



Working towards a prosperous Sint Eustatius

How sustainable tourism can accelerate sustainable economic development and alleviate poverty

Date March 2019

Colophon

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Acknowledgements

I acknowledge that this Tourism Vision Plan is the result of successful collaboration between 'de Rijksoverheid', 'het Openbaar Lichaam Sint Eustatius', non-governmental organizations on Sint Eustatius, the private sector of Sint Eustatius, and the local communities of Sint Eustatius.

Many people contributed to this Tourism Vision Plan in terms of sharing their insights and ideas, making time and putting in effort in interviews and meetings, proactively participating in workshops, and discussing and reviewing this plan in its various stages.

I would like to acknowledge the support, encouragement and involvement of the Government Commissioners of Sint Eustatius, Mr. Franco and Mr. Stegers.

Special thanks are offered to the Department of Economy & Infrastructure, who was supportive, made themselves available at all times to discuss issues as they arose, and who helped to give a sharper focus to the overall direction of this Tourism Vision Plan.

Special thanks are offered to the Sint Eustatius Tourism Development Foundation for their insights and cooperation in this project. The STDF was helpful in sourcing information, and in facilitating the arrangement and organization of meetings, interviews and workshops.

Special thanks are offered to the interviewees as their shared thoughts, ideas, insights and opinions are extremely valuable in this Tourism Vision Plan. Their input resulted in the tourism vision, mission, objectives and strategic direction.

Special thanks are offered to the participants of the workshops. Without their proactive cooperation and their insights, the strategies and actions could not have been formulated.

Special thanks are offered to the Ministry of Economic Affairs and the Ministry of the Interior and Kingdom Relations for their support in this project.

Above all, I thank the local communities of Sint Eustatius for their warm welcome on their island, and for embracing me as one of the them!

Preface

A transformation of the tourism sector on Sint Eustatius (Statia) is required to diversify the local economy, develop tourism as being one of the key economic pillars of the island, and thereby accelerate sustainable economic development on the island. This is the rationale for this Tourism Vision Plan, which proposes a blueprint to guide long-term sustainable tourism development, with a long-term view towards realizing the tourism vision.

The island is missing opportunities when it comes to maximizing benefits from tourism. This includes opportunities to (foreign) investment and jobs, to use tourism revenue to preserve nature and culture, and sustainably support the local community.

Developments in the tourism sector has taken place predominantly on its own course, without a definitive vision, without coordinated planning and policies, without consistent execution and without an integrated approach.

Fundamentally, the ambitions of this Tourism Vision Plan are to foster sustainable tourism development, economic development, and prosperity of and support for the local communities. The tourism sector on Statia should stimulate and deepen the value chain and ensure viable, long-term economic operations, providing socioeconomic benefits that are fairly distributed to all stakeholders.

These ambitions can only be achieved in collaboration with stakeholders to ensure that:

- Tourists have more opportunities to spend on authentic experiences, with more value-added sites to visit, and to stay longer on the island.
- Local communities are an active participant in delivering authentic experiences.
- The natural environment, including its historical, social and cultural heritage is preserved and enhanced, avoiding harmful effects.
- Investors have access to hassle-free opportunities and partnership prospects.
- A skilled, service-oriented workforce is better equipped to engage in higher-value tourism services.
- Government is well-coordinated and consistent, prioritizing sustainability and using reliable data to make decisions.

The tourism sector on Statia has the potential to offer growth, in terms of tourism numbers and the amount of tourism revenues. The underlying goal of the efforts made in the tourism sector is to improve tourism experiences, so that they are authentic and sustainable, while still being firmly rooted in the inherent natural, cultural, historic and social capital of Statia and its local communities.

It is envisioned that Statia will be recognized as an authentic and sustainable island destination for memorable and unique culture and nature-based experiences in a peaceful and tranquil setting among friendly people that take pride in their identity, cultural heritage and the natural environment.

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Glossary of terms

CBS	Centraal Bureau voor de Statistiek
CTO	Caribbean Tourism Organization
E&I	Department of Economy & Infrastructure
EUCC	Coastal & Marine Union
GDP	Gross Domestic Product
NBTC	Nederlands Bureau voor Toerisme & Congressen
ROA	Raad Onderwijs Arbeidsmarkt
Statia	Sint Eustatius
STDF	Sint Eustatius Tourism Development Foundation
STEBA	Sint Eustatius Business Association

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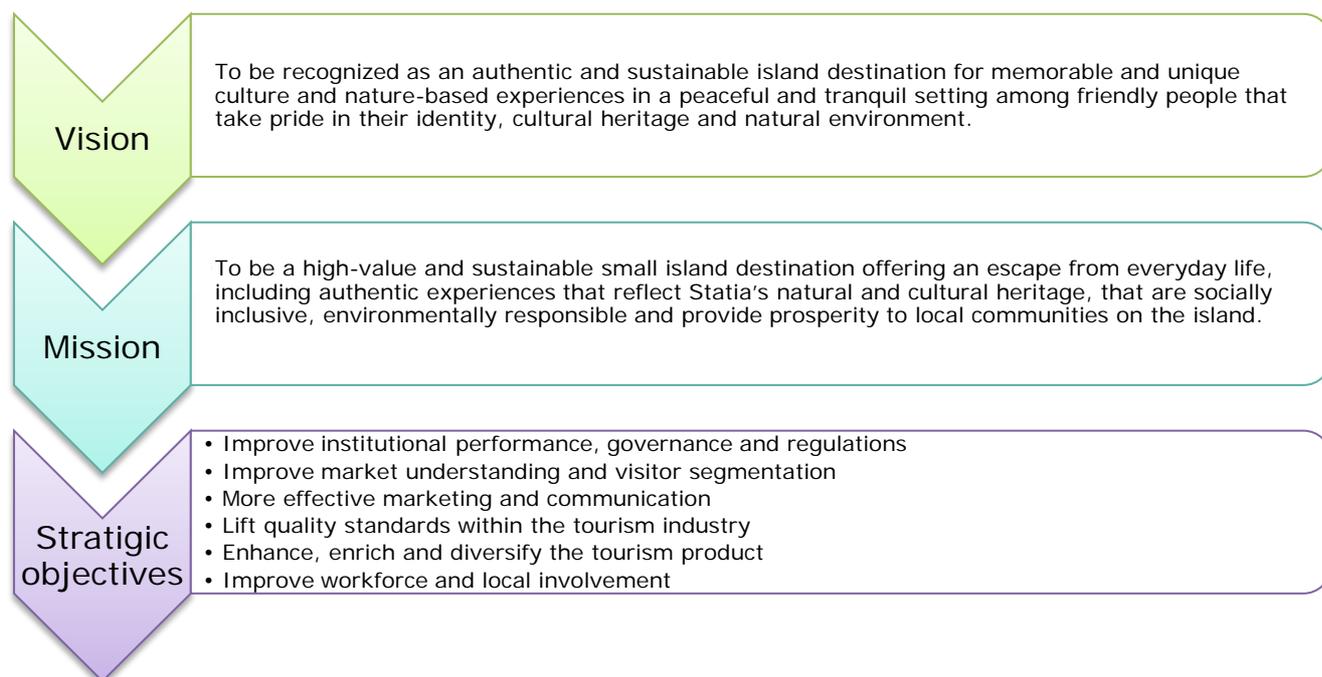
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Executive Summary

A transformation of the tourism sector on Sint Eustatius (Statia) is required to diversify the local economy, develop tourism as being one of the key economic pillars of the island, and thereby accelerate sustainable economic development on the island. This is the rationale for this Tourism Vision Plan, which proposes a blueprint to guide long-term sustainable tourism development, with a long-term view towards realizing the tourism vision.



This vision plan outlines strategies and actions – per strategic objective – that can be undertaken to facilitate sustainable tourism development and thereby move towards the realization of the tourism vision of Statia. Recommendations include:

- Statia should not be developed into a mass tourism destination. It cannot and should not accommodate mass tourists, since it is essential to value, enhance, preserve and protect the island's nature, culture, history, local communities and identity. Also, to ensure that Statia remains 'the Hidden Gem of the Caribbean'. Therefore, it is recommended to develop the tourism sector on Statia in terms of quality, and not specifically in terms of quantity.
- The tourism sector must be developed in a sustainable manner ensuring long-term benefits and long-term economic development of the island.
- The strategies and actions in this Tourism Vision Plan are neither prioritized, nor are they all-encompassing. Therefore, it is recommended to the Tourism Taskforce to discuss the strategies and actions and decide what actions should have priority. They can also execute other actions, other than included in this vision plan, that they feel are more effective to achieve the objectives.
- Structural evaluations of the developments within the tourism sector of the island is essential to have insight in the current situation and identify points for improvement.
- It is recommended to use QualityCoast as a baseline to monitor, evaluate, and improve the sustainability performance of Statia.

- Strong governance and coordination are essential to ensure focus and increased quality performance of the different institutions and organizations.
- Sustainable tourism development of Statia must be inclusive with stakeholder engagement and community involvement, in order to be successful. It is recommended to ensure that everyone on the island benefits from tourism on Statia.
- The Tourism Taskforce should operate in a structural way with the goal to meet the tourism vision collaboratively with the stakeholders involved. Therefore, strong leadership of the taskforce is recommended.
- Connectivity of Statia is essential for tourism development and must therefore be one of the priorities to improve.
- It is recommended to focus on extensive marketing efforts when the tourism products are well-defined, and well-developed in terms of quality. Meanwhile, Statia can still do marketing. Incoming tourists will create tourism revenue for the island. However, this should not yet have the priority until the tourism products are improved. Marketing should only be done when Statia really can deliver what it promises in their marketing efforts to potential tourists.
- Sustainable tourism development is an ongoing process where there is always room for improvement. When it comes to realizing the tourism vision, there is still a lot to be done. Therefore, it is recommended to build capacity in terms of expanding the workforce in number of employees, and improving skills and capacities of existing employees. In addition, it is recommended to use networks Statia has within the region and the Dutch Kingdom (for best practices, expert knowledge, and support).



credits to Cees Timmers. www.statia-pictures.com

1. Introduction – the context of Statia

1.1. Key assets

Today, Statia's fascinating history is a central element of its tourism product. Ruins of the colonial settlement, such as Fort Oranje, Fort de Windt, and the first Dutch Reformed Church, are evident throughout Lower and Upper Town. Tourists can snorkel along the waterfront to find Old Town Walls, or dive more than 30 sites to see shipwrecks from 200 years ago and pristine reefs. Statia also boasts rich natural heritage. Its dormant volcano The Quill, that soars dramatically to a height of 600 meters, as well as its extinct volcano Boven Mountain are ideal for hiking and sightseeing¹.

The people of Statia recognize the importance of the island's rich natural and cultural heritage and have taken important steps to protect and maintain it. The local government has established a network of marine and terrestrial protected areas, monuments and historical sites that are managed by a vibrant community of non-profit organizations. There are three protected areas: Sint Eustatius National Marine Park, Quill-Boven National Park, and Miriam C. Schmidt Botanical Garden. The network of protected area covers an area almost twice the surface area of Statia since the marine park includes waters surrounding the island. Furthermore, a Spatial Development Plan for Statia was developed and enacted about one year ago. The plan provides clear guidelines for development and preservation of the island's natural and cultural heritage².

1.2. Current tourist arrivals

Statia's world-class diving and unique history have helped to position it as an emerging tourism destination in the Dutch Caribbean. It has experienced a relatively stable trend of international arrivals over the past few years, with a 5% fluctuation as can be seen in figure 1. 10,5 thousand tourists arrived on Statia in 2017. That is 5% less compared to 2016. Until September 2017 the amount of tourist arrivals by air increased significantly by 10% compared to 2016³. However, this growth was nullified due to hurricane Irma in September 2017. This led to a sharp decrease of the amount of tourist arrivals by air to Statia in September and October 2017. Moreover, the damage on Sint Maarten due to the hurricane played an important role. Statia does not have an international airport and therefore relies on Sint Maarten as its main hub for international travel.

As shown in figure 2, Statia has a relatively steady number of tourist arrivals throughout the year, meaning that they do not really experience the challenge of seasonality.

Tourists with the Dutch nationality⁴ is the single most important market for Statia. It accounts for 48 percent of all tourist arrivals (see table 1). Furthermore, tourists with the American nationality account for 14 percent of the tourist arrivals on Statia by air. As can be seen in table 1, the share of American and Dominican tourists seems to be slightly increased in 2017, while the share of European Dutch tourists seems to be slightly decreased⁵.

NOTE: due to limited data, a thorough sketch of the current tourism sector on Statia could not be made, including the current target group and current tourism yield. For

¹ Rapid Sustainable Destination Diagnostic and Action Agenda for St. Eustatius

² Rapid Sustainable Destination Diagnostic and Action Agenda for St. Eustatius

³ It must be noted that, within this data on tourist arrivals, no distinction is made between tourists and business travelers.

⁴ This includes tourists with the Dutch nationality coming from Aruba, Curacao and Sint Maarten.

⁵ Toerisme in Nederland 2017. CBS rapport.

tourist arrivals, only data on arrivals by air and per nationality is collected. Other data is lacking.

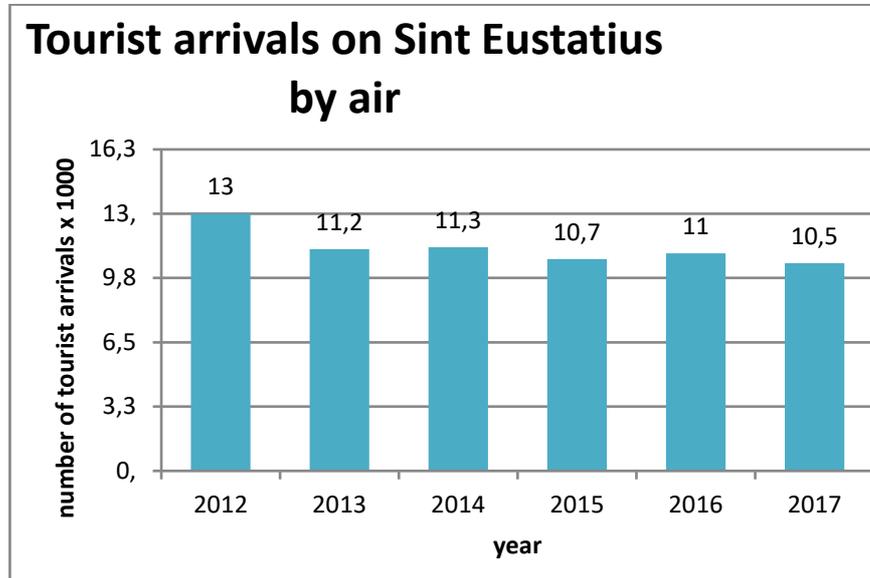


Figure 1. Tourist arrivals on Statia by air. Source: CBS



Figure 2. Tourist arrivals on Statia by air per month. Source: CBS

Table 1. Tourist arrivals on Statia by air per nationality. Source: CBS

	2012	2013	2014	2015	2016*	2017*
Nationaliteit	% van toeristen					
Nederlands (totaal)	56	56	53	52	50	48
Nederlands (Europa)	21	21	20	20	20	18
Nederlands (Aruba, Curaçao en Sint-Maarten)	35	35	33	32	30	30
Amerikaans	11	13	12	12	13	14
Dominicaans	4	4	3	4	5	6
Frans	3	4	4	3	4	2
Canadees	2	2	1	1	1	1
Brits	2	2	2	2	2	2
Filippijns	2	1	2	1	1	1
Venezolaans	1	1	1	1	1	1
Overige Europese nationaliteiten	6	5	6	6	6	5
Overige nationaliteiten	12	13	14	16	16	19

1.3. Conclusion

Statia is a pristine treasure island; that is why they are known as 'the Caribbean's Hidden Treasure' or 'the Hidden Gem'. Tourism on Statia has great economic potential because of Statia's:

- convenient geographical location
- unique heritage
- beautiful historical core
- excellent diving
- unique terrestrial flora and fauna
- friendly local community

Even though the island has a favorable geographical location, many sail past the island without discovering the island. In addition, the connectivity to Statia by air and by sea is limited. This leads to the current situation that Statia is still relatively unknown to the outside world and not known as the treasure island it is.

Effective sustainable tourism development and strategic marketing will contribute to putting Statia on the map as the Hidden Gem. In addition, it will help to tackle one of the biggest challenges Statia is facing, namely poverty alleviation. Since it is proven that tourism can contribute to economic development and poverty alleviation, it is essential for Statia to develop tourism sustainably and effectively as a means to reduce poverty on the island.



2. Vision, mission and objectives

Based on interviews with Openbaar Lichaam Sint Eustatius, tourism stakeholders and local residents on Statia the following vision, mission, strategic objectives and strategic direction have been identified.

2.1. Vision

The vision defines a future reputation the island desires.

To be recognized as an authentic and sustainable island destination for memorable and unique culture and nature-based experiences in a peaceful and tranquil setting among friendly people that take pride in their identity, cultural heritage and natural environment.

2.2. Mission

The mission sets an agenda for transformation – improved quality of tourism products and service delivery that will lead to a greater local creation and retention of revenue, investment in human resources and skills, and improves coordination and collaboration between government institutions, the private sector and local communities.

To be a high-value and sustainable small island destination offering an escape from everyday life, including authentic experiences that reflect Statia's natural and cultural heritage, that are socially inclusive, environmentally responsible and provide prosperity to local communities on the island.

'high-value' means that every aspect of tourism must ensure quality and yield, and not be volume driven. It does not denote Statia as an expensive, luxury-only destination.

2.3. Strategic objectives

1. Improve institutional performance, governance and regulations

Create a system of tourism institutions, regulations and processes and facilitate the tourism industry's best practices, monitoring and enforcement.

2. Improve market understanding and visitor segmentation

Identify niche markets and specific visitor segments, and systematically evaluate these as input to guide tourism product development and marketing decisions.

3. More effective marketing and communication

Tourism demand is focused on tourism yield (total tourism revenues), not specifically on the number of incoming tourists. The goal is not just to attract more tourists, but to attract the 'right'⁶ type of tourists, using the most effective media channels and making the most of available digital data.

⁶ 'Right' in the sense of attracting the target population of tourists who are interested in the experiences Statia has to offer.

4. Lift quality standards within the tourism industry

Create mechanisms to support best practices in being a sustainable destination, including sustainable water, waste and energy management; in service and quality control; and in the protection and preservation of natural and cultural assets.

5. Enhance, enrich and diversify the tourism product

Tourism supply is focused on defining and enhancing the quality of the existing tourism products aligned with Statia's assets and attractions. In addition, the supply side is focused on developing new tourism products to diversify the tourism product offering in order to meet multiple needs of tourists or meet the needs of multiple target markets. The goal is to ensure that these are strategically developed across the island to encourage longer length of stays, encourage more tourism spending, facilitate the spread of tourism across the island and encourage return visits.

6. Improve workforce and local involvement

Develop the overall capacity of the tourism sector workforce in the public as well as private sectors. Tourism training and skills development opportunities should be linked to the needs within the tourism sector. Stakeholders and local communities must be actively involved in sustainable tourism development on the island.

Realizing the objectives will contribute to the realization of the tourism vision. Each objective above is addressed in a separate chapter within this Tourism Vision Plan. The Tourism Vision Plan includes an overview of the current situation, core strategies to transform tourism on Statia, and specific actions to move towards the realization of the objective. Each of the actions should be assigned to a lead organization responsible for execution in close collaboration with relevant partner organizations. In addition, budget, timeframe for implementation, resources needed, outcomes, monitoring and evaluation process, and indicators for success should be identified.

2.4. Strategic direction

The strategic direction, which will be included in the tourism policy of Statia, is to strengthen and nurture its local communities, (historic) places, nature and cultural heritage, and to add economic value to these inherent assets throughout the island.

- Celebrate Statia
- Tourism is rooted in the people, places, natural and cultural heritage, and in the core values of the island. The core values include Statia remaining a peaceful and tranquil island with its own authentic identity.
- Tourism can promote a sense of pride and belonging of local communities.
- Tourism should be used as an income generator to protect, preserve and enhance Statia's natural environment as well as the tangible and intangible cultural assets.
- Tourists, as guests on the island, will be friendly welcomed by local communities.

