MINISTRY OF
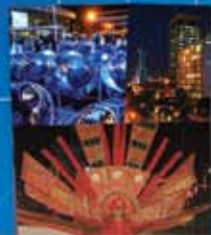**TOURISM**
TRINIDAD AND TOBAGO

NATIONAL TOURISM POLICY OF TRINIDAD AND TOBAGO
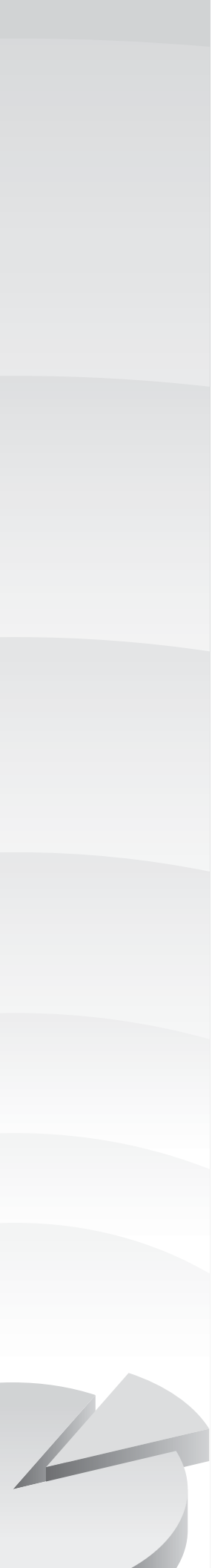
TABLE OF CONTENTS

LIST OF TABLES AND FIGURES

LIST OF ABBREVIATIONS

CAST	Caribbean Alliance for Sustainable Tourism
CDA	Chaguaramas Development Authority
CHTA	Caribbean Hotel and Tourism Association
CSO	Central Statistical Office
CTDC	Caribbean Tourism Development Company
CTO	Caribbean Tourism Organization
EMA	Environmental Management Authority
eTECK	Evolving TecKnologies and Enterprise Development Company Limited
GDP	Gross Domestic Product
IPCC	Intergovernmental Panel on Climate Change
NGO	Non-Governmental Organization
TDC	Tourism Development Company Limited
THA	Tobago House of Assembly
THTA	Tobago Hospitality and Tourism Association
THTI	Tobago Hospitality and Tourism Institute
TTHTI	Trinidad and Tobago Hospitality and Tourism Institute
UDeCOTT	Urban Development Corporation of Trinidad and Tobago Limited
UNWTO	United Nations World Tourism Organization
VFR	Visiting Friends and Relatives
WHO	World Health Organization
WTTC	World Travel and Tourism Council

DEFINITION OF TERMS

Biodiversity

The variety and variability of all living organisms. This could include genetic variability within species, the variety and diversity of species, communities of living organisms and the ecological processes that they influence or perform.

Community Tourism

A type of tourism that engages and empowers local residents in the development, management and ownership of tourism products and services in their communities. Community-based tourism (CBT) emphasizes the need to protect and preserve the environmental, historical, and socio-cultural assets of a community, and embraces eco-tourism, cultural tourism, adventure tourism, recreational tourism, geo-tourism, heritage tourism, health tourism, agro-tourism and other kinds of responsible tourism activities.

Domestic Tourism

Involves residents of the given country traveling within that country.

Creative Class

A socio-economic class or demographic segment made up of knowledge workers, intellectuals and various types of artists.

Domestic or Local Tourist

A person who travels to a region within the country in which he/she usually resides for at least one night but less than one year, and whose main purpose of visit is other than the exercise of an activity remunerated from within the region visited.

Eco-tourism

Environmentally and socially responsible travel to natural or near natural areas that promotes conservation, has low visitor impact and provides for beneficially active socio-economic involvement of local people.

Emerging Markets

Population groups that are entering the travel market as tourists in increasing numbers, especially from emerging economies such as India, China, some Eastern European States and Latin America.

Health Tourism

Travel or vacationing for health or fitness purposes.

International Tourist

A person who travels to a country other than his/her country of usual residence for at least one night but less than one year, and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited.

DEFINITION OF TERMS (cont'd)

Regional Tourist

A person who travels to a country within the geographic region in which he/she lives other than his/her country of usual residence for at least one night but less than one year, and the main purpose of whose visit is other than the exercise of an activity remunerated from within the country visited.

Responsible Tourism

All forms of tourism activity by both tourists and tourism suppliers that minimize negative social, cultural, economic and environmental impacts while generating greater economic benefits for local people and enhancing the well being of host communities.

Stopover Visitor

A person who travels away from home staying less than 24 hours in the place visited.

Sustainable Development

A pattern of resource use that aims to meet human needs (cultural, economic, natural and social) while preserving the environment so that these needs can be met not only in the present, but also by future generations.

Sustainable Tourism

The optimal use of social, natural, cultural and economic resources for tourism development on an equitable and self-sustaining basis in order to provide a unique visitor experience and an improved quality of life for all through partnerships among government, private sector and local communities.

Tourist

A person who travels away from home staying away for at least one night. A tourist travels for different purposes such as business, leisure, conference and incentive, sport or sun, sand and sea.

Tourism

All travel for whatever purpose that results in one or more nights being spent away from home and the sum of the associated services and activities (e.g. hotel accommodation, tours, shopping, and entertainment).

Tourist Spend

The amount of money that tourists spend in a destination. This can be measured per day e.g. average spend per day, or total expenditure.

1. INTRODUCTION

The Government of the Republic of Trinidad and Tobago is fully committed to building a nation in which every citizen benefits from its rich natural and cultural resources and in so doing will transform the society into economic prosperity, social stability and environmental sustainability. The key drivers of such a transformation reside in effective public/private sector partnerships that boost economic diversification and competitiveness, while at the same time balancing the need for environmental, social and human development. The tourism sector is therefore regarded as critical to the achievement of economic growth through balanced and sustainable development and can be a catalyst for socio-economic benefits for local communities, the preservation of our natural and cultural assets and the advancement of our nation.

The Government has increased its thrust towards diversifying the economy in order to enhance the revenue and job creation potential of several key industries, one of which is tourism, and recognises that the development of the sector requires a more strategic approach to long-term competitiveness. Tourism development shall be undertaken in a sustainable and responsible manner so that the sector realizes its full potential to engage local communities, create economic opportunities and alleviate poverty.

Tourism can be an engine of growth capable of rejuvenating other sectors of the economy given that it:

- is labour intensive and employs a multiplicity of skills;
- provides entrepreneurial opportunities;
- has the potential to create linkages with other sectors of the economy, such as agriculture, manufacturing and services;
- allows rural communities to share in the benefits of sustainable development; and
- is a final good.

1.1 The Policy Formulation Process

This Policy was preceded and informed by the Tourism Master Plan (1995), the Three-Year Rolling Plan (2002-2004) and the Comprehensive Economic Development Plan for Tobago (2005). The Trinidad and Tobago Social and Economic Policy Framework (2002-2008) and consecutive Budget Statements were also used as a basis for the Policy. The Policy goals are linked to the seven (7) Development Pillars identified by the Government for sustainable development of Trinidad and Tobago. The Caribbean Tourism Organization's (CTO) Regional Sustainable Tourism Development Policy Framework and the World Travel and Tourism Council's (WTTC) Impact of Travel and Tourism on Jobs and the Economy of Trinidad and Tobago (2005) were also instructive.

The Ministry of Tourism co-ordinated the efforts of a Policy Working Committee comprising the Ministry of Tourism, the Tourism Development Company Limited (TDC), policy advisers and other technical staff to develop the initial Draft National Tourism Policy document between 2006 and 2007. The Division of Tourism and Transportation of the Tobago House of Assembly (THA) also participated in the process.

1.1　The Policy Formulation Process (cont'd)

Subsequently, a Tourism Policy Steering Committee comprising representatives of the above-mentioned agencies guided the revision of the draft document providing more detailed inputs regarding tourism product development, investment and marketing. In order to complete the drafting of the National Tourism Policy, comments from a wide cross-section of key stakeholders and partners were considered.

The Draft Policy was further revised in 2008. In 2009, major stakeholders from the tourism industry were consulted to make inputs to the revised Draft. These stakeholders included public and private sector agencies, community groups and non-governmental organizations (NGOs). Two public consultations were held, one in Trinidad and one in Tobago. The Draft Policy was posted on the Ministry of Tourism's website and a Policy Summary was published in the newspapers. Written comments were invited and received from the public. In 2010, the Policy was reviewed and revised to ensure alignment with the national policy framework for sustainable development.

2. NATIONAL TOURISM POLICY CONTEXT

2.1 The Global Tourism Scenario

Rapid and radical transformation of the international tourism industry which began in the late 1980s has continued into 2010 and is likely to persist into the medium term. As indicated at Figure 1, on the demand side, the transformation process has been driven by increase in knowledge and experience among travellers, war, terrorism, global economic recession, volatile oil prices and growing competition. Supply side transformation determinants include natural and man-induced disasters, pursuits of more sustainable forms of tourism, climate change and significant advancements in information technology (IT).

Figure 1
Key Factors Driving Travel and Tourism

DEMAND SIDE

SUPPLY SIDE

Consumers
- knowledgeable and demanding
- environmentally conscious
- widely travelled and experienced
- demand value for money
- rise of the creative class

Climate Change
- beach erosion, coral bleaching, rise in sea-level
- water and flood shortages
- ecosystem collapse
- record-breaking heat waves, droughts, floods and storms

Travel & Tourism

Locals
- informed and concerned
- keen to benefit from tourism
- want to avoid tourism's negative impacts

Information Technology
- wide and rapid diffusion
- all stakeholders use technology
- technology is constantly changing tourism

Frame Conditions
- growing competition
- volatile oil prices
- opening up of new countries - China, Eastern Europe, India etc.
- global economic recession
- war and terrorism
- natural disasters and outbreak of diseases

2.1.1 Consumers

Standardized and rigidly-packaged holidays are giving way to a new industry 'best practice' of holiday flexibility, product segmentation and sustainability. The growing experience, maturity, independence and environmental consciousness of the consumer are major factors driving change in the travel and tourism industry. Increasingly, consumers are demanding cleaner, greener and more sustainable services, products and experiences.

2.1.2 Locals

Local people have greater access to information and are more aware of new trends as well as many of the negative effects of mass tourism. They are keen to benefit from tourism while avoiding its negative impacts.

2.1.3 Climate Change

Climate change is "the single most important issue that we face as a global community" (Prime Minister of Britain, Tony Blair, April 2004). The need to reduce global emissions of green-house gases is both urgent and critical if we are to avoid dangerous effects of climate change such as beach erosion, coral bleaching, water and food shortages, ecosystem collapse, sea-level rise, extreme weather events and potentially catastrophic "run-away" global heating. Some of the recent events relating to climate change are:

- The 1990s was the warmest decade, and the year 1998 was the warmest year on global record. *Intergovernmental Panel on Climate Change (IPCC)*

- The summer of 2003 was Europe's hottest for 500 years. The heat wave caused 28,000 premature deaths across the continent.

- The Earth is warming faster than at any time in the past 10,000 years. *(IPCC)*

- 150,000 deaths every year are attributable to climate change. *World Health Organisation (WHO)*

- The area of the world stricken by drought has doubled between 1970 and the early 2000s. *Greenpeace*

- Globally, disaster losses increased from $71 billion in the 1960s to $608 billion in the 1990s. *Oxfam*

- There has been a 40% drop in the area of Arctic ice since the 1970s and in August 2007, this area was the smallest ever recorded.

