



Montserrat Tourism Strategy 2019 - 2022

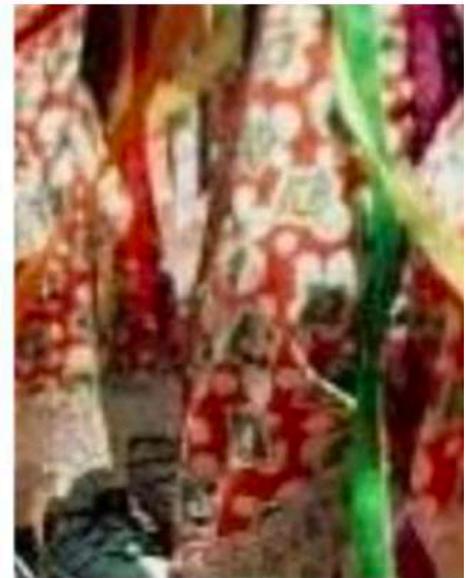


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LIST OF ACRONYMS

| | |
|---------|---|
| AI | Artificial Intelligence |
| CARICOM | Caribbean Community and Common Market |
| CAST | Caribbean Alliance for Sustainable Tourism |
| CHTA | Caribbean Hotel & Tourism Association |
| CLIA | Cruise Lines International Association |
| CROSQ | CARICOM Regional Organization for Standards and Quality |
| CTO | Caribbean Tourism Organization |
| DOT | Division of Tourism |
| ECCB | Eastern Caribbean Central Bank |
| ECIT | The Eastern Caribbean Institute of Tourism |
| EIA | Environmental Impact Assessment |
| EU | European Union |
| FDI | Foreign Direct Investment |
| GDP | Gross Domestic Product |
| GOM | Government of Montserrat |
| HRD | Human Resource Development |
| LIAT | Leeward Islands Air Transport |
| NGO | Non-governmental organisation |
| NTO | National Tourism Organisation |
| OAS | Organisation of American States |
| OECS | Organisation of Eastern Caribbean States |
| PPCP | Public-Private-Community Partnership |
| PPP | Public-Private Partnership |
| TMP | Tourism Master Plan |
| TII | Tourism Intelligence International |
| UNWTO | United Nations World Tourism Organization |
| UWI | University of the West Indies |
| VFR | Visitors to Friends and Relatives |
| WTTC | World Travel & Tourism Council |

DEFINITION OF TERMS

Adventure tourism: A form of tourism in natural areas that incorporates an element of risk, higher levels of physical exertion, and the need for specialised skills.

All-inclusive: A form of package holiday where the majority of services offered at the destination are included in the price paid prior to departure (e.g. refreshments, excursions, amenities, gratuities, etc).

Alternative tourism: Tourism activities or development that are viewed as non-traditional. It is often defined in opposition to large-scale mass tourism to represent small-scale sustainable tourism developments. AT is also presented as an 'ideal type', that is, an improved model of tourism development that redresses the ills of traditional, mass tourism

American plan: a hotel price or rate offered to guests that includes the price of the hotel room, breakfast, lunch and dinner. AP is the common abbreviation. See also room rates.

Attraction: a place, event, building or area that appeals to or attracts visitors

Average Room Rate (ARR): the total guest room revenue for a given period divided by the number of rooms occupied for the same period. Since it can be related to investment, this statistic is frequently used as a measure of economic feasibility.

Backpacker: A visitor, for the purpose of a holiday or special event, who stays in a backpackers lodge/hostel.

Bed and Breakfast: (B & B) overnight accommodations usually in a private home or boarding house, with a full American-style or continental breakfast included in the rate, often without private bath facilities

Best Practice: Operational standards considered the most effective and efficient means of achieving best productivity and most profits.

Biodiversity the variety and variability of all living organisms, including genetic variability within species, and the variety and diversity of species, communities of living organisms and the ecological processes which they influence or perform.

Blockchain a system in which a record of transactions made in cryptocurrency are maintained across several computers that are linked in a peer-to-peer network.

Blue Economy an emerging concept which encourages better stewardship of our ocean or 'blue' resources

Purple Economy that part of the economy which contributes to sustainable development by promoting the cultural and creative industries.

Carrying capacity: The amount of visitor activity that a site or destination can sustain.

Compounded Annual Growth Rate (CAGR) – A useful measure of growth over multiple time periods. It can be thought of as the growth rate that gets you from the initial investment value to the ending investment value

Conservation: Can be broadly interpreted as action taken to protect and preserve the natural world from harmful features of tourism, including pollution and overexploitation of resources.

Cultural Authenticity: Ensuring the appropriate dreaming stories, spiritual beliefs, history, ceremony and art is attributed to the relevant area.

Cultural tourism: Travel for the purpose of learning about cultures or aspects of cultures.

Customers a person who buys goods or services

Day visitors: Visitors who arrive and leave the same day, irrespective of why they are travelling

Demographic Market: Market characteristics relating to age, gender, occupation, income, marital status, place of residence, etc.

Destination Management Company (DMC): A company working in a specific destination to handle all bookings and arrangements for tours or conferences, including hotel accommodation, transfers, sightseeing, meetings and special events. Tour operators or conference planners are likely to use the services of a DMC because of their specialist local knowledge.

Discretionary income: Money received from employment or other sources which can be freely spent on leisure pursuits (such as travel and tourism) after general living costs, taxation etc. are taken into consideration.

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

eCommerce: Internet facilitated commerce, using electronic means for promoting, selling, distributing, and servicing products.

Ecological Footprint - the impact of human activities measured in terms of the area of biologically productive land and water required to produce the goods consumed and to assimilate the wastes generated

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

Emerging markets population groups who are entering the market as domestic tourists in increasing numbers, especially from emerging market economies such as India, China and the former Eastern States (e.g. Russia, Hungary, Czechoslovakia), Latin America.

Environmental impact assessment: A study undertaken to assess the effect of an action upon a specific environment or the social or cultural integrity of a community.

FAM tour: an abbreviation for familiarization tour which is often a complimentary or reduced-rate travel program for travel agents, tour operators, travel writers or others to acquaint them with a specific destination or attraction, thereby helping to stimulate sales

Geographic Market: Market define by physical location such as a region, country, state or city.

Green Economy The green economy is defined as an economy that aims at reducing environmental risks and ecological scarcities, and that aims for sustainable development

High End Denoting high quality and high price targeting high income earners

High Yield Transactions in which the bulk of the revenues or profits accrue to the principal supplier. A situation in which fewer middle-men are present for a transaction.

High Spend Creating more opportunities to encourage high frequency of spending

Hybrid Customer – A type of customer that increasingly opt for both premium and budget alternatives in various product and service categories. For example, a customer that shops at a discount shop and buys expensive items at a Deli; a traveller that takes a cheap charter flight and engages in expensive activities at the destination, such as fly fishing, whale watching.

Inclusiveness the practice or policy of including people who might otherwise be excluded or marginalized

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

Mass tourism: Traditional, large scale tourism commonly, but loosely used to refer to popular forms of leisure tourism pioneered in southern Europe, the Caribbean, and North America in the 1960s and 1970s; a tourism where everything was mass or large scale, standardized (everything the same, including hotel rooms and airplane seats) and rigidly packaged (customers could not change their itineraries except at exorbitant costs

Psychographic Market: Market characteristics based on how people think, feel and behave (which is different from traditional old they are, education levels, sex, etc.)

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

Resilience – the ability to recover quickly from adversity.

Stop-over visitor a person who travels away from home, staying less than 24 hours in the place visited.

Sustainable development a pattern of social and economic transformation which optimises the economic and other societal benefits available in the present without jeopardising the potential for similar benefits in the future.

Sustainable tourism all forms of tourism development, management and activity which enable a long life for the activity of tourism, involving tourism products compatible with keeping in perpetuity the protected natural or cultural heritage resource which gave rise to tourism.

Tourist a person who travels away from home, staying away for at least one night. A tourist can be a domestic tourist (for example resident of Antigua staying one night in Montserrat), a regional tourist (a visitor from Barbados spending one or more nights in Trinidad) or an international tourist (a resident of England staying one night or more nights in Montserrat). See definition of international tourist. A tourist travels for different purposes. Such could include business, leisure, conference and incentive, bird-watching, hiking, diving, golf or just sun, sand and sea.

Tourism all travel for whatever purpose, that results in one or more nights being spent away from home and the sum of the various services and activities that he or she engages in (e.g. hotel accommodation, car rental, tours, taxis, shopping, entertainment, food, beverages, etc.)

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

EXECUTIVE SUMMARY

In order to achieve sustainable development, Montserrat must pursue quality tourism, but it is not ‘business as usual’. The tourism industry has changed. Customers are in control and they are leading the radical transformation of the industry. At the same time technology is facilitating the changes taking place in the industry. The Tourism Strategy is therefore very customer-focused and insists that technology be a key pillar to achieve the industry’s objectives. The Tourism Strategy also recognises that the environment plays a critical role. Without the environment there can be no tourism product. But it is the people of Montserrat that are at the heart of tourism development. They are both the beneficiaries of (Montserratians are the first tourists) and the contributors to tourism development.

The vision has therefore been articulated to be, “Sustainable Development Through Quality Tourism”. And this vision is being supported by key strategic pillars – the customer, the environment, technology, and the people of Montserrat, all built on a solid foundation of quality. Quality tourism is the logical response to the destination’s current situation and aspirations. In order to become competitive in the global travel and tourism marketplace and to attract quality visitors, quality tourism is the answer.



The Tourism Strategy recognises that the current situation does not allow Montserrat to attract high-end visitors at this time. However, attracting and promoting high spend is achievable. The combination of strategies set out herein will help the destination to achieve higher visitor spend in the medium term while setting the foundation to put Montserrat on the right path to being able to target high-end visitors in the long-term.

Sustainable development through quality tourism will be achieved through six (6) strategic areas as shown in the diagram above. The trigger that will propel Montserrat’s tourism competitiveness is the volcano. The volcano was identified by stakeholders as the single most important differentiating factor for Montserrat’s tourism industry.

The volcano value chain will be explored and exploited to “turn ash to cash”. The volcano value chain constitutes four key areas – conservation, science and technology, commercialisation and downstream activities. Tourism will play a significant role in unlocking the volcano value chain and conversely, the volcano value chain will play a key role in igniting tourism competitiveness.



In addition, sustainable development, quality tourism, and greater visitor spend will be achieved by moving up the value chain and delivering transformational experiences. The Tourism Strategy recognises that to be competitive in today’s global environment Montserrat needs to move beyond offering products and services but to orchestrating exceptional and memorable experiences that will evoke lifelong life changes in the minds and hearts of visitors. Visitors do not remember what they see but how you make them feel. Wowing visitors will require exceptional customer service, culinary mastery, the ability to create and deliver great storytelling and interpretation of the tourism product, and entrepreneurial excellence; the four focal points for human resource development within the tourism strategy.

The tourism strategy also acknowledges that competitiveness is largely driven by information technologies. In this regard, technology will play a key role in Montserrat’s tourism development. Technology equips small players to be able to compete with the big giants through the ability to reach and target customers with surgical precision. The fiscal conditions in Montserrat also dictates that Montserrat will need to be effective, efficient and get the biggest return on investment. Technology, particularly the Internet, can ensure that if used properly, Montserrat will get the greatest ‘bang for its buck’.

Montserrat’s positioning as an ecotourism destination, its history, and its promise to future generations point to one critical fact – the environment is indispensable to development. For this reason, the Tourism Strategy places great emphasis on the environment both as an asset to be protected as well as an important tool for tourism and economic competitiveness. Various strategies such as achieving UNESCO World Heritage status for the volcano, developing marine protected areas and an Environment Awareness Strategy.

This Tourism Strategy consists of 6 strategic areas with a mixed bag of 103 strategic initiatives valued at US \$12.6 Million and has been crafted to achieve Montserrat’s tourism development goals over the next three (3) years.

SECTION 1 – INTRODUCTION

1 Introduction and Background

Montserrat is an amazing little Caribbean island that is safe, verdant, idyllic, tranquil, and clean. Its people are warm and welcoming as well as resilient and robust – having survived the devastating Hurricane Hugo in 1989 and a Volcano from 1995 that completely buried the town of Plymouth and left most of its residents under shock, stress and trauma. This mighty Montserrat Volcano has left two-thirds of the island unusable and two-thirds of its population in exile. On the other hand, the volcano has created an estimated 20% more coastal lands, with Montserrat now boasting of new beach and coastal areas, more fertile land than ever before, and loads of aggregate and sand that have economic value. Montserrat’s population is a mere 2500 persons with half estimated to be from Haiti and the Dominican Republic as well as other nationalities.

Tourism is recognized as one of the only sectors that can provide a sustainable livelihood for the people of Montserrat. In developing a viable tourism industry, Montserrat realizes that it is not ‘business as usual’ – that the industry has changed; that it is the customers that are ‘calling the shots’; that information and communication technologies are an all-powerful tool for competitiveness; that the environment is the foundation of the tourism sector and cannot be destroyed; and that the tranquil and peaceful way of life is treasured must be preserved. As such Montserrat has chosen a path of sustainability – to develop quality, rather than quantity tourism; to understand, anticipate and exceed their customers’ expectations; to use technology to drive industry competitiveness and to meaningfully include all Montserratians in the developing and benefiting from the Tourism sector.

In developing its tourism and in making its mark in the industry, it is important that Montserrat identifies and embraces its unique selling proposition (USP). In a global industry that is fiercely competitive, it is important to stand out from the crowd. Montserrat stakeholders realise that what is unique and special about their island is the fact that it has a Volcano. Not only does Montserrat have a volcano, but the volcano is alive, and perhaps most importantly, Montserratians are alive to tell their stories. It is therefore critical that derives the true benefits from the Volcano and exploits the full Volcano value chain.

Montserrat currently welcomes nearly 10,000 stayover visitors and 5,000 day-trippers. The island is served by one ferry with a capacity of. Six days per week and small 9-seater aircraft (three to four times regularly scheduled daily), although the airport has a capacity to take the 19-seater twin-otter aircraft.

This proposed strategy is developed with full inclusion of Montserrat stakeholders. It aims at growing the tourism sector in a sustainable manner with respect for the environment and culture Montserrat and in which no one is left behind. The Vision, Sustainable Development through Quality Tourism shall be achieved through the realisation of the Volcano Value Chain; the development of an Iconic Volcano Interpretation Centre; repositioning of Montserrat in all of its markets; Digital marketing strategies that will target traditional and new markets and an awareness campaign that will see Montserratians as tourists in their own country and where environment conservation becomes the DNA of all tourism practitioners and the population as a whole. After all, successful tourism destinations are those where the people who smile at you are not just the ones that are paid to smile (workers ion the industry), but there is a whole sense

of welcome by all. And what a better way to sell a destination, than to know it yourself. Every Montserratians must be guardians of their environment and ambassadors of tourism.

2 Why Tourism?

The potential of the tourism sector to create jobs and generate wealth is far more significant than virtually all other sectors. Tourism has the potential to reach rural communities, and create entrepreneurship, even amongst people who are considered low skilled and unskilled.

Consider that tourism contributes approximately 10% to the global economy. Tourism contributed US \$1.6 Trillion to global exports and US \$882.5 Billion in capital investments or 4.5% of total global capital investments in 2017.

Tourism is labour-intensive, creating more jobs per unit of capital than many other industries. One in every ten jobs worldwide is attributed to the tourism industry. Tourism employs a multiplicity of skills at all levels of the value chain – lawyers, engineers, doctors, scientists, analysts, accountants, investment bankers, etc. on the high end of the value chain versus cleaners, bar tenders, hair braiders, taxi drivers, painters, labourers, plumbers, mechanics, etc. on the lower end and everything in between.

SECTION 2 – THE TOURISM STRATEGY CONTEXT

3 Global Imperatives

The travel and Tourism industry is growing rapidly and radically. The industry is being transformed by the more demanding, independent, experienced, and knowledgeable travellers, on the one hand, and by the opportunities provided by information and communication technologies, on the other.

3.1 Growth

Consider that Travel & Tourism continues to be one of the world’s largest industries, contributing 10.4% of global GDP, or a value of over US\$8.3 trillion, and accounting for 313 million jobs worldwide. Over the next five years this industry is expected to grow by an average of 4% annually, taking it to 10% of global GDP, or some US\$10 trillion. By 2022, it is anticipated that travel and tourism will account for 328 million jobs, or 1 in every 10 jobs on the planet, according to the World Travel and Tourism Council (WTTC).

Between 1950 and 2018 the number of international arrivals has shown an evolution from a mere 25 million to its current 1.35 billion. This corresponds to a compounded average annual growth rate of 6.1%. International tourist arrivals will reach 1.8 billion in 2030, estimates the *World Tourism Organization*.

3.2 A Paradigm Shift

The industry is growing rapidly and is being transformed radically. On the demand side, the transformation process has been driven by the consumer who is in control of how this transformation is taking place, according to the *Paradigm Shift in Travel and Tourism*. Consumers today are more knowledgeable, sophisticated, demanding and experienced. And

they are in the driver's seat. Supply side transformation determinants are led by the significant advancements in information technology (IT).

Figure 1
The Paradigm Shift in Travel and Tourism



Source: The Paradigm Shift in Travel and Tourism, Tourism Intelligence International, 2012

3.2.1 Customers are Driving Change

The remarkable phenomenon of the pattern of tourism growth and development since World War II is that tourism failed to escape the tendencies of mass production. In fact, in the 1960s, 1970s and 1980s, when Montserrat's tourism sector was booming, travel and tourism was consumed no differently from the way Ford produced automobiles. Everything was standardised and affordable. Suppliers were in control and they dictated what was produced, what price to be set and where tourists should visit. Tourists were price takers. At the same time, tourists were not concerned about where they travelled or how they affected the environment or the cultures with which they came into contact. The mass demand of tourists and the 'mass production' of tourism suppliers created the old, mass, standardised and rigidly-packaged tourism that became the norm.

However, customers today are leading the wave of change. They are in control and suppliers are following their lead. Customers today are dictating a new industry paradigm – a paradigm driven by more conscious, individual and informed customers; a tourism that cares for the environment and the people of host communities; a tourism where flexibility and individuality have become key success factors. Travellers are 'calling the shots' and dictating what should be produced and how. This is precisely why Montserrat needs to focus on what the customers want rather than simply producing and hoping for the best. The new tourism in Montserrat will require customisation, flexibility, individuality and environmental sustainability in order to stay relevant.

Changes in traveller behaviour and values provide a critical driving force for the 'new tourism'. New tourists are fundamentally different from the old. The 'old tourists' accepted mass tourism products and services. Inexperienced, sun-lust customers bought the same packages, went to the same destinations, took the same tours, bought the same souvenirs and even took the same photographs!

On the other hand, the informed, experienced, individual, 'new tourists' of today, are now driving a new type of travel. New travellers are demanding. They are hybrid (they eat at fine restaurants and shop at discount outlets). They are difficult to predict and to please. And they

are spontaneous. New tourists go on vacation to experience and to learn something different. They do not just want to take a photo. They want to take back the memory of an exceptional experience or encounter. They want to be engaged. And it is the ‘new tourist’ that will be interested in what Montserrat has to offer.

3.2.2 Technology is Facilitating Change

It is a driving force that is changing the face of travel and tourism worldwide. While consumers are driving the new tourism paradigm, it is technology that empowers them to do so. At the same time, technology also empowers suppliers to target and cater to customers with surgical precision.

Consider that it is not just a single technology being used in the industry (a computer), but a whole system of technologies being rapidly diffused (computer, Skype, Internet, electronic brochures, back office systems, computerised reservations systems, Facebook, etc.). It is also not a single industry player (travel agencies) that is using the technology, but ALL of them (hotels, banks, tour operators, destinations, airlines, car rental companies, credit card companies, etc.). Above all, and most critically, the consumers are also users¹.

Through technology, consumers can shop online, pay with credit cards and interact with local suppliers via social media. Suppliers can send push notifications, engage customers in real time and predict their behaviour through Big Data and Artificial Intelligence.

In addition, the importance of reaching and engaging consumers and building relationships is now better facilitated through social media and other digital marketing tools. Digital marketing strategies help drive traffic to destination websites; boosts and optimises search; helps build real relationships with customers; creates the opportunity for targeted communications; helps build stronger brands and ultimately help increase bookings and arrivals.

Most importantly, the competition is using technology (Big Data, social media, apps, etc.) and it should not be ignored.

It is through technology that small players can take leading roles. Consider that the largest accommodation provider does not own a single hotel property (Airbnb), the largest taxi company does not own a single vehicle (Uber), and the largest retail outlet does not own a single product or store (Amazon). This disruption in the way we do business is facilitated by technology.

3.3 Fierce Competition

Travel and tourism industry is increasingly competitive. China, Vietnam and the former Eastern Europe are all discovering the benefits to be had from the tourism sector; Space (the Moon, Mars, Venus) is being explored for travel and Virtual Reality tours are already in existence. Competitors are increasingly coming from outside the industry – from pharmacies and post offices to software companies to Airbnb and Uber – there is a growing battle for the share of the travel and tourism pie.

Montserrat cannot continue to compete with safety, cleanliness, tranquillity, clean water, blue skies and green forests alone, but with innovation and intelligence.

¹ Tourism, Technology and Competitive Strategies, Dr. Auliana Poon, 1993

3.4 Frame Conditions

In addition, climate change, limits to growth, geopolitical changes, terrorism and constant threats of war and instability, frame the industry's development. The only constant is change.

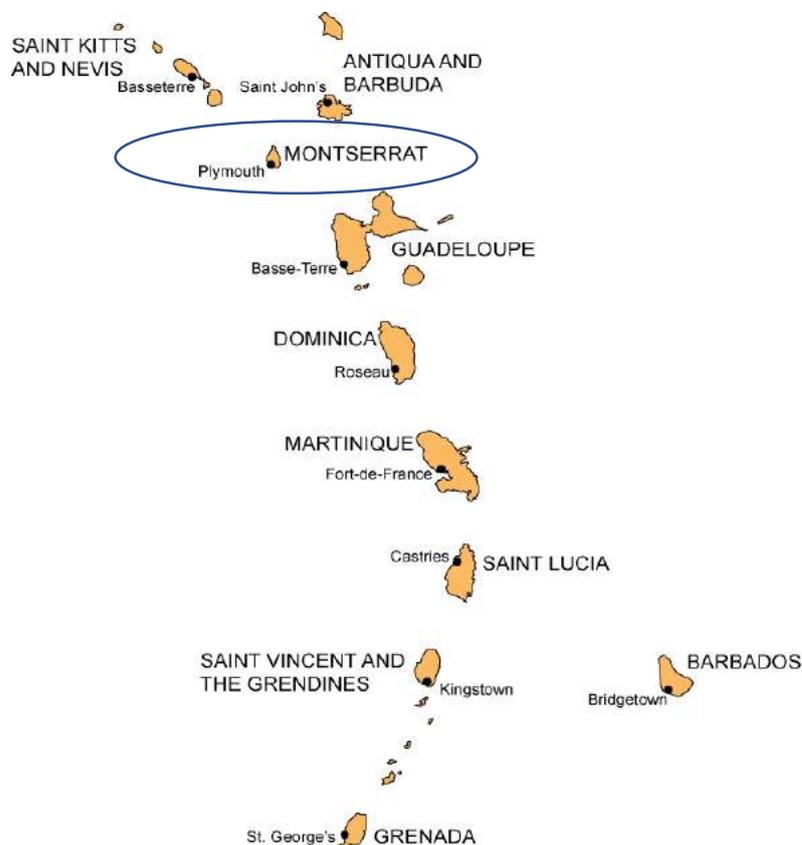
Montserrat recognises that the tourism industry's competitiveness needs to be built on resilience, foresight, agility, technology, innovation, sensitivity to the environment, appreciation of the local culture and inclusion of all Montserratians.

4 The Regional Context

The Caribbean is one of the most tourism dependent regions in the world. Although accounting for less than 3% of international tourist arrivals, the tourism sector in the Caribbean is a significant contributor to the incomes, employment, foreign exchange and growth of the region. The Caribbean recorded an estimated 31.7 million tourist arrivals in 2018, according to *Caribbean Tourism Organization*.

Montserrat is strategically situated within the Eastern Caribbean. The island is surrounded by Antigua, Dominica, Guadeloupe, St. Kitts, and St. Maarten. Montserrat's unique geographic position gives it the advantage of potentially being able to tap into other markets through surrounding hubs. For example, British visitors through the Antiguan, Dutch visitors through St. Maarten, and French visitors through Guadeloupe, not to mention the wider Caribbean market.

Figure 2
Map of the Eastern Caribbean



It is important that Montserrat builds on its regional connections – the French Connection in Guadeloupe and Martinique, for example.

5 Montserrat Tourism Performance

5.1 State of the Industry

The Montserrat tourism industry has been heavily impacted by hurricane Hugo in 1989 and by the Mighty Montserrat Volcano that erupted on July 18, 1995, with subsequent eruptions until 1999, with the last eruption as recent as 2012. Not only have these eruptions displaced lives, homes and transformed the entire landscape of Montserrat, but it has severely hampered the tourism sector. In 2016, Montserrat received less than 10,000 stayover visitor arrivals (8,700) and 5000 excursionists. The island is served by 7-seater aircraft that have 4-6 flights daily and an almost daily (six days per week) ferry service from Antigua (approximately 1.5 hours duration), accommodating 218 passengers.

Montserrat is a beautiful, green, tranquil and safe destination, but it is challenged on many fronts. The destination is still unknown; few potential travellers, even those in the Caribbean, realise that Montserrat is ‘open for business’ and that an active volcano and a ‘buried city’ is right on their doorsteps. In addition, Montserrat can boast of the incredible resilience of its people and their amazing stories. Even more dire is the fact that the heavily-subsidised 218-passenger ferry operates at 10% occupancy and the airline, Fly Montserrat, at 50% average occupancy². Occupancy levels spike for special events and festivals including the St. Patrick’s Day festival, the Christmas festivals and others.

It is critical that Montserrat becomes a known and desired destination, but not overrun by tourists; that the full potential of tourism is realised; that locals are included, and benefit from the sector’s development; and that Montserrat’s beautiful environment is conserved.

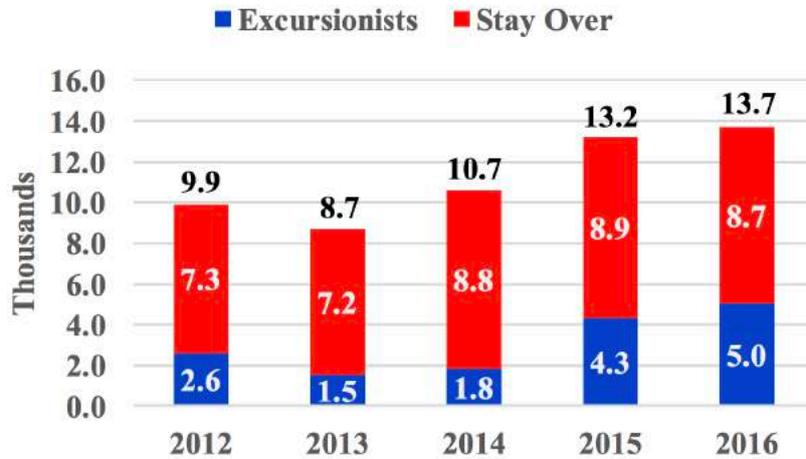
5.2 Visitor Arrivals

Tourism arrivals to Montserrat has been relatively stable. Total arrivals to Montserrat (combination of stay over and excursionists) grew at a compounded annual growth rate (CAGR) of 8.5% from 9,900 in 2012 to 13,700 in 2016³. Stay over arrivals to Montserrat grew at a compounded annual growth rate (CAGR) of 4.5% from 7,300 in 2012 to 8,700 in 2016.

² Interview with Captain Nigel Harris, February 19, 2019.

³ 2017 and 2018 arrival data were not available as at February 2019.