The above is incorporated in the following model (figure 3). Statia can execute this model by means of a top-down as well as a bottom-up approach. On one hand, the tourism vision can be used as a starting point to develop sustainable tourism on Statia. On the other hand, strategies and actions can be undertaken to achieve the objective and thereby meet the tourism vision. This model shows the relations between the different elements in sustainable tourism development.

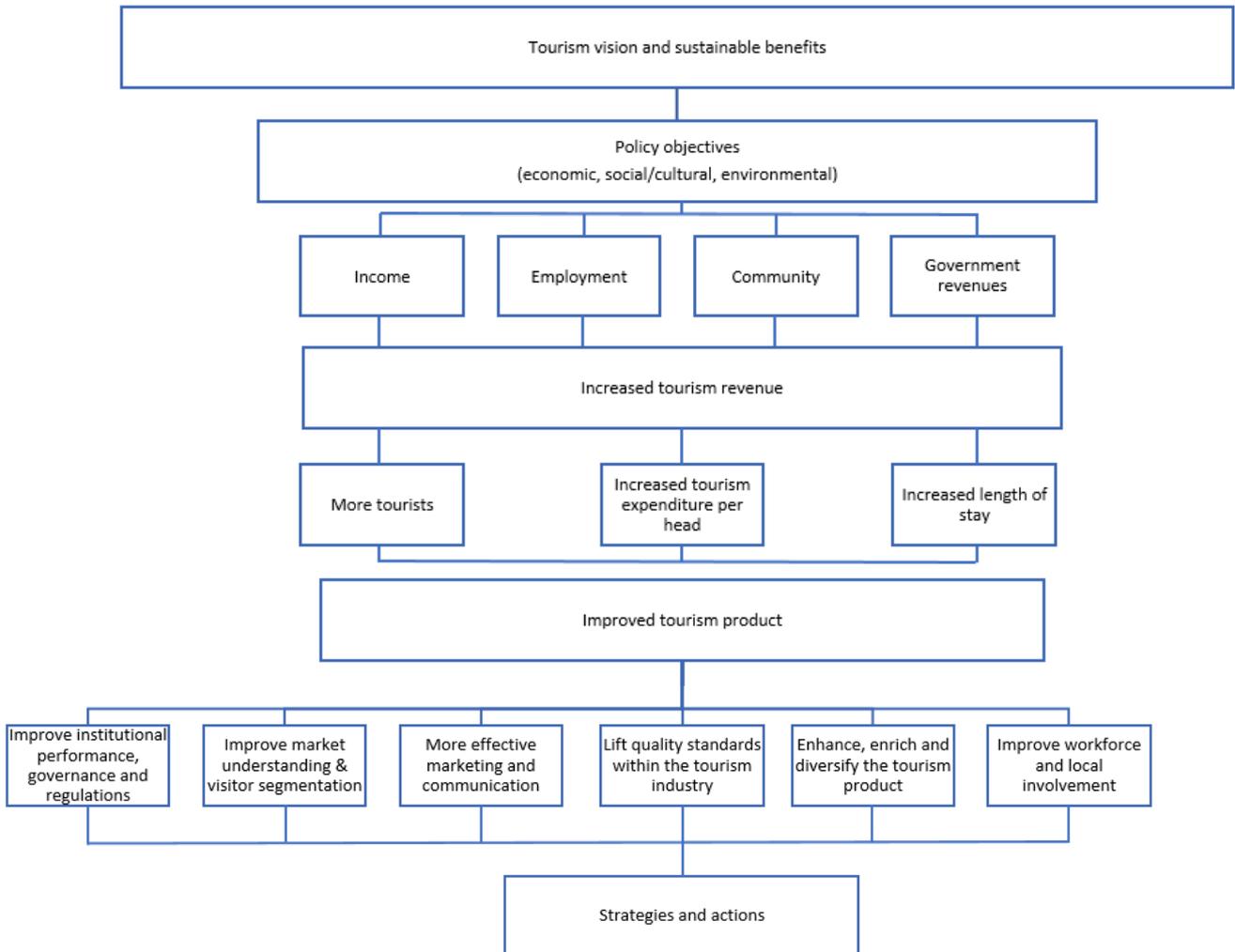


Figure 3. Model of sustainable tourism development

3. Situation analysis of tourism on Statia

The situation analysis identifies the internal strengths and weaknesses and the external opportunities and threats of Statia as a sustainable tourism destination. The analysis delineates a general image of tourism on Statia and is separate from the strengths and challenges as laid out in chapters 6 to 11.

Strengths

- Considered a 'Green' destination that is still unspoilt
- Statia QualityCoast branding is well developed
- QualityCoast award to become a sustainable destination
- Subtropical climate
- Rich in history
- Beautiful cultural heritage
- Adequately protected marine and terrestrial areas
- No seasonality in tourism
- Recognized as a safe community and environment
- Delivers a sense of escape with a range of experiences
- Convenient geographical location
- Friendliness of the people on the island
- Multiple cultures and religions living in harmony on the island

Weaknesses

- Not an established, strong brand
- No tourism policy implemented as yet as well as no political decision-making
- Limited enforcement of current rules and regulations
- Inconsistent tourism service levels regarding product and service quality
- Limited vital connectivity and accessibility to the island
- The local economy is heavily reliant on imports
- Limited communication and collaboration between stakeholders
- Limited data collection and analysis

Opportunities

- New and innovative tourism product development
- More consumers desire sustainable tourism
- More consumers desire authentic exclusive experiences
- Greater public awareness of, and interest in, sustainability and environmental issues
- Increased desire for local products
- Build the number of eco-accredited tourism businesses
- Increase focus on high-spending inter-island and international tourists
- Develop partnerships with luxury brands and travel companies
- Facilitate product development that meets consumer demands for authenticity and nature/culture-based experiences
- More effective destination branding and marketing
- Regional collaboration

Threats

- Potential loss of (marine) environment and heritage
- Climate change
- Tough competition in regionally and globally because of upcoming (sustainable and dive) tourism destinations
- Poor investment climate



4. Tourism, growth and the need for sustainable tourism

With increasing globalization and disposable income, tourism has over the last few decades become one of the largest and fastest growing industries in the world. The sector's direct contribution to Gross Domestic Product (GDP), employment, income and foreign exchange earnings is greatest in developing countries that are largely dependent on tourism, such as many small island developing states⁷. Part of the tourism income trickles down to different groups of the society and, if tourism is managed with a strong focus on poverty alleviation, it can directly benefit the poorer groups through employment of local people in tourism enterprises, goods and services provided to tourists, or running of small and community-based enterprises, etc., having positive impacts on reducing poverty levels. In some developing countries, notably small island developing states, tourism can account for over 25% of GDP⁸.

As a result, governments have been paying increasing attention to the development of the sector with an expectation that it will help generate employment and higher income, thereby contributing to poverty alleviation⁹.

Within tourism development, economic development and poverty alleviation often has more priority than environmental conservation, particularly in developing countries. It is easy for (environmental) resources to be destroyed to achieve short-term economic benefits, however for achieving long-term economic benefits it may be disastrous. Unplanned and uncontrolled tourism growth can result in such a deterioration of the environment that tourism growth and thereby economic development can be compromised. The environment, being a major source of tourism products, should therefore be protected in order to have further growth of tourism and economic development in the future. This is especially true with regard to tourism based on the natural environment as well as on historical-cultural heritage¹⁰.

The above paragraphs show that in order to achieve long-term benefits of tourism, the economic, socio-cultural and environmental aspects of tourism development should be taken into consideration, and a balance must be established between these three aspects to guarantee its long-term sustainability¹¹. This is what tourism destinations try to achieve by sustainable tourism development. Sustainable tourism is defined as "*tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of host communities, visitors, the industry and the environment*"¹².

Not only is sustainable tourism development a must in order to gain long-term benefits, it is also a must because the tourism industry is seeing an increased interest in sustainable tourism. According to Virtuoso¹³, more clients are searching for sustainable options. National Geographic states that "*smart travelers now expect some elements of sustainability when they travel—and welcome it when it goes beyond picking up towels and reusable soap containers*". Last but not least, according to Green Destinations, "*consumer and corporate demand for responsible travel and tourism is growing and the public wants to know how you manage your destination*"¹⁴.

⁷ United Nations Conference on Trade and Development. Sustainable tourism: contribution to economic growth and sustainable development. January 2013

⁸ <http://step.unwto.org/content/tourism-and-poverty-alleviation-1>

⁹ United Nations Conference on Trade and Development. Sustainable tourism: contribution to economic growth and sustainable development. January 2013

¹⁰ Creaco, S., & Querini, G. (2003). The role of tourism in sustainable economic development.

¹¹ World Tourism Organization (n.d.). Sustainable Tourism for Development, available at: <http://sdt.unwto.org/content/about-us-5>

¹² <http://sdt.unwto.org/content/about-us-5>

¹³ Virtuoso is a global network of travel agencies that has formed close relationships with the best hotels, airlines and cruise lines.

¹⁴ https://www.greendestinations.eu/index_new.php?menu=home_greendestinations&lang=en

4.1. Sustainable tourism contributes to long-term benefits

Sustainable tourism refers to a balance between the people, economy and the environment. Tourism is an economic activity that should not come at the expense of those who are involved (travel industry, tourists, but also the local community) and nature and the environment. This seems as common sense but, in the reality, it often is not. As tourism generates a significant amount of money and helps people get a job in the industry, this is often the priority. In order to generate more tourism income, the tourism industry is being developed without limits. Infrastructure, hotels and other facilities are being built without limits. Nature comes at the expense of this unbridled growth. The thought is that if limits were imposed on the number of roads or hotels, this would lead to a loss of tourism income. By wanting to make a lot of profit in the short term, tourism will not be possible in the long-term.

Thus, the economic situation (as a business and as a tourism destination) will be significantly better with strong social and environmental focus. For example, a business that takes care of its local community and environment will be able to employ higher quality personnel, as good staff chooses where they want to work. A tourism destination with high quality environment – such as beautiful marine life – can create better visitor experiences and more visitors wish to come to the destination. In addition, businesses will be worth more when they sell in 10-20 years than if the marine life has been degraded and fewer visitors wish to come¹⁵.

In short, sustainable tourism is also about the balance between the dimensions that ensures long-term benefits from tourism development. And maybe more importantly for tourism destinations, it ensures economic development that is viable on the long-term.

“Being sustainable is good for profit on the long-term”

4.2. Sustainable tourism is a high-yielding tourism sector

Sustainable tourism could be seen as an umbrella concept when it comes to niche tourism markets. Ecotourism, agritourism, heritage tourism, etc. are all types of sustainable tourism. There is significant evidence that sustainable tourism is a high-yielding tourism sector compared to other types of tourism, see figure 4.

Academic evidence for ecotourism as a high-yielding sector:

- According to GlobalData's Q4-2016 consumer survey, 35% globally are interested to book eco-tourism holidays. This rate grows to 57%, when talking about Americans with a household income that exceeds \$150.000 per annum. So, the household income is directly proportional with the interest of eco-tourism holidays¹⁷.
- 96% of Condé Nast Traveler readers think hotels and resorts should be responsible for protecting the environment they operate in. Also, the most travelers are willing to pay more money for an eco-friendly accommodation¹⁶.

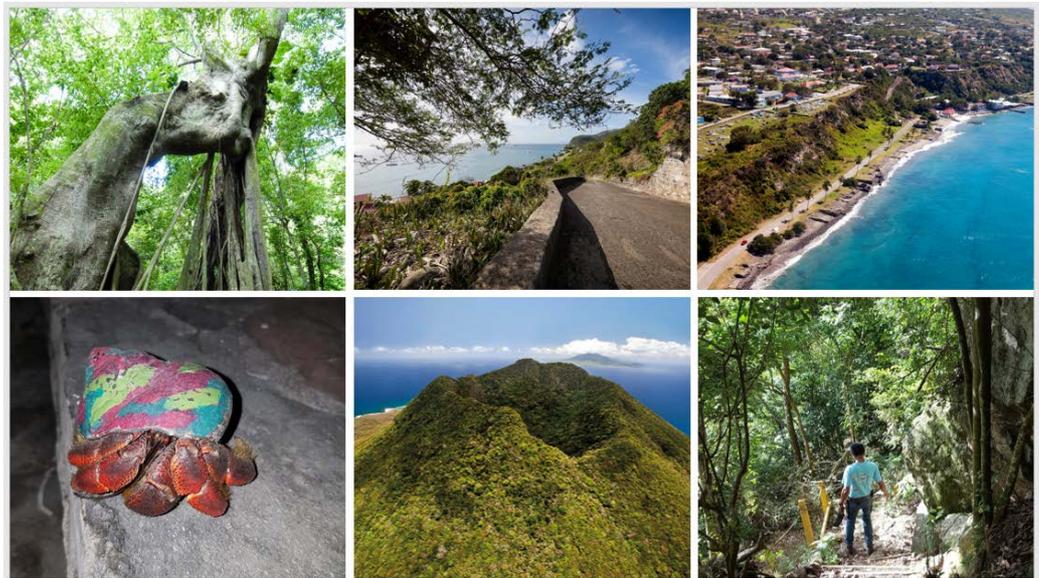
¹⁵ Ecotourism Australia

¹⁶ mozaikhospitality.com/blog/hospitality-news/ecotourism-sustainable-tourism-trends/

Academic evidence for culture and heritage tourism as a high-yielding sector:

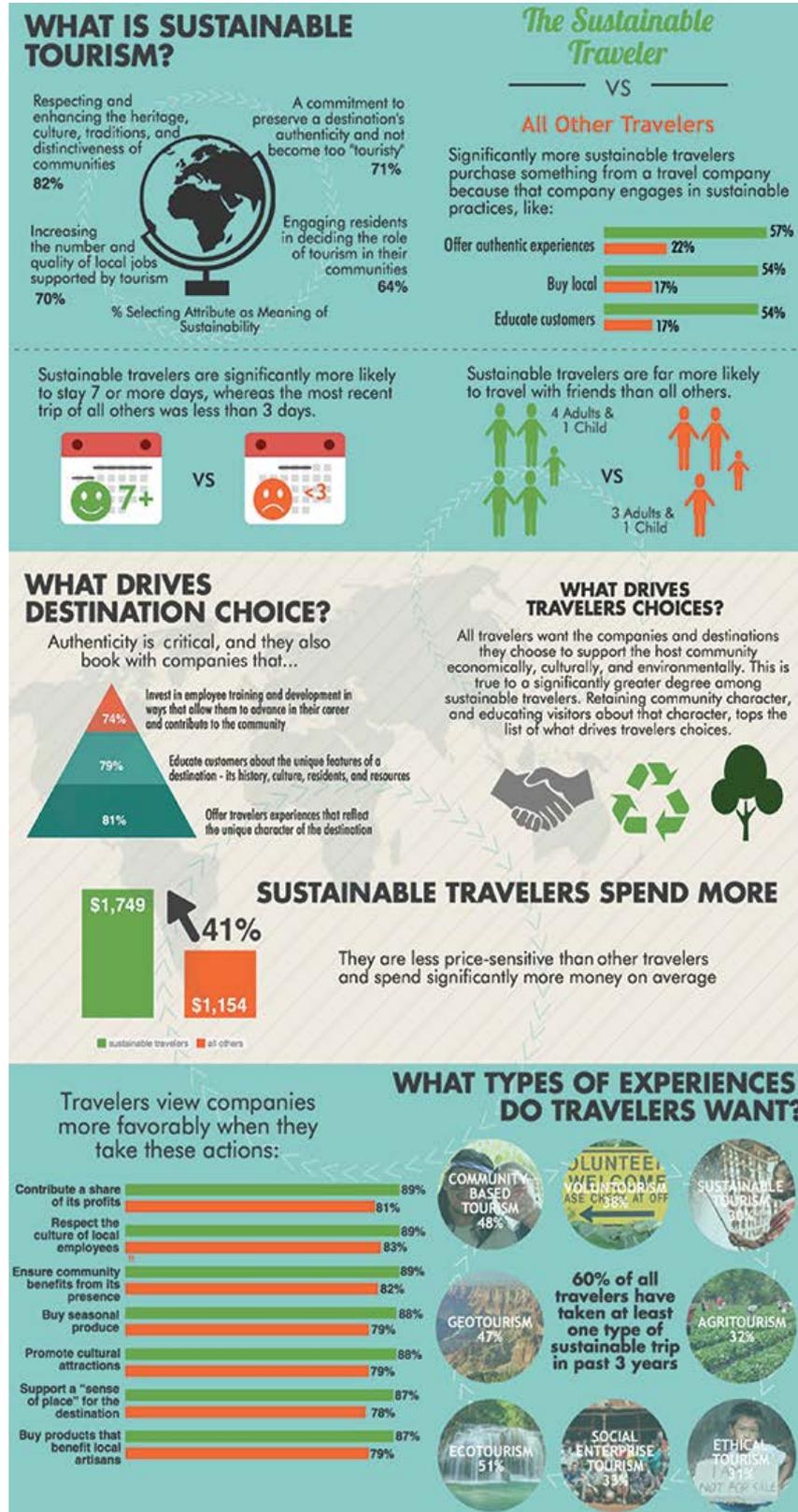
- A recent survey showed that over 50% of respondents polled agreed that history and culture are strong influences on their choice of holiday destination. It is a fast growing and high-yielding sector. Statistics also indicate that culture and heritage tourism continues to grow as rapidly¹⁸.
- There is no denying the fact that culture and heritage tourism tends to attract high-yield tourists. While global figures can be hard to obtain, all available statistics on tourism in various individual markets like the UK, New Zealand, Australia, India etc. reveal a consistent pattern. Culture and heritage tourists often stay longer and spend a lot more money in general than other tourists do. In fact, one study showed that a culture and heritage tourist spent as much as 38% higher per day and stayed 22% longer overall compared to other kinds of travelers¹⁸.
- Although the statistical evidence does not show consistency when it comes to repeat visitors, tourism data on United States' Culture and Heritage visitors indicates that the level of repeat visitation amongst this group of travelers is higher than that of traditional tourists¹⁷.

"Tourism on islands has developed not just due to exotic locations and beautiful beaches, but also because of their historical significance".



¹⁷ <https://www.linkedin.com/pulse/towards-new-sustainable-tourism-model-stamatis-alamaniotis>

Figure 4. Sustainable versus mainstream tourism. How to benefit from sustainable tourism. Source: Destinationbetter.com



4.3. Sustainable tourism alleviates poverty

Tourism and poverty alleviation are being increasingly linked. It is argued that the tourism industry offers an ideal avenue through which poorer countries can open up to the benefits of globalization. There seems to be significant potential to deliver more benefits from tourism to the poor, as tourism is a significant or growing economic sector in most countries with high levels of poverty. According to the World Tourism Organization, tourism is one of the top three contributors to economic development in over 50 of the world's poorest countries ¹⁸.

Poverty is commonly identified based on income or consumption criteria. However, poverty can also be identified by low levels of access to health, education and clean water. Tourism not only provides material benefits for the poor, but can also bring cultural pride, a sense of ownership and control, reduced vulnerability through diversification and the development of skills and entrepreneurial capacity.

Tourism can contribute to development and the reduction of poverty in a number of ways. Economic benefits are generally the most important element, but there can be social, environmental and cultural benefits and costs. Tourism contributes to poverty reduction by providing employment and diversified livelihood opportunities. This in turn provides additional income or contributes to a reduction in vulnerability of the poor by increasing the range of economic opportunities available to individuals and households. Tourism also contributes to poverty alleviation through direct taxation and the generation of taxable economic growth; taxes can then be used to alleviate poverty through education, health and infrastructure development. It should not be forgotten that some tourism facilities also improve the recreational and leisure opportunities available for the poor themselves at the local level.