- Sea level rise due to global warming has already submerged part of the Carteret atolls of Papua New Guinea.

According to the United Nations World Tourism Organization (UNWTO), Small Island Developing States (SIDS), particularly in Southeast Asia and the Caribbean, are most susceptible to climate change. Increasing frequency of extreme weather events, such as record-breaking heat waves, droughts, floods and storms (category five hurricanes and super-typhoons), are vivid examples of the types of climatic occurrences that can have negative impacts on the socio-economic benefits of tourism in these affected areas.

The 2009 Climate Change Conference held in Copenhagen emphasized the importance of addressing the challenges of global climate change by both developed and developing countries. A formal treaty replacing the Kyoto Protocol which expires in 2012 is yet to be established. Nonetheless, the Copenhagen Accord indicates a firm commitment on the part of countries to adopt measures which will reduce the impact of climate change on their societies and in turn their tourism industries.

2.1.4 Information Technology

Technology is creating the basis for flexibility and individuality of the travel experience without necessarily increasing costs. The key points to consider about technology are as follows:

- It is not simply the Internet or a video brochure that is being used for promotion and marketing, but the whole system of information technologies (iPods, cell phones, credit cards, GPS navigation devices, etc.);
- In addition to travel agents and tour operators, hotels, suppliers, tourism destinations and consumers also utilize technology;
- The pace of adoption of technology is rapid; and
- Technology creates new rules of the game for competitors and creates new wealth and new competition (e.g. Expedia, Travelocity and Lastminute.com).

New technologies are challenging tourism destinations around the world to get online or get out of business.

2.1.5 Global Economic Recession

The global economic crisis beginning in 2008 has adversely impacted travel and tourism growth with some estimates reporting a 20 – 30% drop in business for several tourism-related businesses and destinations.

The global economic recession has already caused some structural shifts in the travel and tourism industry in the short term which are likely to continue into the medium and long term. Indications are that one of the most significant impacts, and perhaps one of the most difficult to counteract, is the erosion of consumer confidence – in buying, spending and especially in travelling. In addition, job losses, business closures and the decline in economic activity are creating more uncertainty that will further impact travel in the short to medium term.

In the aftermath of the global recession and other adversities that impact the travel industry from time to time, travel and tourism businesses can expect slower growth; reduced sales and occupancy rates; more bargain-hunting travellers; postponement of travel; less people travelling; travel for shorter periods and shorter distances; great attention to cost cutting; postponement of capital expenditure; laying off of staff; reduced advertising; and increased reliance on the internet and direct sales. Nevertheless, these challenges will present opportunities for innovations and changes to offer better value and retain customers.

According to the CTO, a notable development is the increasing economic power of some South American and East Asian countries such as Brazil, China and India. These countries have been targeted as the most likely nations to withstand the effects of the global recession on account of their progressive fiscal standings and higher levels of inflowing investment in relation to more developed regions such as the United States and Europe. In terms of encouraging travel and tourism between the Caribbean and these emerging countries there will certainly be opportunities which can be further explored.

2.1.6 Increased Competition

In addition to the radically changing competitive environment being produced by more demanding customers, informed and discerning locals, climate change and the applications of information technologies industry-wide, the travel and tourism industry is more competitive than ever. China, Dubai, Vietnam and several Eastern European States are all discovering the benefits to be had from the tourism sector; Space (the Moon) is being opened up for travel and virtual reality tours are already in existence.

2.1.7 Volatile Oil Prices

The volatility of oil prices is also creating enormous pressures for the travel and tourism industry by driving up costs and forcing players to become more cost creative. Mass tourism was supported by cheap fuel and charter flights. Today, a more sensitive and responsible approach is the new best practice.

2.1.8 A Resilient Industry

While the global travel and tourism industry is challenged by unpredictable energy prices, new competitors, new consumers and new technologies, this very resilient industry provides significant opportunities for Trinidad and Tobago.

Despite the challenges, successive growth in the travel and tourism industry has been positive. Over the period 1950–2009 there were only three recorded years of negative growth in international tourism, 0.4% in 1982, 0.6% in 2001 and four percent in 2009. According to the UNWTO, the negative growth in 1982 was influenced by an adverse economic climate and travel restrictions in Central and Eastern Europe that arose as a result of the declaration of the state of siege in Poland. The contraction in 2001 was attributed mainly to the September 11 terrorist attacks in the US while that in 2009 was provoked by the global economic recession and the outbreak of the H1N1 influenza virus.

International tourist arrivals peaked at 922 million in 2008 from 25 million in 1950, an average annual growth rate of 6.4%. However, the growth rate recorded in 2008 of 1.9% was 4.5% below the average annual growth rate for the period 1950-2008. This decline was attributed mainly to the global economic recession in 2008. The situation was exacerbated in 2009. International tourist arrivals in that year declined to 880 million, a four percent negative growth, due mainly to the continuum of the global recession compounded by the outbreak of the H1N1 influenza virus. With the prospect of emerging markets and control of the virus, the UNWTO estimates that these arrivals are likely to increase 8.2% to one billion by 2010 and at an average annual rate of six percent to 1.6 billion by 2020 (see Figure 2).

Figure 2
World Tourism Arrivals 1950 to 2020
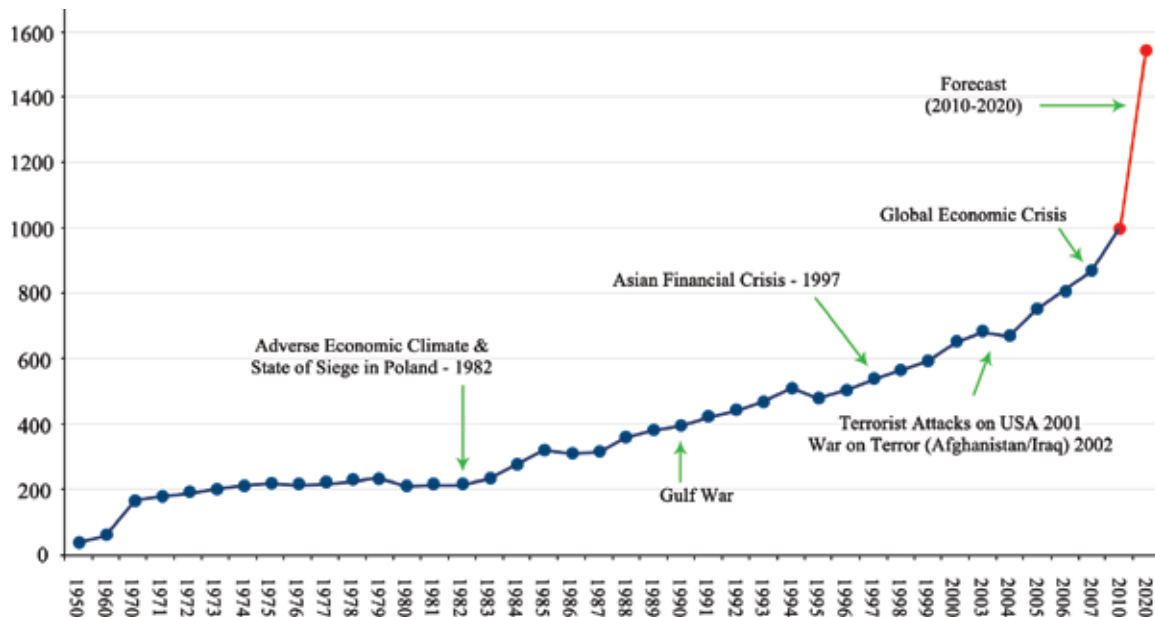
*Source: Tourism Intelligence International, Impact of the Global Recession
on Travel and Tourism, 2009*

The resilience of international tourism arrivals is manifest in the speedy recovery following two major international conflicts in the 1990s, the Gulf War in 1991 and the Kosovo conflict in 1999. While these conflicts triggered significant slowdown in the growth of tourism in the actual years of occurrence there were no lagged effects. In each case, tourism arrivals showed remarkable recovery – in the subsequent year, an 8.3% increase in 1992 and a 7.4% increase in 2000. As indicated at Figure 2 expectations are positive that resilience in international tourist arrivals will continue into 2011 notwithstanding sluggish international economic recovery, global warming and volatile oil prices. This indicates a great opportunity for Trinidad and Tobago to strategically improve its tourism sector to benefit from such growth.

2.2 The Regional Tourism Scenario

2.2.1 Dependence on Tourism

The Caribbean is one of the most tourism-dependent regions in the world. The tourism sector in the Caribbean is a significant contributor to income, employment, foreign exchange and growth of the region. According to the WTTC's *2010 - Travel and Tourism Economic Impact for the Caribbean* report, approximately 16% of the region's exports are generated by tourism. The report also estimates that in 2010 travel and tourism will contribute 12.3% of the Caribbean's GDP (direct and indirect contribution). For islands such as Antigua, Barbados and The Bahamas, it is estimated that tourism will directly contribute 78.5%, 48.1% and 46.5% respectively to GDP in 2010 as indicated in Table 1.

2.2.1   Dependence on Tourism (cont'd)

Table 1
***Estimated Travel and Tourism's Contribution to the GDP of
Selected Caribbean Countries, 2010***

Country	Estimated GDP Contribution (2010)
Antigua & Barbuda	78.5%
Barbados	48.1%
The Bahamas	46.5%
St. Lucia	35.1%
Jamaica	25.4%
Grenada	24.4%
Trinidad & Tobago	10.9%

Source: World Travel and Tourism Council, 2010

In 2010, the Caribbean region's travel and tourism industry is estimated to contribute US$55.4 billion in economic activity, compared with around US$4 billion in 1980. Travel and tourism also generated an estimated 587,000 direct jobs and 1.8 million direct and indirect jobs in the region in 2009 according to the WTTC.

In 2010 the sector is estimated to contribute 10.9% to GDP in Trinidad and Tobago, the least when compared to other countries in the region. Visitor exports of Trinidad and Tobago are expected to contribute approximately 4.9% of total exports, while visitor exports for the rest of the Caribbean are estimated to contribute 15.7% (WTTC, 2010).

2.2.2   Trinidad and Tobago – An Emerging Destination

Trinidad and Tobago accounted for just over one percent of the 22.1 million international arrivals to the Caribbean in 2009 according to the CTO. By contrast, the Dominican Republic accounted for almost one fifth of international arrivals to the region with almost 4 million international visitors recorded in 2009. Cuba also had a large share (11%) of the Caribbean tourism pie with over 2.4 million international visitors in 2009. Jamaica and The Bahamas accounted for eight percent and six percent of international arrivals, each with more than 1.8 million and 1.3 million arrivals respectively (see Figure 3).