Figure 3
Total Visitor Arrivals to Montserrat



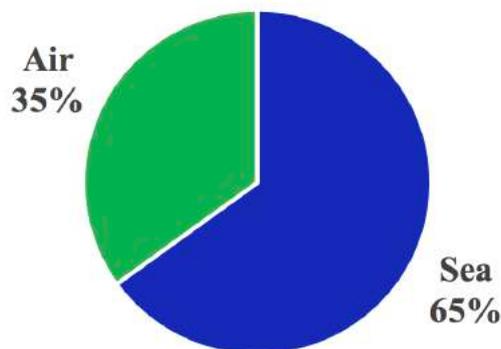
Source: Statistics Department Montserrat, 2019

Excursionists or day visitors (which includes cruise passenger arrivals) exhibited the greatest growth over the 2012-2016 period with a CAGR of 17.8% to reach a high of approximately 5,000 visitors in 2016. Considering Montserrat's limited air access capacity, the real opportunity for short-term growth lies in the attraction of more excursionists.

5.3 Passenger Arrivals by Mode of Transport

Typically, there are more arrivals to Montserrat by sea than by air. The presence of a reliable and regular ferry service accounts for this phenomenon. Based on 2015 passenger movements, nearly two-thirds (65%) of passenger flows were by sea and one-third (35%) were by air. Based on the ferry services out of Antigua, there is still room for more growth by simply increasing the frequency of the ferry service, once there is commensurate demand.

Figure 4
Passenger Arrivals by Mode of Transport in 2015



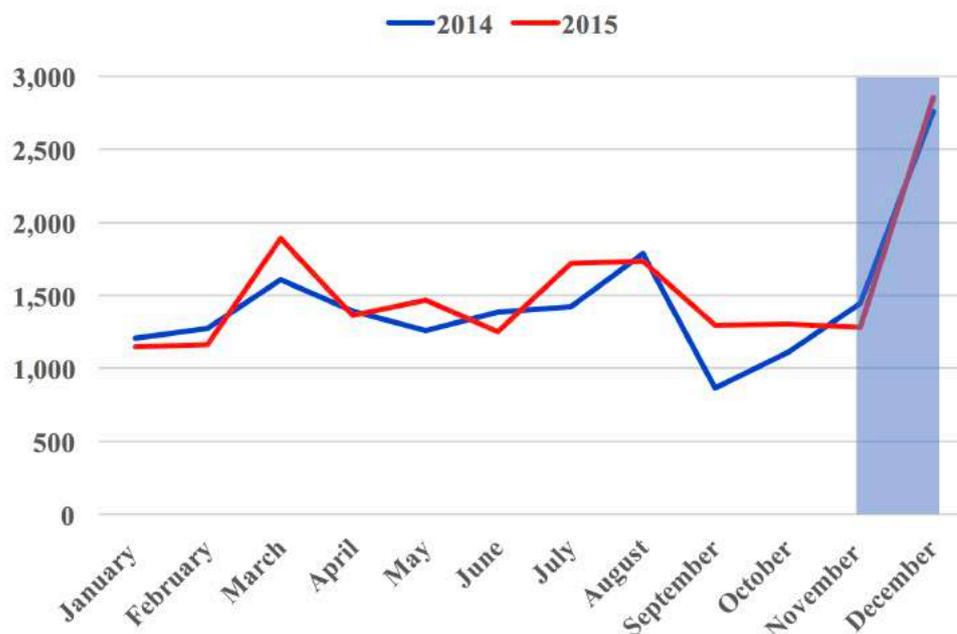
Source: Statistics Department Montserrat, 2019

5.4 Seasonality

The months of December, March and July/August are the busiest periods in the tourism industry in Montserrat. Over 2,000 visitors came to Montserrat in December 2014 and 2015 respectively. This is due to returning residents coming home for Christmas and the Christmas

carnival activities. March is the second busiest month because of the St. Patrick's festival. July and August also attract a lot of visitors because of the Calabash festival and returning residents for summer break in the UK and USA.

Figure 5
Monthly Passenger Arrivals (Air & Sea)



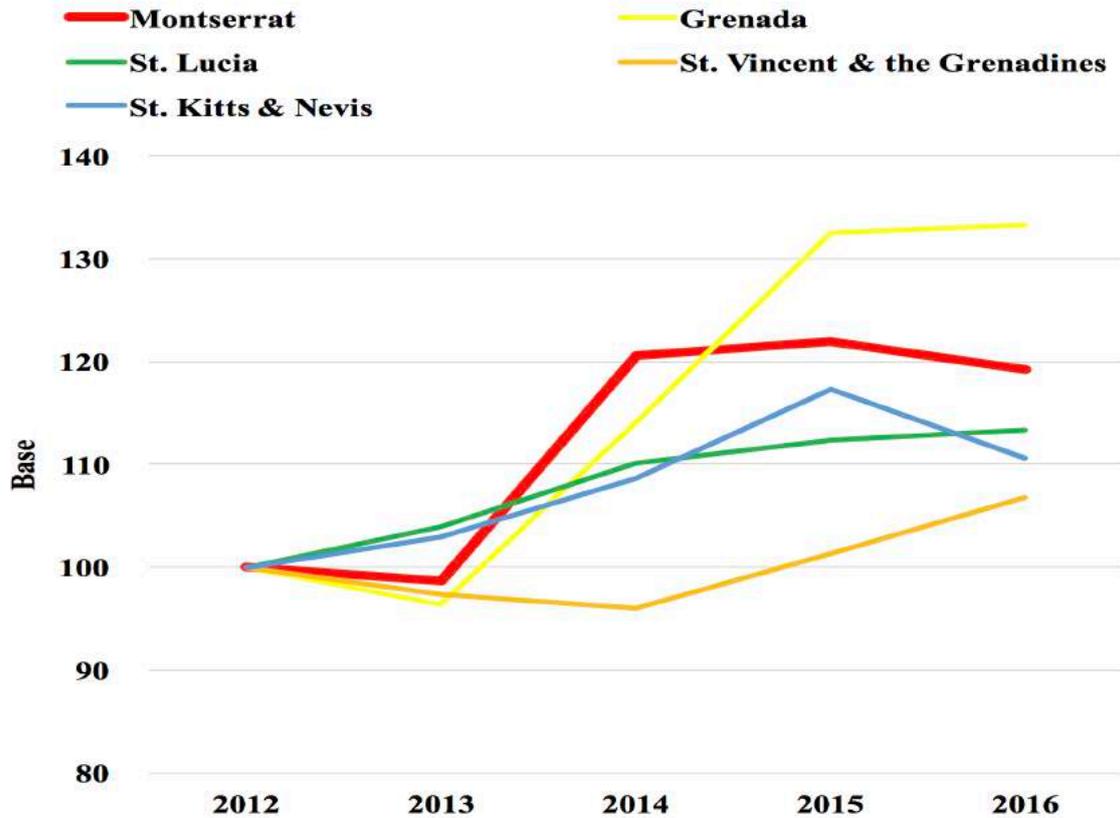
Source:

Statistics Department Montserrat, 2019

5.5 Competitive Analysis

Montserrat has been out-performing some of its competitors largely because of its small starting post-volcano base. Between 2012 and 2016 Montserrat's stay over arrivals experience a CAGR of 4.5%. This compares to a CAGR of 7.5% in Grenada, followed by St. Lucia (3.2%), St. Kitts & Nevis (2.5%), and St. Vincent & the Grenadines (1.6%).

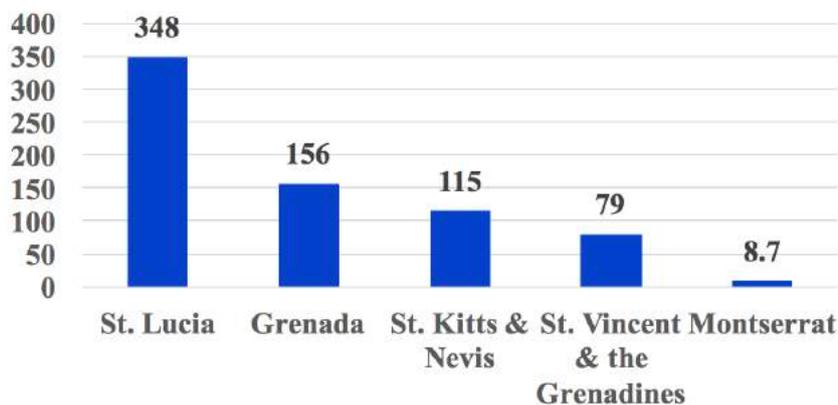
Figure 6
Tourism Performance of Selected Destinations
 Base Year = 2012



Source: United Nations World Tourism Organization, 2019

However, in absolute terms, Montserrat only accounts for a fraction of arrivals compared to its competitors. St. Lucia welcomed 348,000 stay over arrivals in 2016, followed by Grenada (156,000), St. Kitts & Nevis (115,000), and St. Vincent & the Grenadines (79,000), compared with Montserrat's 8,700 stay over arrivals. Why is Montserrat not doing as well as its neighbours? What could be done to put Montserrat on the map?

Figure 7
Stay Over Arrivals to Selected Destinations, 2016
 (Thousands)



Source: United Nations World Tourism Organization, 2019

6 SWOT Analysis

Montserrat has the potential to become the crown jewel of the Caribbean tourism empire. With strengths such as, an active volcano, a buried city, a rich and diverse natural environment, warm and friendly people, virtually zero crime, a peaceful and tranquil atmosphere, geographic and historical links to its main source markets, Montserrat is well poised for tourism growth.

There are also a number of opportunities that Montserrat can take advantage of as it seeks to grow tourism. The potential to exploit the volcano value chain, interlining with international and regional hubs, taking advantage of its close proximity to major Caribbean hubs such as Antigua and Guadeloupe, and access to potential discerning travellers that are looking for the kinds of experiences that Montserrat has to offer, are opportunities that if adequately targeted could help boost Montserrat's tourism industry.

However, there are a number of challenges that need to be addressed that could potentially slow down or even hurt the country's potential as a tourism destination. Poor air and sea access, lack of room stock, a small population base, a weak institutional framework and over-dependence on British funding are all examples of internal weaknesses that need to be addressed in order to be able to take advantage of potential opportunities and grow the tourism industry.

There are also a number of external threats over which Montserrat has no control that could adversely affect tourism's development. These include: strong competition, changing global travel and tourism trends, disruptive technologies, disruptive political changes such as BREXIT, storms and hurricanes, and the possibility that the volcano could erupt again. However, the strengths could be harnessed to mitigate these threats. For example, the existence of controls and warning measures through the Montserrat Volcano Observatory (MVO) could reduce risks associated with volcanic eruptions, particularly as it relates to loss of life.

The strengths, weaknesses, opportunities and threats are listed in the table below.

| INTERNAL ENVIRONMENT | EXTERNAL ENVIRONMENT |
|--|---|
| <p>Strengths</p> <ul style="list-style-type: none"> • A volcano that is active • A population that is alive and can tell their amazing stories • Volcanic monitoring, controls, warning and predictive mechanisms in place to assure safety • A buried city – the only in the Caribbean • A warm and friendly population • An Island that is literally being formed • Increased coastal areas and coastline • A relatively large diaspora base • Peaceful and tranquil island atmosphere • Safe and low-crime environment • A thriving and scenic natural environment • Geographic location and proximity to other Caribbean islands • Historical and political links to the UK • Geographic proximity to the North American and Caribbean markets • Basic infrastructure and utilities in place – a fair road system, fair telecommunications infrastructure with new investments on stream, clean and reliable water, reliable electricity • Tap water is clean and drinkable | <p>Opportunities</p> <ul style="list-style-type: none"> • Interlining opportunities with international and regional carriers • Emergence of new technologies • Changing consumer trends towards an active and healthy lifestyle • Exploitation of the volcano value chain in the areas of science, technology, environment, geopark and UNESCO World Heritage Site status, new coastal lands, aggregates for building and export, museums, photography, sport (volcano marathon and others), sand, mud, souvenirs • New types of travellers that can be transformed by Montserrat |
| <p>Weaknesses</p> <ul style="list-style-type: none"> • Insufficient air and sea access • Insufficient room stock • Small population base • Restricted land use and development (in the exclusion zone) • Outdated accommodation • Over-dependence on the Antigua hub (both air and sea) • Overdependence of subsistence from the UK government (~60% of government expenditure) • Government regimes change every five years on average (based on historical performance) • Inefficient and insufficient data mining mechanisms (no visitor exit surveys, untimely access to data, limited research personnel) • Limited access to tourism training • Lack of quality standards and certification | <p>Threats</p> <ul style="list-style-type: none"> • Possible hurricanes and storms • Competition (regional and international) • Possibility of future volcanic eruptions • Outbreak of communicable diseases, e.g. Dengue • Economic, social and political instability of the UK, aka Brexit • Disruptive technologies, e.g. Artificial Intelligence, Big Data, bitcoin |



Consider that it is not what a country has that make it successful, but what it does with it that counts. It is important for Montserrat to put its Volcanic experience on the world stage and consider applying for UNESCO World Heritage Site status. This will take a lot of work and determination, but could be well worth it. Consider that the heritage sites of the world receive tens of millions of visitors annually, with the Forbidden City in China welcoming 14 million visitors, the Sydney Opera House and the Taj Mahal, 8 million each.

It is critically important for Montserrat to use international designations and relevant brands to catapult the country onto the world stage. So, we need to brand our Volcano – the Montserrat Volcano – and get it recognized as a World Heritage Site. Even Montserrat’s beaches can be Blue Flag Beaches, a European Environmental Standard for safe, clean and community-engaged beaches.



Source: Barbuda Montserrat Nevis Air

SECTION 3 – TOURISM VISION

8 Vision

The vision for tourism in Montserrat is “Sustainable Development through Quality Tourism”.

Sustainable Development Through Quality Tourism



This vision was developed through a visioning exercise with stakeholders. Stakeholders clearly indicated that they want to see a Montserrat in 2050 that was booming, thriving, vibrant and

developed. They want a country that was crime-free, pristine, family-friendly, and safe; a country that was green, clean, inclusive and sustainable. Stakeholders unanimously agreed that in order to achieve their overall vision for sustainable development it could only be done through quality tourism.

9 Mission

To develop tourism in a sustainable manner that benefits and includes all Montserratians – a tourism that respects and protects the environment; provides sustainable, creative, dignified and decent livelihoods; engages and exceeds expectations of travellers through quality products, services and transformational experiences; that uses technology to drive competitiveness – a tourism in which no Montserratian is left behind as the sector progresses

10 The Five Pillars of Montserrat Tourism Development

The tourism vision is built on four key pillars that are indispensable to the success of the tourism industry in Montserrat. These four pillars are depicted in the diagram below. These are: customer-driven, people-centred, environment conservation and technology adoption. Quality is the foundation on which the pillars and the vision, and indeed the entire tourism industry must be built. These are explained in the proceeding sub-sections.

Figure 8
The Five Pillars of the Montserrat Tourism



10.1 Customer-Driven

The tourism sector in Montserrat has to be very customer-driven and market-oriented. Customers have changed. They are more demanding, knowledgeable and conscious today than they were 25 years ago in the pre-volcano era when Montserrat's tourism industry was thriving. The customers of today are also more connected and have access to information in real time through the internet. They also are more environmentally conscious.

In order to attract the new tourist, Montserrat has to understand who they are and deliver what they want. But in order to understand the markets, the Division of Tourism will need to become more data-driven. Improvement in data collection and data mining will be a critical success factor. All players involved in mining data will need to be strengthened – the Statistics Department Montserrat, the Immigration Division, and the Division of Tourism. Visitor Exit Surveys will need to be reintroduced. Also, digital analytics will need to be utilised on a day-to-day basis.

10.2 Environment Conservation

Montserrat's natural environment (including the volcano, natural landscapes, trees, underwater life, etc.) forms the basis of the tourism experience. In the international marketplace, Montserrat can be strategically and uniquely positioned to create a viable tourism product that caters to the nature lover and ecotourism enthusiast. As such, Montserrat's natural environment is indispensable to tourism development, competitiveness and the strengthening of the destination brand. It is therefore critical that all measures are put in place to ensure the preservation of the natural environment.

The environment needs to be seen as a key component of tourism. As such, all partners in the sector must play their part to preserve the environment. For this to happen, all Montserratians need to be made aware of and understand the importance of the environment and the role they must play in protecting the environment. Additionally, tourism investments and developments should enhance rather than hurt the environment. The environment also needs to be seen as both a benefactor and beneficiary of tourism development.

10.3 Technology-Enabled

Technology is another important pillar of the tourism sector. The Division of Tourism and the wider destination need to embrace technology and use it as an effective and efficient marketing tool to reach customers in targeted and focused ways. With the very limited marketing budget afforded to the Division of Tourism, digital marketing is the most appropriate option to consider.

Consider that almost every traveller to Montserrat would have done some form of research online during their planning and booking. It is therefore critical for Montserrat to be easily found when they are searching for their holiday interests, activities and preferences.

The power and the value of the Internet cannot and should not be ignored. There were approximately 4 billion Internet users worldwide in 2018, according to *Nielson Online*. This represents 3.6 billion more Internet users in 2018 than in 2000. Consider also, that there are over 2 billion Facebook users and nearly 3 billion social media users. The sheer numbers and the ability to target these users (e.g. Google Ads and Facebook advertising) create an incredible opportunity that Montserrat needs to fully take advantage of in the new competitive paradigm.

10.4 People-Centred

People are at the heart of Montserrat's tourism development. Sustainable tourism development has its primary duty to the people of Montserrat. Montserratians are the first tourists and the principal beneficiaries of tourism development. Sustainable tourism will ensure that development of the sector is done in a manner that ensures decent work and fair wages for all in the sector; that no Montserratian is left behind as the sector and the country progresses; that communities are meaningfully included and involved at all stages of tourism development; that the culture and unique way of life is preserved; that there is fair trade; and that Montserratians can freely and fairly enjoy and take pride in their country's rich and unique environment.

However, sustainable tourism development is a two-way street. Montserratians must benefit from tourism, but they must also do what is required to ensure that tourism is a success. Stakeholders and actors both within and outside of the tourism industry, the Diaspora, (and indeed, all Montserratians) should play a role in developing the sector.

Consider that successful tourism destinations are those in which the people who smile at you are not the ones who are paid to smile (e.g. workers in the industry). In other words, everyone is warm and welcoming and has a reason to smile. Respect and care for each other, for the visitor and for the environment, is built on a solid foundation of personal esteem and country pride.

10.5 Quality Tourism

Quality tourism is not a pillar per se but rather the foundational stone that supports all of the other pillars of the tourism strategy. Quality is perhaps the most important principle for competitiveness in the travel and tourism industry. Quality has become a dominant trend globally and has important implications for the travel and tourism industry.

Many stakeholders have argued that Montserrat needs to focus on low-impact and high-end travellers. The idea is to attract visitors who could spend more and for players in the industry to get more profits out of the sector. However, for high-spend to be realised the industry will need to offer high value. And for high value to be realised quality tourism must be the order of the day – quality people, quality products, quality services and experiences, and a quality environment. Consider that many of the accommodation villas are dated and need upgrading, customer service needs improving, there are few properly qualified personnel in food and beverage, tourism planning, etc. in the industry, the infrastructure needs improving, access is poor. How can we engender high spend when much of the tourism product is not able to deliver the high-end experience?

The key to quality and in particular, quality experiences, in the travel and tourism industry is the country's human resources. Building a high-spend, high-quality industry involves attracting, empowering, re-directing and rewarding the industry's most valuable asset – its human resources. Thus, it might be concluded: the key to quality tourism is quality labour. Such labour is an invaluable asset in the process of production. In this respect, human beings are unmatched; for it is they that determine the quality of services delivered throughout the travel and tourism value chain.

However, how is quality measured? The key to measuring and monitoring quality is through quality standards and certification, an area lacking in Montserrat.

It is also important that quality is linked to value for money. In other words, delivering more than what customers expect and exceeding their expectations. For example, charging four-star prices and delivering 5 star quality. Customers must never feel fooled or ‘taken for a ride’. And honesty will always be the best policy.

11 Objectives

The objectives of this three-year tourism strategy are as follows:

1. To use tourism as a catalyst to grow the economy
2. To use the volcano to trigger tourism growth
3. Tourism to contribute 20% to total GDP up from 15%⁴
4. To achieve growth in tourism arrivals of 25% (2021 over 2019)
5. To grow employment in the sector
6. To increase country pride
7. To increase the profitability and sustainability of private enterprises and especially MSMEs
8. To conserve the environment

⁴ United Nations World Tourism Organisation, 2015.

SECTION 4 – UNLOCKING MONTSERRAT’S TOURISM GROWTH POTENTIAL

Six core strategies are proposed to drive Montserrat’s tourism development:

Strategic Area # 1. Use the Volcano as a strong ‘pull’ factor to Position Montserrat as a **must-visit** Destination in the Caribbean

Strategic Area # 2. Move up the value chain and deliver exceptional transformational experiences to exceed the expectations of the ‘new travellers’.

Strategic Area # 3. Use Technology to Drive Competitiveness

Strategic Area # 4. Conserve the Environment

Strategic Area # 5. Develop Quality Tourism Products

Strategic Area # 6. Deploy the latest digital techniques to effectively and efficiently market Montserrat

Other strategies include product development, human resource development, marketing, promotions and communication.

12 Strategic Area #1 – Use the Volcano to Position Montserrat as a Must-Visit Destination

Objective: To use Volcano as Montserrat’s Unique Selling Proposition (USP) in order to ignite growth and create the create buzz and excitement that will drive discerning visitors to must-see, must-visit, must-experience Montserrat.

Strategy: To identify, develop and realise the full potential of the Montserrat Volcano Value Chain in areas of conservation, commercialisation, science, technology and downstream activities.

13 Identify and Exploit the Volcano Value Chain

A core strategy of the tourism sector in Montserrat will be to explore and exploit the volcano value chain. As of yet, Montserrat has not fully exploited the volcano value chain (VVC). Focus has purely been on the low end of the value chain in terms of exporting aggregates from the volcanic ash and sand. There are a few tours and insignificant commercial use of the volcano. The axial potential of the tourism sector means that exploring and exploiting the volcano value chain has many direct and indirect linkages to tourism.

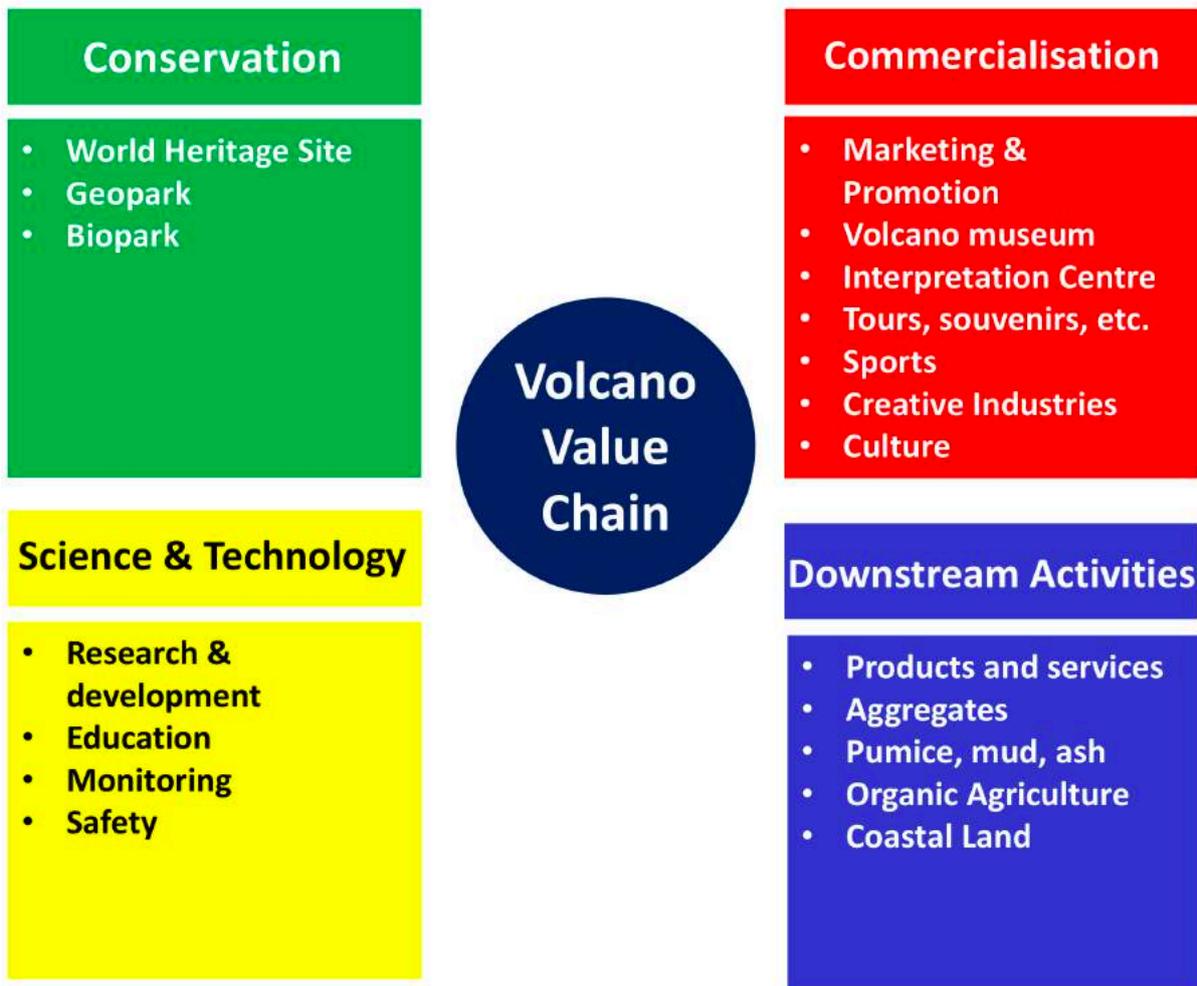
There are four areas in which the volcano value chain can be developed: conservation, science and technology, downstream activities, and commercialisation.

Figure 9
The Four Areas of the Volcano Value Chain



Tourism is a fiercely competitive business and competitive advantage is no longer based on natural attributes (sun, sand, sea) alone, but increasingly based on the human / man-made element driven by science, technology, information, innovation and customer service excellence.

Figure 10
The Volcano Value Chain



Destinations that enhance their natural attributes with science, technology, information, innovation and customer service excellence are those that are making a mark and growing their competitiveness. As such, it is not merely the existence of the volcano that will determine Montserrat's competitiveness in tourism, but rather, how it is used and managed (the man-made elements), and the extent to which it is complemented with talent, technology and innovation. This is why exploiting the value chain to determine the key opportunities and linked strategies is key.

13.1 From Ash to Cash

To realise the potential of the volcano and to facilitate the transition from 'ash' to 'cash' critical strategic elements have to be included. The 'C' in 'cash' has to be activated.



Figure 11
Activating the Volcano Value Chain – Turning Ash to Cash



- **Conservation** – conserve and preserve the natural and cultural heritage associated with the volcano and the surrounding areas in the now ‘exclusion zone’;
- **Commercialisation** – determine the many opportunities to create wealth from the by-products and linked services associated with the volcano;
- **Community Involvement** – ensure that all communities and all Montserratians buy-in to and benefit from the volcano value chain;
- **Culture** – ensure the cultural heritage of Montserrat remains intact and that the volcano is used as a trigger to get others to become aware of and appreciate Montserrat’s cultural assets and traditions;
- **Creativity** – creativity, imagination and innovation are needed to fully realise the potential of the volcano value chain. The government will promote and foster creativity amongst resident Montserratians and the Diaspora;
- **Content** – Montserrat is the only island in the Caribbean with a living volcano and with people who are alive to tell their stories. These stories and content need to be created, collected, curated and promoted to the world;

- **Commitment** – for the volcano value chain to be fully realized the buy-in and support of all Montserratians will be required – including government, residents and the Diaspora;
- **Competence** – effective human resources and the requisite skills and talent will be needed to activate the VVC. Investment in training and in attracting the right kind of talent will be needed for success;
- **Customers** – the VVC cannot be realized if there is no one to buy the products, services and experiences developed along the VVC. Effective marketing to attract the right kind of customers will be needed;
- **Connectivity** – being able to connect Montserrat to the world and the world to Montserrat is a critical success factor in realizing the VVC. Connectivity includes air and sea access but it also includes having state-of-the-art IT infrastructure such as credit card capability and high-speed internet.
- **Capacity** – the relevant institutions such as the Division of Tourism need to be adequately capacitated to be able to facilitate the actualization of the VVC.

