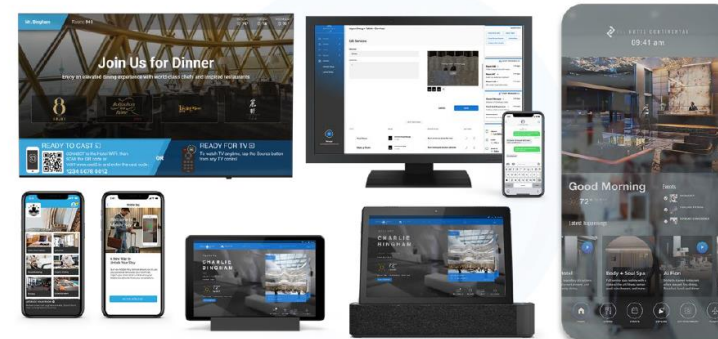


Customized for the Guest Journey  
Before & During Stay  
In the Room  
Concierge & Tours

In the Bar  
On the Beach  
Private Cabana  
Night Club

CHTA  
LIVE  
RESILIENCE  
SERIES

INTELITY



### Mobile Access



Digital room  
keys on  
personal  
smart devices

Convenient  
and secure

Based on the  
ASSA ABLOY  
Seos®  
platform







## 8. *Focal Point:* Accentuate & Differentiate Culture and Diversity







## 9. *Focal Point:* Partner...Collaborate...Coordinate

### COVID-19 Proactive Health Measures For Reopening Tourism





Caribbean Public Health Agency  
Tourism and Health Programme

**Real time monitoring of illnesses via Tourism Health Information System (THIS)**



Interim COVID-19 Health Guidelines for Hospitality: Hotels and Guesthouses

**COVID-19 Health Guidelines**



Healthy, Clean and Green Operational checklists



COVID-19 response in hotels and tourism accommodations



Hospitality health, safety and environment standards



Advance food safety and hygiene certification



Traveller's Health App



Caribbean Travel Health Assurance Stamp

### COVID-19 Tourism Task Force



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GTRCMC  
Global Tourism Resilience & Crisis Management Centre







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Caribbean  
Public Health  
Agency

CARPHA



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## Health and Tourism Working Together

### ***A Unique Partnership by the Caribbean Tourism COVID-19 Task Force:***

Caribbean Public Health Agency  
Caribbean Tourism Organization  
Caribbean Hotel and Tourism Association  
Organization of Eastern Caribbean States  
Global Tourism Resiliency and Crisis Management Centre

- **Formalized in 2015 by CARPHA with the Caribbean Tourism Organization and Caribbean Hotel and Tourism Association**
- **Goal: To Collaborate on Health Safety Prevention and Mitigation Efforts**
- **Most Active Work Prior to Covid-19 Was With Zika**
- **Convened First Covid-19 Industry Briefing on February 4<sup>th</sup>, 2020 – Over 400 Attendees**
- **Covid-19 Task Force Formalized March 8<sup>th</sup>, 2020**
- **Mandate: Info Sharing; Develop Protocols; Training; Monitoring; Recognition**



## 10. Focal Point: Market and Communicate

**ONLY AS A REGION....** IS THE CARIBBEAN BEST POSITIONED TO COMPETE GLOBALLY IN THE FACE OF ONGOING ENVIRONMENTAL FACTORS, CHANGING CONSUMER BEHAVIORS AND DEMANDS, AND THE GROWING ATTRACTION OF ALTERNATIVE DESTINATIONS GLOBALLY.

### DIVERSITY

Nature, culture, experience and heritage. The region, collectively, is **one of the most diverse and richest places in the world**. From its natural assets, to its many different cultures, historical narratives, and of course, its people, **the Caribbean is a place of unlimited experiences and exploration.**

### PEOPLE

Joyful, soulful, charming, warm, resourceful, proud. **The region's People are the jewel in the crown.** There is nowhere on earth to meet people quite like in the Caribbean.

### PROXIMITY

**The region is in close geographic proximity to some of the world's most important markets** as well as many new growth markets (South America). Historically, it has had entrenched multi-faceted relationship with the European market as well.

### RHYTHM

The beat of the islands is like no other. From pulsing, visceral and energetic, to the slow cadence of life in human tempo, to the soothing sounds of the Sea, **the Caribbean is a constant dance.**

### IMAGINATION

The region holds a special place in the imagination of people across the world and across time. It is a place of myth, beauty, and magic.





**Elements of Sustainably Reshaping Caribbean  
Tourism Have Been in Play**

**But...**

**In Today's Rapidly Changing World...**

**We Need to Adapt Quicker**

**Crisis Presents Opportunity**

**What Will It Take to Accelerate Change?**



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## Sustainability as a Core Business: Reshaping Tourism in the Greater Caribbean



# ADVANCING A “SUSTAINABLE” TOURISM STRATEGY







## ***Sustainably Reshaping Tourism...What Will It Take?***

- Leadership – Industry...Government...NGOs...MLOs
- Broad Regional Engaged Stakeholder Support
- Management of Ongoing Structured Process
- Establishing Strategic Directions and Plan
- Resources to Guide and Deliver on the Plan
- Support Infrastructure and Manpower Capacity



***“Travel & Tourism has a hugely positive benefit upon the world, far beyond the immediate pleasure it brings to those who are able to explore and discover people, places and amazing experiences for themselves.***



***The social impact of Travel & Tourism can transform lives of all of those who depend on this sector, alleviate poverty, reduce inequality, protect wildlife and preserve cultures and communities around the globe. It plays a vital part in achieving wider developmental goals.***

***With the immense pressures being faced by the global Travel & Tourism sector due to the current restrictions caused by the COVID-19 pandemic, it's now more important than ever that we remind everyone, how travelling can make all the difference in – and to – the world.”***

**Gloria Guevara, WTTC President & CEO**



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*Thank You!*