There are a number of proven strategies which can be used to enhance overall economic benefits, and which can be used in ways which have a poverty reduction focus:

- attracting higher yield market segments
- increasing tourist length of stay
- increasing visitor expenditure
- developing complementary products
- spreading the benefits of tourism geographically
- infrastructure and planning gain
- local management of tourism & partnerships
- Small Medium and Micro Enterprise development
- reducing seasonality
- employment and training¹⁹

4.4. Trends and developments in the tourism industry

1. **Tourists are willing to spend more money** on for instance a hotel that meets the needs or preferences of the tourist. According to H. van der Meer (Thomas Cook), *"we even see that people's choice of holiday no longer solely depends on the destination, but also on the hotel itself. This can be a decisive factor. The place where people stay is more important than ever"*. Where the purchasing power of the average European Dutchmen increases in 2019, there is also a marked increase in the amount they spend on holiday²¹.

¹⁸ R. Scheyvens (2007). Exploring the tourism-poverty nexus. *Current issues in Tourism*, 10 (3), 231-254

¹⁹ UNWTO (2002). Tourism and poverty alleviation

2. **Tourists show increasing interest in sustainable holidays.** Tourists not only pay attention to themselves and the travel companions, but also to locals. P. Kok of TUI argues that *"83 percent believes that it is important that an accommodation provides good care for the staff and the locals. 71 percent believes that it is important that the holiday positively contributes to the well-being of locals, both culturally and economically. One third of the respondents choose an accommodation that treats humans and animals well and that takes initiatives to reduce environmental impacts"*²¹.
3. **Tourists have increasing interest in long distance tourism destinations.** Travel organizations notice that tourists increasingly opt for long distance tourism destinations, especially couples. Families with children also increasingly opt for long distance tourism destinations. Another point to be noted is that this trend results in the trend that tourists go on holiday for a longer length of stay²¹.
4. **Caribbean Netherlands is a winter destination for European Dutchmen.** According to D-reizen, the Caribbean Netherlands is one of the tourism destinations European Dutchmen increasingly travel to during winter season²¹.
5. **Authentic holidays are becoming increasingly popular.** Although all-inclusive hotels are still immensely popular, there is also a change there. More and more hotels are focusing on authentic holidays. With Greece as the best example, there is an increasing demand for small-scale boutique hotels. In addition, a theme as adults-only holidays also continues to increase in popularity²⁰.
6. **Tourists are visiting new destinations.** From the 2018 Tourism Survey, 22 percent of participants seen a visible increase of tourists from a new destination²².
7. **Tourists are requesting new experiences.** Tour operators are now receiving requests for unique experiences from tourists who want to do something that is a once-in-a-lifetime. This is becoming more common amongst Millennials who want to explore the world and share their stories with others²².
8. **Ecological and educational tours are in demand.** Ecological tours are the most popular tours offered by many tour and activity operators who responded to the 2018 Tourism Survey. These are usually rare experiences that educate and share inside information on the area, and how to protect it for the future. Tours that use proceeds to fund ecological projects such as forest or animal habitat restoration are chosen above alternatives without a cause²².
9. **Tourists enjoy a local experience.** Tourists are choosing to become more immersed in the local culture when visiting a destination. They want to do what the locals do and eat where locals eat²².
10. **Tourists enjoy history and culture.** Walking tours are still one of the leading experiences for anyone visiting a new location. They are a great opportunity to find your bearing, meet other tourists and have all their questions answered by a destination expert²¹.

²⁰ S. Riepema (January 8, 2019). <https://www.ad.nl/reizen/dit-zijn-de-vakantietrends-van-2019-a0810afb/>

²¹ S. Kutschera (December 4, 2018). <https://www.treksoft.com/en/blog/9-travel-trends-that-will-drive-the-tourism-industry-in-2019>

5. Methodology

The development of this report, including the formulation of the tourism vision for Statia, is the result of a gradual and participatory process. This process is characterized by extensive consultation with stakeholders, involving local communities, public sector and private sector through in-depth interviews, group discussions and workshops. Please find a description of the process in appendix A.



6. Improve institutional performance, governance and regulations

A strong, supportive policy framework and an effective, efficient institutional framework will form the backbone of Statia's efforts to move towards the tourism vision. The policy and institutional framework must effectively regulate the tourism sector to maximize sustainability and benefits. It must also maximize efficiency by clearly identifying the roles and responsibilities of the institutions, and provide a platform for coordination and collaboration.

6.1. Where are we?

There is poor coordination and communication between the local government, (tourism-related) institutions and other stakeholders with respect to tourism planning, tourism asset management and tourism destination management. The key tourism-related responsibilities lie predominantly by the Sint Eustatius Tourism Development Foundation (STDF), which includes among other things having an overview of the developments within the tourism sector on the island, international marketing and creating tourism awareness on the island. Still, the STDF is not always aware of the developments on the island related to tourism. For instance, not always is the STDF informed about newly opened tourism businesses.

In addition, the STDF cannot do everything themselves. Many themes require collaboration with stakeholders due to shared responsibilities. For instance, developing culture and heritage tourism involves shared responsibility of the Culture Department. However, communication and collaboration currently does not start naturally. Multiple rationales are provided by the interviewees. One of the reasons is because *"the roles and responsibilities of the different institutions are not clear"*, so institutions do not know who to inform or who to collaborate with. Second, *"ego plays a role. People do not always want to share their information and rather keep it to themselves"*. Third and last, *"so many times, the different organizations are doing different individual things. Sometimes they have the exact same plans that we have, but we are all doing it individually. That is a waste of time and money. Now, if we could just come together and stop acting a fool then we could have more opportunities"*.

Strengths

- The local government is willing to put the necessary resources to improve governance and institutional performance.
- Stakeholders are agreeing on the importance of collaboration and are willing to collaborate.
- Additional knowledge and resources are available from (external) networks, including the Dutch Ministries.

Challenges

- The roles and responsibilities of the local government, the STDF and other tourism-related key institutions are not clear.
- Little consultation, collaboration or coordination among the different stakeholders, which makes it difficult to prioritize and execute things.
- No tourism policy implemented as yet.

6.2. Where would we like to be?

The tourism sector encompasses different themes and thereby requires different institutions working together. Including these themes and stakeholders in the tourism strategy helps to develop an integrated approach for sustainable tourism development. Please see the themes and responsible organizations in the table below²².

Table 2. Themes that are encompassed in the tourism sector linked to the responsible organizations

Theme	Responsible organization
Destination management	STDF
Nature, scenery and animals	STENAPA
Environment and climate	EJL Services BV, STUCO, Made in Statia
Culture and tradition	Culture department
Social well-being	E&I
Business and hospitality	Chamber of Commerce

Collaboration is essential between stakeholders in order to benefit from the opportunities within the tourism sector on the island, especially considering the small size of the island and the relatively small number of inhabitants. It is everyone's role to ensure tourism is developed and managed carefully, and in a sustainable way that meets the vision of Statia.

The ideal situation would therefore be to have a clear overview of the roles and responsibilities of the key institutions. Every institution and employee should be aware of its own role and responsibilities. They should be able to share this with others, so everyone knows who to contact and who to collaborate with in certain cases. Within collaboration, every stakeholder has their own goal. However, these individual goals must be united in a mutual, overarching goal to realize sustainable tourism development. The interviewees were asked what they think the role of the government, the STDF and themselves should be. See below their interpretations on the role of the government and the STDF. In chapter 11, the interpretations on the role of the local communities is outlined.

Next to the identification of the roles and responsibilities, *"there should be an incentive for stakeholders to come together"*. *"You need a strong person in charge to get the different organizations to come as one. We need an umbrella program, that is very inclusive, where we are all in it"*. QualityCoast can serve as this umbrella program.

Role of the government

According to the interviewees, the local government should embrace tourism. *"Within the government, I am absolutely sure that we should invest more in tourism. Once the government has a plan that they can work with, a blueprint, that is consistent with the sustainable development of the island, then it is something that they will invest in"*. The majority of the interviewees argue that the government should act as a guide in the process of sustainable tourism development. *"I think the government should be there to set conditions and for monitoring and evaluation purposes, rather than micromanaging the developments. To make sure that everybody keeps on track. Someone is there holding us accountable"*. *"The local government should also play a role in informing the locals, for instance by means of a town hall session, about the current developments within tourism and what the opportunities are when you look for instance to jobs – to keep the locals motivated"*. In this way, they can *"support locals and their initiatives, stimulate creativity among locals and they can encourage local entrepreneurs to stimulate economic development"*.

²² These themes are derived from the QualityCoast Assessment that is a tool which helps Statia to monitor and develop its sustainable performance as a tourism destination. GEBASEERD OP GDCOMMITTEE

Role of the STDF

According to the interviewees, the tasks of the STDF includes the following:

One, *"the STDF should focus on locals by creating awareness and make the locals tourism-minded"*. An example is that the STDF could organize hospitality training for employees within tourism businesses. The STDF was organizing trainings, but due to budget constraints they could not continue. The STDF could also organize meetings to discuss with the locals how beautiful the island is. *"Statians should appreciate the beauty of the island as it currently is. Statians should acknowledge that the island already has lots to offer, even though the quality could be improved. Having these meetings could enhance the feeling of pride amongst the locals"*. In addition, *"locals will appreciate their island and thereby will for instance keep the island clean"*.

Two, the STDF should focus on attracting tourists to the island and thus be responsible for marketing Statia. *"Let Statia be seen!"* For the STDF to do so, *"they should find niche markets, identify target markets and identify what Statia has to offer to tourists"*. This must be done in a continuous process in order to ensure no stagnation of their tourism industry. In addition, *"the STDF must do research on how Statia can motivate tourists to spend more money on the island and more money on local products"*.

Three, *"the STDF should serve as a tourist office"*. A tourist office which is a must-visit for tourists to be inspired and be informed about what they can see on the island, what they can do and what they can experience when they are on the island. A tourist office that really breaths the local atmosphere. The tourist is warmly welcomed on the island and is informed by the employees about where to relax on the island, where to sleep and where to have delicious food. The tourist office should be able to share the secret spots and extraordinary places on the island. The ones that a tourist does not read about on the internet. The STDF can even sell local products or souvenirs. In this way, the STDF can *"diversify itself and generate its own income, which then can be used to facilitate what it is doing"*. They should then not have to be a primarily subsidy-based organization. In addition, the STDF will in this way support local entrepreneurs and local artists.

Four, *"the STDF should be at the forefront in advising the government"*. Also, interviewees believe that *"the STDF needs to be more out in the field, at the harbor and airport. Let people see who you are, what you work for and what you are trying to do for the island"*. *"They need to visit the tourism businesses"*. *"What are we experiencing? How do we want to move forward with tourism? The tourism businesses get feedback from their customers, so it is good to share that with the tourism office"*. Based on this information they could also inform the government on tourism developments and trends on the island and base their advice to the government upon that information.

6.3. How do we get there?

Strategy 1 – Improve communication, collaboration and coordination

Since the tourism vision can only be realized in collaboration with all the stakeholders, an effective mechanism must be established to strengthen communication, collaboration and coordination between the stakeholders. Below a proposal for such a mechanism is presented in the form of a Tourism Taskforce.

At the government level, the Department of Economy & Infrastructure (E&I) facilitates high-level coordination on tourism, including planning, regulations, and monitoring and evaluation. E&I is advised by the STDF on what the trends and developments are in the tourism sector (on the island, regionally and globally) and how they could act on this.

The STDF must keep overview on the trends and the developments in the tourism sector, and coordinate and act accordingly. This will also require close collaboration with the stakeholders. For instance, what type of tourists do restaurants receive, what are tourists looking for on the island when they go to a tour operator, what cultural elements can the island offer to tourists, etcetera.

In order to facilitate the coordination, a Tourism Taskforce is recommended to be organized, including stakeholders from the public and private sector²³. The goal of this taskforce is to collaboratively, with stakeholder members, act on the realization of the tourism vision. In addition, the Tourism Taskforce should be responsible for making the island a sustainable destination and thereby be responsible for the QualityCoast Assessment²⁴. Based on this, working plans for actions must be developed and monitored by the taskforce (see table under action 3 – Organize Tourism Taskforce). For each and every action, a working plan (as shown by means of the table) should be developed to clearly outline the action to inform stakeholders on what needs to be done and how, and thereby ensure implementation.

It is also their responsibility to frequently evaluate the executed working plans to ensure the effectiveness of the action on the realization of the tourism vision. Key questions to be raised are:

- 1) What are the key actions to be taken for the next quarter?
- 2) Who is responsible and who is involved?
- 3) What is the budget for implementation of the action?
- 4) Is the action executed within the given time period?
- 5) Does the execution of the action meet the expected outcome?
- 6) Is there room for improvement?
- 7) When the outcome is not delivered or deadlines are not met, what is the reason?
- 8) How could other taskforce members support the responsible organizations for the action?²⁵

It must be noted that the taskforce is not only there to keep the members focused. It is also to collaboratively find solutions to challenges, since there is a mutual goal to be achieved.

These working plans need to be discussed by the STDF with E&I on director level. Once E&I approves the working plan, the responsible organization can execute it in collaboration with the organizations that should be involved. The taskforce will only come together on quarterly basis. In the meantime, the responsible and involved organizations are in the lead to execute certain actions they are assigned to. They can therefore meet independently from the taskforce. By the next quarterly taskforce meeting, the stakeholders can together monitor and evaluate the process and execution of the actions. Although, it is proposed to have quarterly taskforce meetings, the leader of the taskforce is always able to call in additional meetings (on behalf of the stakeholders) if necessary. This is a bottom-up approach.

²³ The idea of organizing a Tourism Taskforce was positively embraced by the stakeholders that are also a part of the Green Destination Committee, and who were a part of the vision workshops on 21st and 22nd of January.

Therefore, it is recommended to include these stakeholders as members of the Tourism Taskforce. This group, even though not all are directly involved in tourism, have a vested interest in sustainable tourism development on the island. These members are also selected based on a wide range within the tourism sector, from small scale hotels, to restaurants, to NGOs, to government organizations. Note: participants can always be evaluated and other members can always participate if effective and efficient.

²⁴ See chapter 9 for more on the QualityCoast Assessment.

²⁵ This question is also essential to ask in order to build support for the responsible organization within the taskforce. Support that the responsible organization otherwise would not know where to get. Since it is a joint effort with joint objectives, and since others might need support in the long run as well as people will be quite willing to give advice and support.

However, the same mechanism can also work the other way around by means of a top-down approach. E&I can also ask the STDF (and thereby the Tourism Taskforce) to implement certain actions, which E&I find of importance to positively contribute to sustainable tourism development and thereby the realization of the tourism vision. The STDF should then come together with the Tourism Taskforce to inform them and develop a working plan for the execution of the action. Figure 5 shows an overview of the mechanism.

By the end of the day, the performance of the STDF (and other institutions which fall under the responsibility of E&I) with respect to sustainable tourism development is evaluated by E&I, by means of a performance agreement. So, if the STDF is responsible for the organization of a taskforce, this is included in their performance agreement with a deadline. E&I will see to it that this action is executed after the deadline is expired.



Figure 5. Outline of the Tourism Taskforce mechanism to strengthen communication, collaboration and coordination between the stakeholders

Action 1 – Identify roles and responsibilities of the government & key institutions

As mentioned above identifying the roles and responsibilities of the government and key institutions is important. These roles and responsibilities should be included in the tourism policy to create transparency, ensure commitment and to inform the public.

In addition, E&I should request for the division of tasks within the organizations that fall under their responsibility, in order to improve governance at government level. This task division should be well documented for references. It is only then that the institutional performance can be measured, monitored and evaluated. This will also help to identify the missing or limited skills and competences within an organization in order to provide necessary trainings to the employees.

Action 2 – Train employees on necessary knowledge and skills

Knowledge and skills are essential for good communication, collaboration and coordination. Local government and institutions should prioritize knowledge and skill development of their staff. It is only then that good performance can be achieved. For instance, when the STDF is responsible for leading the Tourism Taskforce, the STDF should have the necessary leadership skills to lead and motivate the different stakeholders, and to keep them together.

Action 3 – Organize Tourism Taskforce

Sub-actions	<ul style="list-style-type: none"> • Select members of the taskforce • Select president of the taskforce • Organize quarterly meetings • Develop agenda, minutes, records of decisions
Who is responsible?	STDF
Who is involved?	<ul style="list-style-type: none"> • Triple M Restaurant • STDF • Department of E&I • Stenapa • Butterfly Tours N Travel • Sint Eustatius Historical Foundation • Golden Era Hotel • EJI Services BV • Made in Statia • Knippenga • Chamber of Commerce • Culture Department • STUCO • 4-Piek Services N.V.
Budget	
Timeline	Completed by end of 2019
Resources needed	<ul style="list-style-type: none"> • Location • President • Secretary
Outcomes	<ul style="list-style-type: none"> • Greater collaboration between public and private sector. • Tourism destination management improved by strengthened consultation. • Continuous update of and learning from QualityCoast Assessment and recommendations.
Indicators for success	<ul style="list-style-type: none"> • Motivated stakeholders • Achievement of actions • Close collaboration between the members • Quarterly meetings • Good leadership
Monitoring and evaluation process	Every second quarterly meeting, 15 minutes should be reserved for evaluating the process and content of the Tourism Taskforce with the members. Potential feedback should be processed by the president to ensure efficiency and effectivity of the taskforce and to ensure satisfaction and motivation amongst the members.

How to work together – the basic checklist

- 1) Prepare to work in partnership by making sure you have the capacity to do so:
 - a. Find out about your partners who they are and what they want.
 - b. Train employees to work with others. Make sure that they understand it is a priority and that they have the necessary competences and skills.
 - i. Leadership skills for the leader.
 - ii. Moderating skills
 - iii. Collaboration tools
 - iv. Motivating skills
 - v. Pro-activity
 - c. Use language and terminology that your partners understand.
- 2) Create an organized collaboration within the taskforce, which:
 - a. Meets on a quarterly basis in a shared space.
 - b. Has a set agenda, minutes, and records of decisions (list of actions). It must be noted that for decision-making, consensus must be sought among the stakeholders.
 - c. Has a set membership but welcomes new partners.
 - d. Is effectively chaired and run by keeping partners together, motivated and focused.

It is also important to:

 - e. Create a constructive atmosphere by making sure that the meetings are well led, starting on time and proceeding in an organized manner.
 - f. Guarantee a reliable meeting structure by making sure there is a clear agenda to which everyone can contribute. This agenda is circulated before the meeting along with any relevant information in order for the partners to prepare. Have the leader to run the meeting, and the secretary to take notes. Make sure everyone gets a chance to have their say. After the meeting, circulate the notes and keep good records.
 - g. Establish internal communication outside the regular meetings, such as a WhatsApp group or mail listing.
 - h. Review process on a regular basis to address problems and reward successes.
- 3) Offer help amongst partners. Make it useful for them to work with each other by offering:
 - a. Training for their staff.
 - b. Professional advice and technical assistance – ideas and networks.
 - c. Financial assistance – target grants and subsidies.
 - d. Marketing tools that they may find useful – brochures, information leaflets and promotion on website.
 - e. Information about trends and developments in tourism sector.
- 4) Share responsibility by setting up joint projects.
 - a. Create a vision together, or use the Tourism Vision of Statia.
 - b. Make an action plan covering what you want to achieve together, for instance for each year.
 - c. Evaluation undertaken actions.
 - d. Celebrate successful projects and praise your partners. ²⁶

²⁶ <http://www.eceat.org/images/Practical,%20profitable,%20protected%20%20MB.pdf>

Action 4 – Structural meetings between E&I and STDF

In order to improve governance by E&I and communication between E&I and STDF, it is recommended to have biweekly meetings. These meetings can amongst other things be used to discuss:

- recent trends and developments in the tourism sector.
- ongoing actions undertaken by the responsible organizations.
- evaluation on communication and collaboration from both ends.
- content and evaluation of performance agreement of STDF.

Action 5 – Develop tourism policy

There are limitations to what can be achieved without policy. This is proven in the current situation where there is no tourism policy and even the enforcement of handing out an exit survey is not consistently executed by the appointed parties. Developing a tourism policy is therefore critical. It must be noted that having a tourism policy will only be effective when it is also enforced. Most probably increased capacity, resources, authority and skill development is needed for this. In addition, this policy should be monitored and evaluated consistently to adapt towards the recent developments in the tourism sector on Statia.