13.2 Volcano Conservation

Conservation is a critical element of the VVC. Conservation needs to be seen as more than a mere goal to be attained but as an opportunity to create wealth for the country. There are three conservation opportunities to be realized in the VVC that could create wealth and help to boost the tourism sector.

13.2.1 Development of A Geopark

The volcano is currently the major attraction on the island. This is complemented by the Montserrat Volcano Observatory (MVO) that offers organized scientific tours and associated information booklets, and an opportunity to purchase items. Tours to Plymouth with trained guides are allowed with special permission from the Police Department and the MVO. However, facilities and services for organized tours, outside of those provided for by the MVO, are not in place. There are plans to establish Plymouth as a national geopark with the potential of achieving international status.

13.2.2 Definition of a Geopark – How Plymouth fits into this

The United Nations Educational, Scientific and Cultural Organization, UNESCO Global Geoparks Networks (GGN), defines a geopark as a geographical area where geological heritage sites are part of a holistic concept of protection, education and sustainable development. It recommends that in defining boundaries, any proposed Geopark should consider the whole geographical setting of the area and shall not solely include sites of geological significance in order to highlight the synergy between geodiversity, biodiversity and culture and to highlight both the tangible and non-tangible heritage. As such, it recommends the inclusion of non-geological themes as an integral part of the Geopark, especially when their importance in relation to landscape and geology can be demonstrated to the visitors”.

Plymouth and the surrounding land area fits into this definition of a geopark.

13.2.3 Geopark to be Declared a UNESCO World Heritage Site

The development of the Volcano and the Buried City of Montserrat as a UNESCO World Heritage site has the potential to put Montserrat on the map and gain much-needed attention on the world stage. Even the mere declaration that the Montserrat Volcano will become a UNESCO World Heritage Site will be enough to create the required buzz and get the attention

of international press, researchers, environmentalists and the discerning and knowledgeable travellers. The value to be gained from such an initiative cannot be quantified.

Table
The World's Most Visited UNESCO World Heritage Sites

| Rank | UNESCO World Heritage Site | Location | Visitors (Millions) |
|------|-----------------------------|---------------|---------------------|
| 1 | Forbidden City | China | 14 |
| 2 | Kulangsu | China | 12.4 |
| 3 | Great Smoky Mountains | United States | 11 |
| 4 | Great Wall of China | China | 10 |
| 5 | Gyeongju | South Korea | 9 |
| 6 | Banks of the Seine | France | 8.1 |
| 7 | Sydney Opera House | Australia | 8 |
| 8 | Taj Mahal | India | 8 |
| 9 | Par Force Hunting Landscape | Denmark | 7.8 |
| 10 | Versailles | France | 7.5 |

Source: World Atlas, 2019

To be included on the World Heritage List, sites must be of outstanding universal value and meet at least one out of ten selection criteria. These criteria are explained in the Operational Guidelines for the Implementation of the World Heritage Convention which, besides the text of the Convention, is the main working tool on World Heritage. The criteria are regularly revised by the Committee to reflect the evolution of the World Heritage concept itself. Until the end of 2004, World Heritage sites were selected on the basis of six cultural and four natural criteria. With the adoption of the revised Operational Guidelines for the Implementation of the World Heritage Convention, only one set of ten criteria exists.

Of the ten criteria listed, Montserrat fits squarely into category eight (viii) and may also be considered under categories (iv) and (vii).

Selection criteria for World Heritage Status:

- To represent a masterpiece of human creative genius;
- To exhibit an important interchange of human values, over a span of time or within a cultural area of the world, on developments in architecture or technology, monumental arts, town-planning or landscape design;

- To bear a unique or at least exceptional testimony to a cultural tradition or to a civilization which is living or which has disappeared;
- **To be an outstanding example of a type of building, architectural or technological ensemble or landscape which illustrates (a) significant stage(s) in human history;**
- To be an outstanding example of a traditional human settlement, land-use, or sea-use which is representative of a culture (or cultures), or human interaction with the environment especially when it has become vulnerable under the impact of irreversible change;
- To be directly or tangibly associated with events or living traditions, with ideas, or with beliefs, with artistic and literary works of outstanding universal significance. (the committee considers that this criterion should preferably be used in conjunction with other criteria);
- **To contain superlative natural phenomena or areas of exceptional natural beauty and aesthetic importance;**
- **To be outstanding examples representing major stages of earth's history, including the record of life, significant on-going geological processes in the development of landforms, or significant geomorphic or physiographic features;**
- To be outstanding examples representing significant on-going ecological and biological processes in the evolution and development of terrestrial, fresh water, coastal and marine ecosystems and communities of plants and animals; and
- To contain the most important and significant natural habitats for conservation of biological diversity, including those containing threatened species of outstanding universal value from the point of view of science or conservation.

World Heritage List Nominations

Only countries that have signed the World Heritage Convention, pledging to protect their natural and cultural heritage, can submit nomination proposals for properties on their territory to be considered for inclusion in UNESCO's World Heritage List.

Nomination process

- Tentative List

The first step a country must take is to make an 'inventory' of its important natural and cultural heritage sites located within its boundaries. This 'inventory' is known as the Tentative List, and provides a forecast of the properties that a State Party may decide to submit for inscription in the next five to ten years and which may be updated at any time. It is an important step since the World Heritage Committee cannot consider a nomination for inscription on the World Heritage List unless the property has already been included on the State Party's Tentative List.

- The Nomination File

By preparing a Tentative List and selecting sites from it, a State Party can plan when to present a nomination file. The World Heritage Centre offers advice and assistance to the State Party in preparing this file, which needs to be as exhaustive as possible, making sure the necessary documentation and maps are included. The nomination is submitted to the World Heritage Centre for review and to check it is complete. Once a nomination file is complete the World Heritage Centre sends it to the appropriate Advisory Bodies for evaluation.

- The Advisory Bodies

A nominated property is independently evaluated by two Advisory Bodies mandated by the World Heritage Convention: the International Council on Monuments and Sites (ICOMOS)

and the International Union for Conservation of Nature (IUCN), which respectively provide the World Heritage Committee with evaluations of the cultural and natural sites nominated. The third Advisory Body is the International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM), an intergovernmental organization which provides the Committee with expert advice on conservation of cultural sites, as well as on training activities.

- The World Heritage Committee

Once a site has been nominated and evaluated, it is up to the intergovernmental World Heritage Committee to make the final decision on its inscription. Once a year, the Committee meets to decide which sites will be inscribed on the World Heritage List. It can also defer its decision and request further information on sites from the States Parties.

- The Criteria for Selection

To be included on the World Heritage List, sites must be of outstanding universal value and meet at least one out of ten selection criteria. These criteria are explained in the Operational Guidelines for the Implementation of the World Heritage Convention which, besides the text of the Convention, is the main working tool on World Heritage. The criteria are regularly revised by the Committee to reflect the evolution of the World Heritage concept itself.

13.2.4 Potential Work on Heritage Status Relevant to the Proposed National Geopark

UNESCO has developed an international framework referred to as “Global Geoparks Network (GGN)” to provide international status for national geoparks in an effort to support, conserve and enhance landscapes and geological formations through the Global Network of National Geoparks. National Geoparks can be developed under the assistance and guidance of UNESCO for the inclusion in the GGN by following prescribed procedures

Criteria for the Establishment of Plymouth as a National Geopark

In order to meet the criteria for the establishment of a national geopark, the following actions must be undertaken:

- It must have a strong political and community support from land and property owners, adjacent communities, the private sector as well as financial commitment from government.
 1. A scientific evaluation of the site must be undertaken outlining its major characteristics-
 - a. Geological history and events and processes that formed it.
 - b. Importance of the site with respect to science, educational value, biodiversity and rarity
 - c. Highlight the ecological, archaeological and historical as well as non-geological themes like cultural and social history and the value and the linkages

2. Size and Setting

The proposed boundaries of the park must be clearly defined and demarcated. The site should be characterized by areas of geological significance as well as biodiversity and culture, and social history and should be large enough to develop and serve local economic and cultural development (particularly through tourism).

The Park must have a distinct identity through signage, public awareness and communication and branding

- Legal and Institutional Framework
 - A management system must be established and a management plan developed through a “bottom up “process with participation of all relevant stakeholders- adjacent communities, land owners, relevant government departments, NGO organizations, the private sector, research organization and educational institutions
 - Relevant policy, legal and regulatory framework governing the geopark must be developed to ensure protection of the site and its resources – buildings, landform and landscapes

- Economic Development

Development of a management plan which outlines among other things, the potential of the park for stimulating sustainable economic activity through employment and creating income generation for adjacent communities and the national economy

- Education

The proposed management plan must outline the ability of the geopark to provide and organize tools and activities to communicate geoscientific knowledge and environmental and cultural concepts to the public (e.g. through museums, interpretive and educational centres, trails, guided tours collateral material and communication media). It should also foster and encourage scientific research with the local population, scientists and local, regional and international education or research institutions.

13.2.5 Planning for Proposed World Heritage Status

During the planning stage of the geopark it is advisable to work with National Commission for UNESCO, and the relevant appropriate governmental authorities linked to UNESCO with the objectives of seeking international status. In the event that Montserrat does not qualify for technical assistance or funding under UNESCO, it should be noted that UNESCO is also affiliated with a European based institution - European Geoparks Network (EGN) which coordinates membership of the Global Geoparks Network within Europe.

13.3 Volcano Science, Research and Technology

Objective: Use volcano science, research and technology to grow the tourism industry – more spend, more arrivals and boost villa/residential tourism.

Strategy: Enable, attract, grow and retain talent in the areas of volcano research, science and technology

Science and technology is another critical component of the VVC. The lesson from Costa Rica shows that attracting environmental, archaeological and geological research and development will give a great boost to the economy and the tourism industry. It is important to learn from the lessons of successful destinations in this regard.

Four general strategic initiatives are required to activate this area of the volcano:

1. **Enable** – provide an enabling environment to facilitate businesses and employees coming to live and work in Montserrat in the areas of research, the environment, science and technology
2. **Attract** – actively promote Montserrat as ‘open for business’ in the areas of science, the environment, research, and technology. Provide incentives to firms and individuals with the relevant competencies in these areas. The Division of Tourism could play a critical role in this regard as a key area of marketing focus would be the attraction of the Creative Class (See Section 5 – Tourism Marketing Strategy) which will provide a market for residential and villa tourism and long stay arrivals.
3. **Grow** – Actively attract Universities in the areas of research, the environment, science and technology to set up in Montserrat. This will provide the ideal environment to grow talent on the island in these critical areas.
4. **Retain** – Montserrat already has some of the right ingredients to retain talent and firms in the areas of science, research, the environment and technology. These include a safe environment with little or no crime; a serene environment conducive to study, work and research; and a natural environmental and geological laboratory. Missing ingredients would be the level of technology on the island; the level of tolerance and openness to the diversity of creative people (races, religion, nationalities, languages, and various orientations); and the level of cultural buzz and activities outside of work and study.

This area of science and research is also critical as a basis for creating scientific content (e.g. health benefits of volcanic ash or organically-grown crops in volcanic soil) to support the exploitation of the volcano value chain and the promotion of the destination.

13.4 Volcano Commercialisation – Volcano Interpretation Centre

It is important that Montserrat does not bury its great treasure and forget about its volcano, but exploit the commercial opportunities that the volcano provides. Many of these aspects have been identified in the ‘turning ash to cash’ section. One key opportunity is the development of the Montserrat Volcano Interpretation Centre (VIC).

The idea of an interpretation centre is not new and has been pursued in the past and invitations to tender were sent out. However, through limited funds the process was derailed and never materialised. The design and development of the VIC needs to be re-scoped and reassessed. It is important that in reviving this idea that the VIC has the following attributes:

- Iconic
- Modern and State of the art
- Experiential
- Transformational
- Educational
- Beneficial to Montserrat

The iconic nature is important. The VIC must do for Montserrat what the Sydney Opera house has done for Australia or the Guggenheim museum has done for Bilbao, Spain or the Eiffel Tower for Paris.

The term “interpretive centre” is used synonymously with a “visitor centre” since the functions tend to be similar. However, an interpretive centre is usually an important structure

located close to a park or major site offering amenities and services. The following functions can be ascribed to visitor centres:

- Promotion and awareness raising of the location of an attraction
- Orientation and filtering of visitors with respect to an attraction
- Providing complete interpretation of an attraction that is inaccessible to visitors because of its fragility (Substitution)
- Interpretation – education visitors about an attraction.

The Government of Montserrat needs to decide whether the proposed Volcano Interpretive Centre will serve the purpose of substitution – providing complete interpretation of the proposed national geopark – for those who may not be able to visit the park and those who do visit the park – a visitor centre. This will decide the location of the park.

However, it is always desirable to construct an interpretive centre in close proximity to any established Park for the various reasons outlined under objectives. This does not preclude the construction of a visitor centre in a more central area.

In proposing the development of an interpretive centre the following must be considered

- Objectives and rationale and goals of an interpretive centre
- Location of the centre based on goals and objectives

13.4.1 Steps Needed For the Development of an Interpretive Centre

Goals

Some goals common to the development of an interpretation centre are as follows:

1. To heighten the awareness and appreciation of the visitor and to give the visitor an understanding of what they are expected to view, allowing first-hand discovery and engagement with one of the most elemental and culturally significant forces of the earth in both its creative and destructive roles.
2. To understand the importance of conservation and to minimize the impact on the site.
3. To depict the legacy of the ongoing volcanic eruption and the continuing story of the people of Montserrat and of the island itself in relation to the volcano. To understand the importance of preserving and telling the history of Montserrat and the stories of those who survived the volcanic eruption.
4. Tell of the resourcefulness and resilience of the people of Montserrat – their stories of survival, adaptation, and assimilation.

Objectives

The objective of an interpretation centre is to enrich the visitor's experience through professional displays, to orient the visitor and to improve understanding of goals of the Park with respect to conservation and interpretation of natural resources.

Interpretive objectives should appeal to learning- educating the visitor on the attributes of the site, the role and function of the geopark and to foster an appreciation of the park. It should be behavioural – encouraging appreciation of the site and educating visitors to observe the rules, regulations, safety and usability of the site.

It should be emotional – providing a “feel good” attitude to visitors and a heightened appreciation of the ambience of the geo park/site. This is key to the transformational experience that Montserrat will offer to its visitors.

The development of a Volcano Interpretation Centre entails the following:

- An Analysis of the subject or phenomena for which interpretation is required. In this case the volcano and the buried city of Plymouth and the environs. This will inform the development of interpretive objectives - What do we want to interpret to the visitor. The analysis is expected to highlight the attributes of the phenomenon, the site, and the social historical and environmental aspects and thus provide opportunities for interaction of visitors with the site and an understanding of the phenomenon.
- Siting and development of the building should be in keeping with the ambience of the area, the theme of the geopark and the projected visitor capacity. The design of the building will be based on the function of the building.
- Development of a floor plan for the area is integral to this, to highlight layout and traffic flow of visitors, the location of the reception area as well as the location of exits and entrances and applicable building codes. Traffic flow can be open or lineal, left to right
- Development of an interpretive plan- this will entail the development of interpretive themes of significance of the volcanic phenomenon, site, ecology and geology of the area, history of the area in terms of economic and social significance, information on visitor trail and access.
- Identification and selection of methods of interpretation - programme and exhibits adapted to the themes of the interpretive programme.

13.4.2 Siting of the Interpretive centre

Site selection and location of the interpretation centre are dependent on the goals and objectives of the centre. Interpretive centres developed for national parks or geoparks are generally located somewhere along the trail leading to the Park. It should be located away from the ticketing station since the function of the centre is generally a function of orientation and filtering. The final site selection will be based on technical considerations.

The VIC should be should be situated in a place that has the following characteristics:

- Must have a view of the volcano itself;
- Must be a part of a network of volcano-related activities, tours and attractions;
- Must be sensitive to the environment;
- Must complement other activities rather than compete with them;
- Must sufficient amenities and facilities such as parking, toilet facilities, etc.
- Must have room for expansion; and
- Must be situated near to a community so that other fringe benefits could be derived from the centre.

If in fact the purpose of the centre is to serve as a “substitute” as described above, then the location would be such that a large majority of visitors and nationals has access to it.

An interpretation centre should not be confused with an information centre although it also serves as a centre of information.

13.4.3 Proposed Conceptualisation of the VIC

The VIC must include the following concepts:

1. Scientific interpretation of the volcano.
2. Social interpretation of the volcano, depicting the reaction, recovery and resilience.
3. Historical interpretation of the volcano showing the before and after of Montserrat and the chronology of events.
4. Present-day visual and interpretation of the actual volcano.
5. Technological and experiential interpretation of the volcano – using latest technologies such as virtual and augmented reality, video, sound, 3D and 4D technologies, other multi-media technologies, etc.

13.4.4 Basic Elements of Interpretation

The process usually starts with the development of Interpretive themes. Themes are usually designed from interpretive goals, objectives and the significance of the attraction. Interpretive themes are derived the analysis/ evaluation of the proposed site and are expected to capture the essence and features of the site. Out of this, sub-themes may be developed to support the themes

Interpretation is achieved through professional displays - a combination of electronic displays, interpretive panels, artefacts, maps, sketches and billboards. Displays generally have a harmonized theme reflective of accuracy of the features of the site. It also entails the development of innovative designs that tell a story and/or explain the essence of the site experience.

Development of an interpretation programme may include some of the following:

- Development of indoor interpretation displays
- Availability of diverse interpretation media. E.g. electronic, printed or verbal guides
- Introduction of codes of conduct to educate visitors on what should or should not do when visiting the site.

However the development of an interpretive plan will be central to establishment of an interpretive centre.

Actions

- Develop an updated Terms of Reference and Invitation to Tender for the VIC to be Re-scoped, reassessed, designed and built.
- The budget needs to be more realistic for both the design and build
- Site evaluation/Interpretive analysis
- Construction of building
- Planning and design of interpretive centre
- Development of interpretation, experiential and educational programme
- Purchase and Installation of interpretive display material

13.5 Volcano Downstream Activities

At present, the main item being exploited from the volcano is aggregates. And while it is arguably one of the best available, aggregates, it is the ‘tip of the Montserrat Volcano iceberg’. But the potential from the mud, ash, and not to mention all of the coastal lands created, is enormous. Even organic agriculture can have an important boost from the fertile land/ash that has been created from the bowels of the earth. Each aspect needs to be identified, analysed, feasibility established, opportunities promoted and eventually realised.

Strategic Area #1 - Use the Volcano as a strong ‘pull’ factor to make Montserrat the must-visit Destination in the Caribbean

Objective: To use Volcano as Montserrat’s Unique Selling Proposition (USP) in order to ignite growth and create the create buzz and excitement that will drive discerning visitors to must-see, must-visit, must-experience Montserrat.

Strategy: To identify, develop and realise the full potential of the Montserrat Volcano Value Chain in areas of conservation, commercialisation, science, technology and downstream activities.

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|--|------------------------------------|------------|---------------|---|
| 1.1 | Carry out a feasibility analysis to explore and exploit the volcano value chain both in terms of commercialisation and downstream activities with a view to moving up the value chain: | Min. Environ. / Min. Finance | Jan 2020 | 90,000 | Feasibility study carried out. Priority products identified. |
| 1.1a | Invite firms to Tender to Carry out a feasibility analysis to explore and exploit the volcano value chain | | | | |
| 1.1b | Develop an Investment Brochure / Guide to show the potential opportunities around the volcano both for local and international investors to drive awareness and educate Investors on the potential of the volcano and the key opportunities. | | | | |
| 1.1c | Use the results of the feasibility analysis to Drive awareness and educate Montserratians on the potential of the volcano and the key role within tourism (<i>See awareness campaign</i>) | Min. Environ. / Div. of Tourism | Mar 2020 | 25,000 | |
| 1.3 | Enable, attract, grow and retain talent in the areas of volcano research, science and technology: | | | | |

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|---|---------------------------------|------------|---------------|---|
| 1.3a | Review and revise legislation such as the immigration act, the companies act, etc. to allow the easy entry and establishment of companies and individuals in the areas of science, research, the environment and technology wishing to live and work in Montserrat | Min. Labour / Min. Finance | Mar 2020 | 60,000 | Legislation in place to support initiative |
| 1.3b | Actively market Montserrat as an ideal place to live and work. Target the Creative Class. (<i>See Marketing Action Plan</i>). | DoT | | | |
| 1.3c | Actively pursue/attract Universities in the areas of research, the environment, science and technology to set up in Montserrat. Start by setting up a database of these universities, then actively communicate with them and discuss the possibility of partnerships, and setting up on island). | Min. Finance / DoT | Sep 2020 | 20,000 | Database developed 10 universities shortlisted and contacted |
| 1.3d | Improve IT infrastructure to facilitate the ease of living and working on the island (<i>See Technology Action Plan</i>) | | | | |
| 1.3e | Carry out diversity sensitivity training and awareness among key personnel and citizens (<i>See Action Ref. #2.3 under Strategic Area #2</i>) | | | | |
| 1.3f | Develop a scientific basis for the claims being made in marketing and promoting the destination (content, telling the story and selling the why), e.g. health claims. Why is | Min. Environement / DoT | Dec 2020 | 100,000 | Scientific studies carried out |

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|--|------------------------------------|------------|---------------|--|
| | Montserrat's volcano beneficial from a scientific and research perspective. | | | | |
| 1.4 | Establish a Volcano Interpretation Centre (VIC): | | | | |
| 1.4a | Develop an updated Terms of Reference and Invitation to Tender for the VIC to be Re-scoped, reassessed, designed and built. Considering site evaluation/Interpretive analysis, planning and design | DoT / Min. Finance | Dec 2019 | - | TOR and ITT/RFP developed and deployed |
| 1.4b | Select and hire successful bidder to carry out scope of works in the TOR | DoT / National Trust | Feb 2020 | 350,000 | Bidder selected, design completed |
| 1.4c | Construct an iconic, state-of-the-art, modern building for the VIC | DoT / Min Finance / National Trust | Mar 2021 | 2,000,000 | VIC construction completed |
| 1.4d | Develop interpretation, experiential and educational programme to be offered at the VIC | DoT/ National Trust | Mar 2021 | 150,000 | Programme developed and implemented |
| 1.4e | Purchase and Install interpretive display material | DoT/ National Trust | Mar 2021 | 100,000 | interpretive display implemented |

| Strategy | Activity | Lead Responsibility | Support | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|--|--|---------------------------------------|---|-------------|---------------|--|
| Establish a strong political and community support from land and property owners, adjacent communities, the private sector | Establish a management committee consisting of stakeholders | Management entity | MVO/ National Trust, Land owners, Dept. of Tourism | 3 -6 months | 50,000 | |
| The proposed boundaries of the area earmarked must be clearly defined and demarcated. The s | Demarcation of boundaries | Lands & Surveys Dept. | Physical Planning Dept. /Land owners/ Min of Agriculture | 3 -6 months | - | Boundaries demarcated and maintained |
| Develop the legal and institutional Framework for the PRk | Development of a mangment plan | Department of Environment/ Legal Dept | Tourism Department Physical Planning/ Private Sector/ MVO. National Trust | 2 years | 75,000 | The Park is constructed and operational |
| Strategy 3: Development of a management framework that promotes | Development of a management plan Development of an Effective communication system | Management Committee | . Tourism Department Physical Planning/ Private Sector/ | | | Management plan developed with input of stakeholders Communication strategy developed |

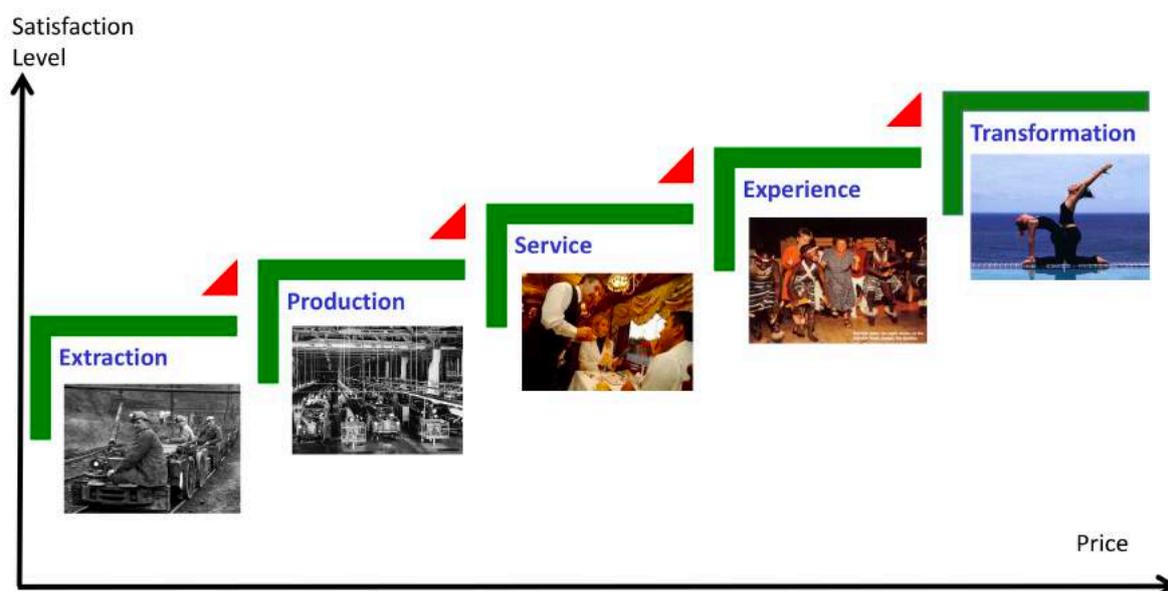
| | | | | | | |
|--|---|---------------------------|-----------------------|---------|----------------------------|--|
| | | | MVO. National Trust | | | |
| Strategy 5 Apply for UNESCO World Heritage Status – | complete application form | Department of Environment | Department of Tourism | 1 year | 100,000 | Plymouth established as a UNESCO World Heritage Site |
| | Monitoring and Evaluation and Maintenance | Department of Environment | Department of Tourism | ongoing | 150,000 (50,000 per annum) | Country benefits from UNESCO World Heritage Status. Site is maintained to the highest standards. |

Total Budget for Strategy Area #1 – USD 3,270,000

14 Strategic Area #2 – Move Up The Value Chain and Deliver Transformational Experiences to the ‘New Travellers’

The Transformational Economy is a new stage of economic offering. The extraction based economy dealt mostly in raw materials: wheat to bake our own bread, wool to knit our garments, coal to run engines. The focus was on extraction. During the industrial revolution, the focus moved from field to factory. The era of mass production had arrived and businesses and economies were becoming wealthier.

Figure 12
The Transformational Economy



Source: Tourism Intelligence International, 2019

Further economic prosperity and increased automation increased wages and decreased the hours worked. But rather than use the increased non-working time to return to making our own bread and knitting our own clothes, consumers (in the advanced industrial economies) chose to spend time purchasing services – restaurants, retail outlets, etc. gained popularity. The age of the service economy was born. People got higher wages, business became more profitable and economies grew wealthier.