Figure 3
Estimated Share of Tourism Arrivals of Selected
Caribbean Destinations, 2009
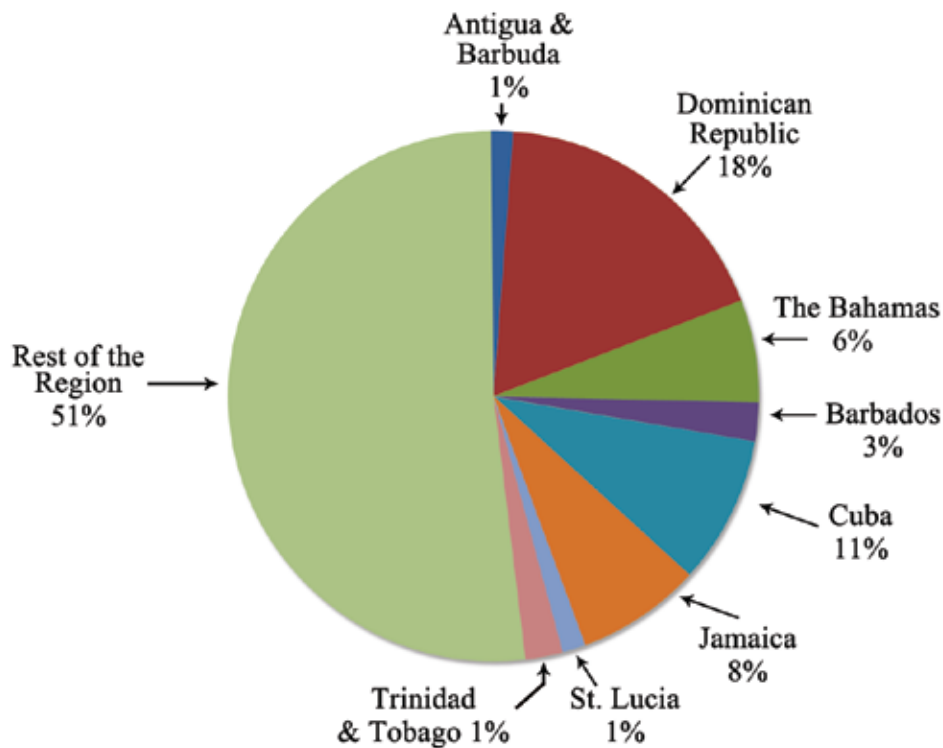
Source: Caribbean Tourism Organization, 2009

2.2.3 Weakening Regional Performance

The Caribbean region was particularly hard-hit by the terrorist attacks of September 11, 2001 and by the current global economic recession. After 9/11 international arrivals to the Caribbean declined by 2.5% between 2001 and 2002. Since then arrivals in the region have been increasing above the world average (7.2% in 2003 and 7.5% in 2004). However, in 2006, arrivals declined by 1.3% and demonstrated minimal growth of 2.25% in 2007. The average annual growth rate for the 2000-2007 period for international stay-over visitors to the Caribbean region was 1.6% below the world average of 4.1% for the same period, according to the CTO.

With the advent of the global economic recession in 2008 many Caribbean countries suffered double-digit declines in tourist arrivals. Anguilla took the worst hit with a decline of 18.8%, according to the CTO. Tourist traffic fell 14.3% in Antigua, 13.7% in St. Lucia, 11.6% in Montserrat and 11.3% in the Cayman Islands.

Jamaica, on the other hand, reported tourism growth of 3.4% through 2009. The country welcomed 63,826 more tourists in 2009 than in 2008. The majority of tourists came from the United States, with American tourist numbers increasing by 1.9% on 2008 figures. Moreover, 161,094 visitors came to Jamaica in January 2010 representing a 7.5% increase over January 2009 figures, according to data released by the CTO.

2.2.4 Cruise Tourism

The Caribbean cruise industry has demonstrated substantial growth, typically growing faster than stay-over arrivals. The average annual cruise passenger growth rate for the period 2002 – 2008 was three percent which averaged seven percent less than the average growth rate for stay-over arrivals of 3.25%.

The cruise sector is considered one of the most robust in the tourism industry given the sector's virtually tax-free status, no labour unions, ability to attract the best staff in the world and capacity to offer a wide range of entertainment and recreational activities on board. There are 264,000 cruise berths operating in the region (for the North American market only) compared with 294,000 hotel rooms in 2007. It is forecasted that there will be approximately 341,000 lower berths (beds) by the year 2012, according to the Cruise Line Industry Association.

2.2.5 Regional Co-operation

Trinidad and Tobago continues to forge and maintain strategic partnerships with other CARICOM member states to develop and promote intra-Caribbean tourism.

Significant strides have been made by the two main regional organizations, the Caribbean Hotel and Tourism Association (CHTA) and the Caribbean Tourism Organization (CTO), in the key areas of marketing, branding and promoting the region, training and human resource development, market research and statistics, environmental conservation and sustainable development.

2.2.6 Key Regional Issues

The issues facing the Caribbean, according to the CTO's Caribbean Sustainable Tourism Policy, are as follows:

i) Inadequate tourism awareness, management and planning capacity;

ii) Limited innovation in product development, marketing and promotion;

iii) Insufficient research and measurement of industry results, standards and indicators;

iv) Negative impacts on natural and cultural resources;

v) Irresponsible use of resources;

vi) The need for community development, empowerment and economic linkages;

vii) The need to address safety, security and health of locals and visitors, as well as issues of disaster management, preparedness and communication;

viii) The need for effective investment schemes and industry incentives;

ix) Insufficient land use plans and carrying capacity studies;

x) Trade, taxation and employment issues;

xi)   Inadequate air access and intra-regional travel and transportation;

xii)   The growth of cruise tourism and its challenges;

xiii)   The need for more information technology and management and acquisition of technological advances;

xiv)   The increased social issues of crime, HIV, prostitution and the illegal drug trade; and

xv)   The need for human resource and entrepreneurial development and education.

2.3   Trinidad and Tobago Tourism Profile

The islands of Trinidad and Tobago have different tourism development potentials. Each island has its own unique selling proposition and different source markets.

2.3.1   Different Tourism Potentials

The National Tourism Policy of Trinidad and Tobago recognizes the differences between the product offerings of each island and will build on this diversity.

The unique selling proposition for Trinidad is its cultural diversity and thriving business environment. The unique selling proposition for Tobago is its semi-rustic and idyllic island-environment, focusing on leisure tourism. Indeed, there are three distinct and unique products and unique selling propositions for Trinidad and Tobago:

- The Trinidad product – cultural diversity;
- The Tobago product – developed yet idyllic island get-away; and
- The Trinidad and Tobago product – islands of contrast.

Table 2 highlights some of the key differences between the Trinidad and Tobago products.

2.3.1 Different Tourism Potentials (cont'd)

Table 2
Differences in the Tourism Products of Trinidad and Tobago

	Trinidad	Tobago
Unique Selling Proposition (USP)	Cultural diversity (religious and racial mix)	Infrastructurally developed, yet semi-rustic, idyllic island-environment Close proximity to the island of Trinidad
Main Types of Visitors	Business travellers Returning residents Independent travellers (not on pre-paid packaged holiday)	European leisure travellers on pre-paid packaged holidays Trinidadians on short trips and week-end visits, long summer holidays
Main Source Markets	USA Caribbean Region	UK & Europe Domestic market (Trinidad)
Accommodation Types	Some large branded hotels Small, independent hotels Bed & Breakfast Apartments	Small, independent non-branded hotels Apartments & Condos Bed & Breakfast Villas
Main Markets	Business tourism	Beaches, leisure, sun, sand & sea tourism
Market Niches Targeted	Business Events and cultural attractions Ecotourism Diving Yatching Shopping Nightlife Historical sites Health Sports	Ecotourism Diving & Water Sports Events and cultural attractions Weddings & honeymoons Historical sites Health

2.3.2 Different Roles in the Economy

Travel and tourism contributed approximately 10.6% (direct and indirect) to the GDP of Trinidad and Tobago in 2009, according to the WTTC. By contrast, tourism contributed almost 36.9% (direct and indirect) of Tobago's economic activity in 2009.

The travel and tourism industry (directly and indirectly) contribute just under half (47.6%) of all jobs in Tobago. Of a population of approximately 54,000 people, there are an estimated 14,000 persons directly employed in tourism-related establishments in Tobago. Tourism is also the main export item for Tobago contributing to 98.4% of direct exports from the island, according to the *WTTC's Travel and Tourism Economic Impact Update, Trinidad and Tobago, 2009.*

2.3.3 Different Source Markets

The main types of visitor to Trinidad are business travellers and returning nationals visiting friends and relatives (VFR). These visitors originate mainly from North America, the Caribbean and, to a lesser extent, Europe. The Caribbean market to Trinidad has been growing, taking advantage of events and sports activities, shopping and visits to friends and relatives. Trinidad also attracts eco and adventure visitors, but these are small in comparison to the dominant business travel and VFR markets.

The United States was the largest source market for arrivals to Trinidad and Tobago combined, making up 47% of all arrivals or 202,499 visitors in 2009 according to the Central Statistical Office of Trinidad and Tobago (CSO). Following behind the USA was the Caribbean region which accounted for 13% or 58,129 arrivals. Canada accounted for 12% of arrivals (50,180) to Trinidad and Tobago in 2009. Central and South America contributed 11% or 46,934 tourist arrivals. The United Kingdom recorded 10% (41,706) of arrivals. Other European countries recorded five percent (20,218) and the rest of the world recorded two percent (10,965) of arrivals.

Figure 4
Tourism Arrivals to Trinidad and Tobago by Source Market, 2009
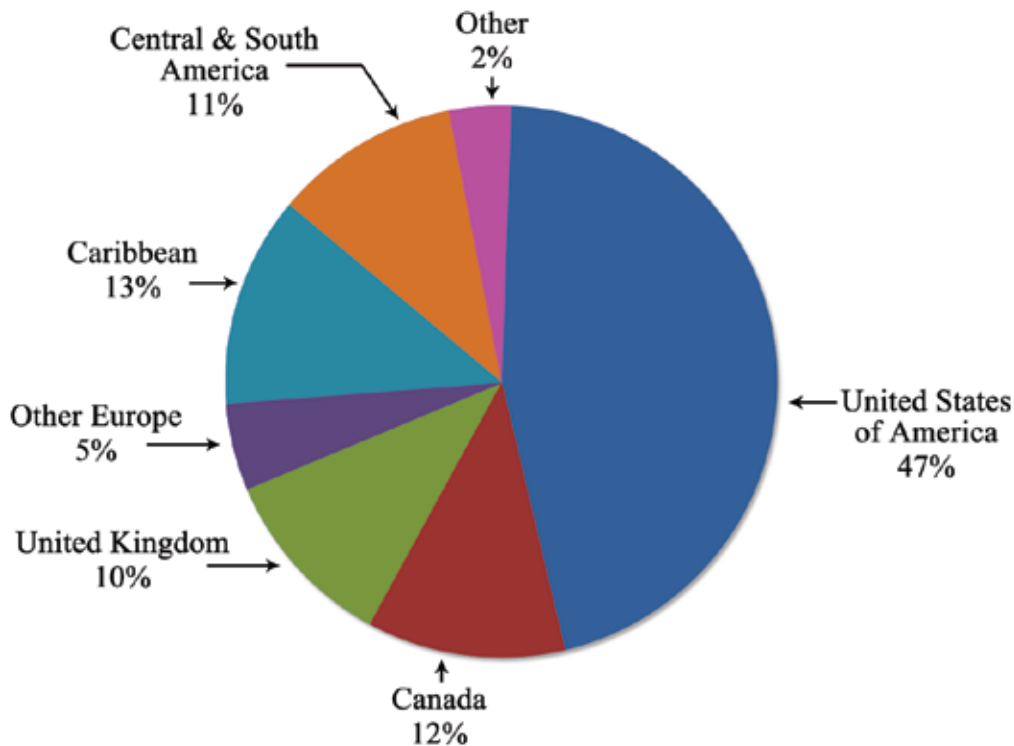
Source: Central Statistical Office, 2009

2.3.3 Different Source Markets (cont'd)

When isolated, Tobago's main foreign visitor markets as shown in Table 3 below are UK and European travellers on holiday packages. According to the Division of Tourism and Transportation of the Tobago House of Assembly (THA), in 2009 the UK accounted for 73% of international stay-over arrivals to the island, with Germany contributing 14%. Other European countries such as Denmark, Sweden and Switzerland contributed a total of seven percent of all stay-over visitors to Tobago while the USA accounted for six percent.