The tourism policy is essential for the local government to create preconditions to realize the tourism vision and the execution of the Tourism Vision Plan. These preconditions can be generic to improve the quality of life of local communities, such as improving the infrastructure and involving the local communities. The preconditions can also be in the form of policy measures, such as incentive to foster business development and to organize awareness campaigns to make the local communities tourism-minded. Therefore, the elements within the tourism policy can be retrieved from this Tourism Vision Plan. Potential elements include:

- The roles and responsibilities of the local government and institutions.
- Process for registration of all tourism service providers in order to have a clear overview of the tourism businesses, including data on occupancy, sustainable operation, etcetera
- Quality standards for the tourism sector
- Incentives for facilitating tourism business development and investments
- Code of conduct for tourists
- Tourism fees
- 80/20 rule in local employment for businesses and organizations
- Different pricing for tourism attractions for locals
- Law enforcement
- Spatial Development Plan

Action 6 – Creating an enabling environment for tourism businesses

Individual tourism businesses' ability to contribute to economic growth depends on a stable and supportive business environment that encourages investment and facilitates competitiveness.

Reforming policy, legal, institutional and regulatory conditions that govern business activities is an essential first step. By simplifying an often complex set of licenses and taxes that tourism businesses are required to obtain in a number of countries, more businesses will be encouraged to start up. It is also important to raise awareness of tourism among investment promotion and support services, as their understanding of the sector will be vital to promoting opportunities. Tourism needs to be effectively integrated with trade policy and benefit from agreements on creating more open markets, provided that these are in line with the principles of sustainable development.

7. Improve market understanding and visitor segmentation

A thorough understanding of the tourism demand on the island is essential to develop marketing and communication strategies and to develop tourism products. This includes understanding regional and international tourists, key niche interest groups and tourists that visit particular key sites. For the numerous visitor segments, it is important to understand:

- their **motivations** and the **experiences** they seek (why they travel, what the key attractors are, what they want to see and do).
- **travel** and **accommodation** patterns (how they travel, where and how long tourists stay).
- **information sources** (how obtain, use and share of information).
- **expenditure** (how much they spend, on what and where).
- **Tourists' satisfaction** on elements of their holiday (travel, accommodation, services, nature, culture).
- **means of booking** (direct online, direct with supplier, tradition travel agent).

To validate findings and understand the tourism industry, it is also important to contextualize any visitor segmentation analysis by taking into consideration:

- The **trends and developments in the global tourism industry with regards to travel motivations, expectations, best practices and technology**, and how they affect (niche) markets.
- The **trends and developments in the global tourism industry with regards to accommodations, tours, attractions and events** which will affect tourists' expectations and the competitiveness of Statia's tourism sector.
- The **marketing and product strategies and development** of competitor destinations in the region, which offer insights into the success factors and how Statia can develop a competitive advantage.

It must be noted that tourism planning can work two ways. One, develop the destination and tourism products based on tourism demand, including existing tourist arrivals and their needs (e.g., what are the needs of the tourists, how can we accommodate those needs by (further) developing existing and new tourism products). Two, attract tourists with specific interests (the target market) based on what Statia has to offer or can offer, and what Statia wants to offer as included in the mission (e.g., who can we accommodate with the products that we have to offer, what type of tourists will be interested in the island's tourism products).

7.1. Where are we?

Currently, a statistical database is lacking on Statia. Het Centraal Bureau voor de Statistiek (CBS) only collects data on the number of tourist arrivals by air and tourist arrivals by air per nationality. Even within the tourism numbers, there is no distinction made between business travelers and tourists who come to visit friends, family and relatives. So, there is little data on tourism from tourism numbers to profiling. Tourists travel motivations, spending patterns and levels of satisfaction have not been statistically established or validated. Therefore, current observations regarding niche markets are largely anecdotal. Due to limited data, it is difficult to sketch the factual current situation on Statia with regards to tourism. *"First and foremost, we need to have a baseline, so we know where we are".*

In addition, the present estimates of the economic value of and employment in the tourism sector have been based on direct economic value and do not include secondary impacts throughout the economy and the value chains associated with tourism consumption. The lack of reliable data on economic linkages is a key constraint to estimating the true economic value of the industry and underestimates its ability to generate employment and provide livelihoods.

Statia currently offers the following experiences, which are broadly categorized as nature-based tourism, cultural and historical sites and diving. Other special interest markets Statia offers include wellness, birdwatching, snorkeling and weddings. These experiences encompass the core activities that tourists participate in on Statia. There is great potential for these experiences to be better managed to generate higher (economic) value and long-term sustainability. For this, market research and tourist profiling need to be adequately used in tourism planning, and product and destination development.

Based on the current tourism products offerings, the current target market is segmented mostly based on the nationality of the tourist and based on the diving experience. As mentioned in paragraph 1.2, tourists with the Dutch nationality is the single most important market for Statia; this includes tourists from Curacao, Aruba and Sint Maarten. It accounts for 48 percent of all tourist arrivals. As mentioned in paragraph 1.2, no distinction is made between tourists and business travelers. Furthermore, tourists with the American nationality account for 14 percent of the tourist arrivals on Statia by air. Furthermore, locals notice that it is elder people, the pensioners, that come to the island. *"Younger people will not come to Statia, because we do not really have a nightlife on Statia"*. Furthermore, Statia targets repeat visitors, who mostly come for diving and the diaspora communities.

Strengths

- Rich and diverse natural, cultural and historical assets.
- Identification of key niche markets.

Challenges

- Limited data collection and analysis on tourist arrivals.
- Limited identification of tourist profiles.

7.2. Where would we like to be?

The basis of a tourism strategy is visitor segmentation and must be based on reliable data and research. Statistical data and research are therefore necessary to identify and understand the niche markets and its target market. The identification and development of niche markets is essential to strengthen Statia's competitive advantage, to expand the total tourism capacity of Statia, and to distribute the benefits of tourism more widely.

The majority of the interviewees believe that Statia must not accommodate mass tourism. They rather feel that niche tourism is more suitable for the island and its local communities. Not only is the island too small to accommodate mass tourism, they believe that *"the island's identity and culture must be preserved!"*. In addition, it is good to have an *"equilibrium balance. We need to find a balance between niche and group tourism. Not per se high-end, but also not mass tourism"*.

Niche market tourism uses programs to attract tourists focusing on a very specific market segment built around a well-defined product. Tourists are looking for experiences. So, visitors are planning vacations that align directly with their interests.

However, 'niche' does not have to mean small. There are niche markets that have large followers and attract significant amounts of tourists. It is also possible to have multiple niche markets where each niche market has its own target market. *"The tourism sector should not only focus on one niche. The island is too small for that. A combination is therefore necessary".*

Based on the existing niche markets, that is built around the tourism product, Statia offers or can offer, specific markets can and should be targeted. According to multiple interviewees, *"the tourism product of Statia should accommodate the general public based on interest". "The target group should not only be segmented based on demographical or geographical factors, but also on the interests of the tourist". "Where tourists come from is very important as it directs you to where you should place your marketing".* Based on interests, Statia can attract the following tourists: (1) tourists who are interested in nature, including diving and hiking. (2) tourists who are interested in culture, including history, heritage and local traditions. (3) tourists who are interested in the local lifestyle. These three types of tourists can be subcategorized by means of the following characteristics.

First, often, these types of tourists are well-educated and have a higher than average household income. They often value a sustainable destination and would like to contribute to the local community and local economy. *"The tourist is a proponent of the preservation of nature and culture. He or she values a 'clean industry', one that is not harmful to the environment and local lifestyle".*

Second, these tourists are often looking to travel off-the-beaten-path and discover authentic things. Since Statia is currently relatively hidden to the world, it is an excellent destination to discover the undiscovered. Tourists have the opportunity to escape everyday life in a tranquil environment, to see unique flora and fauna and to experience local life. This type of tourist is open-minded. *"As a tourist, you should only come to Statia if you are open-minded and dare to look with marvel every day of what you have seen again, what you have experienced again. The tourist enjoys the small and simple things on the island. Tourists need their space to discover".* Even though, the tourist might have no idea what to expect from Statia, he or she is still curious about what the island has to offer. *"As an explorer, the tourist values the present situation on Statia. The island is in first instance not equipped for tourism, but it is prepared. Statia has its own charm".*

It must be noted that the above-mentioned types of tourists can include high-end tourists, who spend more money during their holiday compared to mainstream tourists. And even better yet, this high-end tourist would like to spend its money more to local products, making sure that the money stays on the island and flows to local communities.

As mentioned above, the interviewees have identified three existing niche markets (please see below). These niche markets have been identified for the following reasons:

- There are already significant tourism activity and products centered on these experiences.
- Statia has the attributes and infrastructure to further develop these experiences.
- Tourists are willing to travel a long distance for these experiences.

Nature-based tourism

Statia has rich natural assets from Mountain Boven to the Quill and the Botanical Garden to Zeelandia. Therefore, hiking the trails on the island is a must-do when visiting Statia. The hiking trails have *"an unprecedented diversity of vegetation"*. *"Cacti and shrubs dominate the lower parts. The farther up you go, the greener and more colorful the plants and flowers become. Climbing the Quill is an absolute must when visiting Statia. At the highest point, the view of the neighboring islands is phenomenal. Then comes the descent into the crater. Here, giant trees and colorful flowers grow in a world all their own. Watch critters scurry over the forest floor, push a Colocasia leaf (elephant ear) aside and new discoveries reveal themselves"*²⁷.

Diving

Statia is a destination where the maritime world remained relatively untouched. *"Statia really has some of the best diving!"* Divers are able to discover a rare biodiversity, with eight different ecosystems that are completely intact. The island offers divers an unparalleled yet pocket sized perception. Ancient shipwrecks, pristine coral reefs, and an amazing assortment of fish and turtles. All concentrated in a carefully protected area of thirty square kilometers. Given this unique selling point of Statia, the tourism product around diving is relatively developed on the island. The dive schools have certified instructors, who also educate tourists about minimizing their impact on the underwater nature. In addition, the dive schools do their own marketing, which contributes to receiving repeat visitors.

Culture and heritage

An opportunity for Statia's tourism product is culture and heritage tourism. Statia is known as 'the historical gem of the Caribbean' due to its rich history and the preservation of heritage on the island. From Lower Town up on the Bay Path to Upper Town, there are numerous stories to tell, mostly from the time where Statia was the Golden Rock. Then there is Fort Oranje which commemorates the First Salute for the independence of the United States of America in 1776, and of which its cannons and bastions still seem to guard the island. Over the island you will still find ruins left from the flourishing 1700's, including warehouses, the Old Dutch Reform Church and the synagogue. There are several museums to visit, including the Lynch Plantation Museum and the Sint Eustatius Historical Foundation Museum. In addition, there are still numerous locals who love to tell others about the culture and history of Statia. Storytelling will help Statia to attract tourists to the island and share stories about the local culture(s) and history of the island and its local community.

*"You see, the thing about Statia is that it is flexible. We have nature and history. You can incorporate all those elements together!" To be noted: cultural and nature-based experiences are statistically tourism's two greatest strengths and can involve substantial market volumes and frequent traveling and high spending customers*²⁸.

²⁷ <https://www.statia-tourism.com/nature/hiking-trails/>

²⁸ http://www.developoptourism.com/Special-Interest-Tourism-and-Niche-Markets_-_Nature-Tourism-and-Cultural-Tourism_-_TDS-Consulting-Services.htm

Community-based tourism

Sustainable tourism development cannot function solely on its own. Instead, it should become an integrated part of the local community. Community-based tourism can help to strengthen the linkages between the tourism sector and the local communities on Statia. The aim is, on the one hand, to maximize the benefits of tourism to the local communities. On the other hand, it is to enhance tourists' experiences, since tourists often enjoy the local experience. Currently, *"there are six homestays. It works. They are fitting good"*.

"When you come here as a tourist, it would be good to also contribute to the local environment, not only by spending money. To do things with locals. Not that this means that you have to start couch surfing, but that you have to roll up your sleeves".
"I find that as for short term, there are things that could be created that tourists could also be a part to get a feel of the island and the people. Not only is the tourist an appreciated guest. The tourist is just one of us. To do things together, which could range from planting trees, giving a helping hand, go fishing with a local fisherman or go to the beach with a local family". "These are stories to come home with and to brag about to others".

On the longer term, Statia would like to be able to attract a form of high-end tourism by means of attracting tourists with yachts and private jets, and to attract and accommodate students to the island.

Yacht tourism

The demand for yachting is increasing because of its features: it satisfies the feelings of freedom, being close to nature and history, sports, adventure and exploration. Conveniently located, Statia is an ideal halt for sailing vessels cruising the Caribbean. It is strategically situated nearby the yachting centers of Sint Maarten and Saint Kitts and Nevis. Thereby, creating the opportunity to use spinoff of tourists from Sint Maarten and Saint Kitts. The ideal situation would be to create a niche market around yacht tourism, where tourists come to the island with their own yachts. *"However, this should not be similar to yacht tourism as it is on St. Barths; where yacht tourism is more mass like and of high-end luxury. It is also good to have for instance just two yachts moored in the harbor, ensuring that tourists can still remain incognito on the island and experience the authenticity of the island"*. Unfortunately, Statia has not yet been able to exploit the yachting market. Currently, Statia has neither marina or boat repair, nor fueling facilities. Lack of these facilities is seriously impacting the development of Statia as a yachting center.

Private jet tourism

The private jet market is growing. It is growing in providers, customers and in aircraft availability. Statia could benefit from these recent trends and developments. Statia could for instance be exploited as a parking center and fueling facility for private jets. It could also benefit from the spinoff of Sint Maarten, since Sint Maarten is accommodating an increasing amount of private jets. For Statia to accommodate private jets on the airport, Dutch and European policies and guidelines must be followed. Amongst other things, this means that the runway must be extended with 300 meters in order to accommodate private jets. This is possible as there is space at the airport to extend the runway. However, there are constraints with respect to complying to Dutch and European policies.

Student-tourism

Statia would like to see a more consistent flow of tourists on the island. *"When it comes to sustainable tourism, we need a consistent flow of tourists coming to Statia. Students doing their studies on Statia can be a consistent flow of tourists to the island. "The youth and student travel market is a valuable segment of the overall tourism market, although it is often dismissed or ignored by tourism operators as youth tourists are wrongly perceived as having little financial value. This is, perhaps, because youth and student tourists are generally perceived as having a low income, and thus little disposable income to contribute towards travel".²⁹ "I was a student once. When I look at the amount of money we spent in a country on a monthly basis, we far outspent a tourist who would come for a week or two".* However, to attract students to the island, Statia needs to have an enterprise or school on the island that can provide that consistency, which they currently do not have. In fact, local students have to go off-island to continue their studies after high school. Thus, this will require, amongst other things, investment. *"Tourism would then be a spin-off".* Another opportunity can be to offer internships for students (abroad) in order to boost student-tourism. This tourism product would help in the diversification of the tourism products on Statia. However, the tourism product still needs to be developed in order to build a niche market around it. So, this would be more something for the longer term to be realized.

7.3. How do we get there?

The strategies below address the highest risk areas in terms of misdirected investment and spending on marketing and tourism product development; setting unrealistic targets for growth, and inaccurate forecasting of visitor numbers, revenue, and employment.

Strategy 1 – Improve data collection and analysis

Obtaining reliable data and comprehensive analysis will empower decision-making for sustainable and competitive marketing and tourism product development.

Action 1 – Exit survey

The STDF has designed an exit survey to collect data on tourists. The exit survey is to be filled out by non-residents only. Please see figure 6, for the content of the survey on what data it collects. This is already a good first step to collect data on tourist profiling. However, the implementation of the exit survey is not being executed in a structural process. Therefore, it is advised to include (the process of handing out and collecting) the exit survey in the tourism policy of Statia to ensure a legal framework around (the implementation of) the exit survey. A possible process could be that the immigration office hands out the exit survey upon arrival of the tourist and requires the tourist to hand in the exit survey upon departure.

Besides the collection of data from the exit survey, the collected data must also be analyzed in order to develop strategic tourism planning and destination management. A database must be maintained for continuous benchmarking.

²⁹ R. Davies & G. Caimcross (2013). Student tourism and destination choice: exploring the influence of traditional, new, and social media: an Australian case study. *Tourism Culture & communication*, 3(1), 29-42

(To be filled out by nonresidents only)

Date:..... Email:.....

1. In which country do you reside?
Country:.....
State/Province:.....

2. Is this your first visit to Statia?
o No, N° of times.....
o Yes

3. What was the purpose of your visit?
o Holidays only
o Business Only
o Holidays & Business
o Friends/Relatives
o Other.....

4. What was the length of your stay?
o Day visit (please proceed to question 6)
o Stay over..... N° of nights

5. Where did you stay?
o Hotel
o Cottage/Guest house
o Homestay program
o Private (Family/Friends etc.)

6. What age group do you belong to?
o Under 20
o Between 20 & 35
o Between 35 & 55
o Over 55

7. What is your gender?
o Male
o Female

8. How did you arrive?
o Air.....
o Private aircraft
o Boat/Yacht

9. How did you hear about Statia?
o Friends
o Magazine.....
o Internet

10. Please give a general rating about the island on a scale of 5 to 10..... (10 being the highest)

11. On average I spent
o \$ 500-1000
o \$1500-2500
o \$ 3000-5000

Figure 6. Exit survey for nonresidents to collect data on tourist profiling

Sub-actions	<ul style="list-style-type: none"> • Finish exit survey • Create collaboration with immigration at the airport • Collect exit survey and process the data in database • Data analysis • Develop tourist profiles
Who is responsible?	STDF
Who is involved?	<ul style="list-style-type: none"> • STDF • Department of E&I • Immigration • F. D. Roosevelt Airport
Budget	
Timeline	Completed by end of 2019
Resources needed	<ul style="list-style-type: none"> • Collaboration with immigration • Database • Employees with data analysis skills
Outcomes	<ul style="list-style-type: none"> • Improved data collection and analysis leading to more efficient and effective marketing spending and higher tourism numbers in targeted markets. • Yearly reporting on research findings from collected data.
Indicators for success	<ul style="list-style-type: none"> • Structured data collection from exit survey • Non-residents filling in the complete survey
Monitoring and evaluation process	After one year of data collection and analysis, this 'model' (process and content of exit survey) will be validated and further refined or re-evaluated.

Recommendations for exit survey

- Include a question on with who and how many persons the tourist is traveling. This will help to collect data on tourist groups. This will also allow to let one tourist of the group fill in the exit survey.
- Include a question regarding the product offerings in terms of key niche markets to identify the travel purpose of the tourist (e.g., diving, nature, culture, heritage).
- Include a question on sustainable preferences, which will reflect sustainability preferences.
- For question 9 and 11 include an extra option: other...
- Question 10 is too vague. What is the rating about? The island being sustainable? The island being friendly? The island being beautiful in terms of nature? It is recommended to change the question into please rate your level of satisfaction on the island. This question can be linked to the travel purpose of the tourist.
- Include question: on a scale of 0-10, what's the likelihood that you would recommend Statia as a tourism destination to a relative or co-worker?
- Include a small space where tourists can give written feedback on anything they would like to share.



Action 2 – Collaboration with CBS on broadening the range of data collection

CBS is responsible for collecting data for the Caribbean territories of the Dutch Kingdom; this includes Statia. The CBS office on Bonaire is the central point for data collection and the publication of statistics. The information published by CBS is about subjects that affect the people in the Caribbean territories of the Dutch Kingdom. For example, economic growth, tourism, income situation of persons and households, and health. So, there is already collaboration between Statia and CBS. However, the range of data collected, particularly for tourism, is limited. For example, the data on numbers of incoming tourists is not divided in actual tourists and business travelers. A conversation with CBS is essential to explore to opportunities of collecting more in-depth data on tourism, including travel purposes of the tourists, tourism spending, demographic information of tourist, and employment rate within tourism sector.