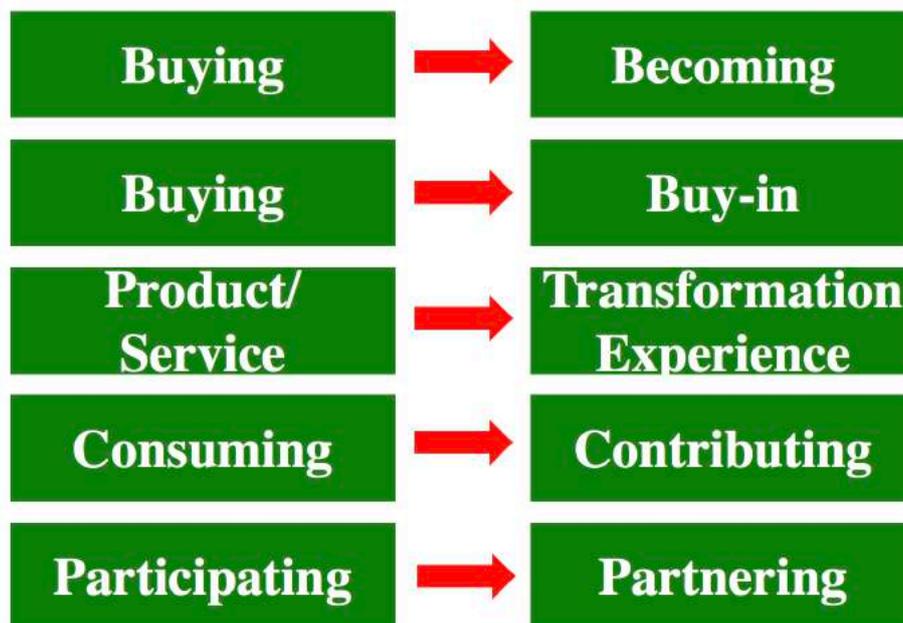
This services stage has become so rooted and so prevalent that in many instances, it is becoming commoditised in a similar manner to raw materials, such as wheat and oil, and goods, such as PCs and cars. Within financial services, cheque accounts, home and car insurance, and savings accounts are seen by most consumers to be identical services, with selection based solely on price or interest rates. Services at restaurants and hotels also run the risk of becoming mundane where a customer becomes just another room number or table number.

In order to differentiate themselves, many companies are moving beyond services to experiences. Thus, Pizza Hut, for example, offers more than a meal; it will host your child's birthday party, complete with a candle-lit cake, entertainment and games. In other words, they offer an experience. Welcome to the experience economy, where persons do not just buy a

product or service but they go away with a memorable experience. Walt Disney Inc. with their Disney Parks is the recognised expert in offering experiences. The workers are called actors, the visitors are the guests and the theme park becomes the stage. Destinations the world over are fighting to differentiate themselves through offering exceptional experiences through festivals, theme parks, virtual reality tours, cultural displays waiting for you when you land at the airport, etc. The experience economy also created greater financial gains. The highest paying jobs on the planet today are those based on the experience economy – musicians, entertainers, athletes, actors, movie directors, authors (e.g. Harry Potter), etc.

However, in order to stand out even further, Montserrat needs to move beyond the experience economy to the transformational economy. In the production and service economies, people bought a product or service. In the experience economy people bought a memorable experience. But in the transformational economy, the focus of the consumer is not on buying but on becoming. It's about a life changing experience. Customers don't buy your product. They buy-in to your product. And this is precisely what Montserrat needs to work towards. Through its history, culture, stories and exceptional people Montserrat has the opportunity to educate, inspire and transform people so that they can buy-in to and fall in love with the Montserratian authentic way of life and be transformed in the process.

Figure 13
The Transition of the Customer to the Transformational Economy





Tourism Intelligence International developed the concept of ‘Compassionate Tourism’ in Malawi in 2006, one of the first examples of the transformational economy being employed in tourism.

Many visitors to Malawi want to not only go on a tour but to also make a difference. It is no surprise, for example, that Madonna adopted four children from Malawi.

The idea is that when a visitor comes to Montserrat, they leave a transformed person; willing to tell others and encourage them to visit; and to engage with Montserrat over their lifetime – to return as visitors; to live and work for part of the year in Montserrat; to adopt a school; plant a tree; and to contribute to the well-being and sustainability of this little rock that is Montserrat.

15 Move up the Value Chain

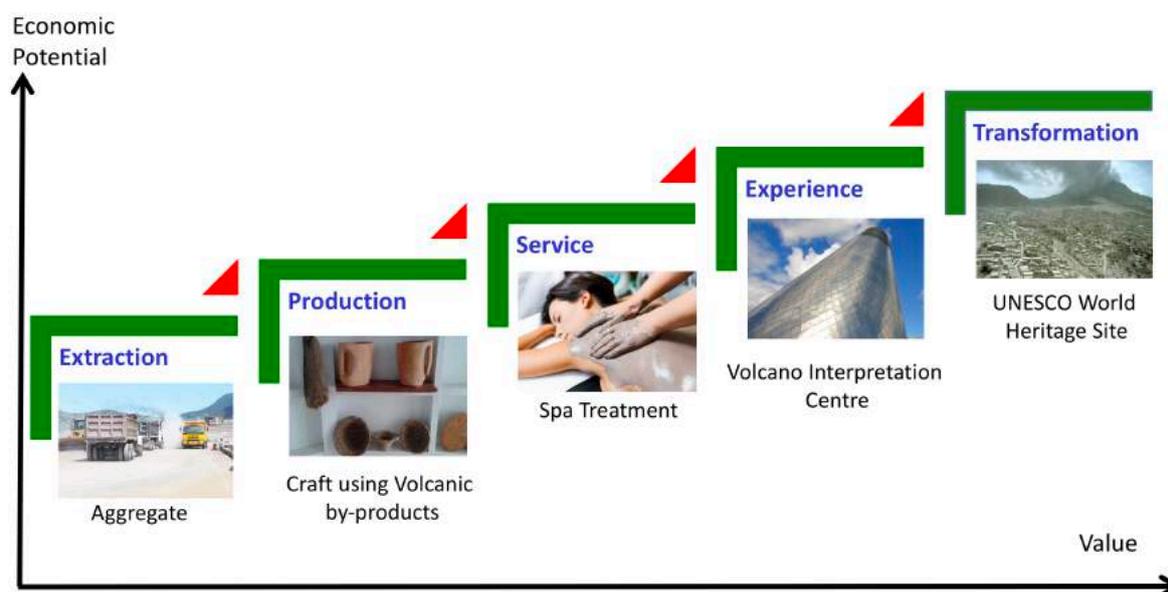
It is critical for the tourism sector to retain more revenue locally and to move up the value chain. More and more value needs to be added in order to sustainably develop the sector. Montserrat needs to move beyond extraction (sand, ash, aggregates, etc.) to offering higher value-creating services and experiences such as the Volcano Interpretation Centre, Spa and Wellness using volcano by-products (ash facials, sulphur scrubs, etc.), educational tourism, volcano tourism, co-working spaces, and much more. The tourism product could move up the value chain by adding more complex, high-value components such as adventure tourism, cultural tourism and medical tourism, education, training, sports, moving upward from basic elements such as sun, sand and sea.

In terms of the volcano value chain consider that the price per unit of exported aggregates is a lot less than say the price of a spa treatment consisting of sulphur or refined ash, which in turn is less than the value added by visiting the UNESCO World Heritage Site and wanting to make a difference and contribute to the betterment of Montserrat. This is where tourism could take advantage of the volcano to really create more wealth-generating opportunities for Montserrat, considerably more than the extractive industries. Consider that Jamaica made US \$121 Million⁵ from bauxite in 2017 and that tourism made 25 times more than bauxite for Jamaica, with approximately US \$3,000 Million⁶ in revenues, in 2017. Tourism clearly has the potential to generate more wealth for Montserrat than any other sector of the economy.

⁵ <https://www.alcircle.com/news/jamaicas-bauxite-export-revenues-to-grow-305-totalling-us1215-mln-in-2017-27009>

⁶ Jamaica Information Services, 2018

Figure 14
Moving Up the Volcano Value Chain through Tourism



Embracing IT is another path to moving up the value chain. A small bed and breakfast setting up a fully optimized website and a Facebook account to better market and sell its property; a destination adding free Wi-Fi at strategic sites and locations to take advantage of free advertising by visitors who post on Instagram and Facebook; a hotel chain incorporating Big Data analytics to better cater to customers' needs; are examples of moving up the value chain using IT. Some steps are inexpensive (adding a Facebook account) while others may be prohibitive (Big Data analytics). It is also important to create avenues and opportunities for tourism operators to engage with local suppliers, to build their capabilities.

16 Develop Quality Human Resources to Deliver the Transformational Experiences

16.1 Human Resource is Vital For Success

Human resources are indispensable to the tourism sector. The importance of talent cannot be underestimated. Consider that tourism is very labour intensive and creates a large number and varied types of jobs. However, not just any type of employee will be sufficient to ensure competitive success. Remember that it is not the physical product but the people that create exceptional, memorable and transformational experiences for our visitors, so the better the quality of our human resources, the better the quality of the experiences of our visitors and guests.

In addition, human capital and quality talent is needed for innovation and creativity, which drives the creation of amazing tourism products for our guests. Talent also drives technology (both the creation of technological advancement and the use of technology to become more competitive).

Therefore, without the human element, Montserrat will be nothing more than an empty shell. Building high quality talent (both attitude and aptitude) is a critical success factor for the further development of the tourism sector.

It is also agreed that the increasing recognition of the economic importance of tourism itself has lent further prominence to the necessity for an expansion of tourism education and training and further development of human resources. The competitive advantage of Montserrat will increasingly depend on the availability of skilled labour. The volcano and the experiences developed around the volcano as the USP for Montserrat will be naught without the right level and availability of quality people to orchestrate the experiences and deliver the brand promise. Therefore, the structure of and focus on (public and private) educational and vocational provisions are important issues for Montserrat.

16.2 Human Resource Challenges in Montserrat

There are a number of human resource challenges that Montserrat faces. Firstly, consider that Montserrat lost a large chunk of its population base in the aftermath of the volcanic eruption. Many bright and talented Montserratians now live abroad, largely in the UK and to a lesser extent in the US. The population that has remained is very limited with some 2,900 Montserratians complemented by a mix of regional residents such as from the Dominican Republic, Haiti, Antigua, Barbados, Trinidad etc. This poses both an opportunity (residents who can speak foreign languages such as Spanish and French) and a challenge (many foreign nationals do not fully understand the Montserratian tourism product as well as the fact that there is no guarantee that they will remain on island for the long haul).

Consider also that there are no formal tourism training institutions established in Montserrat. The Montserrat Community College offers tourism studies at CAPE level. However, this is not sufficient to sustain the industry, especially since nearly 100% of the graduates do not even apply for jobs in the tourism sector⁷. In addition, the CAPE programme is very basic and cannot adequately cater to the needs of the sector. It is very theoretical and even detached from the real issues on the ground in the industry. The closest tourism training institute is the Antigua and Barbuda Hospitality Training Institute (ABHTI). There are some people in the industry who are graduates of ABHTI, however, they are very few in number.

On a positive note, Montserrat forms part of the Eastern Caribbean Institute of Tourism (ECIT). ECIT is a statutory inter-governmental tourism and hospitality virtual training and educational institution serving all OECS Member States. A room that is fully equipped has been allocated at the Montserrat Community College for the delivery of ECIT training. Montserrat has been designated as a node of excellence in specialised tour guiding. The ECIT facilities could be used for additional tourism training. The good news is that there are a handful of qualified individuals on island that could be called upon to offer some basic courses such as customer service, and other entrepreneurial capacity building skills.

Table
Potential Areas of Study for Which There are Qualified Trainer in Montserrat

| Areas of Study |
|---------------------------------|
| Tour Guiding |
| Taxi & Tour Guide certification |

⁷ Interview with Angela Greenaway, Tourism Studies Lecturer at the Montserrat Community College, February 2019.

| Areas of Study |
|---------------------------------------|
| Customer Service – Frontline Officers |
| House Keeping |
| Food Handling Services / Food Safety |
| Mixology |
| Financial Management – Electronic |
| Financial Management – Basic |
| Basic First Aid |
| Using Social Media in your business |
| Photography |

Source: Division of Tourism, 2019

16.3 Tourism Not Seen as a Career Priority

The perception of the kind and quality of talent needed for the sector is often skewed in the minds of the population that still see jobs in the sector centring around low skilled, low paid, menial and transient positions with unfriendly working hours. This misperception causes talent gaps / shortages as tourism is considered less attractive than other sectors, particularly at the higher levels. In fact, travel and tourism employs a plethora of talent both high and basic skillsets – doctors, lawyers, architects, accountants, engineers, entertainers, masseurs, managers, cleaners, musicians, chefs, pilots, translators, IT technicians, customer service representatives, waiters, taxi drivers, etc. Moreover, the perception of a lack of staff development pathways, unsociable working hours, low earnings potential (for some job roles) and out-dated management practices (in some areas of the industry) combine to add to the poor recruitment image for the sector and also lead to high rates of attrition, only at certain levels in the sector.

16.4 The Definition of the Sector Needs to Be Broadened

The tourism sector is still considered as constituting flights, hotels and restaurants. In terms of careers many see only options for housekeeping, waiting, tour guiding, taxi drivers, front desk, and if luck a management/supervisory position. However, tourism constitutes anything a visitor does while on holiday and as such opportunities for employment and entrepreneurship are vast. Moreover, the opportunities do not only exist on the lower end of the value chain. There are many jobs and entrepreneurial opportunities at the top end of the value chain too. Consider that doctors, lawyers, accountants, architects, engineers, entertainers, etc. can also find wealth and income generating opportunities in tourism. As such, we need to drive awareness of the economic scope of tourism to create a variety of employment and entrepreneurship opportunities at all levels of the value chain.

16.5 Key Success Factors for Human Resource Competitiveness in Tourism

- **Both technical and behavioural skills are needed** - In preparation for the world of work, there is a need to emphasise both technical skills as well as behavioural skills or so called “soft skills” such as teamwork, communication skills, positive work ethic, critical thinking etc.
- **Start from a Young Age** – Tourism needs to be taught in schools and driving awareness of the benefits and the possibilities that tourism entails must start at an early age.

- **Lifelong learning is a necessity** – Worker skills must be updated throughout adulthood (lifelong learning) and there must be the provision of programmes and opportunities to address same;
- **Higher levels of enrolment at secondary and tertiary levels** - Higher enrolment (and throughput levels) at the secondary and tertiary levels must be achieved, but particularly at the tertiary level⁸ to enhance the region’s competitiveness and economic growth;
- **A focus on innovation and entrepreneurship** - Forging a culture of innovation and entrepreneurship⁹ is a necessity in order to create a new business class that is willing to take risks, use technology and create new products and services for a global market;
- **The important role of technology** - With the reality of limited human and financial resources, technology has to play an important role in linking Caribbean countries and creating online learning platforms and online centres of excellence that can provide greater accessibility, affordability and quality outputs through open and distance education and open educational resources;
- **Emphasis on technical training and professional certification** – There is now greater emphasis on providing different paths to professional development and certification and greater inclusivity through Technical and Vocational Education which uses occupational standards, that are validated by industry, and that drives competency based curriculum, leading to National Vocational Qualifications (NVQs) that emphasise both technical and behavioural skills¹⁰;
- **Quality standards and continuous improvement** – The setting up of national accreditation bodies to provide oversight relating to the quality of education and training offered by national, regional and international institutions and the programmes being offered. Such accreditation bodies seek compliance to standards and continuous striving for academic excellence.

16.6 Focal Areas for Tourism Training in Montserrat

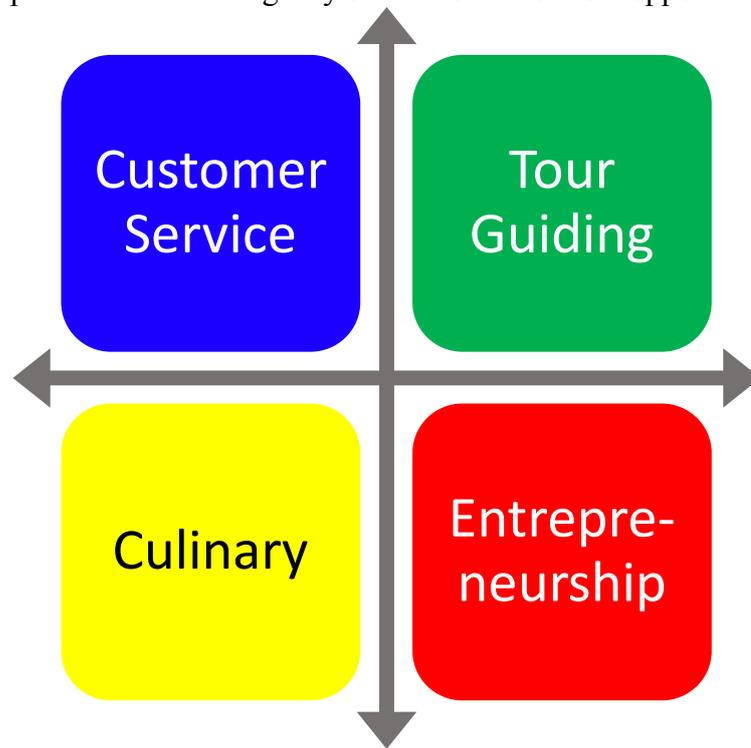
Given the current tourism and human resource landscape in Montserrat and the key opportunities and challenges as well as the core focus on volcano tourism and offering transformational experiences there are four key areas that tourism training should focus on. These include customer service, tour guiding, culinary and entrepreneurship. These areas were selected because of the importance they play in delivering transformational experiences to visitors to the island. The four areas will help ensure that the visitor experience is better orchestrated from arrival to departure. Every person that a visitor interacts with should offer excellent customer service. Every visitor must eat and so culinary training is critical if we want

⁸ “Globalisation and Human Resource Development in the Caribbean” by Patrick Kendall Research Economist, Social and Economic Research Unit, Caribbean Development Bank, October 2007

⁹ “Human Resource Development: Re-shaping Caribbean Education – An Urgent Imperative, 2015

¹⁰ “The Regional TVET Strategy for Workforce Development and Economic Competitiveness,” prepared by the Caribbean Association of National Training Agencies (CANTA) in 2012.

to raise the bar of the destination. Considering that Montserrat is already selected as a centre of excellence in tour guiding and the renewed focus on the volcano experience, tour guiding will remain a critical focal point for training. And entrepreneurship is needed so that Montserratians are capacitated to meaningfully see and seize tourism opportunities.



Strategic Area #2 - Move up the value chain and offer transformational experiences to ‘new travellers’.

Develop High-quality Human Resources to Deliver the Transformational Experiences

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|---|---------------------------------|----------------------|---------------|--|
| 2.1a | Carry out a talent needs assessment for the broadly defined tourism sector | DoT / Min. Labour | Jan 2020 | 70,000 | Needs assessment carried out HR gaps identified |
| 2.1b | Based on the talent gaps identified in the needs assessment, determine what mechanisms are needed to develop and attract the required talent. <i>(to include as a deliverable of the needs assessment)</i> | - | - | - | Mechanisms identified |
| 2.2 | Put mechanisms in place to develop and attract the required talent. | Min. Labour / DoT | Jun 2020 | 120,000 | Mechanisms deployed |
| 2.3 | Develop and deploy a comprehensive Tourism Awareness Campaign (TAC), telling the success stories of Caribbean men and women who successfully ‘made it’ in the tourism sector and highlighting non-traditional employment and entrepreneurial opportunities in the sector such as IT analysts, engineers, marketers, translators, data scientists, app developers, etc. Show the real earning potential of the sector to make tourism more personal and relatable. | DoT / Min. Labour | Jun 2020 and ongoing | 250,000 | TAC developed TAC deployed and ongoing |

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|--|---|----------------------|---------------|--|
| 2.3 | Develop programmes (including teacher training) to ensure that tourism is embedded/incorporated in all subjects at primary and secondary schools e.g. maths, geography, economics, etc.. Tourism is an applied skill. Use the Bahamas model. | Min. Education / DoT | Sep 2020 | 150,000 | Programmes developed and implemented |
| 2.4 | Retrain, retool and certify all levels of management within the sector through seminars and workshops. | DoT / Min Education | Jun 2020 and ongoing | 60,000 | 3 training workshops cy end of 2022 |
| | Culinary Apprenticeship: | | | | |
| 2.5 | Partner with the Antigua and Barbuda Hospitality Training Institute to develop Culinary Apprenticeship: | | | | |
| 2.5a | Sign an MOU with the ABHTI to develop and offer an apprenticeship programme for ten persons per year (the programme should not be longer than 1 year) | DoT / Min Education | Mar 2020 | 5,000 | MOU with ABHTI established |
| 2.5b | Identify 10 individuals to join the apprenticeship programme through a rigid and transparent application process | DoT / Min Education | Jul 2020 | 5,000 | 10 individuals shortlisted |
| 2.5c | Offer scholarships to those 10 individuals to participate in the culinary apprenticeship for one year - to cover airfare, accommodation and any tuition fees | DoT / Min Education | Aug 2020 | 300,000 | 10 scholarships granted 10 students commence apprenticeship |
| 2.6 | Identify and promote regional and international online training programmes in tourism | Min. Education / DoT / Montserrat Community College | Mar 2020 | 50,000 | Programmes identified and promoted |

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|--------|--|---------------------------------|----------------------|---------------|--|
| 2.7 | Offer partial scholarships for those taking up and passing those programmes – 50% of the tuition fees (student to repay half of the grant if they fail the programme). | Min. Education / DoT | Jun 2020 | 100,000 | Scholarships promoted and granted to minimum of 10 persons |
| 2.8 | Train personnel in the sector to create and orchestrate memorable transformational experiences focusing on telling the Montserrat story and getting visitors to buy-in to the Montserratian way of life. Follow the Walt Disney Model. | DoT | Mar 2020 and ongoing | 100,000 | |
| 2.9 | Develop an Entrepreneurship Training Programme to capacitate small businesses in tourism and tourism-related areas to take advantage of the volcano value chain and high-value product/service offering to generate more wealth and high-spend opportunities. | DoT / Min. Labour | Mar 2020 and ongoing | 100,000 | |
| 2.10 | Develop a training program to assist businesses and individuals to be IT savvy | | | | |
| 2. 10a | <p>Identify ‘market-ready’ MSMEs and support their digital transition. Provide the training and tools to allow them to be globally-competitive and the skills to be able to navigate the digital era.</p> <p>Focus on using the Internet to promote their businesses (website development, social media, email marketing, content marketing, SEO, how to run digital campaigns, etc.).</p> | Division of Tourism | 3 years | 60,000 | Target 30 MSMEs over 3 years |

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|-------|--|--|----------------------|---------------|---|
| 2. 11 | The relevant institutions such as the Division of Tourism need to be adequately capacitated to be able to facilitate the actualization of the Volcano Value Chain. | DoT | Oct. 2020 | 50,000 | Training carried out |
| 2. 12 | Carry out diversity sensitivity training and awareness among key personnel and citizens to be able to attract the Creative Class | DoT | Mar 2020 and ongoing | 30,000 | 1 training session per year carried out |
| 2.11 | Make IT an important aspect of the school curriculum. Invest in the training of IT professionals, starting in schools. | Min. Labour | Sep 2020 and ongoing | 50,000 | Ongoing training |
| 2.5 | Identify IT as an important strategic area for Montserrat and develop and attract digital talent as a priority so that both local and diaspora Montserratians can develop the talents needed to drive the future and growth of Montserrat. Ensure that IT becomes a cross-cutting issue affecting the policies and practices at all levels of the country. | Min. Education / Min. Labour / DoT (for marketing) | Dec 2020 and ongoing | 120,000 | Ongoing initiative |

Total Budget for Human Resource Development – USD 1,620,000

17 Develop and Promote ‘World Class’ Cultural Festivals and Events

Objective: To increase the tourism arrivals into Montserrat through the development and enhancement of quality Festivals and Cultural Events.

Strategy: Make festivals and cultural events world class and market-ready and improve the visitor experience.

The economic opportunities that the development of cultural and festival tourism presents are numerous. The value chain of festivals is vast, touching on many different sectors, communities and individuals. Anyone can be involved.



Unlike other sectors of the economy, tourism, and more particularly festival and cultural tourism, has the potential to directly benefit local communities. No other sector of the economy brings ready employment and entrepreneurial opportunities to local communities like festival and cultural tourism. Entertainers, artistes, technicians, vendors, craftsmen, cooks, cleaners, taxi drivers, security guards, community organisers and leaders can all get involved in, AND benefit from, the staging of festivals and cultural events. Visitors travel to an event and spend their money on a number of items including tickets, food, CDs, magazines, tours, arts and craft and other services. These monies often go directly into the pockets of many community members and small business owners.

Figure 15
The Socio-Economic Impact of Festivals



Source: Tourism Intelligence International, 2019

Indeed, local communities are the backbone of culture in Montserrat. They form an integral part of festivals such as St. Patrick's and they are the main recipients of the economic benefits to be had and they are also the main participants. Therefore, promoting festivals and events is key to involving local communities in the development, promotion, growth and sustainability of quality tourism in Montserrat.

Strategy

1. To develop world-class festivals with 'best in class' organisation, management and facilitation capabilities
2. Grow the Festivals Value Chain and achieve efficiencies and ensure that locals benefit
3. Promote festivals globally
4. Support the development of other festivals on island.

Actions:

1. Identify festivals and carry out a needs assessment and priority ranking
2. Roll out 2 festivals per year over the next 3 years to technically support (total 6)
3. Support festivals that are owned by locals and assist the emerging festivals to grow and develop
4. Provide support to the management and organisational aspects.
5. Develop the event locations and achieve economies in design as well as guest satisfaction.

Strategic Area #2 - Move up the value chain and offer transformational experiences to ‘new travellers’.

Develop and Promote ‘World Class’ Cultural Festivals and Events

NB does not include budgets for the actual implementation and running of the festivals.

Strategy

1. To develop world-class festivals with ‘best in class’ organisation, management and facilitation capabilities
2. Grow the Festivals Value Chain and achieve efficiencies and ensure that locals benefit
3. Promote festivals globally
4. Support the development of other festivals on island.

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|--|---------------------------------|----------------------|---------------|---|
| | Identify festivals and carry out a needs assessment and priority ranking | DoT | Jan 2020 | 60,000 | Needs assessment carried out |
| | Roll out 2 festivals per year over the next 3 years to provide technical support (total 6) through the use of international / regional expertise | DoT | Feb 2020 and ongoing | 120,000 | 6 festivals raised to international standards |
| | Support festivals that are owned by locals and assist the emerging festivals to grow and develop | | | | |
| | Provide support to the management and organisational aspects. | | | | |
| | Develop the event locations and achieve economies in design as well as guest satisfaction. | DoT | Feb 2020 and ongoing | 500,000 | Event locations enhanced |

Total Budget for Festival Support – USD 680,000

18 Offer Quality Facilitation to Improve the Visitor Experience

It is unacceptable that with the few visitors that come to Montserrat, there are so many problems with their facilitation (booking flights and ferry, check-in, customs, immigration). Consider that the check-in process at Fly Montserrat both at the airport in Antigua, but more importantly, at home in Montserrat takes anywhere between 15 minutes to half hour per person/group¹¹. Consider also, that the IT infrastructure being used by Fly Montserrat (an airline in which the Government has vested interest) needs to be updated. There are no facilities to print boarding passes. Passes are hand-written and stapled to bags. This needs to be drastically improved.

It is critically important that Montserrat makes it easy for travellers to visit Montserrat. The experience of the visitor begins from the time they begin to research the destination online, book their flight, board the aircraft all the way up to the time their departure flight lands in Antigua. We need to think outside the box and to take full control of the visitor experience. We cannot pursue high spend visitors and offer transformational experiences if we do not transform the way we conduct business. Consider that Montserrat is competing with other destinations both regionally and internationally. Making Montserrat easily accessible and creating hassle-free entry requirements will add to the destination's competitiveness. Slight improvements in the facilitation process also facilitates moving up the value chain, e.g. adding better IT infrastructure at the airport.

In addition, at heavy traffic times, such as Christmas and St. Patrick's Day, it is vital that at least the immigration procedure is completed *en route* to Montserrat. This can be achieved by having an immigration officer on board the ferry for the journey. Montserrat has to start thinking more about the comfort of their valued visitors rather their own comfort. The same holds true for the St. Patrick's Day festival that could also utilise the cricket stadium to provide more space and facilities (including toilet facilities) for visitors, but no, vendors are vehemently against this because they feel that if a crowd of uncomfortable visitors are not 'chock a block' in front of their establishments, they will lose business.

If this business if tourism has to work; to work well where everyone benefits, Montserratians have to start seeing beyond their noses!

Actions:

- Carry out a work flow analysis to improve the efficiencies at the Airport in Montserrat and analyse the entire visitor experience to determine what areas need improvement
- Upgrade the IT facilities and equipment being used by Fly Montserrat
- Implement immigration and customs facilitation on board the ferry en route to Montserrat during peak periods such as Carnival and St. Patrick's Day to reduce waiting times and drastically improve the visitor experience

¹¹ Based on the consultant's random checks.