Table 3
International Stay-Over Arrivals to Tobago
by Main Source Markets, 2009

Source Market	International Arrivals	% Share of Arrivals
United Kingdom	15,662	73
Germany	2,775	14
USA	1,351	6
Sweden	614	3
Switzerland	402	2
Denmark	318	2
TOTAL	**21,398**	**100**

Source: THA-Division of Tourism and Transportation, 2009

2.3.4   Recent Performance

2.3.4.1   International Air Arrivals

The period 2002 to 2005 showed consecutive growth in visitor arrivals for Trinidad and Tobago, with 2003 recording close to 410,000 visitors, an increase of 6.5% when compared to 2002. Steady growth continued for 2004 and 2005 with arrivals totalling 442,555 and 463,192 respectively. In 2005 visitor arrivals totalled 463,192, an increase of 21% when compared to 2002. On the other hand, a 5.8% decline in arrivals was recorded between 2006 and 2008. In 2009 the trend continued with a further decline of 1.5% or 430,631 visitors.[1]

Figure 5
Tourism Arrivals to Trinidad and Tobago
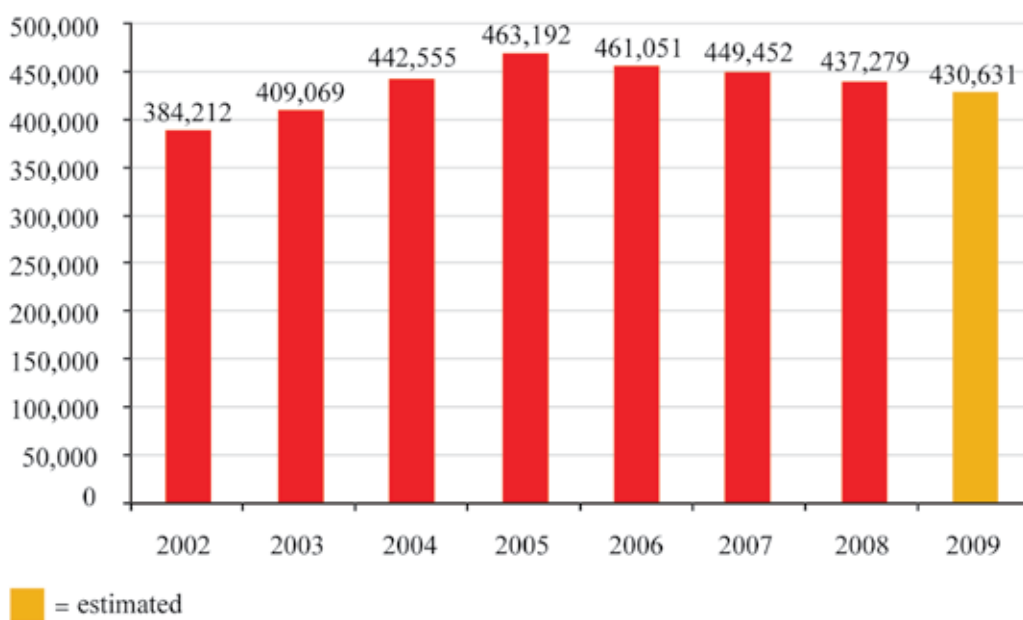
■ = estimated

Source: Central Statistical Office, 2009

Footnote
1. This figure represents an estimate for the year 2009.

2.3.4.1 International Air Arrivals (cont'd)

For Tobago, international air arrivals showed a marked increase for the period 2002 to 2005, peaking at 87,796 which represented a 55% increase for the period under review. However, like Trinidad, Tobago experienced consistent decline in arrivals for 2006 and 2007 with a steep decline of 43% in 2008. In summary, therefore, Tobago experienced a steady decline of six percent in visitor arrivals from 2005 to 2008. However, there was slight growth in international air arrivals for 2009 with a total of 37,861 visitors.

Figure 6
Visitor Air and Cruise Arrivals to Tobago, 2002-2009

	2002	2003	2004	2005	2006	2007	2008	2009
Air	56576	68548	82159	87796	68791	66266	37781	37861
Cruise	10513	15916	24953	34518	42455	13414	26494	67132
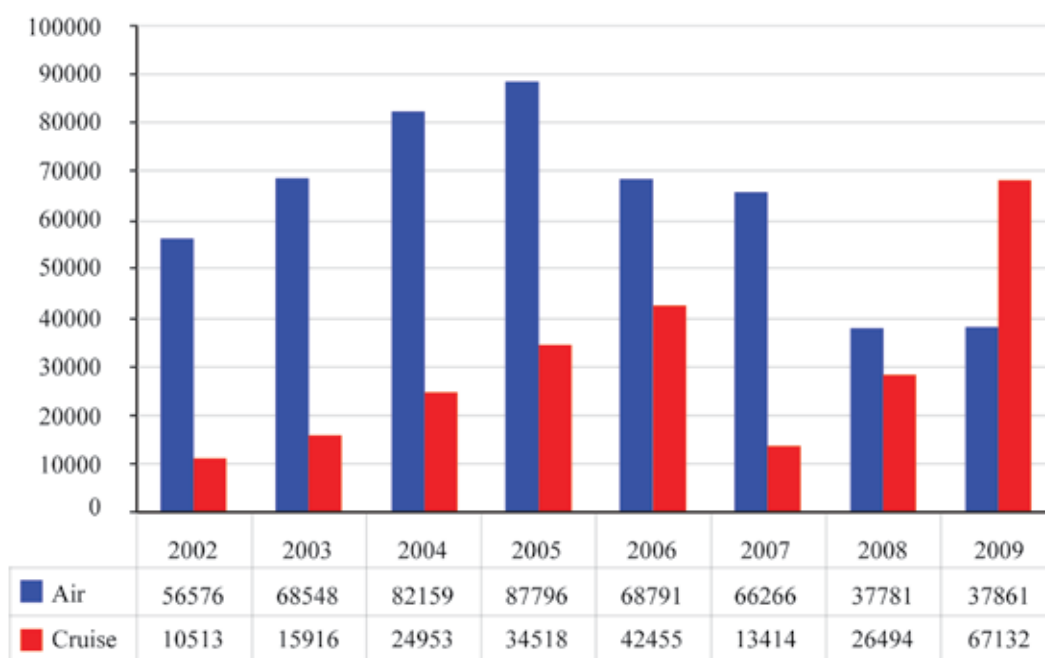
Source: Central Statistical Office, 2009

2.3.4.2 Cruise Passenger Arrivals To Tobago

Cruise passenger arrivals to Tobago increased steadily for the period 2002 to 2006. However, 2007 recorded a sharp drop of 68.2% in cruise passenger arrivals to the island over 2006. Cruise arrivals recovered in 2008 with a total of 26,494 passengers which signaled a 97.5% increase over 2007. In 2009, cruise passenger arrivals climbed dramatically with a figure of 67,132 passengers which represented an increase of 153%.

2.3.4.3   Domestic Arrivals

Tobago is a popular vacation destination for Trinidadians who make up the majority of visitors and bed nights to Tobago. In 2009, 49 times more Trinidadians visited Tobago than British travellers and almost 300 times more Trinidadians visited Tobago than German travellers.

Figure 7
Domestic Arrivals to Tobago by Mode of Transport
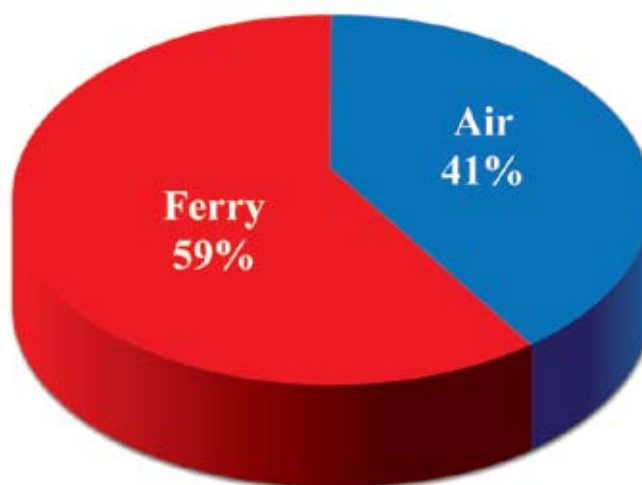
Source: Division of Tourism and Transportation,
Tobago House of Assembly, 2009

Domestic ferry arrivals from Trinidad to Tobago grew by 165% from 181,000 arrivals in 2001 to 480,000 in 2008, reflecting an increased capacity on the sea bridge. The average annual growth rate over the same period was 15%.

Domestic air arrivals to Tobago grew from 207,000 in 2001 to 331,000 in 2008 an overall increase of 60%, representing an average annual rate of growth of seven percent. In 2009, there was a total of 771,196 domestic arrivals to Tobago, an increase of 1.6% when compared to 2008.

2.3.5   Employment

According to WTTC's 2009 *Travel & Tourism: Economic Impact Update - Trinidad & Tobago*, the travel and tourism industry accounted for 14.7% of total employment in Trinidad and Tobago. This figure represented a total of 88,000 (direct and indirect) jobs in the sector. Direct industry employment was calculated to be 5.4% of total employment or 33,000 jobs.

By contrast, Tobago's employment figures in 2009 were higher and reflect the importance of the tourism industry to Tobago's economy. The tourism industry contributed 47.6% of total employment on the island, accounting for 14,000 jobs.

2.3.5 Employment (cont'd)

In 2008 almost two-thirds of the tourism workforce comprised women, one-third of whom were 30 years and younger. Approximalety 16% of the male employees were also 30 and under as shown in figure 9 below.