Action 3 – Create partnerships with the tourism businesses to collect data

Tourism businesses on the island most probably collect their own data (e.g., how many customers do they have on monthly basis, where do they come from, what do they seek on the island, level of satisfaction). If not, tourism businesses should be encouraged to collect this data, for instance by means of a guestbook or (online) survey. This data can also be used in decision-making about marketing strategies and tourism product development and to lift the quality standards of the tourism sector on Statia.

Strategy 2 – Monitor success of marketing efforts

Research must be conducted to monitor the success of ongoing marketing efforts and be constantly adapted when required. Success of the marketing strategy must be measured in terms of boosting the awareness and the appeal of Statia. Brand monitoring is important for Statia to be recognized as a high-value destination that offers authentic niche experiences.

Action 1 – Use data from surveys as source of information

In the exit survey, data is collected on how the tourist hear about Statia. Only from this question already, STDF can analyze what marketing effort works or not. For example, if a non-significant number of responses identifies the statia-tourism website as an information source to attract tourists. It is not effective to do a marketing campaign based on the website. If a significant number of responses identifies the 'Vakantiebeurs' as where tourists heard about Statia, it would be effective to develop a marketing campaign at the 'Vakantiebeurs'.

Action 2 – Online sources of information

Technology can be harnesses to monitor the take-up and response by consumers, especially tracking websites, social media and online platforms. Online tools (e.g., Google Analytics) and online review platforms (e.g., Review Pro, Local Measure) and be used to access consumer reviews of accommodations, tours and restaurants. They provide a dashboard of consumer reviews (Google and Facebook reviews, and travel booking and review websites) to gauge standards and tourist satisfaction. The STDF can consider forging commercial arrangements with online platforms, such as Google and TripAdvisor, to analyze their search data.

Strategy 3 – Demonstrate economic values of the tourism sector

Reliable data need to be collected from regional and international tourists to estimate and forecast tourism revenues and employment. This will more accurately estimate the total contribution of the tourism sector to the island's economy (e.g., tourism revenues, employment in tourism sector, tourism as a percentage of gross domestic product, and tourism imports and exports).

Action 1 – Conduct tourism value chain analysis

Value chain analysis provides a step-by-step mapping and assessment of the chain activities involved in the production and delivery of a tourism experience. The value chain approach to tourism covers all stakeholders involved in delivering a tourism experience. Key activities of the tourism value chain encompass a range of processes linked to the tourism sector, such as policy-making and integrated planning; product development, promotion and marketing; distribution and sales; and destination operations and services.

A systematic analysis of the tourism value chain at the local destination level can be a useful tool to trace income flow in the tourism sector. Such analysis identifies which part of tourism income goes to disadvantaged groups, while also determining possible interventions to enhance tourism's local economic impact. Combining value chain development and local economic development strategies can also enhance the functioning of the market system while supporting pro-poor development and employment creation.

Action 2 – Create online visitor survey

Implement an online visitor survey to complement the exit survey, which collect data on:

- the appeal of Statia as a tourism destination
- tourist spending
- business seasonality
- tourist satisfaction (with accommodations, accessibility, transportation, information services, attractions, restaurants, shopping, safety)

This will also help to realize strategy 1. The exit survey only collects limited data on the tourist profile. Expanding the questions on expenditure and niche experience will provide reliable data for use in tourism revenue and demand estimates. By implementing an online survey, the range of data collected can be expanded and the sample size could be increased. This online survey can be published on the website of the STDF. The overall outcome would be to have improved data collection and analysis leading to more efficient marketing spending and higher tourist numbers in targeted niche markets and visitor segments. In addition, this information can be used to monitor and improve quality and service standards of the tourism sector, which will help Statia to become a high-value destination.

Action 3 – Collaboration with CBS

In collaboration with CBS, data must be collected to identify human resource gaps within the tourism sector and forecast workforce-related trends within the tourism sector. This could also be achieved with employment surveys in collaboration with the private sector.

8. More effective marketing and communication

To achieve the tourism vision, destination marketing encompassing the strategic direction must be implemented. An inclusive, holistic approach is essential to achieve the tourism vision. Without a transformation in marketing approach, Statia will not be able to move to a higher yield tourism sector. Tourism marketing and communication needs to be more focused, inclusive and tailored to address specific needs of tourists for coming to Statia. Return on investment for all marketing initiatives should be continuously and carefully assessed. Investment in marketing is for the long-term and cannot always be judged on per-visitor or per-dollar spending. For example, although events, such as Taste of the Cultures, can generate significant publicity, they may not translate directly into visitor arrivals and spending. Although, they can build the destination brand. Furthermore, marketing has a wider responsibility to manage the tourist's expectations and experiences. *"You can only market what you really can offer"*. Rather than continuing to highlight the same attractions, marketing lesser known, off-the-beaten-track spots on the island can encourage dispersal of tourists around the island and help alleviate over-visitation.

It must be noted that the focus of destination marketing should not be on increasing the tourism numbers, but on increasing tourism yield. Using the most effective media channels specific tourists should be attracted that are identified as the target markets.

8.1. Where are we?

Statia is still relatively unknown to the world for the beautiful treasure island it is, especially for people outside of the Netherlands. It is therefore essential to make the outside world more aware of Statia and thereby put Statia better on the map. It must be noted that strategic marketing with an eye on sustainability and sustainable development is essential, no mass tourism. *"We must use all media channels to promote Statia and reach our target market"*. However, *"to market Statia, we need to know our product"*. Moreover, we need to create interest by the tourists. *"Statia should make people curious"*.

Media channels that is currently being used by the STDF and tourism businesses include:

- Social media
- YouTube
- Statia Blog
- Caribbean Television
- Local radio stations
- Websites
- WinAir catalogue
- Magazines
- Local posters

This helps to make tourists recognize Statia. In addition, interviewees believe that word-of-mouth marketing is the most effective, as it spread fast.

Strengths

- Travel in the Caribbean region has been growing. Statia has the ability to attract people already traveling within the region.
- Perceptions of Statia as a tourism destination are largely positive albeit not widely known.
- Statia is well positioned to be marketed as an authentic tourism destination, including unique culture and nature-based experiences.
- Statia has the Bronze QualityCoast Award which can be used in marketing and promotion.

Challenges

- Statia as a tourism destination is relatively unknown to the world.
- Statia does not yet fill a niche as a high-value destination in terms of high-quality tourism products.
- Absence of a holistic approach to marketing and communications from overarching tourism policy to strategic planning.
- Marketing and communication strategies have not been adapted to the trend and developments in the market or to market requirements.
- STDF is faced with challenges in implementing and executing marketing and communication strategies due to lack of expert assistance, and due to funding limitations.

8.2. Where would we like to be?

The goal is to have Statia on the map well-known to the outside world. For example, *"when people search for marina services on Google, Statia should be within the first 5 search results"*. *"In order to make Statia known to the outside world and execute effective marketing, it would help to focus more on storytelling and to have a PR office in the US and Europe, because that is where most of the tourists come from"*. *"I think storytelling is the most important here. Storytelling towards the community as well, make them feel proud of the things going on. Tell about it, also abroad. Let people tell their stories about Statia, whom have been here, whom who want come back. Things like that are good PR. I do not believe in advertising for Statia, it does not fit"*.

"A good story sells the island. Social media is of course important, but PR in this case is very important".

"You need to market more. Go out there. Let our voices be heard. Make it a priority". However, make sure to *"market Statia on its own merits! You can develop its merits. But you do not need to incorporate someone else's identity in order to make the island prosperous. Statia identity should be there. The entire region should know what is Statia!"* *"You could also promote entertainment on the island. So, you can have more activities, like you have Statia-week. This brings people to the island and at the same time you are showcasing local artists and local music"*. *"We could also have more advertisement of traditional customs, performances and dances. It is just something to help out to promote the locals too and bringing them out of their shell"*.

And while some of the interviewees argue that Statia should be more promoted, others argue that the tourism product should first be strong and well-structured before Statia is marketed in the world. *"We must only promote our island when we have a strong tourism product in place!"* In addition, they argue that the island must first be able to provide its own local communities with the basic needs prior to accommodating tourists.

"We should aspire to be us, be Statia".

8.3. How do we get there?

Strategy 1 – Enhance brand

*"Destination branding is about combining all things associated with the 'place' (e.g., its products and services from various industries – agriculture, tourism, sports, arts, investment, technology, education, etc.) that collaborate under one brand. Its aim is to capture the essence of the destination, in a unified manner, and can be consumed simultaneously at a symbolic and experiential level. It is then used to market those unique added values to consumer needs and sustaining its success in the face of competition."*³⁰

Action 1 – Brand development

It is essential to have a well-defined brand and to communicate this brand identity to be recognized as a sustainable destination with authentic experiences. The brand must be made available to the tourism sector on Statia, so that Statia is consistently identified by this brand. Figure 7 shows attributes a brand must have. Figure 8 displays the brand development process. Figure 9 shows the current logo used for tourism purposes.



Figure 7. Brand attributes



Figure 8. Brand development process

³⁰ Alastair M. Morrison & Donald J. Anderson. Purdue University.

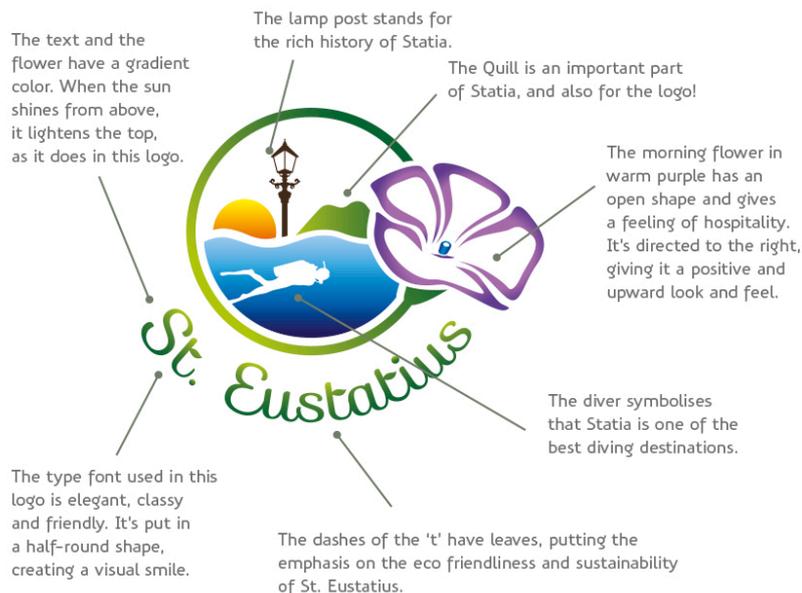


Figure 9. Current logo of Statia that is used for tourism

Action 2 – Develop a marketing plan

A marketing plan outlines the overall marketing approach that will be used to promote a tourism destination. It helps to guide the marketing decisions by assigning tasks, choosing marketing messages, and allocating funds to promote the destination. It solidifies what you will say and how you say it to attract potential tourists to your destination (see table 3). Marketing plans create a customized action statement that the STDF can follow and use to measure the effectiveness of each marketing campaign involved in the effort. A successful marketing plan requires specific information about the tourists who visit Statia and what they want while they stay on Statia. For this the visitor segments of chapter 7 can be used. Steps to take in creating a marketing plan include:

1. Define goals that your marketing strategy will help you achieve. Use the SMART framework for goal-setting. SMART refers to:
 - a. Specific
 - b. Measurable
 - c. Achievable
 - d. Relevant
 - e. Timely
2. Identify target audience – who are we marketing to?
3. Compose the message – what are we promoting?
4. Audit existing assets (e.g., website, blog, offers, forms, social media).
 - a. What can be used to support the new tourism marketing strategy?
 - b. What needs to be optimized?
 - c. What should be scrapped altogether?
5. Define marketing strategy – what approach do we take for achieving the goals?
6. Define marketing tactics – what tactics will be used to execute strategy?
7. Define a firm and realistic marketing budget.
8. Identify timeline to execute marketing plan.
9. Identify the roles and responsibilities of stakeholders to ensure implementation of the marketing plan.
10. Define process for monitoring and evaluation of marketing efforts.

Table 3. Communications strategy formulation

Step	Heading	Questions to ask yourselves
1	Issue	What do you need to communicate?
2	Objective	What do you want to achieve or what needs to change?
3	Target audience	Who can help you to achieve this? To whom do you need to talk? Who do you need to inform/persuade?
4	Audience characteristics	What is the audience like? How can you best communicate with them?
5	Key messages	What is your message? What are the facts and figures that back it up?
6	Communication tools	What will deliver your message to your audience?
7	Evaluation	How can you check that what you are doing works?

Action 2 – Storytelling

Storytelling is one of the key elements of guiding tours, especially in historically significant towns where lot of interesting events has taken place. Storytelling is all about being enthusiastic, capturing your audience's attention and allowing the tourists to feel as though they are part of the story.

Develop oral histories by interviewing community members, including youngsters and elders, to create collection of stories about local history, lifestyle, events, and cultures. These stories could be used for marketing purposes, to sell the authenticity of Statia. Also, vloggers of influencers could be used to tell share stories about Statia with their followers.

Action 3 – Build partnerships

- Statia can be promoted more at Sint Maarten, as it has the opportunity to profit from the millions of tourists arriving yearly at Sint Maarten. A partnership with businesses on Sint Maarten will help to inform tourists about Statia and trigger them to visit Statia.
- The Caribbean Tourism Organization (CTO) provides for an opportunity to promote Statia as part of the Caribbean. This organization has knowledge and expertise on tourism management and marketing.
- Nederlands Bureau voor Toerisme & Congressen (NBTC) is another organization with knowledge and expertise on branding and marketing.
- Use QualityCoast (network) for marketing efforts, and for connecting with specialized marketing and communications agencies for sustainable tourism.
- STDF can also build partnerships with the tourism businesses on the island itself to create joint efforts in marketing the island and the businesses.

Strategy 2 – Embrace digital platforms

The most important element of marketing in this age is digital marketing. Online and social media platforms are the first source of information for traveling abroad. Tourists use their smartphones and tablets throughout their trips, so travel companies and the STDF (responsible for destination marketing) have multiple opportunities to communicate and connect over a longer period of time. Embracing digital media means Statia can remain relevant for longer as a tourism destination.

Action 1 – Update STDF website

A key priority for each tourism destination is to have a visually striking, highly functional destination website that is rich in content, customer friendly and mobile responsive. It should contain:

- The island's vision and mission
- The tourism products and experiences the island has to offer
- Details of tourism businesses on the island (accommodations, tour operators, attractions, retail, arts, restaurants, tour guides)
- Promotional editorials
- Interactive events calendar

The STDF has a destination website www.statia-tourism.com. However, this website is at certain levels outdated. Recommendation are:

- Publish Statia's vision and mission
- Update the events calendar. It now contains events of 2017.
- Update information on tourism businesses.
- Update Statia's characters.
- Rephrase the mission of STDF linked to the island's vision.
- Do not encourage tourists to take blue beads of the island.
- Include sustainability best practices of the island.
- Focus more on storytelling on the website as a means for marketing.

Action 2 – Provide market feedback

Provide market feedback on specific attractions, by for instance using TripAdvisor or something similar. Benefits are:

1. It provides tourists a medium to give feedback on Statia's tourism product offerings.
2. It serves as a form of quality check on Statia's tourism product offerings.
3. It provides potential tourists with the guidance they seek when planning their trip.
4. When the product is of high quality, it helps to attract potential tourists to Statia and experience its tourism products.

Strategy 3 – Use events to showcase products

Organizing events on the island provides exciting experiences to tourists and have potential to generate popularity and promotional coverage to attract potential tourists. In addition, it has potential to generate additional economic impact to local communities. Attending events regionally and internationally gives Statia the podium to promote its own island and assets, and thereby attract potential tourists.

Action 1 – Participate in selected events

Actively participate in carefully selected events to deepen Statia's relationship with key industry partners and to showcase Statia and its tourism products. Events can include:

- Trade shows
- Exhibitions
- Conferences

A strategy should be developed for each event clearly outlining:

- The objectives to be pursued
- The basis upon which the success of the effort will be judged
- The resources needed
- The division of tasks of the participating delegation

Action 2 – Organize annual benchmark event

Sub-actions	<ul style="list-style-type: none"> • Develop idea for benchmark event • Collaborate with international/regional event planners • Involve stakeholders and local communities • Promote event • Ensure sufficient accommodations • International package deals and season passes
Who is responsible?	STDF
Who is involved?	<ul style="list-style-type: none"> • Festivity Committee • Musical Foundation • Local government
Budget	
Timeline	Completed by end of 2020
Resources needed	<ul style="list-style-type: none"> • Collaboration with stakeholders • Special rates for accommodation • Ferry service • Itineraries for tourists • Promotional material (images and videos)
Outcomes	<ul style="list-style-type: none"> • Promotional coverage of the island • Attracting potential tourists
Indicators for success	<ul style="list-style-type: none"> • Increased amount of tourists • Positive reviews on the event and the island • Increased media coverage
Monitoring and evaluation process	<ul style="list-style-type: none"> • Collect feedback by means of survey and social media • Collect data from the hospitality sector • Open suggestion poles • Call in shows post event for feedback

Checklist for organizing events

- **Define the aim of the event.** What are your aims in organizing the event? Is the idea of the event the most appropriate to achieve your goal? What benefit will you gain from the event?
- **Define the target group(s).** Which target group do you want to address? Is the idea of the event appropriate for the chosen target group?
- **Be aware of the relevance of the event.** Is the event topical in the present situation? How can the event benefit the target group?
- **Verify place and date.** Can the selected place accommodate the planned number of visitors? Is the selected place easily and comfortably accessible to your target group? Is any another similar event being organized on/near the selected date?
- **Assess the time, financial and human resources needed to organize the event.** How much time will be needed for an appropriate preparation of the event? How much will the organization of the event cost? What human resources (skills, talents and contacts) are needed for the organization process? What resources do you have, and what should you still involve? Is it possible to attract the necessary resources?
- **Identify which rules and regulations apply to the organization of public events** (for example, laws and procedures regarding events, security and medical assistance, insurance, copyright, and of course the regulations that exist about the use of the protected area).
- **Take a decision about the organization of the event.** ³¹

³¹ <http://www.eceat.org/images/Practical,%20profitable,%20protected%20%20MB.pdf>

Action 3 – Create events calendar

Many types of events can be organized on the island. The challenge is to create a balanced programme or events calendar by coordinating existing events and organizing new events in order to fill any gaps in your calendar. A well-planned, diverse and appealing events calendar can more evenly distribute major events throughout the year, and create demand for accommodations and services, outside of traditional peak periods. The events calendar should include:

- Date and time of the event
- Location of the event
- If applicable, fee of the event
- Title of the event
- Type of event
- Short description of the event
- Links to more information

Publish this on the STDF website and make sure to update this on a frequent basis.



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9. Lift quality standards within the tourism industry

Statia must enhance best practices to preserve the island's natural and cultural heritage and attract the right type of tourists to the island. Tourists that are inclined to respect the core values of Statia (see figure 10). The global trend is also towards more environmentally friendly and socially conscious tourists seeking authentic experiences who are selective in their travel accommodations and spending choices. Tourists are becoming more and more responsible and looking for sustainable destinations. This rapidly growing group of tourists is more inclined to support and spend more on high-quality service, high environmental standards, authentic community engagement, and evidence of community support and well-being.

Statia needs to position itself competitively against destinations with a similar comparative advantage in nature-based and culture-based experiences. Being a sustainable destination will help to achieve this comparative advantage. In addition, with information flowing freely in this digital age, Statia cannot afford bad reviews on service standards, attractions, health and safety, environmental and cultural heritage management, and community interactions. Therefore, it is essential to lift quality standards at specific touch points that will improve the high-value reputation of the tourism sector of Statia and of Statia as a sustainable tourism destination. In addition, a concerted effort must be made to lift quality standards in order to deliver the best touristic experiences outlined in chapter 7 and chapter 10. The improvement of quality standards is essential for:

- accommodations
- attractions
- events
- information services
- tours



Figure 10. Core values of Statia

9.1. Where are we?

Various issues have an impact on the quality of tourism products and services in the tourism industry, including:

- Managing and protecting natural and cultural assets
- Sustainability performance
- Customer service
- Information facilities

Currently, Statia takes numerous initiatives to improve the quality of tourism products and services in the tourism industry, including:

- They have identified protected areas on the island to protect and manage flora and fauna.
- They have developed a nature policy.
- They are currently developing a culture policy framework.
- They are member of QualityCoast, which provide global certification to sustainable tourism destinations and allows monitoring of its sustainability performance.
- 'Statia Serves' project that provides hospitality training.