Strategic Area #2 - Move up the value chain and offer transformational experiences to ‘new travellers’.

Offer Quality Facilitation to Improve the Visitor Experience

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|--|---------------------------------|------------|---------------|-----------------------------------|
| | Carry out a work flow analysis to improve the efficiencies at the Airport in Montserrat and analyse the entire visitor experience to determine what areas need improvement | DoT | Sep 2019 | 30,000 | |
| | Upgrade the IT facilities and equipment being used by Fly Montserrat | Fly Montserrat / DoT | Sep 2019 | 50,000 | |
| | Implement immigration and customs facilitation on board the ferry en route to Montserrat during peak periods such as Carnival and St. Patrick’s Day to reduce waiting times and drastically improve the visitor experience | Immigration and Customer / DoT | Sep 2019 | - | |

Total Budget for Facilitation – USD 80,000

Total Budget for Strategy Area #2 – USD 2,180,000

19 Strategic Area #3 – Use Technology to Drive Montserrat’s Competitiveness

Objective:

1. To create one of the most connected islands in the world with quality digital infrastructure, products and spaces.
2. To be ‘ahead of the game’ in terms of technology adoption; to generate new products, services and experiences; to make micro, small and medium-sized enterprises (MSMEs) globally competitive; to engage efficient and cost-effective digital marketing and become a full-fledge digital economy.

Strategy: Use information and communication technologies (ICT) in all aspects of the tourism business and the wider economy to increase efficiencies and competitiveness.

Montserrat government’s investment in fibre cable is an important initiative that will make Montserrat high-tech and e-ready. This development must be exploited by the tourism sector and the rest of the economy.

Not only is the Caribbean lagging behind in terms of the adoption of new technologies but certain basic ICT infrastructure could be improved. Consider that the adoption of the Internet for general use and for business use has grown rapidly and widely around the globe. Internet penetration rates in many developed countries are well over 75% (Iceland – 98%, Finland – 93%, UK – 91.6%, USA – 90%, Singapore – 81%, Argentina – 79.4%¹²) and the growth is happening at lightning speed. However, Montserrat lags behind other countries in the Caribbean. Montserrat’s internet penetration rate is 55% as of 2019. However, many of Montserrat’s closest neighbours have higher internet penetration rates – Antigua (87%), Barbados (78.5%), Dominica (65%), St. Kitts (71%), St. Lucia (66.5%) and St. Vincent (64.5%).

In addition, many small operators do not have any online presence whether they are small properties such as villas, tour guides, etc. In today’s world if you are not online, you are not on sale.

It is important to invest in the hardware, but also in the digital competence and capabilities and attract talent in these areas in order to support the transition to a true digital economy – cashless transactions, online banking, government services available online (drivers’ permits, licensing, payment of taxes, opening a business, etc.), booking of tickets, hotel reservations, car rentals, etc. Small local businesses, e.g. Scriber Tours, need to be globally visible with ‘best in class’ digital tools (websites, Facebook, Instagram and more).

Actions:

1. Identify ‘market-ready’ MSMEs and support their digital transition. Provide the training and tools to allow them to be globally-competitive and the skills to be able to navigate the digital era. Target 10 MSMEs per year over the next 3 years. To include a wide range of

¹² InternetWorldStats, 2019

MSMEs such as event planners, festival owners, artisans, museum operators, tour guides, villa operators, hoteliers, guest houses, taxi drivers, attraction owners, souvenir shops, artists, etc. Support could include website development, social media support, training on how to run digital campaigns, etc.

2. Establish a strong digital capability at the Department of Tourism in order to fully utilize the digital space to effectively and efficiently market and promote Destination Montserrat and the Montserrat Volcano.
3. Obtain/Install/budget script-writing, copywriting and photographic capabilities in order to create the exclusive and extraordinary content to drive the digital strategy.
4. Create free Wi-Fi enabled beaches and public spaces to allow guests to take selfies, post images and promote Montserrat.
5. Use technology and data-driven strategies and analytics to more effectively engage and involve the Montserrat Diaspora, a key market for Montserrat.
6. Promote Destination Montserrat with modern marketing and promotion tools.
7. Work with the government of Montserrat and private sector enterprises to rapidly introduce innovation in key aspects of daily life – payments, banking, etc.
8. Link IT with the investment strategy to attract IT-related tourism businesses, foot-loose professionals (financial, design, art, literary, entertainment and other creatives), and co-working spaces.
9. Make IT an important aspect of the school curriculum. Invest in the training of IT professionals, starting in schools.
10. Identify IT as an important strategic area for Montserrat and develop and attract digital talent as a priority so that both local and diaspora Montserratians can develop the talents needed to drive the future and growth of Montserrat. Ensure that IT becomes a cross-cutting issue affecting the policies and practices at all levels of the country.

Strategic Area # 3. Use Technology to Drive Competitiveness

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|---|---------------------------------|-----------------------|---------------|--|
| 3.1 | Establish a strong digital capability at the Division of Tourism in order to fully utilize the digital space to effectively and efficiently market and promote Destination Montserrat and the Montserrat Volcano: | | | | |
| 3.1a | Hire a Digital Marketing Specialist to work at the Division of Tourism | Director of Tourism / DoT | June 2019 | 150,000 | Digital Marketing Expert hired |
| 3.1b | Train existing staff to become skilled in basic Digital Marketing competencies and skills | Director of Tourism / DoT | May 2019 – April 2020 | 5,000 | Training for two members of staff completed in 5 areas |
| 3.1c | Train staff specifically in Content Marketing and Copywriting skills to be able to use the Internet and digital technologies to create and sell the Montserrat story and attract organic website visitors | Director of Tourism / DoT | May 2019 and ongoing | 5,000 | Training for two members of staff completed in 5 areas |
| 3.2 | Outsource competent photography and videography skills to capture and tell the story of Montserrat in high quality photos and videos | Director of Tourism / DoT | Dec 2019 | 50,000 | |
| 3.3 | Create free Wi-Fi enabled spots at strategic sites and public spaces to allow guests to take selfies, post images on Social Media and promote Montserrat. Target Little Bay, Old Road Bay, Lime Kiln Bay, Jack Boy Hill, Garibaldi Hill and others. | DoT / Flow or Digicel | Feb 2020 | 72,000 | Free Wi-Fi enabled up to 10 sites |

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|---|---------------------------------|----------------------|---------------|---|
| 3.5 | Use technology and data-driven strategies and analytics to more effectively engage and involve the Montserrat Diaspora, a key market for Montserrat | | | | |
| 3.5a | Create a dedicated social media space to facilitate communication with the Montserrat Diaspora | DoT | Jun 2019 | 5,000 | Diaspora Facebook page set up |
| 3.5b | Create a database of Diaspora contacts and location information and use this database to communicate and capture information (use database to also determine who they are and where they are located). Use appropriate technologies such as an online survey or social media to capture contact details | DoT | Jun 2019 and ongoing | - | 1,000 contacts received by Mar 2021 |
| 3.6 | Promote Destination Montserrat with modern marketing and promotion tools (<i>See Marketing Action Plan for more details</i>) | | | | |
| 3.7 | Work with the government of Montserrat and private sector enterprises to rapidly introduce innovation in key aspects of daily life – payments, banking, etc. | DoT / Local Banks | Dec 2021 | 250,000 | Widespread deployment of payment options deployed |
| 3.7a | All tourism providers to become capable of capturing credit card payments (taxi drives, tour guides, etc.). Explore the use of mobile money or mobile apps. Partner with the banks to implement throughout Montserrat. | | | | |

Total Budget for Strategy Area #3 – USD 537,000

20 Strategic Area #4 – Conserve the Environment

20.1 Environmental Overview of Monserrat

The environment is the pillar of tourism development in Montserrat. The environment has to be an integral part of the DNA of the tourism sector and its practitioners.

The topography of Montserrat is dominated by 4 volcanic mountains, Silver Hills, Centre Hills, Soufrière Hills and the South Soufrière Hills. In 1995, the island was decimated by the volcanic eruption of the Soufriere Hills. The habitable size of the island has been reduced by 62 %. The entire south eastern half of the island which constitute two thirds of the land area has been designated as an exclusion zone This includes the terrestrial and marine environment.

The Northern zone of Montserrat consists of 15.2 sq. miles (39.4 sq. km). It stretches for 6 miles (7 km) in a north/south direction and 4 miles (6.4 km.), at its widest point, in an east west direction and is dominated by two main hills, Silver Hills, 403 m. (1,323 ft.) in the north and Katy Hills, 740 m (3,429 ft.) tall in Centre Hills, joined by a steep ridge. Centre Hills and Silver Hills have been designated as forest reserves and are protected under the Forestry Act.

The island has a diverse terrestrial and marine natural resource base. It has an interesting secondary rain forest, montane forest, and elfin woodland. The dry scrub forest and cactus forest are abundant on the northeast coast. There is also a diversity of fauna ranging from species of birds including migratory birds, reptiles, amphibians and a variety of butterflies some of which are endemic to Montserrat. The marine environment is unpolluted with pristine dive sites, diversified coral colonies and a variety of reef fishes. In addition, Montserrat has a rich historical and cultural heritage. What differentiates Montserrat from other Caribbean destination is its active volcano and relatively low crime rate. All of these assets make up Montserrat and are the basis for successful development of tourism.

However, Montserrat is by its very nature a small, discrete island with limited resources. As such it is extremely susceptible to destruction of its natural, historical and cultural resources unless sustainable natural resource management concepts are not integrated into all management and development programmes. By its very product Montserrat lends itself to adopting and integrating the concept of ecotourism/ sustainable tourism as the major pillar for tourism development.

20.2 Strategic Environmental Context

Conservation of the natural environment is integral to Montseratt’s Tourism Master Plan and Tourism Policy since the natural resources of the island form the basis for the development of major tourism projects within the three identified tourism centres in the northwest coast the west coast and the highlands. A major pillar underlying the proposed plan is sustainability which encompasses generation of income for the benefit of people, protection of the environment and encouraging participation of all stakeholders in the process through the development of a public/ environmental awareness programme. The outlined strategy encompasses all the element of ecotourism development that embodies Montserrat’s tourism vision ‘Sustainable Development through Quality Tourism’. Priority areas outlined for strategic environmental evaluation and action are as follows:

- Establishing a mixed-use marine reserve

- Establishment of a Plymouth Volcano reserve
- Establishment of a GeoPark
- Increase environmental awareness

20.3 Development of Protected Areas in The Terrestrial And Marine Environment

With respect to the terrestrial and marine environment and the development and establishment of national park /marine reserves, IUCN defines a protected area as follows:

“An area of land and/ or sea especially dedicated to the protection and maintenance of biological diversity, and of natural and associated cultural resources managed through legal or other effective means”.

IUCN has defined 6 management regimes for protected areas based on the management objectives of these areas. The proposed designation for the Silver Hills forest reserve as a national Park and the proposed marine reserve from Bunkum Bay to Plymouth fall under IUCN’s Category II: National Park: protected areas managed mainly for ecosystem protection and recreation. It is defined as follows:

“A natural area of land and/or sea, designated to (a) protect the ecological integrity of one or more ecosystems for present and future generations, (b) exclude exploitation or occupation inimical to the purposes of designation of the area and (c) provide a foundation for spiritual, scientific, educational, recreational and visitor opportunities, all of which must be environmentally and culturally compatible”.

20.4 Management Planning Process for the Establishment of a Protected Area

The basic management planning process for the proposed establishment of a marine park, a national geo park or other attractions is as follows:



20.5 Proposal to Establish a Marine Protected Area

The tourism master plan indicates that extensive research on the biological resources of the marine environment has been undertaken by the Ministry, Coral Cay, Waite Institute and other organisations with the objective of integrating conservation into the development of the valuable marine resources. The plan recommends the establishment of a pilot marine protected area to be located between Bunkum Bay and Plymouth with a view to addressing the following:

- Marine zoning to accommodate different uses and activities;
- fishing management;
- reef protection
- reef marking and establishment of dive and possible yachting moorings;
- solid waste management
- effluent discharges;
- impact of sand extraction; and
- recreation and tourism.

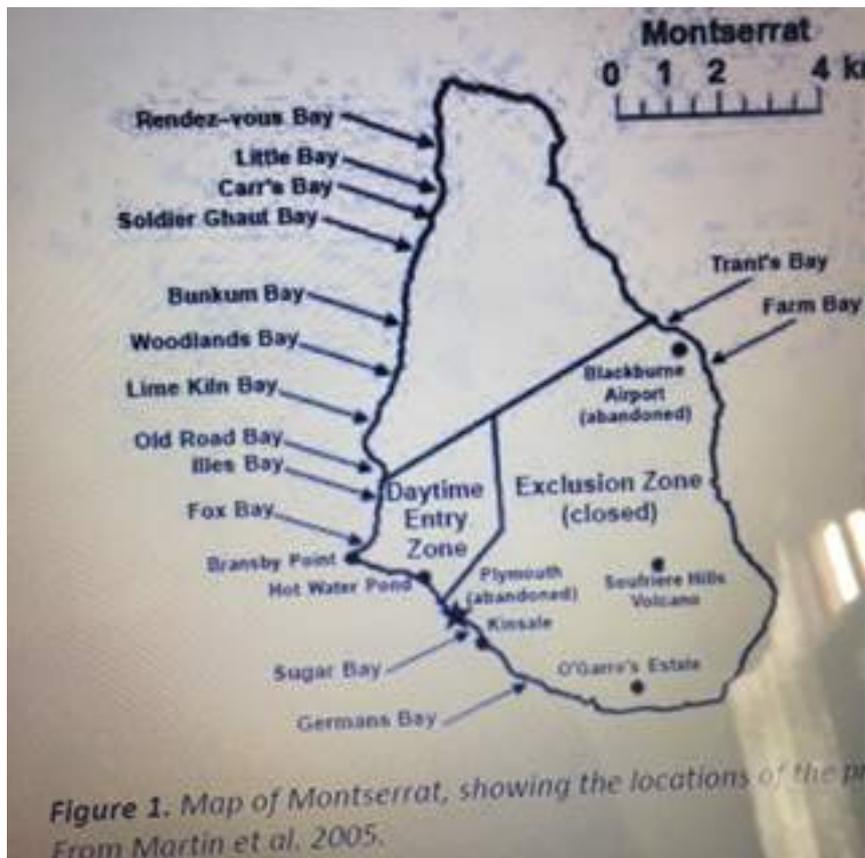
This indicates multiple use of the resource and the need to reduce negative impacts of land - based and marine activities.

Multiple use of marine managed areas dictates the need to adopt a balanced approach to use and conservation of the resource by ensuring the use of the resources does not have a negative impact on these resources.

The area proposed is an important recreation, economic and biodiversity area. Biological resources consist of shallow and deep coral reefs - artificial reefs and deep reefs- seagrass beds, mangrove and wetland areas (presently destroyed by the volcano) as well as four beaches. It is considered as a high biodiversity area since it serves as a nursery for fishing and a habitat for turtles with its extensive seagrass beds.

Figure 17

Map of Montserrat - Showing the locations of the principal bays and the Exclusion Zone.



Source: Sustainable Fisheries Group U.C 2015

Economically, activities taking place in this area consists of moderate fishing, snorkeling, spear fishing and sports fishing. The area is an important conch fishing ground. It is also a fishing landing site with 10% of total volume of landed fish.

It is an important tourism area with recreational uses including swimming, diving (with six dive sites), and four snorkelling sites as well as sports fishing.

Figure 18
Dive Sites of Montserrat



A report from “Sustainable Fisheries Group U.C. Santa Barbara (2015)” recommended that this area should be zoned as a “Fisheries and Recreation Zone” to be managed for fishing, diving, recreation, and marine conservation, including turtle nesting while the south coast of the island should be zoned as a “Fisheries Management Zone” managed exclusively for fisheries.

The proposed marine reserve is currently under the jurisdiction of the Fisheries Division which falls under the Ministry of Agriculture, Housing, Land, Trade, and the Environment

20.5.1 Definition of a Marine Protected Area

IUCN defines a Marine Protected area as “Any area of intertidal or subtidal terrain, together with its overlying water and associated flora, fauna, historical and cultural features, which has been reserved by law or other effective means to protect part or all of the enclosed environment”.

20.5.2 Criteria for Proposed Designation

The existing legal jurisdiction for establishment of the Marine Protected Areas lies under the Fisheries Division which falls under the Ministry of Agriculture, Housing, Land, Trade, and the Environment. Under the Fisheries Acts of 2000 and 2002, the Minister has the power to create marine reserves in order to protect living resources, breeding grounds, and habitats; facilitate regeneration of depleted areas; promote scientific research; and preserve natural beauty. The Governor has the power to create priority areas for fishing and protected areas where fishing is prohibited, declare fish a protected species, and designate fisheries management areas, as well as create regulations for fisheries management (Fisheries regulations 2002)

20.5.3 Multiple - Use Marine Area

Any marine area designated for multiple use is differentiated from a marine park where no disturbance is allowed. Multiple use areas are described as “Marine Managed Area”, (MMA) where conservation is the underlying force in the management of these multiple activities. MMA must meet the following criteria:

- It must have legally defined boundaries
- It must be established by laws and regulation
- Must offer protection of the identified resources through laws and regulation.

The process of designation of marine protected area must involve stakeholder input and participation at the planning level which continues into development, implementation and monitoring of the marine area

The goal of the proposed marine reserve should incorporate the sustainable management of the biological, social and economic values of the demarcated marine space based on sound scientific principles while providing recreation, food security, sustainable livelihood and educational opportunities for national development.

Graeme Kelleher and Richard Kenchington in “**Guidelines for Establishing Marine Protected Areas**” 1991, outlines the sequence of decision making for the establishment of a marine protected area as follows:

- Stage 1. Legal establishment of boundaries
- Stage 2. Zoning
- Stage 3. Enactment of zoning regulations
- Stage 4. Specific site planning
- Stage 5. Specific site regulation
- Stage 6. Day-to-day management
- Stage 7. Review and revision of management

20.5.4 Recommended Strategies To Be Considered At The Planning Stage

Some proposed strategies required for establishment of the marine protected area and to meet the objective of conserving the biological resources, minimizing land-based sources of pollution and guaranteeing some level of social and economic benefits to users of the resources and reducing user conflict are as follows:

- Evaluation of the biological and socio-economic characteristic of the resource
Evaluation of the biological and socio-economic characteristics of the resource is also essential to identify major threats to the proposed marine reserve, the sources of threats and their impact so as to identify mitigation measures that should be incorporated into activities and programmes of the management plan and to develop policies to deal with them. Relevant to this are activities like overfishing, uncontrolled recreational use, land-based sources of pollution like sand mining, solid and liquid waste, tourism development and climate change. This helps to reduce user conflict and to maintain the biological integrity of the resource
- **Establishment of an effective policy, legal and regulatory framework with** clear responsibilities for the management and development of the marine areas and to avoid conflict of jurisdiction and effective enforcement. This will entail a review of existing policies, legal and regulatory frameworks to include regional and international framework- marine agreements and conventions to which Montserrat is a signatory.
- In considering review of legislation proposed legislation should provide for zoning, continue harvesting of fish and for undertaking other activities for which zones have been developed as well as the provision of resources for infrastructure support and management.

Legislation should also address joint coordination and planning by all government agencies with statutory responsibilities with respect to areas managed. Additionally, because of the inter-relatedness of the marine and the land-based sources of pollution, provision should be made in legislation for control of activities occurring outside the park. On a long-term basis, it will be essential to develop a coastal zone management strategy integrated conservation goals and objectives.

In order to ensure compliance relevant regulations should be developed where they do not exist, to support enforcement of relevant marine laws.

Development of Standards and guidelines governing the various activities should also be considered.

It should be noted that the newly developed Act, “ **The Conservation and Environmental Management Act No. 17 of 2104**” provides for “the administration, conservation and sustainable use of biological diversity, natural resources and the natural heritage of Montserrat; the designation and management of protected areas, pollution control; the regulation of activities; the incorporation of international obligations with respect to the environment into national law and related matters.”

This is a very important legal instrument with respect to management and regulation and protection of the proposed marine protected area. However, clear jurisdiction of management of the Marine Protected area with the Fisheries Division must be clarified to avoid duplication of jurisdiction.

- **Development of a management framework that promotes synergy of the marine and terrestrial components and active stakeholder engagement.**
Multiple management of various resources users as well as activities dictate the need to develop a management framework that promotes synergy of the marine and terrestrial components and active stakeholder involvement. As such management objectives should embrace an integrated

approach using participatory planning and active involvement of all stakeholder into the management and operations of the proposed marine reserve

Lessons learned from some Caribbean islands like St. Lucia and Dominica have indicated that the preferred governance approach is that of a management authority with broad stakeholder participation to include representation from fishers, dive operators, the community and other relevant government agencies e.g. the Tourism Department, Physical Planning, Environment etc.

- **Zoning**

Multiple use of protected areas indicates the needed to prescribe different management regimes within the protected area. This can be achieved through zoning. Zoning entails the subdivision of the resource area into specific use allocation zones to support multiple use of the resource. Zones identify where various strategies for management and use will best accomplish management objectives to achieve the desired future of the protected area.

Various use allocations pertinent to marine reserves include habitat restoration, diving, fishing, research areas/nature study, protection of breeding areas, water sports / anchorages and is based on ecosystem characteristics of the site and protection regimes.

Where livelihoods are compromised it is important to look at alternative livelihoods or to establish incentives for support alternative livelihoods.

- **Development of an Effective communication system**

Where multiple stakeholders utilize the same resource based it is important to maintain dialogue with them on on all aspects of park management, monitoring and development.

Management must also provide a forum for stakeholders to share their concerns, priorities, and knowledge of the marine resource and at the same time to gain access to the knowledge, resources and any proposed management activities. This will reduce threats to the resource, engender a sense of ownership and provide the public and political support necessary for the success of the proposed protected area.

- **Establishment of a Financial Framework**

This constitutes an assessment of the arrangements including financial, human and physical resources required for the establishment of the protected area should be established. It would entail the development of a financial strategy and a business plan for the facility. This would cover: staffing equipment and facilities training, interpretation and education monitoring and research and evaluation.

20.6 Environment Action Plan

| Strategies | Activity | Lead Responsibility | Support | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|---|--|-----------------------|---|------------|---------------|---|
| Strategy 1 Develop an effective legal and regulatory framework for effective management of the MPA | Review and develop and enact relevant legislation & regulations | Dept of Legal Affairs | Fisheries/ Environment | -2 years | 60,000.00 | Legislation and policies are developed and ratified |
| Strategy 2: Establish and demarcate legal boundaries and zones of the marine park to ensure effective management and use of the park resources | Demarcation of boundaries and installation of boundary markers | Fisheries Dept. | Research organizations/ fishers and divers | - | -60,000.00 | Boundaries demarcated and maintained |
| | Research and Development of baseline information on the marine park | Fisheries | Research organizations/ fishers and divers | | 60,000.00 | Scientific survey undertaken as a basis for demarcating zones |
| | Establishment of zones | Fisheries | | | 60,000.00 | Boundaries and zones of the Park are ratified and gazetted |
| Strategy 3: Development of a management framework that promotes synergy of the marine and terrestrial components and active stakeholder engagement. | Development of a management plan | Fisheries | Environment / Tourism Dept. | - | 60,000 | Management plan developed with input of stakeholders |
| | Development of an Effective communication system | | | | | Communication strategy developed |
| Strategy 4 Establish a Effective management framework | Establish optimum staff requirements for effective management and operations of the Park | | | | 60,000 | Optimum staff requirements determined Staff recruited |
| Strategy 5: | Develop a Financial strategy for the Park | | | | 50,000 | Financial strategy in place and operational |

| | | | | | | |
|---|---|--|--|--|--------|---|
| Establish financial framework for the Park | Develop a business plan for financing the Marine Park | | | | 60,000 | Business plan developed and adopted by the BOD and operational |
| | Establish a framework for the management and collection of user fees | | | | | Framework for collection of user fees is developed, operational |
| | Prepare park budget for funding for upcoming financial year Apply for and obtain grants -Develop a portfolio of projects profiles for accessing/ sourcing of funding | | | | | Financial subvention approved and available At least 3 funding proposals submitted to funding agencies |
| Strategy 6: Deploy an Environment Awareness Campaign | See Environment Awareness Campaign under Section 6 | | | | | |

Total Budget for Strategy Area #1 – USD 470,000

21 Strategic Area #5 – Develop Quality Tourism Products

Objective: To Develop exceptional visitor products, attractions, services, experiences and transformational opportunities that exceed the expectation of Montserrat’s guests/clients/travellers.

Strategy: To continuously improve and upgrade facilities and services and deliver ‘state of the art’ experiences; that conserve the environment; that include nationals in the benefits (as tourists, owners, providers and workers) from their development; and truly transform travellers.

21.1 Proposed Environmental Practices with Respect To Sites

The tourism product of Montserrat is based on its natural historical and cultural assets, sites and attractions. As such, the adoption of an ecotourism approach in the development of its product is essential to its sustainability. As such Montserrat must adopt the principles of ecotourism in its policy and development approach and this is reflected in the tourism policy and master plan.

The World Conservation Union (IUCN) describes ecotourism as: *Environmentally responsible travel and visitation to natural areas, in order to enjoy and appreciate nature (and any accompanying cultural features, both past and present) that promote conservation, have a low visitor impact and provide for beneficially active socio-economic involvement of local peoples.*

Eco-tourism is also synonymous to “sustainable tourism”. The Organization of Eastern Caribbean States, Sustainable Development Unit defines sustainable tourism as: *The optimal use of natural and cultural resources for national development on an equitable and self-sustaining basis to provide a unique visitor experience and an improved quality of life through partnership among government, the private sector and communities.*

21.1.1 Principles of Ecotourism

Some of the major principles of ecotourism as espoused by organizations like the Ecotourism Society (TES) and The Nature Conservancy, (TNC) include:

- Preserving the character of the natural and cultural environment by avoiding negative impacts resulting from development and use of the resources
- Educating potential visitors and the community on the importance of conservation and thus build constituencies for conservation
- Generating income for the management and conservation of protected areas.
- Providing economic benefits to local communities through direct and indirect income and capacity building
- Promoting sustainable growth of the tourism industry through effective planning and stakeholder participation to ensure that the social and environmental capacity is not exceeded
- Retaining a high percentage of revenues in the host country by stressing the use of locally-owned facilities and services.

21.1.2 Recommended Environmental Practices

The Development of an Environmental Management Programme in project development and management that will entail the following:

- Assessment of the sites to evaluate the resources as a basis for the development of a site management/ conservation plan to protect the resources. With respect to natural resources, special attention will be given to endemic, endangered species, bird nesting sites, geological processes and artefacts, etc. The same would be undertaken for cultural and historic sites.
 - Compliance and enforcement of all laws and regulations for the protection of the resources of the site and educating the public and users of the site on these laws and regulation
 - Development of a comprehensive education programme to inform adjacent communities and all park users so as to engender a sense of responsibility in protection of the site and its resources
 - Building and site design and use of material should, as far as possible, be compatible with the environmental ambience and should have minimal impact on the environment. It is always advisable to undertake an environmental Impact Assessment of an Environmental Assessment prior to construction to reduce negative social and environmental impacts
 - Zoning where necessary. Zoning is a mechanism for assigning overall management objectives and priorities to different geographic areas (zones) within a protected area or other ecotourism sites. By assigning objectives and priorities to these zones, planners are also defining what uses will be allowed, and which ones will not be allowed. These parameters are usually based upon the characteristics of the natural and cultural resource base, protected area objectives.
 - Development of a monitoring programmes and a data management system to support this so as to monitor
 - o The carrying capacity of the sites to ensure that tourism activities do not compromise the biological or cultural integrity of the sites. This will form the bases for the for implementing and control measures so as not to exceed the carrying capacity
 - o To monitor visitor satisfaction as a basis for improving facilities and services
 - o Development of a data management system
1. Development and implementation of a water and energy conservation policy and programmes to reduce wastage of water and energy through water and energy saving devices and practices and to utilize alternative energy sources
 2. Promotion of solid waste reuse and recycling by adopting the 3R concept- reduce, reuse, recycle and making providing available for adequate storage, handling and disposal of waste.
 3. Reducing the use of hazardous waste substances and as far as possible to utilize to replace with non- hazardous alternatives.
 4. Reducing noise levels or other impacts that can affect wildlife
 5. Provision of signs and educational material to encourage good environmental practices
 6. Ensure community participation and development. Respect community culture and traditions and provide employment and income generating activities for adjacent communities
 7. Development of a Disaster Management Plan
 8. Development of a Comprehensive Safety and Security Programme for the safety of visitors.