Figure 8
Gender Profile of Employees in the Tourism Sector in Tobago
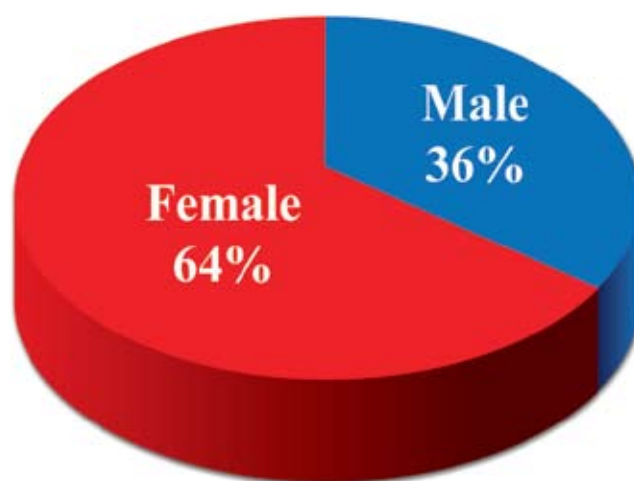
Source: Baseline Study for the Tobago Hospitality and Touism
Institute, Tourism Intelligence International, 2008

Figure 9
Age Profile of Employees in the Tourism Sector in Tobago
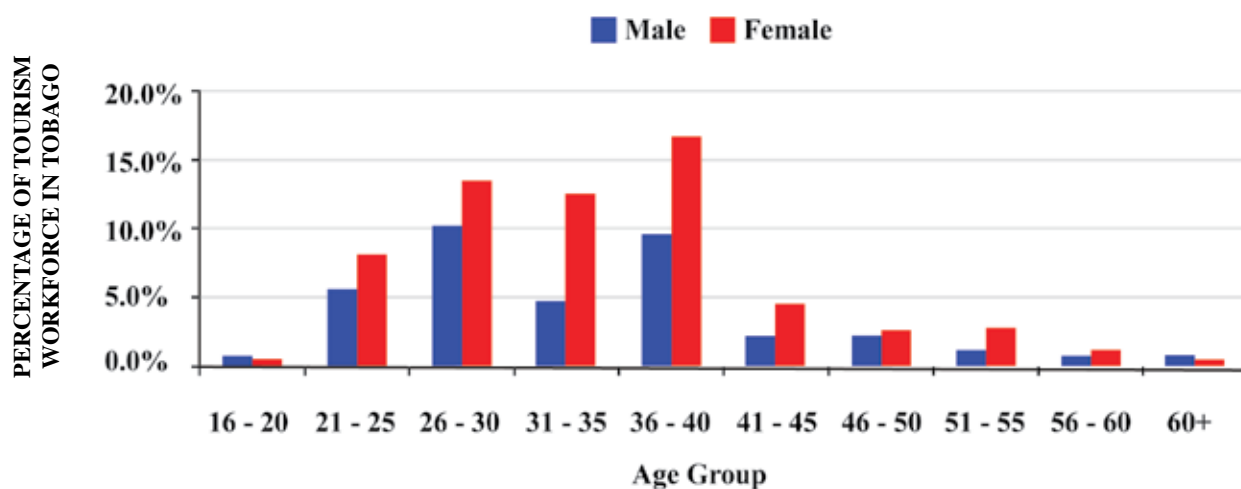
Source: Baseline Study for the Tobago Hospitality and Touism
Institute, Tourism Intelligence International, 2008

2.3.6 Tourism Accommodation

The accommodation sector in Trinidad and Tobago is characterized by small and medium-sized establishments, the majority of which are locally owned. These properties range from hotels and guesthouses to bed and breakfast and self-catering facilities.

TRINIDAD

The tourism accommodation stock in Trinidad has a number of internationally recognized brands including the Trinidad Hilton and Conference Centre, the Hyatt Regency Trinidad, Crowne Plaza, Courtyard by Marriott and Holiday Inn Express.

Table 4a
Breakdown of Approved Room Stock in Trinidad, 2009

Property Type	No. of Properties	No. of Rooms	% Share of Trinidad Accommodation Sector
Hotels and Guesthouses	28	1,857	91.2%
Bed & Breakfast	49	180	8.8%
Total	77	2,037	100%

Source: Tourism Development Company, 2009

TOBAGO

In 2009, according to the THA Division of Tourism and Transportation, the total room stock in Tobago was 4,270, the majority of which comprised small establishments such as guest houses, apartments, condos, bed and breakfast and villa properties. These accounted for 68% of room stock in Tobago.

Table 4b
Breakdown of Approved Room Stock in Tobago, 2009

Property Type	No. of Properties	No. of Rooms	% Share of Tobago Accommodation Sector
Apartment	162	976	23%
Bed & Breakfast	81	273	6%
Guesthouse	199	983	23%
Hotel	39	1,340	31%
Villa	171	692	16%
Condo	2	6	0.1%
Total	655	4,270	100%

Source: THA - Division of Tourism and Transportation, 2009

2.3.7 Major Issues

A number of factors affect the potential of the tourism industry to play a more meaningful role in Trinidad and Tobago's economy. The major issues to be addressed are:

- Collaboration and communication among major stakeholders;
- Environmental degradation;
- Tourism education, training and awareness;
- Local community involvement;
- Infrastructure;
- Air and sea access;
- Marketing and promotion;
- Quality of tourist accommodation establishments;
- Adherence to international standards;
- Adequate funding;
- Socio-cultural impacts; and
- Customer service.

3. NATIONAL TOURISM POLICY FRAMEWORK

This Policy is predicated upon the overarching national policy framework for sustainable development of Trinidad and Tobago and is aligned to the seven (7) Interconnected Pillars through which the Government seeks to achieve its mission to promote a process of people-centred development. The Government recognizes that building a viable tourism sector requires strong public/private sector partnerships, inclusion and support of the national community, emphasis on our rich plurality and cultural diversity and strategic application of modern information communication technology platforms to ensure efficiency and cost-effectiveness.

Given the potential of the tourism sector to create employment, alleviate poverty, earn foreign exchange and stimulate the creation of inter-industry linkages, particularly with the agriculture, construction, manufacturing, sports and other service industries, the Government is committed to the development of a responsible, sustainable and competitive tourism industry as a means of social and economic transformation of Trinidad and Tobago and the edification of its people.

3.1 Tourism Policy Statement

To use sustainable tourism as a tool for the economic, socio-cultural and environmental development of Trinidad and Tobago for the benefit of all citizens.

3.2 Guiding Principles

The National Tourism Policy of Trinidad and Tobago provides a framework that shall allow for the sustainable development and management of the tourism industry, guided by the following eleven (11) key principles:

i)   Tourism development shall benefit all of the people of Trinidad and Tobago both as visitors (customers) as well as participants (suppliers) of the industry;

ii)   Effective local community involvement shall form the basis of tourism growth;

iii) A participatory integrative approach shall be adopted where local communities, the private sector, NGOs, the general public and other interest groups and stakeholders are given opportunities to take part in the planning and decision making process, and ownership of the tourism industry;

iv)   Tourism shall be used as a tool for the social development and transformation of the country;

v)   Central Government shall work collaboratively with the Tobago House of Assembly and the tourism sector in Tobago to ensure that tourism is sustainably developed in Tobago;

vi)   Tourism development shall be people-centred and innovation and investment-driven;

vii) Government shall provide the enabling framework and impetus for development;

viii) Sustainable usage of the environment shall be practised;

3.2 Guiding Principles (cont'd)

ix)   Cultural authenticity shall be maintained and the culture further supported and promoted;

x)   The talent of the people of Trinidad and Tobago shall be developed and nurtured to provide the innovation and creativity that will fuel the competitiveness of the sector; and

xi)   Tourism development shall take place in the context of strong co-operation with other States within the Caribbean.

3.3 National Tourism Policy Goals

3.3.1 Overall Goals

Development shall be sustainability-based, people-centred, innovation and investment-driven and private sector-supported.

Government is committed to:

i)   Enhancing the lives of the people of Trinidad and Tobago through economic, environmental, socio-cultural, and recreational development;

ii)   Establishing an appropriate institutional framework for the tourism sector;

iii) Focusing on high quality planning and development of tourism products and services that is in keeping with evolving trends, research and market intelligence, international standards and best practices;

iv)   Harmonizing the capital investment regime;

v)   Encouraging effective industry linkages;

vi)   Building and strengthening human resource capacity;

vii) Promoting public awareness; and

viii) Encouraging participation of local communities in the travel and tourism industry.

3.3.2 Socio-cultural Goals

i)   To use the tourism industry as a vehicle for nation building and an improved quality of life for the citizens of Trinidad and Tobago through development of infrastructure, services, amenities, job creation, increased competitiveness and economic diversification;

ii)   To promote a domestic tourism programme that will have the social development of citizens as its primary objective;

iii) To address issues of drug trafficking, crime and harassment of individuals and the incidence of HIV/AIDS that are critical to both the health of citizens and tourists alike;

iv)   To develop tourism with dignity – encouraging mutual respect for all cultures and eliminating all forms of discrimination on the basis of language, religion, culture, race, sex, age, wealth, ability, or other;

v)   To promote pride in all of the cultural forms of the country;

vi)   To support the revival of dying traditions, art and culture and to expose and record endangered historical facts, particularly in music and art;

vii)   To utilize the cultural, historical and recreational assets of Trinidad and Tobago as anchors for the development of a highly differentiated and competitive tourism product;

viii)   To promote peace nationally, as well as, regionally and internationally, and greater respect for human life;

ix)   To provide appropriate education, training and awareness programmes for tourism, as well as, capacity-building for disadvantaged groups;

x)   To promote human resource development, focusing on gender equality and career development, as well as, the implementation of national labour standards;

xi)   To encourage the active participation of local communities at all levels of the tourism sector and in the development, management and implementation of tourism projects; and

xii)   To encourage participation by all citizens of Trinidad and Tobago in the development of plans and policies for the tourism sector.

3.3.3 Economic Goals

i)   To make tourism a national priority – the economic base that will sustain the social and economic transformation of Trinidad and Tobago;

ii)   To create employment and make a sustainable contribution to the well-being of all citizens;

iii)   To significantly increase the potential of travel and tourism to generate both the quality and quantity of jobs needed in the industry;

iv)   To aggressively promote the tourism industry as a generator of economic growth and foreign exchange;

v)   To significantly increase the number of visitor arrivals to the country;

vi)   To develop mechanisms to encourage higher visitor expenditure and more activity-oriented visitors;

vii)   To maximize the economic benefits of tourism by establishing linkages between tourism and other sectors of the economy, in particular agriculture, culture and sports;

viii)   To encourage spin-off effects in the growth of the entertainment sector, marine industry, telecommunications, non-traditional manufacturing based on cultural traditions, clean energy research, festivals management, and manufacturing industries that cater for the sector;

3.3.3 Economic Goals (cont'd)

ix) To encourage and support local participation in the tourism industry;

x) To develop and strengthen local communities to achieve a more diversified range of tourism products to promote economic development;

xi) To create opportunities for small and medium-sized businesses as well as emerging entrepreneurs and the informal sector;

xii) To make Trinidad and Tobago a more attractive cruise and yachting destination;

xiii) To strengthen the linkages between the Trinidad and Tobago economy and the tourism sectors of other Caribbean countries;

xiv) To encourage the further growth of the regional (Caribbean) tourism market; and

xv) To use tourism to foster greater economic integration of the region.

3.3.4 Environmental Goals

i) To develop tourism in a sustainable and responsible manner;

ii) To develop the management and monitoring tools required to ensure the sustainable development of the sector;

iii) To continuously monitor the impacts on sensitive areas;

iv) To require and ensure that environmental impact assessments are conducted for all tourism-related projects;

v) To evaluate and consider the impacts of proposed tourism projects on other sectors of the economy;

vi) To work with the Environmental Management Authority (EMA) and other agencies to develop a co-ordinated, country-wide environmental strategy;

vii) To consult with all land-use agencies to ensure the optimal allocation of land for tourism development;

viii) To ensure that the tourism sector's physical structures are in accordance with the building codes and regulations of the country;

ix) To work towards developing carrying capacity regulations that will ensure the protection of ecologically sensitive areas;

x) To encourage and promote the use of sustainable practices and strategies throughout the sector, including delivery of service, the design, construction, and operation of visitor accommodations, sites and attractions and other tourism projects;

xi) To encourage adherence to global environmental standards and related certification;

xii) To develop initiatives fostering a more environmentally-conscious population;

xiii) To aspire towards the achievement of reducing carbon footprint for the local travel and tourism industry.