However, there is still room for improvement, including:

- Policies are not consistently enforced.
- Tourists are actually motivated to take blue beads home as souvenirs. While the blue beads belong to the cultural heritage of Statia.
- Create awareness and education about the relevance and importance of Statia nature and culture.
- Improve sustainability practices concerning management and reduction of waste, water and energy.
- More recommendations of the QualityCoast Jury can be reviewed in the Jury Report 2016³².

QualityCoast

QualityCoast is a sustainability award for coastal communities, towns and islands, led by the Coastal & Marine Union (EUCC). With the QualityCoast programme (www.qualitycoast.info), EUCC aims to establish an international network of coastal communities that share similar values on sustainable and socially responsible tourism, at the same time maintaining high standards in the quality of their tourism offer.

QualityCoast offers reliable and transparent international Award programmes and a certification option for destinations with serious ambitions for a good sustainable tourism policy. The Awards and certifications are issued for periods of two years. The programme also offers an assessment of the visible sustainability (performance, or sustainability status) in a broad range of categories and criteria, since tourists are not only interested in policies, strategies, ambitions and plans, but especially on how they experience a destination.

Participation of destination management organizations in the Award programme improves their awareness performance and achievements in an international context. The comparison with other awarded destinations provides the community with a good picture of its strengths and weaknesses. The international assessment and recommendations by the international Jury provide local authorities with a guidance to be considered in an agenda for improvement.

³² http://www.qualitycoast.info/?page_id=2965

Communities join a network of like-minded communities and share their experiences and best practices in order to improve sustainability and social responsibility in tourism. Their performance in these fields is connected to international tourism marketing through certification under the supervision of an independent international Jury issuing the Awards.

EUCC carries out a marketing campaign together with the Awarded destinations to promote them as the most attractive destinations for visitors interested in nature and landscape, environment, and cultural identity and to highlight their performance in tourism quality and sustainability. The marketing campaign includes promotion at holiday fairs, media publicity, wide dissemination of brochures, promotion via our various web sites and social media.

The community's own international tourism marketing can profit from the status of QualityCoast destination. Experience in several countries learns that this will continue to generate media publicity nationally and internationally. Sustainability based marketing efforts will increase the "green profile" of the destination both externally and internally and this will help mainstreaming sustainability on local policy and decision making.

Strengths

- QualityCoast Assessment
- Wealth of natural and cultural assets.
- Nature and culture policy framework to manage preservation and protection of natural and cultural assets.
- Spatial Development Plan marking the protected areas and provide guidelines for development.

Challenges

- Quality standards for accommodation and service providers vary greatly. There is little management, monitoring, or enforcement of best practices, professionalism or quality. This is particularly prevalent in the hospitality sector.
- Absence of tourism impact assessment on natural and cultural assets.
- There is no effective quality standard or certification system in place yet for accommodations, tours, events, attractions and retail businesses that measures and encourages their sustainability performance. This limits Statia's capacity to:
 - a. Provide consistent guidance to businesses and organizations on how to improve their sustainable performance.
 - b. Provide tourists with the ability to identify and indicate a preference for best-practices.
 - c. Assist in promoting Statia as a sustainable tourism destination (by highlighting the best practices) to the tourist segments in chapter 7.
- No enforcement of policies (e.g., blue bead is taken as a souvenir of island by tourists).
- There is generally limited information present at most sites (e.g., clear indication of hiking trails, limited signage at cultural sites). Tourist information regarding health, appropriate conduct with respect to nature, culture and the communities is minimal.

9.2. Where would we like to be?

Statia has beautiful nature, unique culture and rich history as unique selling points to attract tourists to the island. However, tourists will only come when these assets remain unspoilt. Therefore, it is essential to actively preserve and protect Statia's natural environment and cultural heritage in order to attract and accommodate tourists in the future. In addition, it is important to preserve and protect the island's identity and core values in order to remain unique and to respect the local communities.

Another aspect that is of high importance is improving hospitality on the island. The majority of the interviewees believe that the customer service is a critical point for improvement. *"Where our service industry is concerned, there need to be changes, there need to be improvement". "Our service industry suck. If we could provide a better service on the short term, then at least those that are here enjoy more". "Good customer service is lacking. For example, talking friendly to customers, serving drinks in the correct way, explaining what is on the menu, etcetera".* So, hospitality training or customer service training is needed. These trainings could be provided to learn employees within the service industry how to clean rooms, how to serve meals, how to ensure hygiene, etcetera. There is an existing project, 'Statia Serves', where trainees receive hospitality training. However, this should be available for everyone in the tourism sector and it should be at a consistent level.

Supply of goods and services must also be improved to cater tourists. *"Sometimes you can only choose three things of a whole menu, because the restaurant is out of supplies. Even worse it that they only tell you this when you are ordering a specific dish. So, you end up disappointed because you cannot eat what you actually wanted to eat. It would make a huge difference when the staff tells you in advance 'I am sorry, but today we only have goat meat and chicken'".* In short, *"we need a consistent level of quality"*.

These improvements will also be beneficial for locals. The overall outcome must be for tourists as well as local communities to have easy access to reliable information and services, feel safe, and be impressed by sustainable performance, social responsibility, and service standards on the island.



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9.3. How do we get there?

Strategy 1 – Improve the quality of customer service and hospitality

In the tourism industry, the success or failure of businesses and the destination depends on the quality of service. Good customer service helps to turn customers, including tourists, into ambassadors of the business and destination they visit.

Action 1 – Develop and introduce a quality standard for businesses and organizations

A quality standard must be developed and introduced for businesses and organizations to ensure quality, but also to have a consistent quality standard within the tourism sector. Another possibility is to embrace an existing (international) quality standard.

Objectives for having a quality standard in tourism sector:

- Improve the overall quality of products and services within the tourism sector.
- Raise the levels of demand on the island, regionally and internationally.
- Promote competitiveness within the tourism sector.
- Provide valuable and reliable information on quality standards for the tourists and the travel industry.

An example of assessment criteria that should be included in the quality standard for accommodations include:

- Facilities of the accommodation
- Cleanliness
- Information about the island
- Value for money
- Hospitality

Overall strategy: evaluate the current tourism quality standards situation through negotiations with tourism stakeholders, and identify customers' needs and expectations.

Step 1 – review existing criteria for tourism businesses

- Review existing criteria for various facilities and services and evaluate these according to local, regional and global best practices and competitive environment
- Identify gaps and constraints
- Make appropriate recommendations on modifying and/or upgrading the existing criteria

Step 2 – establish and formulate new criteria

- Identify for which facilities/services/sectors criteria need to be established
- Formulate criteria in line with national/regional needs and considering international industry practices and competitive environment
- Prepare initial criteria drafts
- Introduce criteria drafts to industry stakeholders
- Prepare final criteria and support the approval process

Step 3 – implement and assess criteria

- Establish assessment responsibilities and procedures
- Plan assessment and inspection
- Guide assessment findings and result definitions

Step 4 – capacity building of assessors

- Evaluate assessor capacities, knowledge and expertise levels
- Identify gaps and constraints
- Make recommendations for most suitable capacity building methods
- Compile and provide assessment supporting tools (knowledge, reference manual)
- Provide training

Step 5 – communication of criteria

- Criteria launch press conference
- Industry workshops for key tourism stakeholders (accommodation sector, owners, investors, tour operators, transportation companies, tourism related service partners)

Step 6 – criteria and quality control

- Familiarization of criteria
- Define controlling tools and methods (for tourism businesses themselves) (check-lists, documentation, reports, use of technology, etc.)
- Agree and establish control procedures
- Plan timeline and execution³³

Key issues to consider when developing a quality standard:

- Standards – will you have just one standard, or different levels?
- Assessment – how will compliance be judged? Self-evaluation, the STDF, or independent assessors?
- Timescale – how often will assessments take place?
- Sanctions – if quality fails, how will members be informed?
- Cost to participants – will they pay the cost of assessment and marketing?
- Trademarking – should the quality standard develop its own brand?
- Publicity – how will the quality standard be publicized to provide market benefits to participants?

Action 2 – Training and development for staff

Ensuring high tourist/customer satisfaction is critical to the sustainable growth of the tourism industry. To ensure that the tourism industry delivers a great tourist experience, it is essential that the workforce has the skills necessary to deliver a high-quality service. Please see table 4 for potential training topics. This requires a sound training culture with the tourism industry. Training is also a sustainable investment, it can be shared across organizations, is relatively cheap and does not rely on expensive infrastructures.

Training and development within the private sector can be realized by having a partnership with Sint Eustatius Business Association (STEBA). STEBA takes a leading role in the economic development of the island by taking initiatives in the following areas:

- Attract investment
- Promote Statia's business interest abroad
- Carry out studies that lead to business opportunities
- Educate Statia business community through workshops, lectures and courses
- Encourage Statians, particularly young people to become entrepreneur³⁴

³³ <http://cooperation.unwto.org/technical-product/quality-standards-tourism-services>

³⁴ <https://www.facebook.com/pg/St.EustatiusBusinessAssociation/about/>

Table 4. Potential training topics

Nature guiding – how to visit the area
Wildlife identification – animal species, flora, fauna
Hosting – how to welcome tourists
Customer service – how to serve customers
Local history – buildings and events
Local culture – songs, stories, music, and legends
Preservation management of nature and culture

Sub-actions	<ul style="list-style-type: none"> Investigating training needs: identify missing skills in the team and find out with the employees what they would like to be trained in. Identify training supply: what training can be offered by your staff, other stakeholders or third parties? What are the areas of expertise they have? Establish goals and measures to evaluate results and outcomes of the training with the employees. Evaluate the outcomes of the training.
Who is responsible?	Each organization or business is responsible for the development of their own staff.
Who is involved?	<ul style="list-style-type: none"> STEBA ROA STDF E&I Culture Department
Budget	
Timeline	2019, ongoing
Resources needed	<ul style="list-style-type: none"> Learning goals of the employees Teacher Location Education material
Outcomes	<ul style="list-style-type: none"> Motivated employees Skilled workforce High quality service delivery
Indicators for success	<ul style="list-style-type: none"> Customer satisfaction Motivated workforce Improved performance of employees (productivity and quality of work)
Monitoring and evaluation process	<ul style="list-style-type: none"> After the course, the employees must evaluate the relevance and usefulness of the training using for instance surveys or talk to the teachers. After half a year the manager and employee should together evaluate the employee's performance. These feedback conversations should continue on a frequent basis of half a year or a year (depending on the circulation of the workforce). Use feedback conversations to also listen to the needs of the employees concerning additional training or their needs/expectations from the managing staff (what do they need from the manager).

Benefits of customer service training for the organization/business, employees and customers:

- **Higher employee motivation and engagement.** Providing training on customer service allows employees to understand their role in the organization/business. An organization/business that invests in skills training indicates their commitment towards continuous staff development and progress. Thus, inspiring employees to become more engaged in the organization/business and more motivated towards delivering better services to customers.
- **Improved customer service skills.** Through customer service skills training, employees are able to improve their skills and/or acquire new ones. Specific customer service training focus on improving communication, listening, problem-solving and organizational skills. Training employees on the same set of competencies gives them a standard process to deal with customers and creates a sense of team spirit.
- **Increased customer satisfaction.** Improving the quality of your customer service through training leads to an increase in customer satisfaction, retention and loyalty. The improved manner that employees interact with customers leads to the consumer feeling appreciated and respected. This appreciation is critical to the success of the organization/business.
- **Rise in profit.** Improved customer service plus increased customer satisfaction plus increased customer loyalty contributes to an increase in profit. ³⁵



credits to Cees Timmers. www.statia-pictures.com

³⁵ <https://fjijisun.com.fj/2018/09/01/customer-service-skills-training-popular-with-tourism-industry/>

Action 3 – Introduce uniforms for staff

Benefits of staff uniforms:

- **Create an attractive business image.** For better or worse, society tends to judge people by how they dress. Selecting an appropriate employee uniform can immediately establish a professional business image that attracts and helps retain customers.
- **Promote your organization, business or brand.** When employees wear uniforms displaying corporate logos and colors, they help brand and differentiate their business in the markets they serve.
- **Free advertising.** Well-designed work uniforms worn in public become “walking billboards,” promoting a company’s products and services “for free.”
- **Foster team spirit.** Work uniforms promote a sense of team spirit and a sense of belonging. This, in turn, can improve worker productivity.
- **Employee benefit.** Employer provided uniforms save employees money, and when provided as part of a Rental Program, eliminate employee laundering time and expense.
- **Improve customer relationships.** Work uniforms helps to make the staff easily recognizable, thereby improving overall customer service. It must be prevented to have customers coming into the establishment but knowing who to approach for help.
- **Promote company pride.** Work uniforms help instill a sense of pride and responsibility and can convert employees into “brand ambassadors” outside the actual workplace.
- **Improve health and safety.** Uniforms help to protect staff in the workplace and to maintain high standards of hygiene. In the kitchen environment, staff uniforms can help in protecting the workers from equipment, heat, and chemicals. Some uniform items can also help avoid accidents and injury, for example, non-slip safety shoes, aprons, hats, and gloves. This also helps in maintaining hygiene especially during preparation and serving of food.

Strategy 2 – Enhance preservation, presentation and management of natural and cultural assets

Guidelines, codes of conduct and management plans must be implemented to preserve natural and cultural assets while providing high-value touristic experiences. For example, guidelines and evaluation procedures to assess the infrastructure and facilities in touristic sites can help ensure consistency of delivering the experience. These infrastructure and facilities include parking, retail, toilets, rest facilities, and signage. It is essential to continuously evaluate sites and to integrate recommended actions for improvement. The overall outcome is to encourage public and private sector, local communities and tourists to contribute to the protection, preservation and enhancement of Statia’s natural and cultural assets.

Action 1 – Develop codes of conduct

Codes of conduct are voluntary sets of guidelines that aim to influence behavior of tourists and/or activity providers. They can be communicated to the users and tourists on interpretation panels, leaflets at visitor centers, and by activity providers to their customers. Topics that may be included in codes of conduct are:

- Environmentally responsible behavior (e.g. stay on trails, no littering, set up camp responsibly, use biodegradable detergents, minimize use of firewood, etc.).
- Socio-culturally sensitive behavior (photographing local residents, visiting places of worship, etc.).
- Responsible company management and ethics (qualification of guides, employment conditions, etc.).

Developing a code of conduct for tourists and activity providers will help to minimize the effect on nature, environment, cultural heritage and local communities.

Action 2 – Organize awareness campaigns on safeguarding nature and culture

More awareness and education about the relevance and importance of nature and culture on the island, and how to protect these will most likely increase locals' interests in engaging in eco-tourism and cultural tourism. In addition, they will be able to help protect and maintain Statia's assets. Efforts to promote cultural continuity ensures that the knowledge and skills of local communities are passed on from one generation to the next. This is vital as the rehabilitation of cultural sites often depends more on the strength of intangible heritage, rather than solely the strength of tangible heritage.

It is highly recommended for schools to encourage youngsters to further their studies in history or cultural studies. The tourism office should be more involved in fostering tourism awareness within the schools along with other stakeholders. Also, awareness campaigns on reducing the use of water and energy and reducing waste should be a key priority. For instance, a lot of lights are still on in the middle of day, where it is not necessary to have the lights on.

Strategy 3 – Facilitate the use of best practices (on sustainability)

To be a high-value destination and be able to provide authentic experiences, Statia needs to elevate tourist services in the public and private sector, including ports of entry and exit, accommodations and attractions. It is useful to monitor quality standards and customer services. Periodic data gathering can take place by using short customer satisfaction surveys for tourists as well as for locals. The tourist survey will moreover help to understand tourist preferences and profiles, which feeds visitor segmentation as described in chapter 7. Best practices can be used as examples to improve quality throughout the tourism sector.

Action 1 – Use QualityCoast Assessment as a measuring and monitoring tool on sustainability performance of the island

As mentioned earlier, the QualityCoast Assessment helps Statia to identify, monitor and evaluate its sustainability performance in the tourism sector. Every two years, Statia should conduct the assessment in order to evaluate its sustainability performance and to identify the areas for improvement. The assessment needs to be filled out online via the QualityCoast portal (see figure 11). The Jury provides the strengths and weaknesses, and based on that they also provide recommendations for improvement. Statia can learn from this and there improve its sustainability performance. In paragraph 6.3, it is mentioned that the Tourism Taskforce is responsible for making Statia a sustainable tourism destination, and is thereby also responsible for the QualityCoast Assessment. The overall outcome is for the island to learn and improve its performance based on the assessment. It must be noted that the taskforce should not wait until the next assessment to take place, but must be committed to improve its performance continuously during these two years. It is essential that the Tourism Taskforce (in this context) helps:

- To develop a system to monitor, publicly report, and respond to environmental, economic, social, and cultural heritage issues;
- To monitor residents' aspirations, concerns, and satisfaction with tourism, to be regularly recorded and publicly reported.
- To establish a multi-year tourism strategy that is publicly available, is suited to its scale, that considers environmental, economic, social, cultural, quality, health, and safety issues, and was developed with public participation.

0. Destination characteristics		4. Culture & tradition	
93%		100%	
General information	1-10 ⓘ	Cultural heritage	1-3 ⓘ
Scope of the assessment	11-13	People & tradition	4-5 ⓘ
Sustainability Success Story	14		
1. Destination management		5. Social well-being	
85%		95%	
Commitment & organisation	1-5 ⓘ	Human respect	1-7 ⓘ
Planning & development	6-13 ⓘ	Community participation	8-12 ⓘ
Monitoring & reporting	14-20 ⓘ	Local economy	13-16 ⓘ
Legal & ethical compliance	21-26 ⓘ	Social impact	17-19 ⓘ
		Health & safety	20-22 ⓘ
2. Nature, scenery & animals		6. Business & hospitality	
100%		95%	
Nature & conservation	1-5 ⓘ	Business involvement	1-9 ⓘ
Nature & animal experience	6-7	Information & marketing	10-15 ⓘ
Landscape & scenery	8 ⓘ	Hospitality	16-19 ⓘ
3. Environment & climate			
100%			
Land use & pollution	1-5 ⓘ		
Water management	6-9 ⓘ		
Sustainable mobility	10-13 ⓘ		
Waste and recycling	14-16 ⓘ		
Energy & climate change	17-18 ⓘ		
Climate change adaptation	19-20 ⓘ		

Figure 11. Quality Coast standard as shown on the main page of the portal as part of the Quality Coast assessment

Action 2 – Encourage tourism businesses to participate in QualityCoast program.

The QualityCoast assessment and recommendations can help to evaluate sustainability performance and facilitate the use of best practices on destination level, as well as on business level. QualityCoast developed a new program for businesses and organizations to get a certificate for their sustainability performance, including waste, water and energy management. Based on a number of criteria, QualityCoast measures the sustainability performance of these businesses and organizations. Benefits include:

- QualityCoast helps to encourage businesses and organizations to operate sustainably.
- QualityCoast assessment offers a tool to measure, monitor and evaluate the sustainable performance of businesses and organization and thereby identify how well they are doing.
- QualityCoast offers recommendations for improved sustainability performance.
- Best practices are highlighted to be used by businesses and organizations.
- Businesses and organizations are able to use the QualityCoast certification and logo for marketing and promotion.
- Businesses and organizations are able to use the QualityCoast network.

It is recommended to encourage businesses on Statia to participate in this new programme.