21.2 Quality Sites and Attractions

The development of sites and attractions will assist Montserrat in attracting more visitors to the destination and improving the quality experience for all (both locals and visitors alike).

This tourism strategy proposes to develop ten (10) priority sites and attractions to give the tourism industry a boost. These sites and attractions include:

- Volcano Viewing Sites
 - The Buried City of Montserrat
 - Jack Boy Hill
 - Garibaldi Hill
 - Hot Water Pond
- Main Beaches
 - Little Bay Waterfront
 - Bunkum Bay
 - Lime Kiln Bay
 - Old Road Bay
- Key historical Sites
 - Old Sugar Mill
 - Arrow's Heritage House

Figure 19
Map of Montserrat with Selected Sites and Attractions



Source: Google Maps and Tourism Intelligence International, 2019

21.2.1 The Buried City of Montserrat

Montserrat is the only Caribbean state that can boast of a Buried City, and not just any buried city, a city that was buried overnight because of the eruption of a volcano. It is also the only buried city where there are people to tell the tale.



Some of the greatest buried and lost cities in the world are well known because of a single critical factor – the story of that city has been created and told the world over. Consider the mythical story of the Lost City of Atlantis. Although not scientifically proven to exist, many people can recall the story of that lost city. It has become famous because of the story or myth created. Similarly, Montserrat’s single most critical success factor in selling the Buried City is to tell the tale, sell the story and market the myth.

Key actions:

- Identify and interview persons who are still alive and get their account of the history, the before and after and their personal tale of what happened.
- Using multi-media and the latest technologies, orchestrate the stories to create the Tale of the Buried City.
- Use the content created as a key marketing tool to market not only the Buried City but Montserrat as a whole.
- Ensure that the Buried City is not lost by regularly maintaining the area – removing or cutting shrubs that are overgrowing the area, etc.
- Create pathways along some of the streets to allow for better viewing of the buried buildings;
- Create a 3D model of the City of Plymouth before the eruption of the Volcano.
- Develop a virtual reality or augmented reality tour of the City before the eruption of the volcano. There are some individuals who are already working on such a project but more resources and support are required to make it a reality.

21.2.2 Jack Boy Hill



Jack Boy Hill is a family-oriented and fun-loving picnic and volcano viewing site. It is located in Saint Georges Parish Montserrat, with an estimated elevation of about 200 meters above sea level. From Jack Boy Hill one can view the northern part of the volcano and the view of the old Blackburn Airport is clearly visible, as well as, the destroyed villages of Trants and Long Ground.

The facilities at Jack Boy Hill include a fenced/gated area with 2 picnic tables, a telescope for viewing the volcano and nearby areas, toilet facilities and a building unit that could be used as a concession area/gift shop. It also features a barbecue Grill and landscaped areas. The view and location allow for the perfect intimacy with nature and a safe and ideal setting for local fun and family excursions. The area has evolved into more than a volcano viewing area and is considered a popular spot for local residents to frequent on the weekends.

The Jack Boy Hill facility is currently being maintained by the Division of Tourism. The overall objective is for the facility to contribute to paying for its upkeep.

Key actions to improve the Jack Boy Hill are as follows:

- Fix Telescope or replace with a token-based telescope where people can insert tokens when they want to use the telescope. This will help pay back for costs of purchasing and maintaining the telescope.
- More signage is needed to and at the location. Very little directional signage *en route* to the area.
- There is need for an interpretation panel
- Add a playground area for kids to make the facility more family-friendly
- Add more solar panels for additional lighting at night to accommodate people spending more time in the evenings at the facility
- Consider repurposing the building into a gift shop offering memorabilia, water, snacks, vending machine, etc.
- Rent or lease the facilities to an entrepreneur to run and manage a gift shop and to manage and maintain the area. The existing building can be used as the gift shop/concession. It needs to be upgraded with a few minor fixes such as cleaning and painting, and other remedial work, e.g. fix floor boards.
- Add about 4 more picnic facilities
- Add 2 more grills

- Market the area as an event location for birthdays, anniversaries, and even small weddings
- Rent picnic facilities (tables, grill) but entrance will always remain free

21.2.3 Garibaldi Hill



Garibaldi Hill is the final summit after a trek through the village of Isles Bay. Access to the area is mainly by a dirt / partially paved road. It can be easily accessed on foot as well. The summit of the hill provides a 360 degree view of the southern and northern sections of the island, including but not limited to, the former capital Plymouth, the Plymouth Jetty, the Fort of St Georges Hill, Foxes Bay, Windy Hill, Cork Hill, Delvins, St. Peters, and Isles Bay among other places as well as a striking view of the vents of the Soufriere Hills Volcano.

Due to the proximity to the ocean, the volcano, and the combined effects of sea blasts and the corrosive effects of acid rain, all materials to be used at this site must be weather resistant and durable, if they are to stand the test of time.

- Add toilet facilities down at the beach (Isles Bay)
- Add telescope for a zoomed view of Plymouth and the Volcano
- Signage and interpretation sign

21.2.4 Little Bay Water Front



Little Bay Waterfront extends from the boardwalk at the exit of Montserrat Port Authority to Pont's Beach Bar. Between these two points are mostly privately owned establishments of beach bars, restaurants, a gift shop and an ice-cream parlour. It has a beautiful view of the ocean and boats in the dock. Little Bay is the island's most popular beach for visitors and locals. Little Bay is also the entrance for many shore dives and snorkelling activities. This area is also well known as a venue for birthday celebrations, events, and family fun.

For a small bay, Little Bay already has a number of fixed buildings and permanent structures. It is recommended that no additional fixed buildings be added to the area from both a physical planning perspective as well as an environmental point of view. During the Calabash Festival a temporary structure is added to the beach to facilitate cultural and entertaining activities. However, there is an additional area across the road from the beach that is used for the Carnival event during Christmas. This facility could be used for other cultural events.

Key Activities:

- Remedial works on the waste water and the rivers flowing onto the beach
- Add open shower stalls at the opposite end of the beach (heading away from the port) to complement what exists in the main ‘built’ area. Current facilities cannot handle the capacity.
- Update signage
- Add vendor facilities/mobile kiosks for cruise passengers (they are currently putting a tent every week – costly and not attractive). Use the area next to the Port just before the bridge.



21.2.5 Bunkum Bay



Bunkum Bay Beach is a small secluded beach located in the village of St. Peter’s. As a direct result of wave action, certain times of the year the sand disappears from the beach leaving only rocks. The beach has no changing rooms, restrooms or shower facilities. facilities at visitor attractions contribute to the attractiveness of the tourism product.

A set of fisherman sheds were built to accommodate the fishermen in the area. Two spaces in the existing shed will be retrofitted with a shower stall and toilet facility.

- Retrofit sheds to use as bathroom facilities
- Add Signage

21.2.6 Lime Kiln Bay



Lime Kiln Bay is a small beach located on the west coast of Montserrat (west of Salem and North of Old Towne). It is mostly used by locals. It is maintained on a regular basis.

Lime Kiln Bay is one of Montserrat's most secluded beaches. This beach is a common nesting ground for the endangered, endemic leather back and logger head turtles.

Apart from a few benches, there are virtually no facilities at this beach. It is recommended that at least toilet facilities and a few more picnic benches be added to this beach. The provision of adequate toilets, showers and changing facilities at Lime Kiln Bay will increase tourist visitation since almost everywhere else in the world, this is the norm – certainly, most visitors will expect and demand these features.

One of the critical issues at Lime Kiln Bay is the adverse effects of coastal erosion. Much of the land is being lost to the sea and mitigating measure should be considered. At the barest minimum, carry out a study to determine the impact of coastal erosion on Montserrat's beaches and determine what long term solutions should be considered for protecting Montserrat's coast lines.

21.2.7 Old Road Bay



Old Road Bay is another beach area that has potential to become a thriving tourism area. Old Roads Bay is located in the village of Old Towne and shares the northern portion of the Belham Valley delta with Isles Bay. The shoreline at Old Roads Bay has also been extended by about 600 feet with new land formed from soil from the volcano.

Old Roads Bay historically had a reputation as one of Montserrat's finest beaches for swimming, because of its crystal-clear waters, and its gentle flowing shallow shoreline. Historically, the Vue Pointe Hotel, which is perched on the slope north of the beach, was one of Montserrat's premier hotels, and had a stellar reputation for its impeccable quality.

While a few persons use the beach for swimming, there is no potable water available - no shower stalls, no changing rooms or restrooms. This is in stark contrast, to what once existed back in its hay day. The beach from a purely physical standpoint, is now superior, larger and have more potential than before the volcanic eruption.

The area is susceptible to flooding and is need of earth berms and other mitigating measures. Restoring the beach will have huge implications for villa-tourism which was once a major driver in the economy.

To truly take this beach to the level that is required to make it world class, a lot of work has to go into it. However, in the short to medium term there are a number of small steps that could be taken to enhance the area. These include the following actions:

- Install Toilet / Shower facilities (water infrastructure need to be added)
- Solar lighting
- Plant coconut, almond and sea grape trees
- Add a berm / gabion basket to prevent river from going on to main road.
- Add seating such as benches and picnic tables

21.2.8 Arrow's Heritage House

Alphonsus 'Arrow' Cassell is one of Montserrat's greatest icons. An acclaimed calypsonian, Arrow became know all over the globe for his mega hit, "Hot, Hot, Hot". Sadly, Arrow passed away in September 2010. While his legacy lives on in his music, his story needs to be better leveraged to put Montserrat on the tourism map. His legacy and his music can add tremendous value to the tourism product. As such, his last place of abode could be converted into a museum or viewing spot to attract and entice visitors and locals alike. The challenge is being able to convince his Estate to make it a reality.

- Approach the Estate of Alphonsus 'Arrow' Cassell to use the house as a museum in exchange for maintaining the house.
- Work has to be done to assess what (if any) is required to convert the house into a museum.

21.2.9 Hot Water Pond



Hot Water Pond, located at the base of the former Montserrat Springs Hotel, used to bbe a huge tourist attraction and a key success factor for the hotel. However, the entire spring was covered by volcanic ash. There are many who claim that the spring could be revived and used a major attraction in the area, complementing the Buried City Tour.

It needs to be determined if the hot springs could be revived and if so, what facilities need to be put in place to truly turn it into an attraction.

- The first step would be to excavate the site to determine whether it is still viable.
- The second step would be to determine how it can be used as part of the buried city experience.

21.2.10 Old Sugar Mill

The Old Sugar Mill is now a relic of its former glory in the old plantocracy. The Old Sugar Mill is a piece of Montserrat's history which needs to be preserved. However, the area is being overgrown by shrubbery and what remains of the building and the old mill itself is being deteriorated over time. The spot has the potential to become an iconic tourism spot to sit under the shade of the nearby trees, sipping on a cup of hot bush tea in the café while taking in the spectacular view of the volcano.



This piece of Montserrat's history should be preserved and used as a tourism asset. However, the National Trust must take responsibility for the site and supported by the Division of Tourism. The area could be turned into a volcano viewing spot and the old building converted into a coffee shop and gift shop with proper toilet facilities.

- Consider converting into the Sugar Mills Café / Museum with toilet facilities.
- Signage, interpretation and telescope to be added

Strategic Area #5 - Develop Quality Tourism Products

Objective: To Develop exceptional visitor products, attractions, services, experiences and transformational opportunities that exceed the expectation of Montserrat’s guests/clients/travellers.

Strategy: To continuously improve and upgrade facilities and services and deliver ‘state of the art’ experiences; that conserve the environment; that include nationals in the benefits (as tourists, owners, providers and workers) from their development; and truly transform travellers.

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|---|---------------------------------|-------------|--------------------------------------|---|
| | 1. Develop the Buried City: | | | | |
| | Identify and interview persons who are still alive and get their account of the history, the before and after and their personal tale of what happened. | DoT / National Trust | March 2020 | 100,000.00 | 20 persons shortlisted and interviewed |
| | Using multi-media and the latest technologies, orchestrate the stories to create the Tale of the Buried City. | DoT / National Trust | July 2020 | 150,000 | The “myth” of the Buried City developed and portrayed in different forms of media |
| | Use the content created as a key marketing tool to market not only the Buried City but Montserrat as a whole. | DoT | August 2020 | Incorporated into the Marketing Plan | Content distributed across all digital platforms (Facebook, YouTube, Website) |
| | Ensure that the Buried City is not lost by regularly maintaining the area – removing or cutting shrubs that are overgrowing the area, etc. | Ministry of the Environment | Immediately | Use existing resources | -Site regularly maintained -Some old buildings are visible again |
| | Create pathways along some of the streets to allow for better viewing of the buried buildings | Ministry of the Environment | Sep 2019 | 50,000 | Major streets cleared People are able to walk on the old streets |

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|--|---------------------------------|------------|---------------|---|
| | Create a 3D model of the City of Plymouth before the eruption of the Volcano in joint partnership with the private sector. | National Trust / DoT | June 2020 | 20,000 | 3D model developed |
| | Develop a virtual reality or augmented reality tour of the City before the eruption of the volcano. There are some individuals who are already working on such a project but more resources and support are required to make it a reality. | National Trust / Private Sector | Dec 2020 | 70,000 | Virtual reality product developed and implemented |
| | Add washroom facilities near the entrance to the Exclusion Zone near the security / guard booth | DoT / Min. Works | Oct 2019 | 50,000 | 1 male and 1 female W/C created |
| | | | | | |
| | 2. Jack Boy Hill: | | | | |
| | Fix Telescope or replace with a token-based telescope where people can insert tokens when they want to use the telescope. This will help pay back for costs of purchasing and maintaining the telescope. | DoT | June 2019 | 20,000 | |
| | More signage is needed to and at the location. Very little directional signage <i>en route</i> to the area. | DoT | Dec 2019 | 10,000 | Road signs and directional signs installed at strategic locations |
| | There is need for an interpretation panel | DoT | Dec 2019 | 4,000 | interpretation panel installed |
| | Add a playground area for kids to make the facility more family-friendly | DoT | June 2020 | 85,000 | Playground installed |
| | Add more solar lights for additional lighting at night to accommodate people spending more time in the evenings at the facility | DoT | June 2020 | 25,000 | Solar lights installed |
| | Repurpose the building into a gift shop. It needs to be upgraded with a few minor fixes such as cleaning and | DoT | June 2020 | 50,000 | Building refurbished |

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|---|---------------------------------|------------|---------------|-----------------------------------|
| | painting, and other remedial work, e.g. fix floor boards. | | | | |
| | Rent or lease the facilities to an entrepreneur to run and manage a gift shop and to manage and maintain the area. The existing building can be used as the gift shop/concession. | DoT | July 2020 | - | Lease established |
| | Add about 4 more picnic tables | DoT | June 2020 | 10,000 | 4 tables added |
| | Add 2 more grills | DoT | June 2020 | 5,000 | 2 grills added |
| | Market the area as an event location for birthdays, anniversaries, and even small weddings | DoT | June 2020 | - | |
| | Rent picnic facilities (tables, grill) but entrance will always remain free | DoT / managed by the gift shop | July 2020 | - | |
| | | | | | |
| | 3. Garibaldi Hill | | | | |
| | Add toilet facilities down at the beach (Isles Bay) | DoT | June 2020 | 50,000 | |
| | Add telescope for a zoomed view of Plymouth and the Volcano | DoT | June 2020 | 20,000 | |
| | Signage and interpretation sign (directional signs and interpretation panel) | DoT | June 2020 | 15,000 | |
| | | | | | |
| | 4. Little Bay | | | | |
| | Remedial works on the waste water and the rivers flowing onto the beach | DoT | Sep 2019 | 20,000 | |
| | Add open shower stalls at the opposite end of the beach (heading away from the port) to complement what exists in the main 'built' area. Current facilities cannot handle the capacity. | DoT | Dec 2019 | 75,000 | |

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|---|---------------------------------|------------|---------------|-----------------------------------|
| | Update signage | DoT | Dec 2019 | 10,000 | |
| | Add vendor facilities/mobile kiosks for cruise passengers (they are currently putting a tent every week – costly and not attractive). Use the area next to the Port just before the bridge. | DoT / Port Authority | Jun 2020 | 50,000 | Minimum of 5 kiosks developed |
| | | | | | |
| | 5. Bunkum Bay | | | | |
| | Retrofit sheds to use as bathroom facilities | DoT | Jun 2020 | 25,000 | |
| | Add Signage | DoT | Jun 2020 | 5,000 | |
| | | | | | |
| | 6. Lime Kiln Bay | | | | |
| | Add more picnic benches | DoT | Dec 2020 | 10,000 | |
| | Add toilet / changing facilities for the enjoyment of local patrons | DoT | Dec 2020 | 100,000 | |
| | Carry out a study to determine the impact of coastal erosion on Montserrat's beaches and determine what long term solutions should be considered for protecting Montserrat's coast lines. | Min. Environment | June 2021 | 70,000 | |
| | | | | | |
| | 7. Old Road Bay | | | | |
| | Install Toilet / Shower facilities (water infrastructure need to be added) | DoT | Dec 2020 | 100,000 | |
| | Solar lighting | DoT | Dec 2020 | 35,000 | |
| | Plant coconut, almond and sea grape trees | DoT | Dec 2020 | 5,000 | |

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|--|---------------------------------|------------|---------------|-----------------------------------|
| | Add a berm / gabion basket to prevent river from going on to main road. | DoT | Dec 2020 | 75,000 | |
| | Add seating such as benches and picnic tables | DoT | Dec 2020 | 50,000 | |
| | | | | | |
| | 8. Arrow's Heritage House | | | | |
| | Approach the Estate of Alphonsus 'Arrow' Cassell to use the house as a museum in exchange for maintaining the house. | National Trust / DoT | Dec 2019 | - | |
| | Work has to be done to assess what (if any) is required to convert the house into a museum. | National Trust / DoT | Jun 2020 | 50,000 | |
| | | | | | |
| | 9. Hot Water Pond | | | | |
| | The first step would be to excavate the site to determine whether it is still viable. | Ministry of Works | Sep 2020 | 75,000 | |
| | The second step would be to determine how it can be used as part of the buried city experience. | DoT | Dec 2020 | 30,000 | |
| | | | | | |
| | 10. Old Sugar Mill | | | | |
| | Consider converting into a Museum and Café with toilet facilities and a gift shop. | National Trust / DoT | June 2021 | 400,000 | |
| | Signage, interpretation and telescope to be added | DoT | June 2021 | 25,000 | |

Total Budget for Quality Sites and Attractions – USD 1,944,000

22 Quality Investments

Against the backdrop of a new and renewed focus on tourism development in Montserrat (e.g. the reinstatement of a Director of Tourism after three years absenteeism, and the implementation of this Tourism Strategy), and an increasingly competitive marketplace, investment in plant and infrastructure is critical. Investment becomes even more important as Montserrat set out to focus on quality tourism.

Available data point to a strong and positive correlation between tourism investment and the industry's direct contribution to GDP. Research from the *World Economic Forum* (WEF) indicates that the greater the investment in infrastructure (air transport infrastructure, ground and port infrastructure, marinas, tourism services infrastructure, national parks and protected areas), the greater the contribution of travel and tourism to a destination's economy¹³.

If Montserrat is grow its share of visitors and to appeal to a more discerning 'high-spend' group of travellers, new investments are needed. The key is how to generate the value and volume of investments required to sustain the industry's growth.

Montserrat needs to actively attract investments to drive its tourism development. Investment opportunities need to be identified and created as well as efficiently facilitated and enabled.

An investment strategy needs to be developed. This will guide investors – foreign, local and diaspora – and provide a transparent framework for development.

Suffice it to mention here that new types of investors and investments need to be attracted (e.g. in the field of IT, science and research, attractions, accommodation as well as new opportunities such as co-working spaces to cater to the Creative Class).

With regard to visitor accommodation, out-dated plant and equipment need to be reinvented and made future-ready.

Review and revise the Fiscal Incentives Act, which was last updated in 2008 and determine what incentive schemes to offer given the new paradigm. Identify the 'best practices' regionally and globally and create a favourable, state of the art investment climate.

23 Develop Co-Working Spaces to Grow Residential Tourism

Objective: To boost residential or villa tourism and encourage visitors to stay longer and spend more.

Strategy: Create Co-working spaces that are attractive and IT enabled that will attract creative people to come to Montserrat to work and holiday for extended periods of time.

It is increasingly evident that successful tourism destinations are as attractive to live and work as they are to travel and play. It is the attractiveness or the 'happiness' of the entire destination that drives travel demand. It is therefore important to examine both aspects of Montserrat's attractiveness as a destination – for working and for holidaying.

¹³ World Economic Forum

In order to increase visitor spend, generate longer stay visits, and boost residential or villa tourism, Montserrat will need to attract not only visitors for leisure, but particularly visitors for working holidays. Information Technology allows creative people (analysts, bankers, authors, musicians, bloggers, etc.) to be able to work virtually anywhere they choose. Montserrat could be that ideal location for working holidays where creative people can work for months at a time, staying in villas.

Air Studios was a perfect example of a co-working space that facilitated the work carried out by the creative class. Singers/song writers such as the Beatles, Sting, Elton John etc. were members of the creative class. However, today Montserrat needs to broaden its horizon and attract other members of the creative class.

In order for working holidays to become a reality there are a number of factors that need to be in place. On the one hand, there is the expected array of amenities and attractions – accessibility, infrastructure, medical facilities, IT infrastructure, and co-working spaces. On the other hand, there are some key intangible factors that drive the demand for working holidays. These intangibles include the ‘vibe’ of the destination, safety and security, its creativity, attractive scenes and places that are unique, special and inspiring, and co-working facilities that allow creative people to come together to collaborate and create.

A co-work space is a shared work environment where creative people meet, work, network, share ideas and collaborate on projects. These spaces are typically independent of a single office or business and instead bring together entrepreneurs and business professionals from many different industries, businesses and areas of expertise in an area that facilitates creativity and what better place to create an ambiance of creativity than the beautiful island of Montserrat. Co-working spaces are great for independent contractors or people who travel frequently, or just anyone interested in finding creative and contemporary places to work.

Actions:

- Actively promote the development of co-working spaces as an investment opportunity
- Partner with villa owners and operators to promote long-stay remote working opportunities
 - Create a collection of co-working products that could be used to attract working holiday visitors
- Create conditions for co-working spaces to flourish
 - High speed internet access
 - Better visa and entry facilitation to long-stay visitors seeking co-working opportunities

24 Quality Sea Air and Sea Access Refer to the section on facilitation also.

An access study is being carried out in conjunction with this study and its findings will be of tremendous value. Suffice it here to mention that smooth and seamless air and sea access is critical to the success of any destination.

Quality Investments

| Ref. | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|------|---|---------------------------------|------------|------------------|-----------------------------------|
| | Set up an Investment Promotion Unit within the Ministry of Finance | Min. Finance | Mar 2020 | To be determined | |
| | Develop an investment strategy | Min. Finance | Sep 2020 | 95,000 | |
| | Develop an investment brochure / prospectus to use to present to potential investors (include as a deliverable in the investment strategy – See above) | Min. Finance | Sep 2020 | See above | |
| | Review and revise the Fiscal Incentives Act (include as a deliverable in the investment strategy – See above) | Min. Finance | Sep 2020 | See above | |
| | Develop Co-working Spaces | | | | |
| | Actively promote the development of co-working spaces as an investment opportunity | DoT | Sep 2020 | 100,000 | |
| | Partner with villa owners and operators to promote long-stay remote working opportunities | DoT | Jun 2020 | - | |
| | Create conditions for co-working spaces to flourish: | | | | |
| | High speed internet access (fibre optics) – Already under implementation | | | | Already under implementation |
| | Review immigration act with regard to allowing people from key markets to stay longer than 3 months, e.g. USA, Canada, the Caribbean, Ireland, etc. and other countries targeted for co-working (See Ref. # 1.3a above) | | | | |

Total Budget for Investments – USD 195,000

Total Budget for Strategy Area #5 – USD 2,139,000

SECTION 5 – TOURISM MARKETING STRATEGY

25 Strategy #6 – Deploy the Latest Digital Techniques to Effectively and Efficiently Market Montserrat

25.1 Introduction

Although not new, destination Montserrat is seldom-known internationally. Potential travellers are not even aware that Montserrat is ‘open for business’ after the eruption of the volcano in the late 1990’s. The volcano has also changed Montserrat in many ways. The lack of marketing over the last three to four years did not augur well for destination Montserrat. This marketing strategy is developed with the assumption that Montserrat is a ‘new product’ being brought to market.

Montserrat will continue to target the main international markets of the UK and the USA as well as the key regional Caribbean market and the Diaspora. A number of new markets will also be considered, such as the Irish market. The demographic Millennial market will also be targeted, and critically, the psychographic market of the Creative Class will be included as a new area of focus, particularly to create high spend and grow the residential / villa tourism product of Montserrat.

The proposed marketing strategy is focused, targeted, efficient and effective. The emphasis of the marketing strategy is on **digital** marketing – email marketing, social media, Search Engine Marketing (SEM), Search Engine Optimisation (SEO), content marketing, Pay-Per-Click Advertising (PPC), etc. Digital marketing is more cost-effective and targeted than traditional marketing.

The focus on digital marketing does not exclude traditional marketing. Public Relations, Press Releases, development of collateral material, road shows, etc. will still remain.

Another key element of the marketing strategy will be the fostering of strategic partnerships – Joint Marketing Agreements (JMAs) with nearby destinations such as Antigua, co-branding partnerships with internationally-recognised brands, partnering with the travel trade, partnerships within the blogosphere, and development and deployment of brand ambassadors and brand influencers (including among the diaspora), are examples of strategic marketing partnerships that will be employed within the Marketing Strategy.

Marketing Objectives:

- Generate an image of the island of Montserrat as a safe and vibrant tourism destination
- Change the perception that in Montserrat there is nothing to do and the country has been ravaged by a series of climate changes
- Promote a new ideology of “volcano tourism”.
- Attract new type of tourists to the island of Montserrat; those preferring the authentic yet hi-tech lifestyle, living different and with a love for the environment.

- Maximize benefits to local tourism stakeholders by improving market accessibility and making locals the First Tourists.

Strategies:

- To attract more quality tourists to Montserrat that would stay longer and spend more.
- To use data, analytics to understand and target discerning customers to Montserrat and ensure that their expectations are exceeded.
- To use available digital technologies to more effectively and efficiently target priority markets.
- To prioritise and target both old and new demographic markets as well as psychographic and geographic markets and market segments.

Montserrat’s marketing strategy aims at efficiency and effectiveness, and is SMART - founded on the use of ICT; precise target marketing with measurable results. Elements of this marketing strategy include:

1. Branding and Positioning
2. Leveraging international brands
3. Targeted Markets and Marketing
4. Development of new markets
5. Growing established markets

26 The Four Pillars of the Marketing Strategy

The marketing strategy is hinged on four key pillars – driving awareness, education and engaging, telling and sharing the story, and tracking and measuring results.

| DRIVE AWARENESS | EDUCATE & ENGAGE | TELL THE STORY | TRACK & MEASURE |
|--|---|---|--|
| ← Awareness → | ← Interest → | ← Desire → | |
| | ← Action → | | |
| <ul style="list-style-type: none"> • Create Interest • Create Desire to Learn more • Spark Conversation • Generate buzz • Encourage public to take action | <ul style="list-style-type: none"> • Educate and Engage for positive impact • Drive interest • Boost Desire • Encourage public to take action • Make public part of the discussion | <ul style="list-style-type: none"> • Share the the USP of Montserrat – the Volcano and the people • Share the story of the special people and places of Montserrat • Encourage public to take action | <ul style="list-style-type: none"> • Tangibly measure impact / ROI • Boost level of insight • Adapt marketing strategy and actions based on analytics |
| WHAT | WHAT & WHY | WHO & HOW | WHEN & HOW MUCH |

Source: Tourism Intelligence International, 2019

26.1 Pillar 1 – Drive Awareness

While Montserrat is an existing destination, the current dispensation suggests that the marketing strategy adopts a new destination approach. Montserrat is still not very well known regionally or internationally. As such, awareness will be an important pillar, especially at the start of the marketing campaign.