3.4 Targets

i) To significantly increase the contribution of tourism to GDP;

ii) To significantly increase visitor arrivals and tourist expenditure;

iii) To increase the quantity and quality of jobs generated by the tourism industry;

iv) To increase the multiplier effect of tourism throughout the economy and particularly the agriculture, culture and sports sectors; and

v) To monitor the implementation of the National Tourism Policy ensuring that development is consistent with the goals for responsible and sustainable tourism development in Trinidad and Tobago.

3.5 Key Success Factors

Government recognizes that the following eleven (11) key factors will drive the success of the tourism industry:

3.5.1 A sustainable tourism product: An appropriate form and scale of tourism will be planned taking into consideration such factors as the cultural, historical and recreational resources, carrying capacity, and the natural environment of communities.

3.5.2 Private/public partnerships: Tourism initiatives must ensure collaboration with government agencies, the private sector, community residents and other stakeholders to ensure meaningful engagement and empowerment of local community residents.

3.5.3 A safe and stable environment for tourism development: Investors and visitors must be protected and their investments and safety facilitated;

3.5.4 An internationally competitive tourism sector: Tourism offerings must be superior and offer value for money;

3.5.5 Customer focus: The industry must be customer-driven, innovative and responsive to customers' changing needs;

3.5.6 An authentic tourism product: Trinidad and Tobago must emphasize the talent of its people, diversity of its culture and rich resource base for tourism;

3.5.7 A well-trained workforce: Adequate and appropriate national capacity to manage the sustainability of the tourism sector must be ensured through training and education;

3.5.8 Economic empowerment for citizens: Remuneration must be competitive in order to attract, retain and motivate personnel who will consistently deliver high quality service;

3.5 Key Success Factors (cont'd)

3.5.9   A distinctive brand: Trinidad and Tobago must be creatively and aggressively marketed and promoted;

3.5.10 Inter-Ministry coordination: Economic linkages must be developed and growth fostered through strategic integration into the national economic policy; and

3.5.11 Stakeholder engagement and participation: Institutional structures must reflect partnership, representation, transparency, effectiveness and communication.

3.6 Beneficiaries

It is envisaged that the development of a sustainable and responsible tourism industry in Trinidad and Tobago will benefit all stakeholders. In this regard:

i)   Local communities will become more involved in the planning and development of local tourism, resulting in access to enhanced infrastructure and enjoyment of quality tourism recreation and services. Increased opportunities for entrepreneurship, employment and income generation will result;

ii)   Youth and future generations will benefit through the responsible use of resources;

iii) Women will have greater opportunities for training, competitive compensation and mobility within the sector;

iv)   The environment will be preserved for future generations through sustained conservation efforts;

v)   Employees in the tourism sector will have increased access to training and development on a continuous basis with the potential for increased income earning and enhanced standard of living through career development;

vi)   Tourists will have increased access to the destination and greater reliability of quality tourism services, while sharing enhanced tourism experiences that are enticing, educational and entertaining;

vii) The private sector will have access to an increased number of visitors, thereby stimulating increased opportunities for successful entrepreneurship, employment and income generation. Access to appropriate and timely incentives and technical assistance will be available with the expected result of a good return on investment;

viii) Public agencies will be better able to co-ordinate policy and planning activities by enhancing monitoring capacity that will drive policy intervention and facilitate the provision of quality products; and

ix)   Citizens of Trinidad and Tobago will benefit through the cohesive planning process for the tourism sector that will bring enhanced quality of life and sustainable development.

4. NATIONAL TOURISM POLICY

The Government of Trinidad and Tobago shall create an environment that facilitates the country's tourism growth by addressing human resource development, community development, infrastructure and transportation development, investment promotion, accommodation issues, product development, and marketing.

4.1 Resource Base and Sustainable Development

Government recognizes that the environment is an important resource base for tourism. Accordingly, tourism shall be developed responsibly and with due care and regard for the natural and cultural treasures of the country. Government shall ensure that development of the tourism sector is in accordance with the physical environmental policies of the country and evolving international environmental standards. The principles of sustainable development shall inform all areas of tourism planning and management.

Government shall:

i) Pursue the implementation of environmental policies and conventions ratified by the Government of Trinidad and Tobago, through collaboration with the relevant local, regional and international agencies;

ii) Ensure the conduct of Environmental Impact Assessments and obtaining of Certificates of Environmental Clearance, as necessary;

iii) Promote and encourage the adoption of environmental certification programmes;

iv) Support and encourage the use of sustainable building materials and other conservation measures for the development, design, operation and maintenance of facilities;

v) Support the development of a national carbon reduction scheme to offset Trinidad and Tobago's contribution towards global warming;

vi) Encourage and promote the adoption of state-of-the-art methods, practices and technologies to ensure the sustainable growth of the tourism industry and the negative impacts of global warming and climate change;

vii) Encourage the adoption of energy saving and other environmental best practices;

viii) Develop and implement effective risk assessment and crisis management strategies to deal with any of the symptoms of climate change and other natural disasters;

ix) Enforce appropriate environmental and other legislation in order to create the desired outcomes of sustainability in the tourism sector;

x) Encourage and promote knowledge, information and innovation that complement the natural advantages of Trinidad and Tobago;

xi) Encourage and support communities to develop tourism products based on authentic, diverse, indigenous cultural traditions and practices;

4.1 Resource Base and Sustainable Development (cont'd)

xii) Encourage and support the development of permanent cultural facilities for the purpose of staging folkloric theatre, international performances and other forms of entertainment;

xiii) Support the preservation of the built and natural cultural heritage of Trinidad and Tobago;

xiv) Use innovation and technology to enhance visitor experiences;

xv) Support the development and management of natural and cultural resources within specific communities and environments; and

xvi) Encourage mechanisms for greater community participation in the management of natural and cultural resources within communities.

4.1.1 Land Use

The effective allocation and use of land resources is one of the keys to sustainable development.

Government shall:

i) Encourage consultations with the Town and Country Planning Division, the Commissioner of State Lands, and other bodies with responsibility for and/or with viable interest in land use, for the purpose of tourism development;

ii) Develop a plan whereby suitable and available sites for hotel development, state-of-the art sporting facilities; as well as, the creation of new zones, sites and attractions would be identified and earmarked;

iii) Co-operate with all stakeholders and other land interests leading to optimal land allocation and usage for the tourism sector;

iv) Give consideration to the carrying capacities of sensitive areas and tourism sites and attractions;

v) Include effective protection and sustainable utilization of natural and cultural resources in land use planning and development projects for tourism;

4.2 Community Participation

One of the pillars of this Policy is the involvement of local communities in the growth of the tourism sector. It is the objective of Government to appropriately engage and empower local communities in the planning and decision making process for the development, management and ownership of tourism products and services.

Government shall:

i) Engage in consultation with local communities to build sustainable tourism products and to meet their needs;

ii) Develop viable models, policies and strategies for community-

based tourism designed to encourage communities to own, develop, implement and manage feasible community-based development projects;

iii)   Educate and train local communities and build their capacity to fully participate in the sector;

iv)   Encourage partnerships between local communities and the established private sector and NGOs to promote, develop and manage tourism events, products, sites and attractions;

v)   Promote tourism to the national public as a tool to empower local and rural communities, alleviate poverty and foster balanced development;

vi)   Encourage collaboration between and among communities locally, regionally and internationally;

vii)   Promote increased access to funding to facilitate greater participation by local communities and small, micro and medium-sized businesses in the tourism sector;

viii)   Create mechanisms to ensure greater community participation in the planning, development and promotion of tourism; and

ix)   Encourage communities to organize themselves into active, responsible and representative bodies.

4.3   Youth Development

Young people have a critical role to play in the growth and development of the tourism industry.

Government shall:

i)   Encourage the development of a youth travel market to facilitate travel by young people domestically, regionally and internationally;

ii)   Support the creation of summer jobs in the tourism industry to expose youths to the travel and tourism industry;

iii)   Facilitate the expansion of the range and scope of education and training opportunities and provide career guidance in the tourism sector; and

iv)   Support and promote capacity building programmes for youth involvement in the tourism industry.

4.4   Information Management and Research

Government recognizes that the timely use of sound information and research is critical for the enhancement of tourism products, marketing and promotion.

Government shall:

i)   Facilitate research and evaluation of investment legislation for similar developing countries and introduce sustainable investment opportunities and guidelines for the tourism sector;

4.4   Information Management and Research (cont'd)

ii)   Facilitate carrying capacity studies for sites and attractions;

iii)   Strengthen the in-house capacity and capabilities of the Ministry of Tourism, TDC and THA to generate and publicize appropriate tourism statistics and market intelligence information;

iv)   Ensure that a management information system for tourism data collection is established and utilized;

v)   Ensure the implementation of appropriate monitoring systems such as economic impact systems and the Tourism Satellite Accounting System;

vi)   Ensure that consumer and industry trends are continuously monitored and shared with stakeholders;

vii)   Encourage and facilitate ongoing research and monitoring of air transportation, environmental impact, climate change, product development, competitors and other key factors affecting the industry; and

viii) Facilitate on-going market research of target markets to inform and optimize destination-marketing efforts.

4.5   Product Development

The Trinidad and Tobago tourism product shall be distinguished by an innovative, differentiated, high value, internationally competitive visitor experience.

Government shall:

i)   Encourage the adoption of national and international standards;

ii)   Encourage the adoption of sustainable and responsible practices in all aspects of development including the remodelling and renovation of products and services;

iii)   Support capacity building in order to develop high quality planning and development of products and services in the tourism sector in keeping with evolving international standards;

iv)   Emphasize the development of new products that offer good potential for growth;

v)   Ensure that local peoples and cultures are not over-commercialized or exploited;

vi)   Foster innovation and creativity in the products being developed;

vii)   Promote developments that are appropriate to the structures and strategies of Local Government authorities and local communities;

viii) Encourage the sustainable development of underdeveloped and environmentally sensitive areas;

ix)   Encourage both new and existing suppliers of tourism products to provide facilities (accommodation, attractions and other services) for the differently-abled;

x) Encourage the development of appropriate niche markets, for example sports tourism and agro-tourism, and encourage the provision of facilities, training, marketing and promotion to give emphasis to the development of these niche markets;

xi) Pay specific attention to the domestic tourism market and facilitate the provision of appropriate facilities to cater to this market;

xii) Facilitate the strategic planning process for product development;

xiii) Promote the design and improvement of facilities, sites and attractions so that they meet internationally competitive standards;

xiv) Undertake the redesign and beautification of Port-of-Spain and Scarborough and their entrances so as to provide an enhanced first impression of the capital cities;

xv) Undertake the upgrade of the Port-of-Spain and Scarborough cruise ship facilities;

xvi) Promote the development of tourism products that focus on delivering unique, engaging and unforgettable experiences that cater to the needs of increasingly demanding travellers;

xvii) Facilitate the creation of opportunities to increase visitor spend;

xviii) Encourage the use of sustainable designs, materials and global best practices throughout the travel and tourism sector; and

xix) Promote the adoption of new technologies in all areas of the travel and tourism industry to create competitive advantage for the sector.

4.6 Marketing and Promotion

This Policy recognizes that three distinct products form the basis of tourism in Trinidad and Tobago, namely, the Trinidad product, the Tobago product and the Trinidad and Tobago product.