Strategy 4 – Improve tourist information, signage and interpretation

Tourist information and interpretation need to be emphasized, including accurate signage, tourism office, and online information. This is necessary to enhance the quality of tourist experiences and encourage independent travel on the island. Well-signed hiking trails, viewpoints and cultural sites will encourage tourists, especially return tourists, to explore the island more comprehensively and enjoy multidimensional touristic experiences.

Guides and tour operators must be trained, so that they can:

- Speak in front of groups of people and develop narration skills.
- Develop organizational and leadership skills.
- Obtain knowledge of the tourism products.
- Educate visitors about lesser-known sites that are of interest from a natural, cultural or historical perspective.
- Meet the needs of the tourists.
- Enhance the quality of the information and experience.

Action 1 – Develop tourist information guide

This guide should include tourist information about the specific attractions, sites and trails on Statia. It should also include do's and don'ts with respect to the environment, nature, culture, local communities, and safety.

Action 2 – Improve trail signs

It is necessary to develop a map with the hiking trails on the island as well as ensure clear directional signage of the trails, so tourists can independently hike the trails. There are hikers that are adventurous and rather hike without a guide. Currently, the hiking trails in and around the Quill have directional signage by means of ribbons. However, they are easily missed or they have fallen of the trees. Thus, making the trails unclear for hikers and thereby increasing the risk to get lost. Therefore, it is essential to find alternative ways to improve the directional signage of the trails. It is recommended to choose materials, colors and designs that is in harmony with the surroundings, reinforcing the unique selling points rather than distracting attention from these qualities. Furthermore, use as much local materials, involve local crafts and use local (historic) designs.

Trail signs should be used to communicate with the users. The signs can be divided into different groups:

- **Identity and direction signs.** Display information such as trail name, the type of trail, distance to destinations, intersections with other trails, points of interest along the trail route and the level of expertise required. Signposting should be placed at intersections and forks, and possibly shortly after them as a check that the user is on the right route.
- **Use signs.** Indicate what is permitted or prohibited on the trail, such as smoking, use of matches and littering. The signs are best placed at access points.
- **Safety signs.** Display warnings concerning underpasses, street intersections, blind comers, wildlife, etc.
- **Interpretive and protective signs.** Indicate natural resources, historical points of interest and other unique selling points of the area.

Action 3 – Enhance and maintain tourism signage throughout the island

Signage throughout the island must be improved, including:

- When tourists come of the aircraft or boat, they must feel welcomed and informed. For example, place a text of 'Welcome on Statia' by means of a billboard or flowers.
- Place a map at the airport and harbor in the form of a billboard, which displays key attractions and experiences on the island.
- Place road signs pointing to key attractions on the island pointing the direction and displaying (walking) distance.
- Place information boards at key attractions, important places, and heritage to inform tourists what the attraction, place or heritage is about.



10. Enhance, enrich and diversify the tourism product

A successful and sustainable tourism sector is defined by the unique selling points of tourism destinations. These tourism destinations also have combined attractions, facilities, accessibility, human resources, image and prices to match their supply and demand dynamics. Public-private partnerships, ongoing dialogue and collaboration, and joint planning between stakeholders underpin such tourism destinations.

Statia has not been systematically, proactively and continuously engaged in tourism planning and has not been using an integrated approach. Statia should therefore establish tourism planning that can effectively build Statia into a sustainable tourism destination by preserving, developing and implementing an integrated tourism destination plan, while facilitating sustainable destination management. Tourism planning is especially important for the government, and so that resources can be directed where they can provide the greatest benefit.

Tourism planning enables key catalytic projects to be developed so that other projects may follow. Examples of these key catalytic projects are roads, airports, marinas, urban regeneration and accommodations. In the case of natural, cultural and historical attractions, institutions that are not directly involved in the tourism sector provide many of these catalytic projects, which means that a whole-government approach to planning and development can greatly contribute to accelerating tourism growth.

Tourism planning

Tourism planning – the process and outcome – is the first and most critical tool to address fragmentation of human and financial resources, and to distribute tourists and tourist experiences. The tourism economy involves a set of touristic experiences delivered by many organizations in the public and private sectors. It is essential that they work together to better use and manage resources, which strengthens the quality of the tourist experience and the performance of businesses.

By strengthening the tourism economy, services that local communities enjoy, such as restaurants, attractions, heritage and entertainment, will also benefit. Actions directly aimed at making the island a better place to live and work will also make it a more appealing place to visit. Destination planning can play an important role in identifying how local services (e.g., transport, nature management, culture, arts and leisure) can support the tourism economy. By showing these links, tourism can be considered more as a core contributor to economic and social development.

Statia seeks a greater diversity of tourists to stay longer and spend more on the island, rather than focusing primarily on an increased number of tourist arrivals to the island. Every tourist should have a positive and unforgettable experience so that they return home as ambassadors and advocates for Statia. And in the most ideal situation even visits Statia again. Achieving these outcomes depends on a broad tourism-related infrastructure that caters to multiple interest groups and price points.

An important starting point is to identify the tourism product (including attractions, accessibility and facilities). The tourism product can:

- Harness the natural, cultural and historical values of the island.
- Disperse tourism over the island.
- Diversify the range of tourism experiences for tourists.
- Provide opportunities for poverty alleviation and employment.
- Provide opportunities for business and investment.

Roads

The roads on Statia are poor. However, the local government is currently improving the roads on Statia. The majority of the local residents use cars as a common means of transportation. Cycling is not really promoted as the roads do not have cycling lanes. Due to the small size of the island, there is no public transportation. Taxis and rental cars are a common means of transport for tourists. Due to the short distances and uncrowded roads, traveling by car is fast and most convenient.

Air

As an island, Statia is heavily dependent on access by air. Currently, WinAir is the only airline providing flights from and to Sint Maarten. This leads to the situation where WinAir has a monopoly position and the tickets are very expensive. *"It costs an arm and a leg to fly from here to Sint Maarten". "At least if we had another airline then we had a choice, and the fares would not be so extravagant. Because it cost you almost more to go from here to Sint Maarten than from here to the United States"*. In addition, Statia is heavily dependent on the international airport of Sint Maarten. Efforts must therefore focus on attracting a second airline that provides flight to and from Statia and on expanding routes to other destinations besides Sint Maarten. Statia could for instance look at the opportunities to collaborate with Saint Kitts, since the island also has an international airport and there minimize dependency on Sint Maarten International Airport.

Furthermore, Franklin Delano Roosevelt Airport of Statia provides limited facilities. The airport is built to support small aircrafts. A small single-story terminal building processes passengers and baggage, and also serves as the customs area. A two-story tower is attached, but the airport has no control tower. There are no jetways or services, and a small apron allows for aircraft passenger to disembark.

Sea

Currently, Statia has neither a marina nor boat repair and fueling facilities. According to Hoogenboezem-Lanslots et al. (2010), *"due to lack of suitable terminal facilities, cruise ships do not call at Statia"*³⁶. This must be developed in order to improve the harbor of Statia and thereby attracting vessels to the island. According to a local, *"ferry services to the island are possible, because Statia has an open harbor. That means that if a ferry comes to the island, it has to moor in the open sea, where tourists will have to be transported to the island by smaller boats. However, tourists are often not willing to do this"*. There are a small fishing boats who sometimes take tourists and locals to Saba and Saint Kitts. However, there is no guarantee when and at what time these fishing boats go to the other islands. Nor do tourists often know where to find these fishermen to see who is going to other islands. Furthermore, it is risky to go on the rough sea by these small boats. So, either the harbor must be renovated, or ferries must be technically developed in a way that:

- It can moor at the Statia harbor;
- It can handle the rough sea;
- It has a significant speed to overcome the distances in a short time period from island to island.

Furthermore, it must be noted that to make the ferry service attractive for locals and tourists, the fares should be significantly lower than the airfares.

³⁶ Hoogenboezem-Lanslots, K. M. A., Schenau, Y. M., van Leeuwen, R. J., Briene, M. F. M., & de Freitas, J. A. (2010). St. Eustatius Strategic development plan. <http://uploadvijn.burovijn.nl/uploader/Vijnuit/Niet%20verwijderen/FinalSDP.pdf>

Strengths

- Significant cultural and heritage sites, and (protected) nature areas around the island.
- Friendliness of the people on the island.
- Relatively small island with short distances between touristic attractions.

Challenges

- Limited systematic implementation of existing plans and projects.
- Poor infrastructure around numerous touristic areas, including roads and street lights.
- Non-international airport with basic facilities, but with planned upgrades.
- Limited vital connectivity infrastructure by air and by sea.
- Limited telecommunications and internet.

10.2. Where would we like to be?

It must be noted that there is a need for diversification of the tourism products that Statia has to offer, if we are to seriously view tourism as a means of economic development. Currently, Statia's dive tourism is relatively developed on the island. Opportunities for the creation of tourism products are in the areas of nature/ecotourism, and cultural and heritage tourism. The island is rich in cultural heritage and historical sites with a well-established nature park³⁷. Statia can offer these products, however it needs to be developed and showcased more, in order to have a strong product in place.

The majority of the interviewees believe that the quality of the tourism product should be improved. Especially when it comes to catering the more high-end tourists who would require more luxury, the island needs to improve its tourism products. Tourism income will not only increase if an increasing number of tourists come to the island. Tourism income can also increase when a single tourist spends more money on the island. It is therefore important to count the dollars instead of the heads. For example, cruise tourists can rapidly outpace the growth in stay-over tourists. However, they often spend no more than one day on a destination. Stay-over tourists oftentimes remain the engine of growth for the tourism industry, because they stay longer and spend more a day. Therefore, it is essential to improve the quality of the tourism product. The better your product the more money a tourist is willing to spend.

The majority of the interviewees argues that Statia including the local residents is not ready yet to accommodate (significant amounts) of tourists, because they do not have a strong and high-quality product yet. *"I think the island and we ourselves need to be prepared first in order to attract more tourists to the island." First of all, it is essential to have the infrastructure in place, including airport, harbor, roads, telecom, drinking water facilities and accommodations. Currently, there are developments regarding to improving the infrastructure". "At the beginning of 2019 the airport will be renovated. The old terminal will be exploited as a parking place for private jets. As of December 2018, Statia will have more airlift. EZ Air will fly on daily basis from and to Statia."* This might break the monopoly position of WinAir, which will certainly lead to lower airfares. These are significant opportunities for tourism. The harbor, including its entrance facilities needs to be improved. There are also plans to develop a boulevard. The roads are currently being renovated. A new eco-resort is being built near Knippenga Estate. This eco-resort can accommodate high-end tourists, and maybe in the near future even 'private jet tourists.

³⁷ STDF. (2016). Supplementary Financial Support 2016.

Some interviewees believe that locals need to be creative in organizing events and developing activities, “because we have not much in Statia.” These events should comply to the needs, interests and identity of local communities. However, others believe that it is precisely this feeling of not having to do anything that makes Statia special. It is just escaping the world and relax on Statia. Also, “*you can dive here, but there is a lot of competition within the region. The hiking here and running away from wild pigs, I mean that is really a thing. That is Statia. I think for Statia, the value is that it is in first instance not equipped for tourism, but it is prepared. And I think that is exactly the right feeling. You can feel the informality here: ok you are welcome but excuse us the room is like this. And of course, it can be improved, but not in a way to overdo it.*”

10.3. How do we get there?

Strategy 1 – Implement integrated tourism planning

Based on the Tourism Vision Plan, tourism planning must be executed in order to develop the destination. Key local stakeholders will need to be consulted in the planning process; this is covered by the mechanism of the tourism taskforce. The stakeholders can be involved in implementing the tourism plans, prepare events, monitor clean-up programmes, organize awareness campaigns and develop networks. The STDF will provide leadership to these organizations through the tourism taskforce and work closely with them.

Action 1 – Develop niche market development strategies

To ensure the supply side is considered, develop niche market development strategies for each of the identified existing niche markets. Identification of weaknesses and/or challenges within the existing niche markets and tourism products is necessary in order to improve its quality. Tourism planning must then be established that is consistent with this Tourism Vision Plan.

Strategy 2 – Diversify tourism products and create signature experiences

To bring additional value to the tourism experience, it is essential to provide a diversity of experiences and higher standards. This would expand the tourism product offering and open touristic experiences to a wider range of tourists, increasing the island's competitive advantage. A strategic tourism development process involves ensuring that the tourism infrastructure, accessibility, services and accommodations meet the needs of the tourists.

Preserving the authentic areas is just as important as creating and enhancing new experiences, for example The Strip. Clear regulations, codes of conduct and construction guidelines should be in place to prevent large-scale developments and enforce environmentally friendly business practices, including restricted use of plastic, waste recycling and reduction of the use of water and energy.

Action 1 – Improve the quality of existing tourism products

Improving the quality of existing tourism products can include:

- Diversification of the hiking trails – different lengths and degree of difficulty in order to provide high-quality experiences to different types of tourists.
- Improved signage and information facilities to and at the key attractions.
- Enhanced protection of Statia's coastline, viewpoints, cultural heritage and natural assets.
- Legislation, such as a beautification act to prevent significant visual pollution.

Action 2 – Support introduction and development of new tourism products

Although it is essential to improve the quality of existing tourism products, we must also avoid getting caught up in the existing products. Therefore, it is also important to develop new (innovative) tourism products.

- Define, with the Tourism Taskforce and/or other stakeholders, potential products on Statia that would fit the vision, mission and strategic direction.
- Embrace private sector and individuals who would like to create a new tourism product.
- Coordinate and collaborate with (regional) stakeholders.
- Create new itineraries based on (new) tourism products (with tour operators on the island).
- Develop short promotional videos and images.

Strategy 3 – Improve connectivity and infrastructure to enhance (existing) products

Inaccessibility and limited connectivity have been identified by the interviewees as the main weakness of Statia as a tourism destination. The local government is responsible for the connectivity and infrastructure on the island. In addition, the STDF should advocate support of initiatives to improve connectivity, including improved airport and harbor. The STDF should work with public and private aviation industry stakeholders to identify potential new charter flights and permanent route additions, and align marketing initiatives to support these routes.

Action 1 – Attract a second airline

Attracting a second airline to provide flights between Sint Maarten and Statia will help to create competition for WinAir and thereby reduction of the airfares. In addition, opportunities must be discovered to benefit from the international airport on Saint Kitts, in order for Statia not to be solely dependent on the international airport of Sint Maarten.

Action 2 – Develop ferry service from and to Saba, Sint Maarten and Saint Kitts.

Ferry services to Saba, Sint Maarten and Saint Kitts would also increase the connectivity of Statia. Small passenger ships sometimes moor for one day at Statia. Tourists have then the opportunity to spend multiple hours discovering the island before leaving to the next destination. More passenger ships should be attracted to Statia to increase its connectivity, but also to develop its tourism sector.

Action 3 – Upgrade airport

Improvements of the airport can include:

- Develop parking facilities for aircrafts and private jets.
- Develop fueling facilities for aircrafts and private jets.
- Develop welcoming atmosphere towards incoming passengers at the airport.
- Develop entertainment for travelers, such as shops and restaurants.
- Enhance the runway to accommodate larger aircrafts and private jets.
- Increase accessibility of the airport to all.
- Develop washrooms.

Action 4 – Upgrade harbor

Improvements of the harbor can include:

- Develop a marina.
- Develop boat repair facilities.
- Develop fueling facilities.
- Develop entertainment facilities for travelers.
- Renovate and enhance the boulevard area.

11. Improve workforce and local involvement

An empowered tourism workforce and engaged stakeholders and local communities will contribute considerably to high-value visitor experience. High-value tourism tends to be more labor intensive, because group sizes are generally smaller, and tourists prefer more-personalized accommodations and experiences. It provides significant jobs and skilled opportunities for locals, although it demands a high level of intuitive services and enhanced skills to provide niche experiences.

People are a core element of sustainable tourism, and part of the tourism mission is to ensure that tourism creates benefits for the local communities of Statia. Tourism can be an excellent source of revenue, particularly in destinations with limited livelihood prospects. Here, it also provides opportunities for education, training, and meaningful employment in a range of hospitality services, such as accommodations, tours, events, attractions and performances. Creating tourism benefits especially for local communities, will contribute to poverty alleviation on Statia.

Development of small businesses and community-based tourism can strengthen local economies and investment in infrastructure and services that are shared with the communities (e.g., roads, transport, recreation facilities). On a deeper level and in line with the strategic direction of Statia, engagement of local communities in tourism can foster preservation of history, culture and traditions that might otherwise be lost. It can also renew a shared sense of local pride, ownership, and care to protect the authentic elements of Statia. Positive engagement between tourists and local communities can be an excellent vehicle for fostering cross-cultural awareness, understanding and peaceful relations.

To realize benefits, it is critical that:

- Communities are aware of the potential benefits of tourism and that tourism is perceived as a viable employment opportunity and career option.
- People are aware of and can access meaningful training and employment.
- Tourism roles and working conditions meet best-practice standards.
- Communities have support in learning how best to host tourists to capture these benefits.
- Support is available to help small businesses and community-based tourism preserve traditional arts, crafts, music, language, dance, dress, history, locations, artefacts, traditional medicine and healing, styles of growing and preparation of food.

Without a dedicated focus on this element, there is a risk that Statia will lose much of the unique identity and culture that is a key attraction for tourists. The island would miss out on potential employment, opportunities for poverty alleviation, small business development, and revenue that could all be funneled directly into community development.

11.1. Where are we?

With respect to the workforce, the tourism sector is labor-intensive, which requires a wide variety of skills from employees. Employers, tourists and sometimes even locals themselves are complaining about limited soft skills from employees within the tourism sector, including attitude, cooperation and appearance; skills that are particularly important in a service industry like tourism. Having the right people on the right job is crucial to Statia becoming a high-value destination. In order to meet the needs and expectations of the tourist, the skills base of Statians need to be expanded and upgraded. Other significant human resource challenges that have been identified by locals, include labor shortage and retaining current employees. Recruiting, retaining and training employees are all critical elements to business successes and the quality of the touristic experience.

With respect to local involvement, Statia currently offers six homestays. Furthermore, locals are involvement in tourism through the annual Sustainability Conference organized by the STDF. Statia could benefit more when they will create opportunities for locals to be directly involved in tourism, including:

- Jobs
- Small business development
- Selling locally-made products
- Performances as part of staging
- Local cuisine

Strengths

- Public sector is willing to review existing structures that understands the need for change to ensure that goals and objectives are achieved. There is a desire for strong learning development and training framework.
- The people on the island are friendly and speak multiple languages, which offers an advantage for developing high standards of local community involvement and interaction.
- There are already six homestays on the island, ensuring some level of local involvement in tourism.

Challenges

- Limited capacity and resources to attract, retain and train employees.
- Brain drain: educated and experienced locals migrate overseas for employment that may offer better remuneration and career development prospects.
- Employment in the tourism and hospitality sector is not always a preferred career option as it is considered as low status jobs.
- Current tourism products have limited opportunities for community interactions. There are significant opportunities to celebrate and experience Statia. This would involve the local communities in activities (e.g., local crafts, cultural wear, music, traditional food).

11.2. Where would we like to be?

With respect to the workforce, action is needed to enhance the tourism sector's attractiveness as a source of decent work and meaningful careers; to strengthen employee retention; to improve work conditions and advance effective, continual skills training. Please see more on the essence of an engaged workforce in chapter 9.

With respect to local involvement, *"locals want to relive a little of the Golden Rock days"*. Sustainable tourism might help to relive those days. However, not only the government and the STDF have an important role to play in the sustainable tourism development on Statia. The interviewees believe that the locals themselves must also play a role. *"Tourism is all of us!"*. According to the interviewees, locals should make the tourist feel welcome, be friendly, help to develop the island and promote Statia. *"We are supposed to open our doors and sell the island"*. *"Local people should educate themselves to sell the island"*. *"Everyone needs to do their full share"*. Moreover, *"we need to collaborate in order to be successful"*.

The majority of the interviewees believe that *"the ideal situation for sustainable tourism development on Statia is when sustainable tourism development and local development go hand in hand. For instance, infrastructure should not only be improved to accommodate tourists, but also to accommodate local communities"*. It must be ensured that local communities benefit from tourism on Statia.