Awareness is the first pillar of the marketing strategy and is meant to create interest and get people to start talking about the coming attraction. This will be the teaser phase of the campaign. People will start to see that something is happening, something is coming. They will start to ask questions and their interest will be piqued. This pillar partially answers the question, “What?” but without giving too much details.

Key Objective: Drive Awareness / Likes / Following / Website Visits

Call to action – Follow us on Social Media

26.2 Pillar 2 – Educate and Engage

The second pillar of the marketing strategy is the education and engagement phase. Education is critical to the marketing strategy. People need to learn more about Montserrat. What is there to do? What makes Montserrat unique and special? Why is Montserrat THE place they should visit? Why is the volcano so special? And many other questions.

Engagement is also key. This pillar will get people to start talking about Montserrat. People will start reaching out and asking questions and making comments on the website and on social media. Social media will play a critical role in engagement.

This pillar will share more information on the WHAT and will also answer the WHY?

Key Objective: Create Interest / Share / Comments / Ask Questions / Website Visits

Call to action – Click here to learn more

26.3 Pillar 3 – Tell the Story

The third pillar of the marketing strategy is telling the story. This component will constitute a large chunk of the marketing budget and will be a critical element of the marketing strategy. This pillar answers the WHO and HOW of the marketing strategy. It will share the story and inspiration of Montserrat – telling the story of the **Faces and Places** of Montserrat. The main idea is to evoke desire. People need to see themselves *doing, having* and *becoming*. This pillar will make them fall in love with the people and the places of Montserrat. Telling the story of Montserratians who survived the volcano; stories of the Buried City and other sites and attractions; stories of key tourism operators (e.g. Norman Cassell, Scriber, David Lea, Roselyn Cassell, and so many other people of high quality) – who are these people and what makes them special?

The stories should inspire people to want to get to know the people and places of Montserrat. It's all about falling in love with Montserrat and sparking a strong desire to become part of the story too. This is where transformational marketing will play a key role. Telling the story will move beyond trying to get people to the point of booking or buying to the point where there is a desire for buy-in and becoming. Booking will be a natural response to this desire.

Key Objective: Create Desire / Share / Comments / Ask Questions / Website Visits / Planning / Booking / Travelling

Call to action – Click Here to Start Your Journey

26.4 Pillar 4 – Track and Measure

The fourth pillar of the marketing strategy is tracking, measuring and evaluating the strategy's performance of time. Key tools will be deployed to measure performance, e.g. unique website visits, the generation of leads and possibly even conversion rates. This is generally easy for online and digital marketing as tracking is often built in to different actions, e.g. a Google Adwords pay-per-click (PPC) campaign can be easily tracked, measured and evaluated based on key analytics that Google provides. Many websites come built with analytics as well to determine the success of certain actions. Traditional advertising will be a bit more difficult but not impossible to track. For example, determining the success of a newspaper press release could only be measured based on the number of calls related to the release, a spike in website visits at the time of the release, a jump in visitor arrivals after the release and so on. Tracking and measuring will be considered throughout all phases of the marketing strategy.

27 Montserrat Branding and Positioning

27.1 Reposition and Rebrand

It is important that Brand Montserrat is re-branded, re-positioned and re-launched in all of its markets.

1. Logo

Montserrat's logo is still relevant and can be kept. The colours are vibrant; the M in Montserrat still stand for verdant Mountains and the three hearts is also a play on the clover leaf of the



Irish heritage. The clover over the mountain also represents the eruption of the volcano. So, the logo as it stands fits in well with the new tourism strategic focus of Montserrat.

The British West Indies reference is also relevant as a distinguishing feature as there are other Montserrats in the world, e.g. Spain. However, 'Caribbean' is a more appropriate word since the Caribbean brand has more marketing clout than the term 'British West Indies'. It is important for Montserrat to leverage Brand Caribbean for its full benefit, especially as Montserrat is a member of the Caribbean Tourism Organisation (CTO). British West Indies should be replaced with 'Caribbean'.



2. The Marketing Claim

Montserrat's current marketing claim, 'Come. We have time for you.' is out-dated and needs to be re-thought and re-invented. The claim should create a call to action as well as evoke an emotional response. Consider using Blue instead of the current yellow/orange as it is easier on the eye and it 'hits' you.



3. Positioning

It is also necessary that a clear positioning of Montserrat is developed based on the new vision, mission and thrust of tourism development. While the old positioning of eco-tourism and adventure will remain, it needs to be more focused on the volcano. Hiking, diving, nature, etc. are not differentiating features. There are many other destinations in the

Caribbean and indeed around the world that can offer eco-tourism and nature. However, eco-tourism based specifically on the volcano is a unique feature that will make Montserrat stand out as a destination.

27.2 Fully Utilise the Caribbean Brand

Compared to brand Montserrat, the Caribbean brand is better-known worldwide. The name “Caribbean” itself has a strong brand recognition and brand strength. However, the Caribbean brand has not been fully exploited by Montserrat to generate the benefits that it could. As members the Caribbean Tourism Organisation, Montserrat could do more to piggyback on the Caribbean brand. Perhaps, the term “British West Indies” in the logo could be replaced by “Caribbean”.



27.3 Strengthen the Montserrat Brand

In many instances within the destination the word ‘Montserrat’ is not sufficiently being used. For example, everywhere you go within the destination you see signs and marketing materials with the MVO. While it is understood that MVO is an acronym that stands for ‘Montserrat Volcano Observatory’. MVO could be anything from a visitor perspective. The word ‘Montserrat’ needs to be prominent.

In the example below, while this is a page belonging to the Government of Montserrat and not a tourism page per se, all of this is marketing. The Montserrat brand is not emphasised. It appears to be a ‘second thought’. Instead of Government Information Unit Montserrat it should be Montserrat Government Information Unit.

Wherever possible the word ‘Montserrat’ should be given pride of place.

Figure 20
Government Information Unit Facebook Page



Snapshot taken on February 22nd 2019

On the official Montserrat Tourism Facebook page the brand does not jump out at you. Part of the logo is hidden. This should never be the case. The brand should always be prominent.

Figure 21
Island of Montserrat Official Tourism Facebook Page



Snapshot taken on February 22nd 2019

Plymouth, which has been covered in volcanic ash also needs to be branded as ‘The Buried City of Montserrat’. Generic terms as shown on the VisitMontserrat.com website should be avoided where possible. We have to focus on strengthening the Montserrat brand at every opportunity.

Figure 22
VisitMontserrat.com Website



Snapshot taken on February 22nd 2019

27.4 Leverage International Brands

Leveraging international brands will go a long way in putting this tiny island on the map.

It is critically important for Montserrat to use international designations and relevant brands to catapult the country onto the world stage.

It is important to brand our Volcano. There are many *Soufrieres* around the world and particularly within the Caribbean such as Martinique and St. Lucia. As such, to create greater differentiation and to strengthen the tourism brand, the volcano should be called ‘The Montserrat Volcano’.

Importantly, the volcano and surrounding areas need to be designated as a UNESCO World Heritage Site. The World Heritage site status has significant brand clout that comes with it. This is an opportunity that Montserrat should strategically aim for. Even without the designation itself, a declaration by the Premier that Montserrat is working towards becoming the first UNESCO World Heritage Site in the Caribbean will generate significant buzz and awareness for Montserrat in the international press.



Even Montserrat’s beaches can be Blue Flag Beaches, a European environmental standard for safe, clean and community-engaged beaches. Blue Flag is an internationally-recognised brand that could help to strengthen the awareness and brand muscle of the tourism destination of Montserrat.

Hotels, festivals, events, projects, and other aspects of the destination can also be branded. For example, the Volcano Half Marathon could be referred to as the National Geographic Volcano Half Marathon through a strategic co-branding partnership with National Geographic or some other internationally-known brand. St. Patrick’s Day could be co-branded with a top Irish brand such as, the Kerrygold, or some other appropriate internationally-recognised Irish brand. But even the festival St. Patrick’s day, Montserrat, the only country/island to celebrate this event outside Montserrat needs special branding.

Bear in mind that companies do not just give away their brand like that. It must be very clear what the marketing and promotional benefits are to the co-sponsors. A clear sponsorship/partnership package must be developed and promoted. Transparency and accountability are also key.



How about the Guinness Volcano Half Marathon? It is important to leverage the history of Montserrat, the presence of the volcano, and the corporate social responsibility of these brands to seek co-branding and sponsorship opportunities.



28 Market Assessment

28.1 High Spend versus High End Markets

Montserrat would like to target low-impact, high-end visitors. When considering destinations that target high-end markets examples of St. Barths, Mauritius, and Mustique come to mind. However, given the current tourism scenario in Montserrat the possibility of targeting high-end markets does not currently exist. Consider that in order to target high-end markets Montserrat would need to offer high-end service, high-end tourism products and experiences, high-end accommodation, first class flights, fine dining, etc. all delivered and orchestrated by high-end human resources in the industry. As such, the high-end focus is a long-term aspiration. The proposed focus on quality tourism and developing transformational experiences will put Montserrat on the right path towards eventually being able to target high-end visitors.

Rather than high-end, Montserrat will target high-spend visitors over the short to medium term. While the two may appear to be the same, they are not. The high spend focus takes the current tourism situation and creates a scenario that allows existing and potential visitors to spend more at the destination. High spend focuses on the frequency of the expenditure and yield, whilst high-end focuses on the value of the expenditure. Increasing frequency and yield is a lot more achievable in the medium term.

High spend can be achieved in three ways:

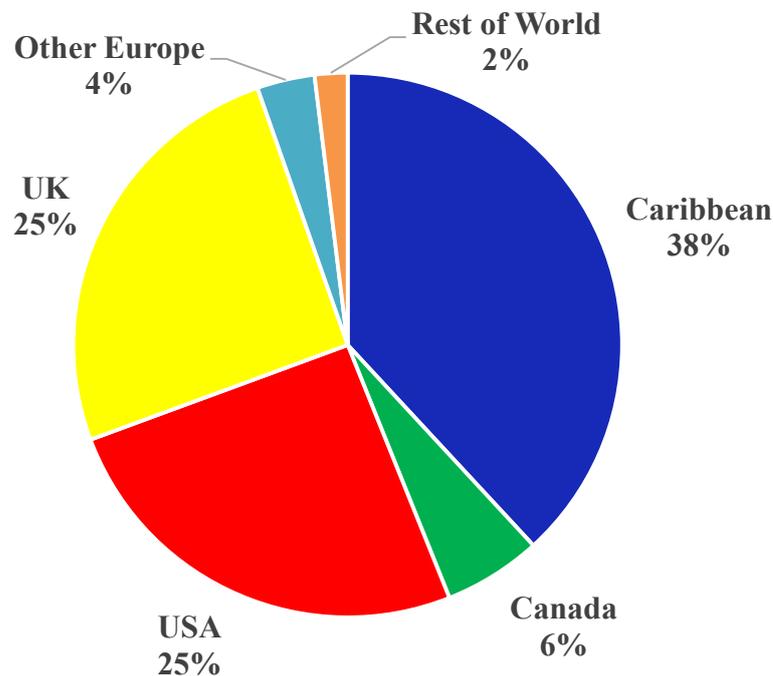
1. **Moving up the value chain** and creating transformational experiences using existing resources.
2. **Creating more opportunities for visitors to spend** – more activities, more commercialisation, etc. This is where the volcano value chain plays a key role and exploiting the many opportunities such as craft, souvenirs, health and wellness, and so much more. At every turn visitors must encounter an opportunity to spend their money.

3. **Attracting longer stay visitors.** Getting visitors to stay longer will inevitably mean that they will be spending more over a longer period of time. Targeting the Creative Class is key. This will also be a critical boost for residential / villa tourism.

28.2 Current Markets

Based on the latest available data, the largest source market for Montserrat is the regional market of the Caribbean, which accounted for 38% of the market share of stay over arrivals in 2015. Internationally, the US and the UK each accounted for 25% market share, followed by Canada (6%) and Other Europe (4%).

Figure 23
Market Share of Stay Over Arrivals to Montserrat in 2015



Source: United Nations World Tourism Organization, 2019

It is recommended that the markets of the Caribbean, USA and UK be the main geographic markets of focus for Montserrat. However, while these three geographic markets will remain the focus, marketing will also include new demographic and psychographic markets, particularly the Millennials and the Creative Class.

28.3 Target Markets

A combination of demographic, psychographic and geographic markets are proposed for Montserrat. These are identified and explained in the table below:

| Market Type | Definition | Target Markets |
|------------------------------|--|---|
| Demographic Market: | Market characteristics relating to age, gender, occupation, income, marital status, etc. | <ul style="list-style-type: none"> • Millennials • Montserratian Diaspora |
| Geographic Market: | Market defined by physical location such as a region, country, state or city. | <ul style="list-style-type: none"> • USA (including Canada) • UK (including Ireland) • Caribbean (particularly Trinidad) |
| Psychographic Market: | Market characteristics based on how people think, feel and behave | <ul style="list-style-type: none"> • The Creative Class |

28.3.1 The Creative Class

There is a new or emergent class or market made up of knowledge workers, intellectuals and various types of artists and creative people. This market is referred to as the creative class. The creative class is an ascendant economic force that will drive the demand for future work and leisure. Unlocking the potential of the creative class is key to unlocking the potential for travel, leisure and economic growth in Montserrat. Targeting the creative class will drive demand for working holidays.

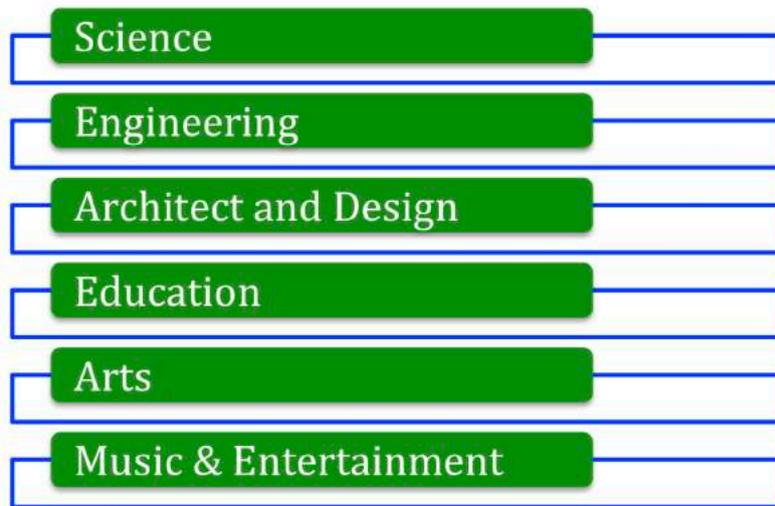
Members of the creative class are talented and well educated; they consume and are dependent on the latest technologies. They are not confined by space and are often in search of new experiences. They want to learn about new cultures, participate in work that is driven by creativity and tolerance. They want to be with other creative individuals in order to get inspiration. They can be described as a the global mobile workforce.

The creative class is not a class of workers among many, but in reality, it is the class that will bring any country who has them to great economic power and growth. The creative class creates outcomes in new ideas, high-tech industry and regional growth. They are made up of scientists, engineers, architects, designers, musicians, authors, artists, entertainers, etc.

With an economic shift towards information technology (IT), research and development (R&D), the Internet (and related areas such as Social Media), the creative class is growing rapidly. They are leading the new Gig Economy, where work is flexible, boundary-less, borderless and technology-driven.

Air Studios was a perfect example of a co-working space that facilitated the work carried out by the creative class. Singers/song writers such as the Beatles, Sting, Elton John etc. were members of the creative class. However, today Montserrat needs to broaden its horizon and attract other members of the creative class.

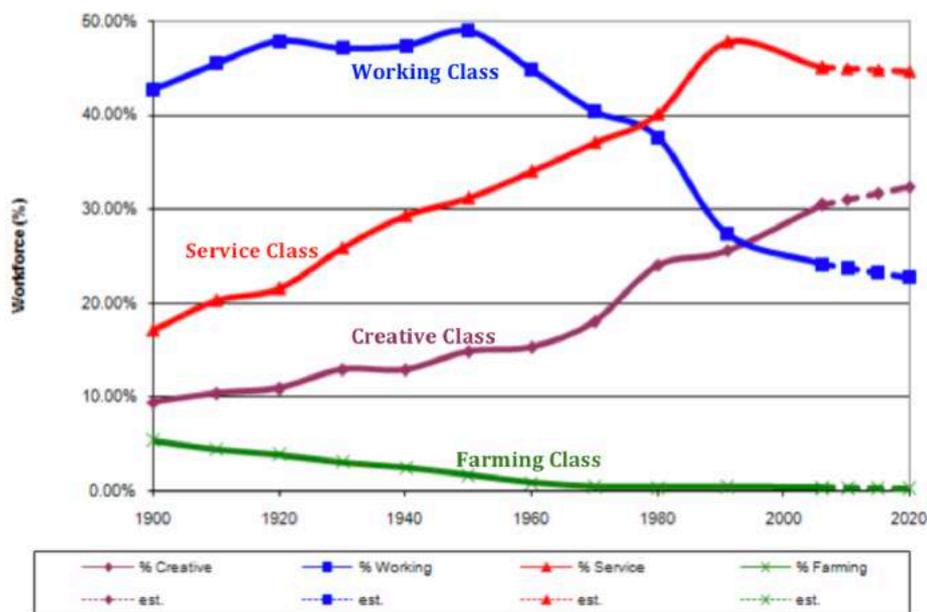
Figure 24
The Core Professions of the Creative Class



Source: Cities on the Rise – Competitive Strategies for City Tourism, Tourism Intelligence International, 2014

The creative class is the fastest growing workforce segment and constitutes more than a third of the working populations of developed countries, according to Richard Florida.

Figure 25
Historical & Projected Workforce Groups (% share)



Source: Rise of the Creative Class, Richard Florida, 2006

The Division of Tourism should strategically target the creative class through the use of digital marketing techniques. For example, through Facebook advertising the DoT could target the creative class by profession (scientists, engineers, designers, musicians, authors, etc.); or

through YouTube ads target people watching videos on co-working spaces or work abroad opportunities.

28.3.2 The British Market

Montserrat will continue to target the British market on account of its political and historical fit as well as the connection to the Montserratian Diaspora living in the UK.

Britain is a very important travel market. It is the fourth largest outbound travel market in the world, after China, the USA and Germany. Britain has traditionally been the world's third most important travel market but was taken over by China in 2010 when Britain produced some 55 million visits abroad, compared to China's 57.4 million.

Taking holidays abroad is a firmly established priority for the British after home ownership. Travel is considered an essential, rather than a luxury commodity. In fact, the British people are 12 times more likely to get excited about going on holiday than getting a new job, according to a survey by *Expedia.com*.

Britain is a very lucrative travel market for a number of reasons. Consider that:

- The United Kingdom has a population of 66 million, the third largest population in Europe behind Germany and France and is likely to become Europe's number one in the future;
- The British are mature, demanding and experienced travellers, with an enormous appetite for travel;
- British travellers are very experienced in foreign travel and increasingly inclined to seek out new, unexplored and exotic destinations;
- The British have a large number of paid holidays (four to six weeks per year);
- The British have more access to direct flights than any other nationality;
- It is socially acceptable for the British to take holidays.

The combination of four to six weeks of paid holidays; one of the highest incomes in the world; a historically strong currency and the sheer appetite for travel, has produced the world's fourth largest travel market – the UK.

28.3.2.1 Economic Outlook of the UK Market

The UK generated US \$2.6 trillion in Gross Domestic Product (GDP) in 2017, making it the fifth (5th) largest economy in the world.

Figure 26
GDP of the United Kingdom (USD Trillion)



Source: World bank, 2019

Economic growth is projected to increase slightly in 2019 before slowing in 2020, on the assumption that there is a smooth exit from the European Union. Some Brexit-related uncertainties will remain until there is clarity about future trading and travel arrangements. UK growth is projected to remain modest at around 1.6% in 2019¹⁴. Inflation is expected to converge to 2% by the end of 2020.

The strong global economy, and the competitive value of the pound (GBP), have boosted UK exports and tourism over the past two years. These economic indicators bode well for outbound travel from the UK.

28.3.2.2 Britain is a Major Source Market

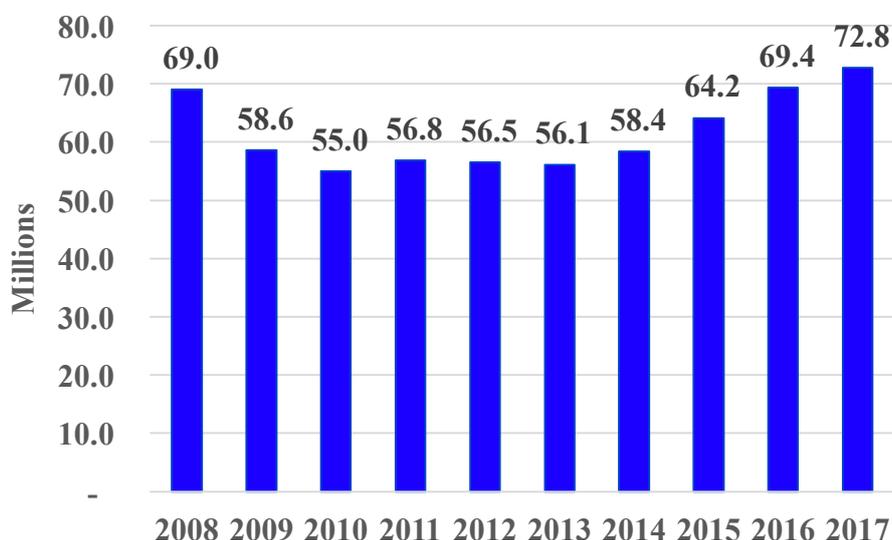
The British travel market is one of the most significant global markets. The British outbound market accounted for 5.6% of the 1.3 Billion international tourist arrivals in 2017 and 5.5% of the US\$1.3 trillion in tourism expenditure of that same year. This market should not be ignored.

In 2017 there were 72.8 million trips taken from the UK. This is significant considering that the population is 66 million. In other words, British travellers take more than one trip abroad per year. While growth is slowing, British outbound travel is expected to remain strong.

¹⁴ Estimates by Price Waterhouse Coopers (PWC), UK, 2019

Consider also, that the British travel market is very resilient. Recovery after international events such as terror attacks, wars and economic recession typically takes two years, much faster than American travellers.

Figure 27
UK Outbound Trips
(Millions)



Source: United Nations World Tourism Organisation and Office for National Statistics, 2019

28.3.2.3 The British Have Time to Travel

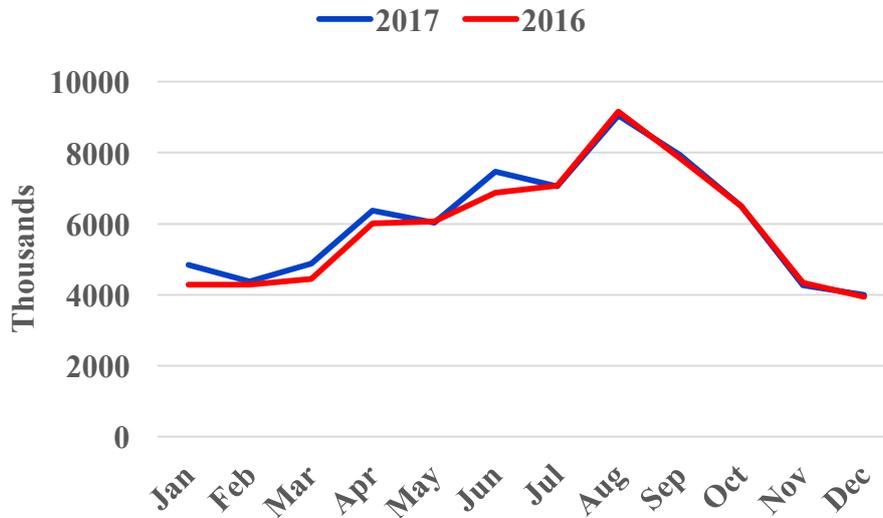
A very important determinant of travel is time to travel. One needs only to consider what the size of the USA travel market would be if Americans had six weeks of paid holidays like the Germans. British residents have an average of twenty-five work days (five weeks) of paid holidays per year.

Typically, most people in full-time employment in the UK receive between four and six weeks holiday a year, depending on length of service. The British have an additional eight days of public holidays. These public (bank) holidays serve to extend the weekend and have become popular for short breaks. Bank holidays are usually arranged to fall on a Monday. The long paid holidays of the British means that they could travel to farther destinations and stay for longer periods of time, which is good news for Montserrat.

28.3.2.4 Seasonality of UK Outbound Travel

British travellers typically travel in the summer months (July and August), largely because of the summer school holidays. However, there are also those who look for deals and cheap flights in the low season (April to June and September to October).

Figure 28
Seasonality of UK Outbound Travel

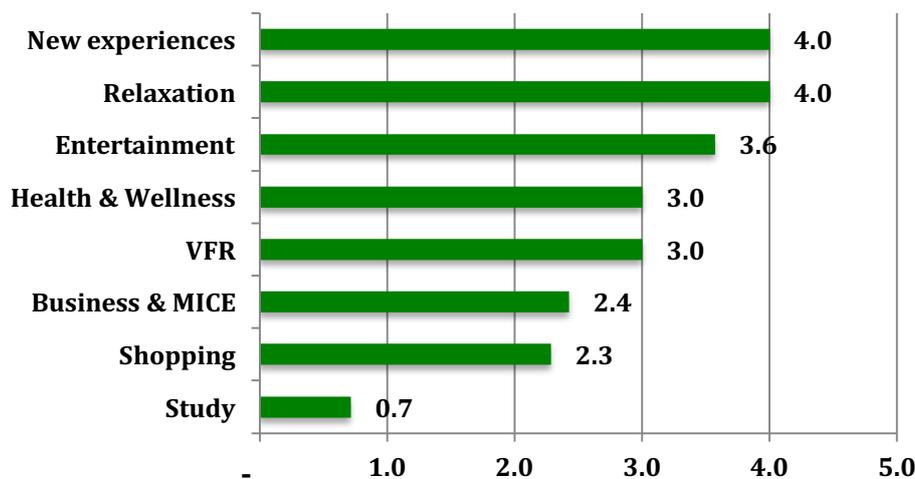


Source: Office for National Statistics, 2019

28.3.2.5 Main Travel Motives

The two main reasons Brits travel are to acquire new experiences and for relaxation according to *Tourism Intelligence International UK Tour Operator Survey, 2011*. The Brits are experienced travellers and have traditionally travelled all over the world in search of the warmth of the weather. But they are now looking for something more; for new experiences. Exotic and emerging destinations will increasingly become popular among the Brits, which bodes well for Montserrat a new, off-the-beaten track destination that offers relaxation aplenty, with the exotic culture and the pull of the volcano. The British are looking new places and faces to see; new and different customs and cuisine; interesting and exciting history and stories.