Government shall oversee marketing strategies which are developed in collaboration with the THA and other key stakeholders and which:

i) Emphasize the diversity of the products of Trinidad and Tobago and build on the unique selling propositions of both islands;

ii) Encourage interaction with relevant industry partners and influence the synergy between the private and public sectors to increase market reach and impact through cooperative marketing strategies;

iii) Target selected niche markets which shall include but not be limited to:

   a) adventure and eco

   b) traditional leisure (beach)

   c) shopping

   d) conferences and meetings

   e) sports - tournaments, regattas, training

4.6 Marketing and Promotion (cont'd)

- f) culture – events and festivals
- g) weddings and honeymoons
- h) dive
- i) cruise
- j) yachting/sailing
- k) health and wellness
- l) the creative class
- m) the Trinidad and Tobago Diaspora

iv) Contribute to and take full advantage of regional marketing efforts and initiatives, particularly as they relate to sports and culture;

v) Build on the Trinidad and Tobago cultural diversity as a unique selling proposition and brand for the country;

vi) Develop the potential for cultural tourism in Trinidad and Tobago, by developing, organizing, marketing and promoting cultural events to local, regional and international markets;

vii) Enhance and promote regional and international sporting events, such as cricket, football, golf, tennis, swimming and fishing to maximize on the socio-economic benefits of the growing sports tourism market;

viii) Effectively promote, support and encourage the development and hosting of signature events, including sporting and cultural events;

ix) Implement practical crisis management remedies to deal with the negative impacts of natural disasters, crime, and outbreak of communicable diseases;

x) Utilize information technology as a key tool in marketing the tourism product of Trinidad and Tobago; and

xi) Support the expansion of international air services, as appropriate.

4.7 Accommodation

Effective management and dedicated staff are critical inputs to the tourism accommodation sector for variety, quality, service excellence, value for money and profitable operation without endangering and/or destroying the environment.

Government shall:

i) Encourage the sustainable operation of the accommodation sector;

ii) Encourage the growth of an adequate and diversified accommodation sector in keeping with target markets, international standards and the islands' carrying capacity;

iii) Support the upgrade and enhancement of existing accommodation establishments;

iv) Attract internationally branded hotels that have a proven track record of social and environmental responsibility;

v) Create a regulatory framework to encourage and enforce international standards;

vi) Encourage partnerships within the accommodation sector for marketing, human resource development and environmental sustainability;

vii) Encourage profitable participation by small accommodation properties in the development of the tourism sector, whilst meeting industry standards; and

viii) Provide support services to small, independent and locally-owned properties to enable them to become more environmentally and economically sustainable.

4.8 Infrastructure

Recognizing that the development of tourism infrastructure benefits both tourists and citizens of Trinidad and Tobago, Government shall:

i) Continuously maintain and upgrade existing infrastructure in order to improve accessibility and mobility for both able and differently-abled persons;

ii) Improve the accessibility and infrastructure of rural areas to facilitate the pursuit of their full tourism potential;

iii) Ensure comprehensive improvement and development of adequate infrastructure at tourism sites and attractions;

iv) Undertake or facilitate the implementation of major tourism infrastructure projects that would have considerable impact on the development of the tourism industry;

v) Ensure that issues concerning tourism infrastructure are considered during the overall planning process, and that there is coordination among the relevant agencies;

vi) Give attention to negative environmental impacts that are associated with the provision of bulk infrastructure for tourism (especially in remote and ecologically sensitive areas); and

vii) Renew and update the IT infrastructure to ensure modernity, availability, accessibility and appropriate pricing.

4.9 Transportation

4.9.1 Air Transportation

Given the importance of air transportation to the growth of the tourism industry, Government shall:

i) Continue to build strategic alliances with global airlines;

ii) Encourage more open competition;

iii) Encourage the further development of air transportation services;

4.9.1 Air Transportation (cont'd)

  iv) Support the national carrier and negotiate routes with other international airlines in accordance with current and potential tourism demand to ensure the provision of competitive services;

  v) Improve the quality and efficiency of air transportation infrastructure; and

  vi) Pursue the development of regional air transportation.

4.9.2 Ground Transportation

With regard to ground transportation for the tourism sector, Government shall:

  i) Provide continuous training for taxi drivers and other transport operators in order to enhance their services;

  ii) Encourage entrepreneurship in the provision of transportation services;

  iii) Improve standards and quality control among all forms of ground transportation;

  iv) Improve the linkages and co-ordination among different forms of transportation and encourage strategic alliances with other stakeholders in the industry;

  v) Facilitate the expansion of the range and accessibility of different transportation options to visitors; and

  vi) Provide information on services, facilities and prices on relevant websites and at all ports of entry.

4.9.3 Sea Transportation

With regard to sea transportation between the islands of Trinidad and Tobago, Government shall:

  i) Ensure that port infrastructure and the service provided meet international standards and market demand;

  ii) Promote the co-ordination of ferry services and schedules with other tourism and transportation providers; and

  iii) Ensure that there are convenient and efficient systems for booking and purchase of tickets for the ferry service.

4.10 Investment Promotion and Facilitation

In order to enhance Trinidad and Tobago's position as an attractive location for tourism investment, Government shall:

  i) Institute a conducive, responsive, and effective legal and institutional framework for tourism investment;

  ii) Market and promote Trinidad and Tobago as an attractive and distinctive location for tourism investment;

  iii) Ensure that the promotion and facilitation of investment is supported by appropriate research, market intelligence and analysis;

iv)   Conceptualize and market signature projects for Trinidad and Tobago that will help define each island destination;

v)   Adopt a practicable policy on equity participation by the Government in tourism projects;

vi)   Develop and promote a competitive and dynamic range of investment opportunities and incentives to attract, sustain and retain tourism investment;

vii)   Designate zones and sites for tourism development and facilitate the supporting infrastructure;

viii) Encourage the development of branded tourism products that have the potential to contribute to the marketing of Trinidad and Tobago;

ix)   Target investments that have a proven track record in sustainable and responsible tourism development and that will also contribute to capacity building among the local population;

x)   Give priority to investment proposals that contribute to the following:

   a.   Maximum local ownership and participation;

   b.   Strengthening of linkages with other sectors of the economy;

   c.   Preservation and promotion of the nation's culture and heritage;

   d.   Preservation and enhancement of the environment;

   e.   Utilization of local resources;

   f.   Local job creation;

   g.   Increased national revenue and net foreign exchange earnings;

   h.   Capacity building among locals, e.g. management training and scholarships; and

   i.   Promotion of innovative products and practices.

4.11   Employment, Training and Tourism Education

In order to sustain investment in human resource development within the sector to achieve internationally competitive standards, Government shall:

i)   Measure and monitor the quality and quantity of the manpower currently functioning in the tourism sector and conduct a needs assessment for the sector at all levels;

ii)   Promote employment opportunities linked to the tourism industry;

iii)   Facilitate training of front-line and support personnel within the industry in partnership with the private sector;

4.11 Employment, Training and Tourism Education (cont'd)

iv) Build capacity among the tourism institutions to plan, manage, develop, implement and monitor sustainable tourism;

v) Upgrade and promote the Trinidad and Tobago Tourism Industry Certification (TTTIC) Programme;

vi) Continue teacher training programmes which incorporate the 'Train the Trainer' component;

vii) Encourage the integration of appropriate material into primary and secondary schools' curricula and encourage more field visits and excursions;

viii) Implement a continuous programme of tourism education and awareness;

ix) Encourage the upgrade and expansion of tourism and hospitality institutions and certifications at the tertiary level by:

　　a) offering tertiary level scholarships in tourism related fields;

　　b) continuing to develop language and technology-oriented training modules;

　　c) expanding opportunities for tourism internship;

　　d) supporting and encouraging the introduction of postgraduate level leisure, tourism and hospitality management programmes;

　　e) encouraging tertiary level institutions to keep up with the evolving needs of the tourism industry in accordance with international standards; and

　　f) encouraging international collaboration and branding.

4.12 Health, Safety and Security

In order to promote an environment for the health, safety and security of residents and visitors, Government shall:

i) Implement public health and sanitation programmes for communities that cater for visitors;

ii) Ensure that visitors are able to access health care facilities including emergency services;

iii) Implement standards and practices to ensure food safety;

iv) Adopt and promote the use of international health and safety standards at all hotels in the country;

v) Take suitable action to prevent and minimize the spread of communicable and other diseases which impact the tourism sector;

vi) Undertake both short and long term actions and strategies to reduce crime and violence against tourists;

vii) Institute appropriate legal procedures that would facilitate speedy and effective prosecution for cases where tourists are involved;

viii) Provide adequate information to visitors at all ports of entry that will help to improve their safety and security;

ix) Ensure that adequate resources are devoted to providing for the safety of locals and visitors; and

x) Carry out appropriate research concerning tourism security trends and monitor the effectiveness of safety and security measures.

4.13   Local, Regional and International Co-operation

This Policy recognizes that collaboration between the THA and Central Government as well as between Trinidad and Tobago and regional and international organizations would facilitate the achievement of strategic industry objectives through the sharing of research, experience and best practice. Collaboration in the following areas shall be pursued:

i) Environmental conservation and product development;

ii) Marketing and public relations;

iii) Training;

iv) Cruise tourism development;

v) Art and handicraft production; and

vi) Easing of visa and travel restrictions.

Government shall:

i) Continue to collaborate with the THA and Local Government bodies to ensure the sustainable development of the tourism sector on both islands;

ii) Continue to work with other countries in the region to address critical challenges such as air access, environmental issues and human resource development;

iii) Pursue opportunities for scale economies, synergies and other benefits that come from integration and co-operation;

iv) Facilitate the increase of travellers between the islands;

v) Encourage the efficient and effective co-ordination of marketing activities; and

vi) Work towards the implementation of regional projects to promote economic development.

5. NATIONAL TOURISM POLICY IMPLEMENTATION

5.1 Institutional and Regulatory Framework

This Policy recognizes that an appropriate institutional framework is critical for driving the development of the tourism industry. In order to realize the full potential of the country's tourism industry, the Government of Trinidad and Tobago shall seek to establish physical, social, legal and institutional frameworks that shall set the stage for the sustainable growth of the tourism industry.

Government is responsible for providing a facilitating, enabling and stimulating environment for the development of tourism. In that regard, its roles and responsibilities shall include, but not be limited to:

i) Providing a stable economic, social and political environment for tourism to flourish;

ii) Ensuring the safety and security of residents and visitors;

iii) Facilitating and providing appropriate incentives for private sector investment in tourism;

iv) Establishing, facilitating and enabling appropriate legal and fiscal frameworks for the industry;

v) Facilitating the development of a tourism culture in Trinidad and Tobago and the supply of skilled manpower for the industry;

vi) Facilitating the establishment of appropriate public transportation services;

vii) Facilitating an active labour market policy and an appropriate labour relations environment for the industry;

viii) Allocating appropriate financial resources for tourism development;

ix) Promoting tourism as a national priority;

x) Encouraging and facilitating foreign direct investment;

xi) Co-ordinating and liaising with regional and international Governments with regard to tourism development;

xii) Co-ordinating the tourism-related efforts of all Government ministries and related Government institutions; and

xiii) Facilitating the sustainable and responsible development of the tourism industry by formulating appropriate development guidelines and regulatory measures.