Tourism can generate significant benefits for local communities in small island developing states. Tourism can promote social development through its impact on job creation, income redistribution and poverty alleviation. Also, improvements in infrastructure can spill over into the rest of the island economy, leading to more services, such as improved access to transport, electricity, water and sanitation³⁸.

In addition, it is important that young entrepreneurs are motivated. They could for instance participate in the program of community-based tourism, start their own Bed and Breakfast, sell local products or develop touristic activities. *"In that way, you can involve locals in the sustainable tourism development"*. *"Maybe someone wants to become a bicycle repairman. This would require bicycle rental. So, there is a catalyzation process there"*. However, locals should be encouraged to be creative and find a gap in the market. They should not all start the same businesses, only because they see that it is working for their fellow Statian. Furthermore, *"locals should be creative in exploiting opportunities and developing initiatives. This will make the island more attractive"*. *"There are locals that can do stuff. They are very talented and creative! But at the same time, they are very shy. You want to put more confidence in them. Tell them that it is ok to proud of yourself and of the island!"* *"They need to be more confident that they could show the pride"*.

³⁸ <http://www.sids2014.org/index.php?menu=1582>

11.3. How do we get there?

Strategy 1 – Promote employment and career opportunities in tourism

To ensure that development of the workforce accompanies tourism sector growth, recruitment must be scaled up by improving perceptions of the tourism sector and career prospects in the sector.

Action 1 – Launch public awareness campaigns focusing on two key messages.

1. The tourism sector holds a wide variety of opportunities for Stadians.
2. All Stadians have a role to play in sustainable tourism development, from a life-long career to simply being friendly to tourists.

Action 2 – Speakers at school

Launch a speaker series where successful entrepreneurs and professionals (from all levels) speak to students about their own personal opportunities and success in the tourism sector. This could also be organized in the form of career days.

Action 3 – Organize awareness campaigns

Various annual awareness campaigns should be implemented targeting different segments – community members, families, women, workforce, youth. Topics to be covered include:

- Tourism career choices
- Salary and working misconceptions
- Career progressions
- Hotel and services workplaces
- Family support

With the use of mainstream and social media, these awareness campaigns must be prioritized and creative. This can be further strengthened by using events, such as street theatre workshops and open house initiatives at hotels, to help demystify employment in the tourism industry and attract potential employees.

Action 4 – Support starting (local) entrepreneurs

It is essential to support (local) entrepreneurs, especially at the start of their business. Therefore, it is recommended to inform potential entrepreneurs on the preconditions to start a business. In addition, (local) entrepreneurs can also be supported in terms of funding, tax benefits and networks.

Strategy 2 – Prioritize training and development

Training improves skills, knowledge and a sense of responsibility. The outcomes of training depend on many factors, such as quality of the training package, proportion of technical skills and soft skills, industry experience and level of skill of the instructor or trainer, training center facilities for practical demonstration, and exposure to the industry of trainers and trainees. If any of the above factors are not in place, it is difficult to achieve the expected outcomes of the training. Soft skills training is critical for service excellence and ensuring improvements in attitude and a sense of responsibility.

See more on training and development in paragraph 9.3, action 2 – Training and development for staff.

Strategy 3 – Involve local communities in tourism

Greater community engagement and inclusivity by ensuring communities benefit from tourism, fostering sense of pride and recognition of the significance of Statia's natural and cultural assets as a repository of tradition, history and values.

Action 1 – Enhance homestay program

Homestay programmes can be enhanced by:

- Providing training to initiators (hospitality and (entrepreneurial) knowledge)
- Marketing and promotion of the homestays
- Offering tourist activities around the area
- Enhancing community participation and commitment
- Introducing quality standards for the accommodation
- Increasing the ability of relatively poor people to participate
- Creating activities with locals, where tourists can give a helping hand within the community

Action 2 – Make locals tourism-minded through public awareness campaigns

Produce monthly/periodic local publication that provides information about what is happening in the tourism sector and the wider community. Include:

- Showing appreciation of the various tourism initiatives by the locals and local enterprises.
- Encouraging locals to exploit the potential of resources within their communities for purposes of small business development geared for the tourism sector.
- Encouraging locals to find employment in the tourism sector.
- Encouraging locals to interact with tourists.
- Encouraging local to take advantage in opportunities to participate in the decision-making process.
- Encouraging locals to participate in activities aimed at natural and cultural heritage preservations.
- Encouraging locals to participate in training and awareness programmes which would enhance their ability to play a positive role in sustainable tourism development.

Action 3 – Create a community space

Create a community space, for instance at Fort Oranje. This space could be used for information, sell local products, markets, music, local arts, crafts and food, for both locals and tourists.

Action 4 – Collect feedback from locals

Not only is it important to collect feedback from tourists, it also is to collect feedback from the local communities. Tourism can only work on Statia if local communities embrace tourism on the island. Therefore, it is essential to have insight in the level of satisfaction of locals with respect to tourism. Based on this, improvements can be made to for instance maximize tourism benefits for locals. Feedback can be collected by means of:

- Call in show on the local radio
- Surveys
- Short interviews by the STDF

Recommendations

This Tourism Vision Plan is the result of successful collaboration between 'de Rijksoverheid', 'het Openbaar Lichaam Sint Eustatius', non-governmental organizations on Statia, the private sector of Statia, and the local communities of Statia. This means that this vision plan is supported by all the involved parties, and more importantly by the local communities of Statia.

This vision plan outlines strategies and actions that can be undertaken to facilitate sustainable tourism development and thereby move towards the realization of the tourism vision of Statia. Additional to the above, I would like to put emphasis on the following recommendations:

- Statia should not be developed into a mass tourism destination. It cannot and should not accommodate mass tourists, since it is essential to value, enhance, preserve and protect the island's nature, culture, history, local communities and identity. Also, to ensure that Statia remains 'the Hidden Gem of the Caribbean'. Therefore, it is recommended to develop the tourism sector on Statia in terms of quality, and not specifically in terms of quantity.
- The tourism sector must be developed in a sustainable manner ensuring long-term benefits and long-term economic development of the island.
- The strategies and actions in this Tourism Vision Plan are neither prioritized, nor are they all-encompassing. Therefore, it is recommended to the Tourism Taskforce to discuss the strategies and actions and decide what actions should have priority. They can also execute other actions, other than included in this vision plan, that they feel are more effective to achieve the objectives.
- Structural evaluations of the developments within the tourism sector of the island is essential to have insight in the current situation and identify points for improvement.
- It is recommended to use QualityCoast as a baseline to monitor, evaluate, and improve the sustainability performance of Statia.
- Strong governance and coordination is essential to ensure focus and increased quality performance of the different institutions and organizations.
- Sustainable tourism development of Statia must be inclusive with stakeholder engagement and community involvement, in order to be successful. It is recommended to ensure that everyone on the island benefits from tourism.
- The Tourism Taskforce should operate in a structural way with the goal to meet the tourism vision collaboratively with the stakeholders involved. Therefore, strong leadership of the taskforce is recommended.
- Connectivity of Statia is essential for tourism development and must therefore be one of the priorities to improve.
- It is recommended to focus on extensive marketing efforts when the tourism products are well-defined, and well-developed in terms of quality. Meanwhile, Statia can still do marketing. Incoming tourists will create tourism revenue for the island. However, this should not yet have the priority until the tourism products are improved. Marketing should only be done when Statia really can deliver what it promises in their marketing efforts to potential tourists.
- Sustainable tourism development is an ongoing process where there is always room for improvement. When it comes to realizing the tourism vision, there is still a lot to be done. Therefore, it is recommended to build capacity in terms of expanding the workforce in number of employees, and improving skills and capacities of existing employees. In addition, it is recommended to use networks Statia has within the region and the Dutch Kingdom (for best practices, expert knowledge, and support).

Appendix A – Methodology

Vision formulation process step by step

Step 1. Conduct in-depth interviews

In-depth interviews were conducted with Openbaar Lichaam Sint Eustatius, stakeholders and local residents of Statia. Questions that were used during these interviews can be found in appendix B. Based on the interview transcripts, insight with respect to sustainable tourism development on Statia was created, including:

- The current situation
- The ideal situation
- Key opportunities
- Key challenges

Step 2. Organize vision workshops

On the 21st and 22nd of January 2019, visions workshops were organized from 10.00h to 13.00h with stakeholders. The overall goal of the vision workshops was to develop working plans which allows the execution of potential quick wins (that contributes to realizing the tourism vision of Statia), with commitment of and in collaboration with stakeholders. Stakeholders had to develop working plans within their own group. Please see table 5 for the participating stakeholders and group division.

Table 5. List of stakeholders present in the vision workshops³⁹

Group 1 – PR <ul style="list-style-type: none"> • E JL Services BV – waste management • STDF • Triple M Restaurant 	Group 2 – Marketing & sell our culture <ul style="list-style-type: none"> • STDF • Butterfly Tours N Travel • Made in Statia – local farmer
Group 3 – Sell local products <ul style="list-style-type: none"> • Chamber of Commerce • Sint Eustatius Historical Foundation • Knippenga Resorts • STUCO • E&I 	Group 4 – Organize annual benchmark event <ul style="list-style-type: none"> • STDF • Golden Era Hotel • E&I • 4-Piek Services N.V. – Tour operator

The workshops were structured in the following way:

Step 1. Creating consensus

- Present the findings of the interviews, including the list of actions.
- Ask the workshop participants if this is the complete picture. Does this correspond their thoughts/opinions? Are we missing something?
- Reach consensus that will be used as starting point for the actions.

Step 2. Identify quick wins

- Present action list as included in appendix C.
- Let the participants label actions from easy/difficult to implement and little/lots of effect. Please see the figure 13 for the tool used to label actions.
- Identify quick wins based on the COCD-box (see figure 14 for the results).

Step 3. Make the working plan

- Let the groups decide what action they would like to make a working plan for.

³⁹ The group was last minute divided in this way due stakeholders who were not able to (last-minute) participate in the workshops.

- Let the groups develop a working plan for the execution of the action (see figure 14). Working plans must take into consideration the preconditions as displayed in table 6.
- In this way, ownership and commitment from the stakeholders is created.

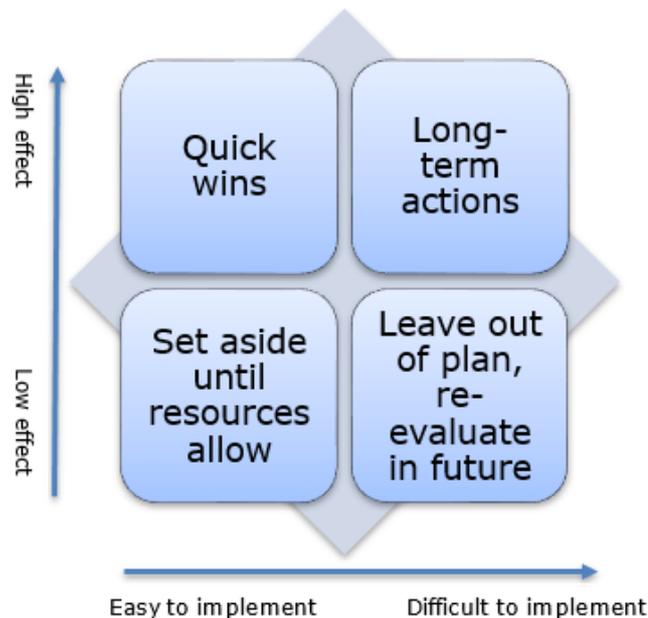
Step 4. Peer feedback

- Let the groups present their working plan to fellow participants.
- Groups will provide feedback to each other and incorporate feedback in the working plan.
- Present the final working plans. (Please see the final working plans of the groups in tables 7-11)
- In this way, collaboration and communication is created. This is especially useful when certain quick wins involve multiple stakeholders.

Table 6. Preconditions of the working plans

<p>Preconditions for the working plans</p> <ul style="list-style-type: none"> • What action needs to be taken? • Who should be responsible and involved • When does the project start and end? • What resources are needed? • How will this action be monitored and evaluated? • What are the indicators for success/milestones for monitoring and evaluation?

Figure 13. COCD-box used to identify quick wins



Quick wins: actions that are easy to implement within an estimated time frame of one year, and which have high effects on sustainable tourism development.

Long-term actions: actions that have high effects on sustainable tourism development, but are more difficult to implement. These actions will have an estimated time frame of 5 years.

Set aside until resources allow: these actions have little effect on sustainable tourism development, but are rather easy to implement. Due to little effect, these actions are not given priority. Therefore, these actions can always be executed when time and resources exist.

Leave out of plan, re-evaluate in future: these actions are not realistically achieved, since the difficult implementation outweighs the little effect of the actions.



Figure 14. Identification of quick wins in the upper left square by the workshop participants

Table 7. Working plan: PR

Sub-actions	<ul style="list-style-type: none"> Develop communication plan to focus your message and reach target audience
Who is responsible?	STDF
Who is involved?	<ul style="list-style-type: none"> Government Private sector
Timeline	Before you start, take the time to get really close to the product. Work with product team to understand the problem
Resources needed	<ul style="list-style-type: none"> Advertisements in the form of news stories or reviews in newspapers Find PR office that fits your needs Collaboration with stakeholders
Indicators for success	<ul style="list-style-type: none"> Number of tourist arrivals Number of increased airlift Number of tourism spending
Monitoring and evaluation process	Have regular meetings with board members, stakeholders and staff members.

Table 8. Working plan: more marketing

Sub-actions	<ul style="list-style-type: none"> • Find something that is unique • Find points of interest • Define tours • Define history
Who is responsible?	STDF
Who is involved?	<ul style="list-style-type: none"> • Government • Private sector
Timeline	Five year project
Resources needed	<ul style="list-style-type: none"> • Social media • Billboard • Flyers • Brochures • Money • International television
Indicators for success	<ul style="list-style-type: none"> • Community awareness • Number of tourists • Employment rates • Mentality of locals
Monitoring and evaluation process	Supervisory board

Table 9. Working plan: sell our culture

Sub-actions	Identify own culture (music, cultural wear, local dish, greeting)
Who is responsible?	Culture Department
Who is involved?	<ul style="list-style-type: none"> • STDF • Local communities • Network partners
Timeline	Half year project
Resources needed	<ul style="list-style-type: none"> • Material • Designer • Tailor • Local suppliers
Indicators for success	Community awareness
Monitoring and evaluation process	<ul style="list-style-type: none"> • Culture department • Supervisory board • protocol

Table 10. Working plan: sell local products

Sub-actions	<ul style="list-style-type: none"> • Identify what local products we already have • Develop other possibilities • Support what is already there • Motivate others to start • Create platform for people to get the information and support them through starting their own business
Who is responsible?	Sint Eustatius Foundation
Who is involved?	<ul style="list-style-type: none"> • Private sector • Chamber of Commerce • STEBA • Government
Timeline	Completed by end 2021 – two year project
Resources needed	<ul style="list-style-type: none"> • Human resources • Funding • Promotion • Policies to protect local market
Indicators for success	<ul style="list-style-type: none"> • Quality of products • Quantity of products • Quantity of local entrepreneurs • Data from businesses
Monitoring and evaluation process	After two years evaluate how many local entrepreneurs are still going with their businesses, whether they are still growing, and how many products were actually sold (to tourists)

Table 11. Working plan: organize annual benchmark event based on Carnival

Sub-actions	<ul style="list-style-type: none"> • International package deals and season passes • Collaborate with international/regional event planners • Invite troupes to come to Statia to take part in the parade • Sufficient accommodation/places to stay • Timely planning • Quality improvement • Marketing: promotional videos (capture the moments, entice new visitors/revelers) • Improve service • Join regional/international membership groups • Collaborate with sister island Saba
Who is responsible?	Sint Eustatius Carnival Committee
Who is involved?	<ul style="list-style-type: none"> • STDF • Festivity Committee • Musical Foundation • E&I • Government
Timeline	July 2019
Resources needed	<ul style="list-style-type: none"> • Money • Cooperation with other stakeholders • Support from local government • Special rates from hospitality sectors • Ferry service • Itineraries
Indicators for success	<ul style="list-style-type: none"> • Increased revelers by sending invitations to leaders abroad • Member of popular carnival associations • Improve product • Better service • Safe carnival
Monitoring and evaluation process	<ul style="list-style-type: none"> • Survey • Data from hospitality sectors • Social media feedback • Increased media coverage • Call in shows post event for feedback • Open suggestion poles

Appendix B – Questions for interviews

Identity

Can you please tell me something about yourself? (personal characteristics, culture, education, family background)

Who are Stadians of today?

What core values are important in the Stadian community?

What are Stadians good at?

What are Stadians not good at?

What are Stadians proud of?

What do you NOT want to see lost or changed?

What do you want to see lost or changed?

How do you want to be seen by the world?

What do you want Stadians to be remembered for?

What is an acceptable level of change in your community?

Is there anything else you would like to share with me?

Tourists

What would you like to share with tourists/visitors?

What would you advise them to see?

What do you think tourists come for to Statia?

What do you think tourists demand when coming to Statia?

What kind of tourists do you currently see on the island?

What kind of tourists should Statia be able to attract?

What kind of tourists would you like to see on the island?

How do you think we can attract them?

In what way do you think tourists should adapt to locals (when you think about the core values of the community)?

Destination

What are your favorite things to do on Statia?

What does Statia has to offer to locals and tourists?

What should Statia offer to locals and tourists?

What makes Statia different (from the other islands in the region)?

What type of destination is Statia currently?

What type of destination should Statia be?

What tourism activities does Statia currently offer?

What tourism activities should Statia offer?

Do you have any (crazy, out of the box) ideas on tourism products or tourism experiences that Statia could sell?

Vision (please look for sustainability concepts in the answers or ask additional questions to let them also think about these concepts).

Where would you like to see tourism developing in the next five years?

Why should Statia develop its tourism sector?

What do you think is the added value of tourism on Statia?

What would be the most ideal situation with tourism on Statia?

How do we accomplish this ideal situation? What do we need?

How much of what type of tourism development fits with your image of your destination's future?

What do you want to see happen?

What do you NOT want to see happen?

What challenges is Statia facing when it comes to tourism development?

What should be the short term goals for tourism development on Statia?

What should be the long-term goals for tourism development on Statia?

How would you like to be involved in the tourism development on Statia?

How could you contribute to the development of the destination and/or tourism?

How could the local government contribute to the development of the destination and/or tourism?

Do you have ideas on how we could achieve that locals directly benefit from tourism on Statia?

Appendix C – List of actions

This list includes actions that were mentioned by the interviewees that in their opinion needs to be executed to facilitate sustainable tourism development on Statia.

- Develop map with trails on the island
- Improve information facilities at airport and harbor
- Improve information facilities for locals – where to get funding?
- More airlift
- More sealift
- Organize benchmark events
- Have a bus to drive tourists around
- Organize sunset cruises
- Create re-enactment of historic events through plays and tours
- Promote sustainability standards by entrepreneurs (by creating incentives)
- Develop code of conduct for tourists
- Develop opportunities to attract flights through the international airport of Saint Kitts
- Develop yacht tourism
- Develop strategic and effective marketing campaigns
- Target journalists for press coverage
- Encourage use of local food
- Develop more sights
- Develop more walking tours with trails
- Exploit Historic Core
- Develop 5 star hotels to accommodate high-end tourists who come for tranquility
- Develop fortification routes
- Showcase artifacts
- Tell stories about the history of the island
- Develop zip line or cable carts at the Quill
- Increase accessibility to all
- Develop more exciting tourist activities
- Create exposition of local artists
- Organize field projects for students
- Develop Bed & Breakfasts
- Develop parks for children
- Sell local products
- Develop Fort Oranje for touristic purposes (museum, shops, fortification route, wedding venue)
- Create car-free Historic Core
- Develop community center
- Encourage local entrepreneurship
- PR
- Organize local markets
- Collect data
- Share traditions
- Showcase culture
- Promote sustainable transportation - electric driving
- Minimize cars by introducing new ways of transportation
- Develop tour packages (with sister islands)
- Regional collaboration