Government is committed to creating an institutional framework that supports and co-ordinates the development of the tourism sector in an effective and efficient manner. This framework shall comprise:

i) The public sector agencies of the Ministry of Tourism, the Tourism Development Company Limited (TDC) and the Division of Tourism and Transportation of the Tobago House of Assembly (THA), with adequate resources to meet their respective mandates;

ii) Standing Committees for the sustainable development of tourism in both Trinidad and Tobago, comprising stakeholders and relevant public sector agencies to facilitate and co-ordinate tourism development; and

iii) An appropriate legal and regulatory framework for the tourism sector.

The roles and functions of the main agencies responsible for tourism development are outlined below.

5.1.1 The Ministry of Tourism

The mission of the Ministry of Tourism is to formulate tourism policy and strategy and to guide, regulate, oversee and foster the sustainable development and promotion of the tourism sector through effective public, private and community partnerships, so as to enhance its contribution to the economic and social progress of Trinidad and Tobago. The principal responsibilities of the Ministry are:

i) Provision of leadership and strategic direction in tourism development;

ii) Formulation of a national tourism policy and sub-policies to guide tourism development in Trinidad and Tobago, via the widest consultative process;

iii) Collaborating with relevant agencies, organizations, ministries, associations and community groups on matters related to tourism policy and product development and to the advancement of the tourism industry in general;

iv) Monitoring and evaluation of the industry;

v) Monitoring the implementation of tourism policy and ensuring that strategies and programmes are in sync with the National Tourism Policy;

vi) Facilitating the timely release of funds to the TDC and the Zoological Society of Trinidad and Tobago (ZSTT) and monitoring allocations and expenditure;

vii) Providing oversight of the operations of the TDC;

viii) Research and planning as they relate to policy formulation and advice;

ix) Building and managing a database for tourism statistics for various segments of the tourism industry;

x) Provision of a legislative and incentives framework for tourism;

xi) Facilitating and monitoring the administration of the Tourism Development Act, Chap. 87:22;

xii) Building public awareness on activities in the Ministry and tourism industry through various media; and

xiii) Provision of a modern and efficient lifeguard service at patrolled beaches in Trinidad.

5.1.2 The Tobago House of Assembly (THA)

In accordance with the Tobago House of Assembly Act, Chap. 25:03, the THA is responsible for the overall development of the island of Tobago, including tourism development. The Division of Tourism and Transportation is the main implementing agent of the THA with respect to tourism and is responsible for:

    i)   Formulation and implementation of specific policy and plans for the tourism sector in Tobago;

    ii)   Conducting tourism market research for Tobago;

    iii)   Providing tourist information services for Tobago;

    iv)   Product development and service management for tourism development in Tobago;

    v)   Monitoring and evaluation of the tourism sector in Tobago;

    vi)   Implementation of standards for the development and maintenance of tourism infrastructure and sites and attractions in Tobago;

    vii)   Marketing and promotion for the tourism sector in Tobago;

    viii) Promotion of investment opportunities in Tobago;

    ix)   Maintenance of tourism facilities/amenities in Tobago;

    x)   Administering the provisions of the Tourism Development Act, Chap. 87:22 in respect of tourism investment in Tobago; and

    xi)   Collaborating with the Ministry of Tourism and the TDC with regard to the development and promotion of tourism.

5.1.3 The Tourism Development Company Limited (TDC)

The Tourism Development Company Limited (TDC) is a special purpose State Enterprise operationalized in May 2005 and mandated to develop and market Trinidad and Tobago's tourism product. The TDC is the implementation arm of the Ministry of Tourism, dedicated to realizing the national development objectives for tourism in Trinidad and Tobago.

The TDC's specific functions include:

    i)   Development of all aspects of the tourism sector in Trinidad;

    ii)   Development and enhancement of tourism products in Trinidad;

    iii)   Establishment of standards for tourism development in collaboration with relevant agencies;

    iv)   Implementation of standards for tourism infrastructure and identified sites and attractions in Trinidad;

    v)   Tourism marketing and promotion in collaboration with the THA Division of Tourism and Transportation;

    vi)   Promotion of investment opportunities in Trinidad;

    vii)   Maintenance of identified tourism facilities/amenities in Trinidad;

    viii) Administering the provisions of the Tourism Development Act, Chap. 87:22, in respect of tourism investment in Trinidad.

5.1.4 Standing Committees on Tourism

In fulfilment of the Government's commitment to develop the tourism industry in consultation with all major stakeholders, there shall be two (2) Standing Committees for the sustainable development of tourism in Trinidad and in Tobago, respectively. The primary role of these Committees shall be to facilitate and co-ordinate the sustainable development of the tourism industry in each island, but there shall be linkages between the two (2) Committees. They shall comprise representatives of key governmental and tourism-related organizations (public/private sector) and shall co-opt tourism-related stakeholders as necessary. The Standing Committees shall provide a formalized mechanism of collaboration among stakeholders and shall focus on important issues pertaining to the industry.

5.2 Roles of Stakeholders

5.2.1 Role of Local Government

At the Local Government level specific functions of policy implementation, environmental planning and land-use and product development, are further supported. The main functions of the Local Government authorities are:

i)   The provision, maintenance, enhancement and control of parks, recreation grounds, beaches, watercourses, and other public spaces;

ii)   Construction and maintenance of roads in their respective jurisdictions including the provision and maintenance of drains, bridges, side-walks, and street-signs;

iii) Cleaning, maintenance and enhancement of public spaces;

iv)   Approval of building and housing-development plans;

v)   Assessment and collection of land and building taxes.

5.2.2 Role of the Private Sector

The private sector has an important role in the development and promotion of tourism in Trinidad and Tobago. The private sector bears the major risks of tourism investment as well as a large part of the responsibility for satisfying the visitor. The delivery of quality tourism services and providing the customer with value for money are largely private sector responsibilities. Furthermore, the private sector is in a position to promote the involvement of local communities in tourism ventures by, inter alia, establishing partnership tourism ventures with communities.

The role of the private sector is to:

i)   Invest in the tourism industry;

ii)   Operate and manage the tourism plant efficiently, sustainably and profitably;

iii) Advertise and promote individual tourism services as well as the country - locally, regionally and internationally;

5.2.2   Role of the Private Sector (cont'd)

iv)   Continuously upgrade the skills of the workforce by providing training and retraining;

v)   Continuously refurbish plant and equipment;

vi)   Operate according to the best environmental standards;

vii)   Satisfy customer needs by providing quality products and services as well as value for money;

viii)   Develop and promote socially and environmentally responsible tourism;

ix)   Ensure the safety, security and health of visitors in collaboration with the Government and other private sector members;

x)   Collaborate with the Government in planning, promoting and marketing tourism;

xi)   Operate according to appropriate international standards; and

xii)   Facilitate the involvement of local communities and small, micro and medium sized enterprises in the sector through establishing partnership ventures with communities.

5.2.3   Role of Parastatal Organizations

The Government has established parastatal organizations to propel the growth and development of the economy. Some of these parastatal organizations have a critical role to play in the development of tourism. Together, the Urban Development Corporation of Trinidad and Tobago Limited (UDeCOTT) and Evolving TecKnologies and Enterprise Development Company Limited (eTeck) own a large percentage of the hotel rooms in Trinidad and Tobago.

The Chaguaramas Development Authority (CDA) is responsible for the Chaguaramas National Park which includes a hotel and convention centre as well as tourism sites and attractions.

In order to build a successful and sustainable tourism industry, it is important that the plans, actions and strategies of these parastatal organizations are closely co-ordinated with other industry partners.

5.2.4   Role of Non-Governmental and Community-Based Organizations

Non-Governmental and community-based organizations, especially those with an environmental and community-oriented focus, play a vital role in the development and spread of responsible tourism practices, while providing valuable insights at the grassroots level. NGOs also play a critical role in building capacity and assisting local communities to organize themselves and to bring new and innovative products and services to the market.

The role of these organizations is to:

i)   Organize themselves to play a more effective role in the tourism industry and interact with Government and stakeholders at all levels;

ii)   Identify their resources and attractions for tourism development;

iii)   Exploit opportunities for tourism training and awareness, finance and incentives for tourism development;

iv)   Seek partnership opportunities with the private sector of the tourism industry;

v)   Participate in all aspects of the tourism business;

vi)   Support and promote responsible tourism and sustainable development;

vii)   Participate in decision-making with respect to major tourism developments planned or proposed for the communities; and

viii)   Participate in and promote responsible tourism.

5.2.5 Role of Women

Women make up almost two thirds of the workforce in Tobago according to a survey conducted in September 2008, by Tourism Intelligence International on behalf of the Tobago Hospitality and Tourism Institute (THTI).

The employment of women can be a fundamental determinant of the development impacts of the tourism industry. The special roles that women can play in developing sustainable tourism in Trinidad and Tobago are identified below:

i)   As teachers, mothers and mentors, generate awareness of the potential of tourism to stimulate community growth and development;

ii)   Assist in the shaping of a responsible and sustainable tourism industry;

iii)   Promote and encourage respect for the dignity of women in the development, marketing and promotion of tourism;

iv)   Promote equality in the conditions of employment for women;

v)   Lobby the support of developers and local authorities for the provision of infrastructure, services and training to enhance the position of women in communities; and

vi)   Give special attention to the needs of female tourists, with particular emphasis on safety and security.

5.2.6 Role of the Media

The media is recognized as a key partner in the tourism development process. As tourism operates in a global environment, the messages that are communicated can have either a positive or negative effect on the tourism market share.

The tourism sector looks to the media to:

i)   Be a representative and credible partner in society;

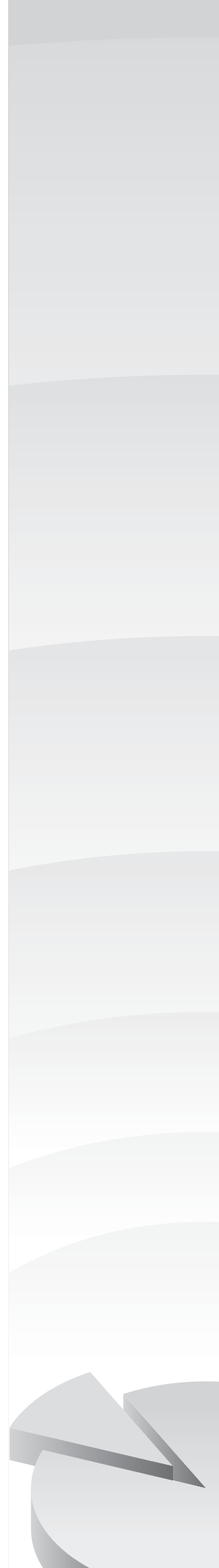ii)   Provide responsible reporting on the destination;

5.2.6 Role of the Media (cont'd)

      iii)   Create awareness of the importance of tourism to all citizens of the country;

      iv)   Objectively promote the country;

      v)   Provide educational and informative tourism coverage; and

      vi)   Assist with the promotion of domestic tourism.

5.3 Monitoring, Evaluation and Review

The Ministry of Tourism is the State agency which is charged with the responsibility of co-ordinating the activities associated with the implementation of this Policy. Accordingly, the Ministry shall devise an Implementation Plan, prioritizing action items, identifying responsible persons/organizations and establishing time frames for implementation.

The Ministry shall monitor this Implementation Plan and submit an annual report to Cabinet with an evaluation of the extent to which the goals and objectives of the National Tourism Policy are being achieved and make recommendations for adjustments to the Policy if necessary.

MINISTRY OF
TOURISM
TRINIDAD AND TOBAGO

http://www.tourism.gov.tt/