Figure 29
British Travel Motives



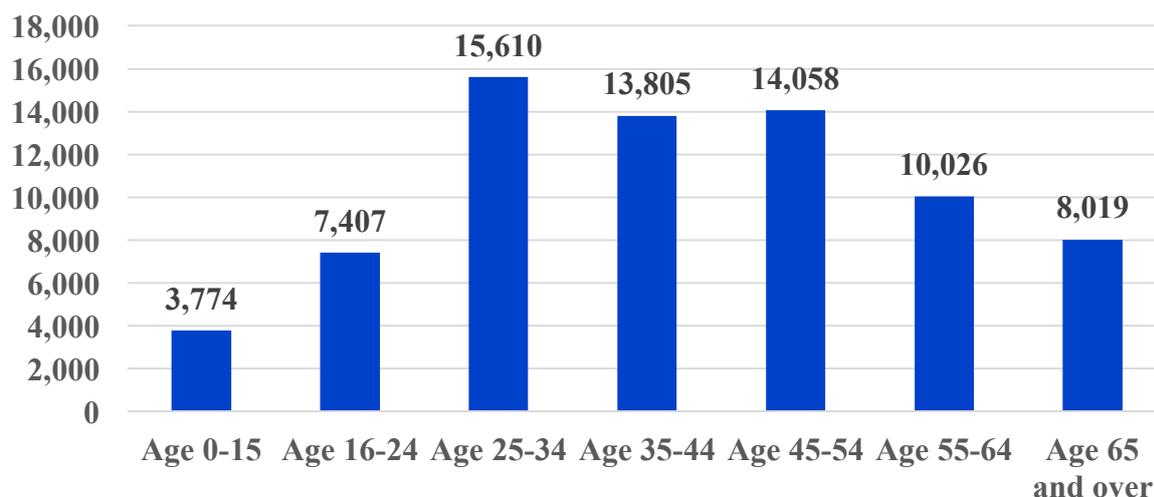
Source: *Tourism Intelligence International, UK Tour Operator Survey, 2011*

5 = Extremely Important, 4 = Very Important, 3 = Important,
2 = Not So Important, 1 = Not Important

28.3.2.6 Travel by Age Group

The 25-34 age group (Millennials) has the highest frequency of travel from the UK. In 2017, 15.6 million Britons from the 25-34 age group took a trip abroad. This was followed by the 45-54 age group, then by the 35-44 age group.

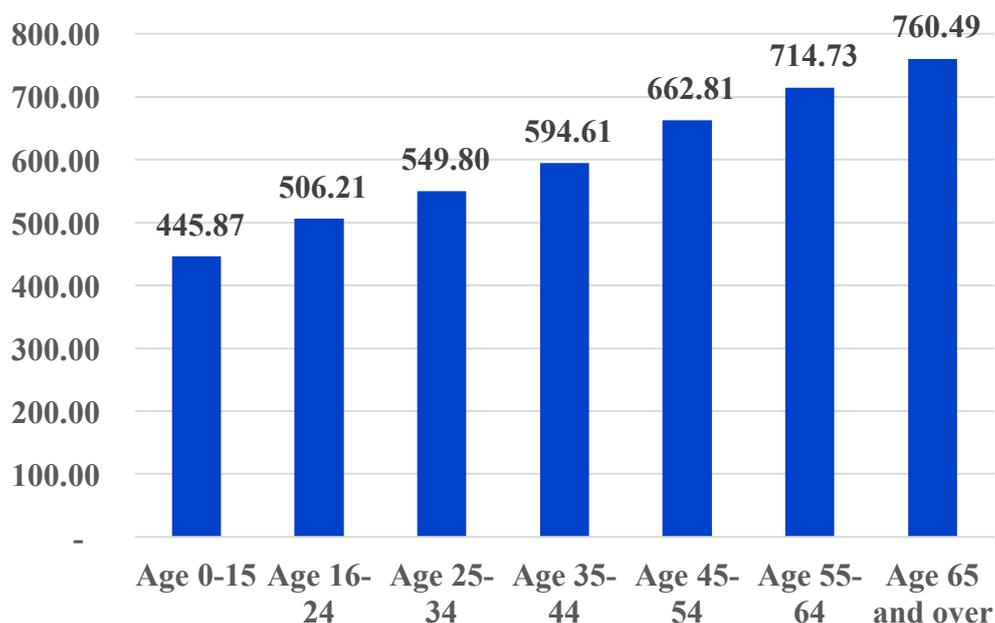
Figure 30
British Travel Abroad, by Age Group
(thousands)



Source: Office for National Statistics, 2019

The data shows that the older age groups spend more per trip as shown in Figure 31 below. Britons make more money as they get older. Plus they have more time for vacation when they retire. It is therefore no surprise that the post-retirement age groups spend the most per trip overseas.

Figure 31
British Travel Spend per Trip Abroad, by Age Group
(Pound Sterling)



28.3.2.7 The Most Lucrative UK Travel Regions / Cities

The most lucrative regions for travel from the UK can be characterized as those having:

- ▶ The largest population base;
- ▶ The highest Gross Value Added (GVA) per capita;
- ▶ The highest average weekly earnings;
- ▶ The largest number of travellers;
- ▶ The highest levels of travel expenditure; and
- ▶ Recording the lowest unemployment levels.

Based on these criteria, *Tourism Intelligence International* estimates that the top five regions in terms of their travel market potential for Montserrat are:

- ▶ London
- ▶ Scotland
- ▶ South East
- ▶ South West
- ▶ North West

Table 2.8
Overall Ranking of UK Travel Regions

| Region | Overall Rank (2010) | Overall Rank (2005) | Overall Rank (2000) |
|------------|---------------------|---------------------|---------------------|
| London | 1 | 2 | 2 |
| Scotland | 2 | 8 | 8 |
| South East | 3 | 1 | 1 |

| | | | |
|-----------------------------------|----|----|----|
| South West | 4 | 4 | 6 |
| North West | 5 | 3 | 4 |
| East | 6 | 7 | 3 |
| West Midlands | 7 | 9 | 5 |
| Yorkshire & Humberside | 8 | 6 | 8 |
| East Midlands | 9 | 5 | 7 |
| Wales | 10 | 10 | 11 |
| North East | 11 | 12 | 10 |
| Northern Ireland | 12 | 11 | 12 |

Source: Tourism Intelligence International, 2001, 2006 and 2011

It is recommended that the main target market within the UK will be London and environs, especially considering the access to flights.

28.3.3 The American Market

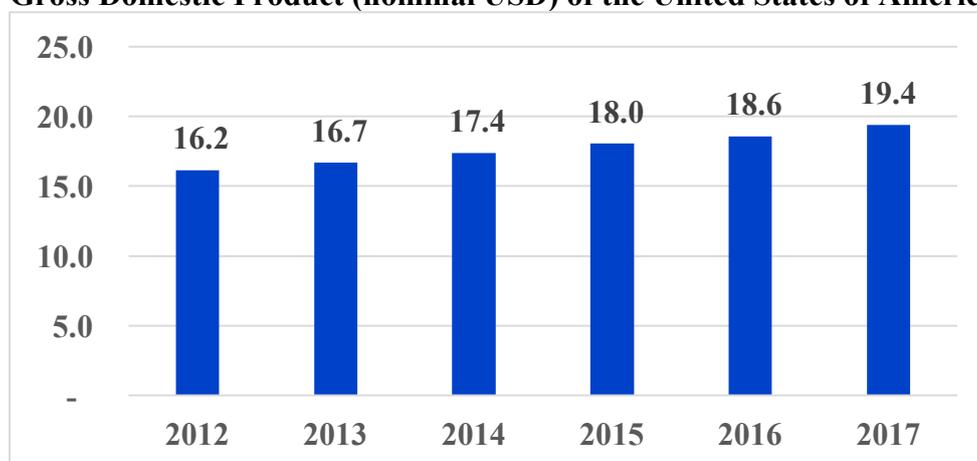
Montserrat will continue to target the US Market because of its close geographic proximity and the connection with the Montserratian Diaspora living in the US.

The United States (US) is a very important market in general and this is no different for the travel and tourism industry. Consider that at 322 million residents, the US has the third largest population in the world. The sheer size of the US population makes this market quite significant. However, it is not only the size of the market that matters, but the ability of Americans to spend that really counts. The US has the strongest economy in the world and this is not expected to significantly change in the medium term.

28.3.3.1 Economic Outlook of the US Market

The US generated US \$19.4 trillion in Gross Domestic Product (GDP) in 2017, making this country the largest economy in the world. GDP for the US is expected to reach US \$23.8 trillion by 2022.

Figure 32
Gross Domestic Product (nominal USD) of the United States of America



Source: Bureau of Economic Analysis and Focus Economics, 2017

Although the growth of the US economy is slower than expected, there are other strong indicators that remain in place. Inflation continues to decline, employment levels are getting better, per capita income is on the rise, and consumer sentiment reflected by the levels of consumption is growing steadily. These indicators bode well for outbound travel from the US.

While the growth of the US economy is slowing, GDP per capita is rising. In 2017, GDP per capita in the US was US \$62,517 some US \$11,131 more than 2012. This shows that on average Americans have more money to spend on discretionary items such as travel.

Figure 33
GDP Per Capita (USA)



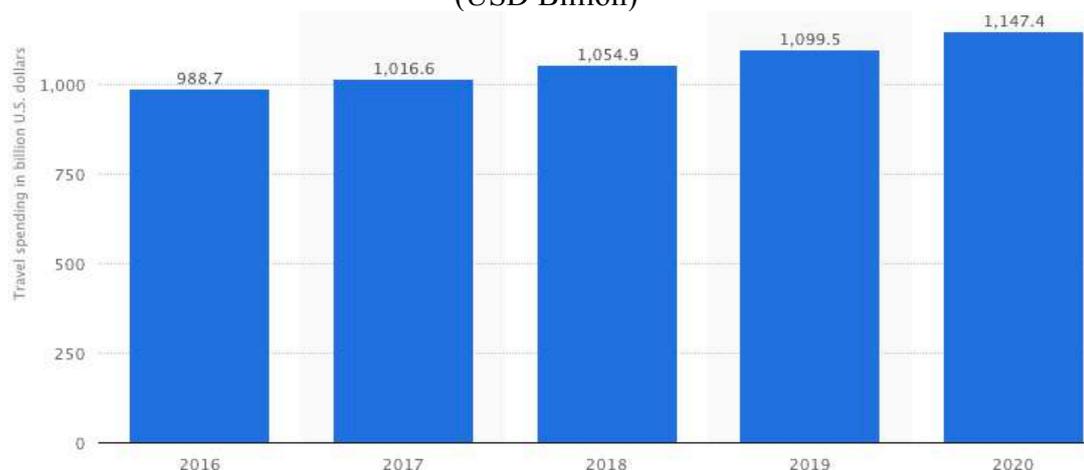
Source: Bureau of Economic Analysis, 2017

The US Dollar has been generally getting stronger against major currencies between 2008 and 2018. Apart from a few dips, the general trend has shown that the US Dollar is outperforming key currencies such as the Euro and the Pound Sterling (GBP). The fixed relationship between the USD and the XCD bodes well for travel to Montserrat from this lucrative market.

28.3.3.2 American Travellers are Big Spenders

In terms of spending, the United States of America (USA) is the most important outbound market in the world. In 2018, US travellers spent an estimated US\$1,055 billion on domestic and outbound travel, according to Statista.com. And it is expected to reach US \$1.15 trillion by the year 2020. Travel abroad accounted for US 135 billion, according to the United Nations World Tourism Organisation. This makes the US the largest travel market in terms of expenditure. And the strengthening of the US Dollar against world currencies makes the US market even more lucrative.

Figure 34
US Domestic and Outbound Travel Expenditure
 (USD Billion)

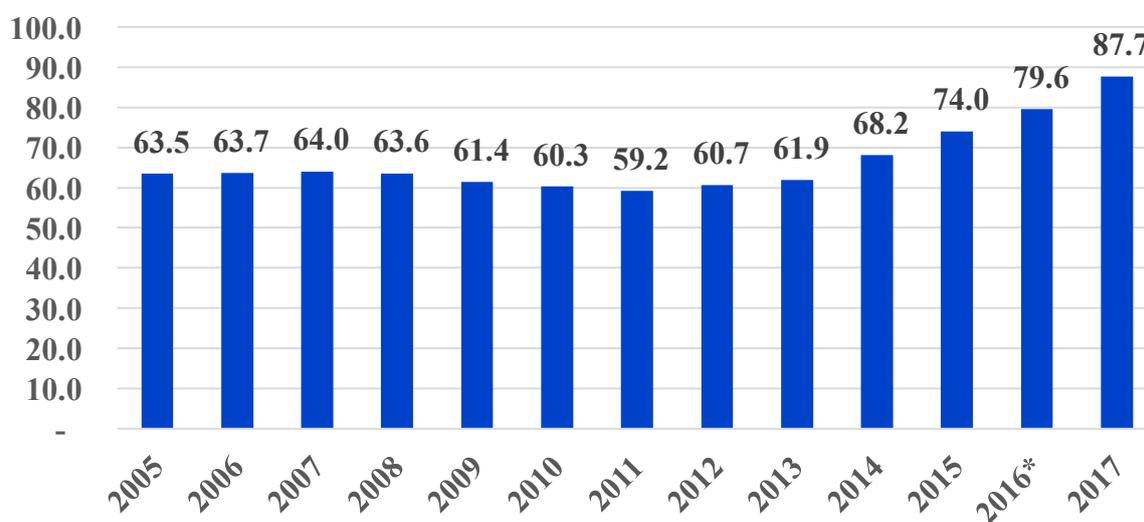


Source: Statista.com, 2019

28.3.3.3 Americans are Avid Outbound Travellers

The U.S. resident outbound market totalled 87.7 million in 2017. Outbound travel from the US grew at an average annual growth rate of 2.7% between 2005 and 2017.

Figure 35
US Outbound Travel



Source: United Nations World Tourism Organisation, 2019

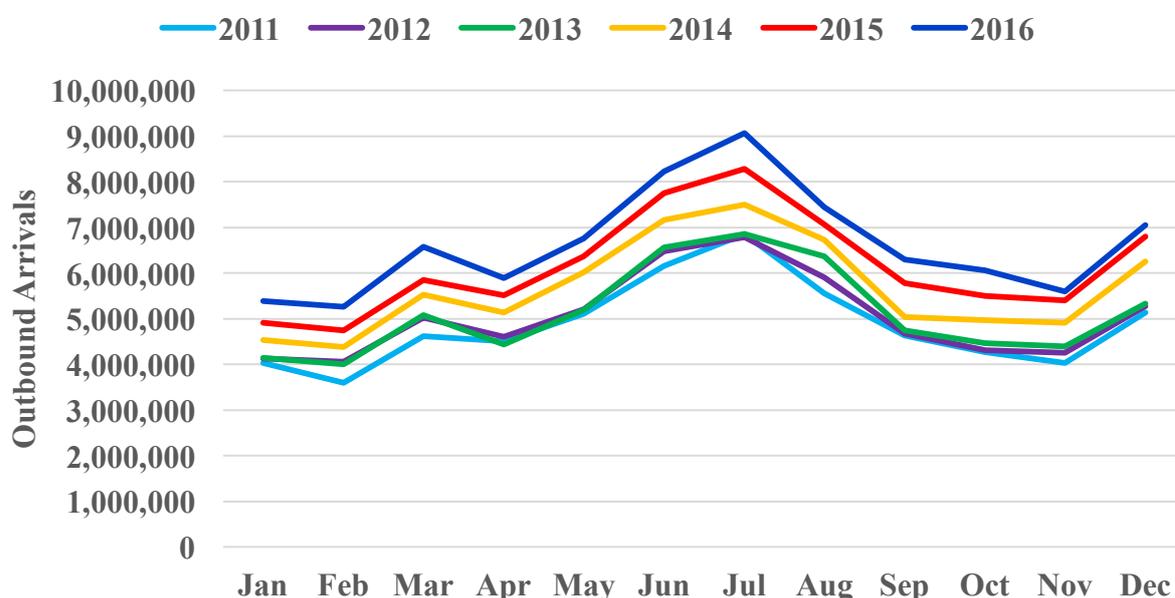
History shows that the American travel market is quite resilient. From terrorism to recession, there is always a rebound, albeit a bit slower than other countries and travel segments.

The unprecedented terrorist attacks on the US on September 11th, for example, had profound impacts on the travel and tourism sector worldwide. The travel and tourism industry has been resilient, consistently recovering from the Gulf War in 1991, the Asian financial crisis in 1997, the Kosovo Conflict in 1999, the terrorist attacks of September 11, 2001 and the global economic recession of 2008-2009. Within one year of a major crisis, the American tourism sector typically recovers.

28.3.3.4 Seasonality of US Outbound Travel

The monthly data of outbound travel from the US indicates that Americans typically travel during the summer period June to August. These three months collectively account for nearly one third (31%) of outbound travel from the US. July is clearly the leading month accounting for 11.2% of US outbound travel, followed by June (10.5%) and August (9.6%), according to the National Travel and Tourism Office of the US Department of Commerce. Outside of the summer period, the next most popular month is December which accounts for 9.2% of outbound travel. January and February are the least popular months for travel, each accounting for 6.6% and 6.4% respectively. This dispels the notion that Americans mostly travel during winter in search of warm weather. They may very well do so domestically.

Figure 36
Monthly Overseas Travel from the US Market

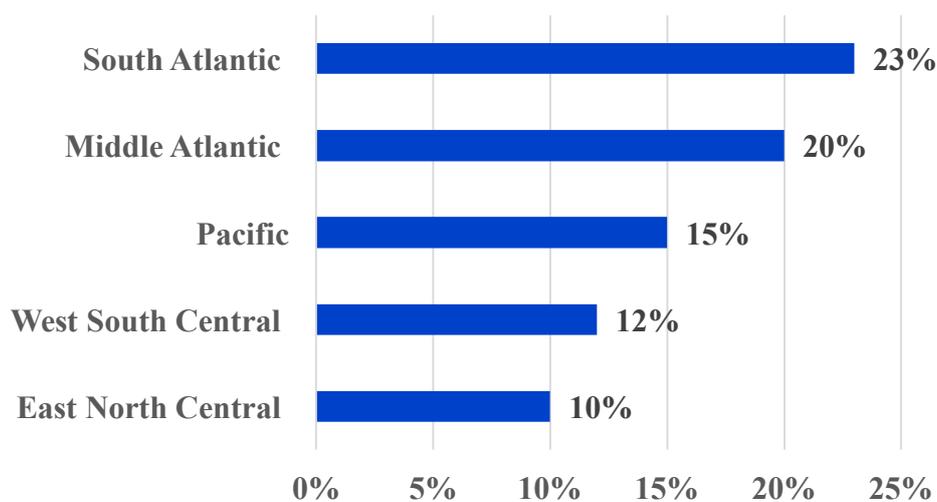


Source: US National Travel and Tourism Office, 2018

28.3.3.5 The Most Lucrative US Travel Regions / States

An examination of US overseas travellers shows that the greatest share of travel originates from the Middle Atlantic, Pacific and South Atlantic regions. Together, these regions account for more than two-thirds of US overseas travellers. The East and West South Central regions supply the least number of US overseas travellers, contributing just 2% as Figure 37 below demonstrates.

Figure 37
The Top Five US Outbound Travel Source Regions/States

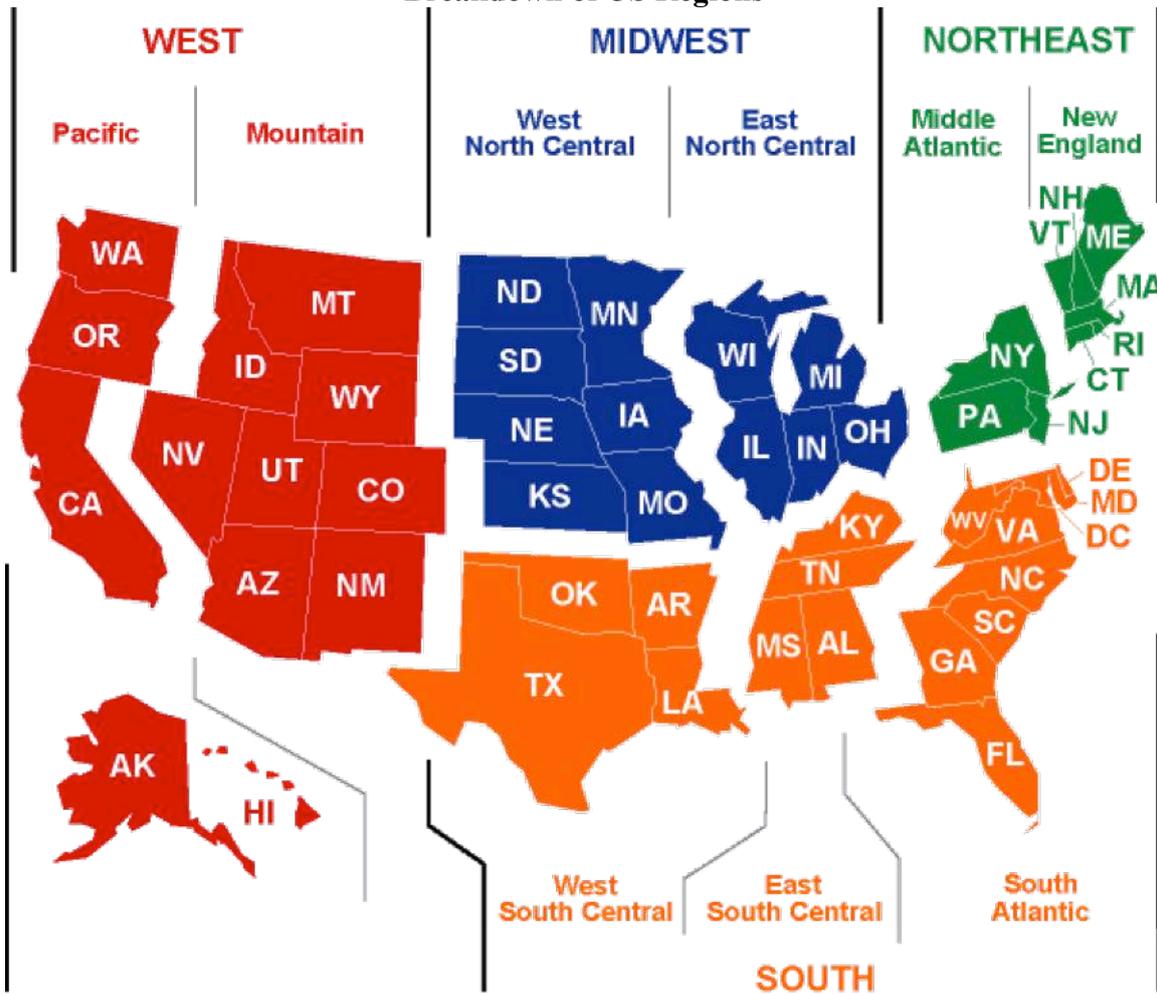


Source: US National Travel and Tourism Office, 2017

The top source regions/markets within the US for outbound travel to overseas destinations are as follows:

- South Atlantic States (Florida, Georgia, Virginia, Washington D.C., Maryland and North Carolina) accounted for 23 percent of US outbound travel in 2015. This region also experienced the most growth (25%) in outbound travel between 2014 and 2015.
- Middle Atlantic States (New York, New Jersey and Pennsylvania), experienced a 20 percent share of all US travel abroad in 2015.
- Pacific States (California and Washington) generated 15 percent of outbound travel.
- West South Central States (mainly Texas) registered a 12 percent share and travel was up 18 percent.
- Travel from East North Central (primarily Illinois, Ohio and Michigan) accounted for 10 percent and was up seven percent.

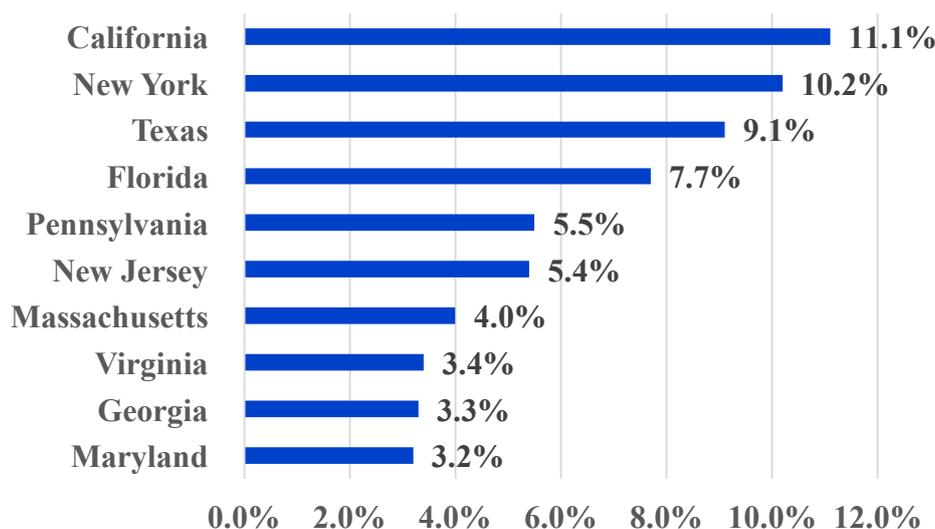
Figure 38
Breakdown of US Regions



Source: The National Energy Information Center, 2016

California is the leading American states in terms of the sheer volume of travellers. In 2015, there were over 3 million outbound travellers from California, representing 11% of the market. With 2.8 million travellers the state of New York was in second place and accounted for 10.2% of the US outbound market in 2015. Texas was in third place representing 9.1% of the market with a travelling population of 2.5 million in 2015. These three top states collectively accounted for 30.4% of total US outbound travel. Other key states included Florida, Pennsylvania, New Jersey, Massachusetts, Virginia, Georgia and Maryland.

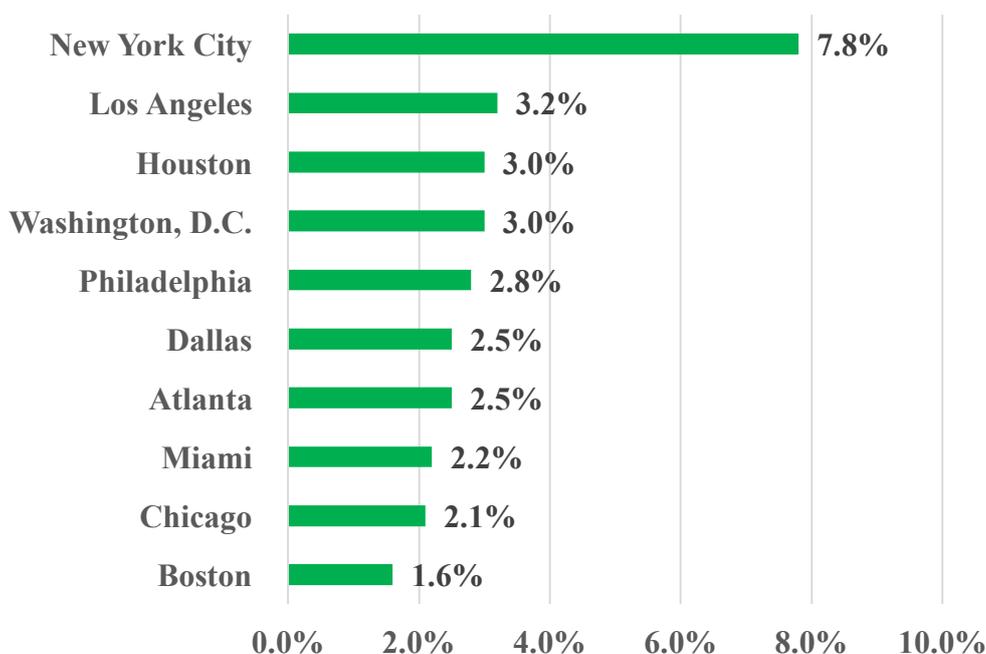
Figure 39
The Top Ten US States for Outbound Travel



Source: National Travel and Tourism Office, 2018

Overall the largest outbound travel generating city in the US is New York City. In 2015, 2.15 million travellers left their resident base of New York City to take a trip abroad. New York City accounted for 7.8% of outbound travel in 2015. Los Angeles follows in the distance with 883,000 travellers in 2015, accounting for 3.2% of the market share. Washington DC and Houston shared third position with 828,000 travellers each; a 3% market share. Philadelphia followed in 4th position with 773,000 travellers.

Figure 40
Top Ten US Cities for Outbound Travel



Source: National Travel and Tourism Office, 2017

28.4 Leverage the Regional Market

The regional market is an important market as it accounts for nearly two-fifths (38%) of arrivals to Montserrat. The region is important because of the close geographic and cultural proximities to Montserrat as well as access to flights.

28.4.1 Antigua Partnership

Antigua is a very important market for Montserrat as it is the main hub to the island. Daily flights on Fly Montserrat and SVG Air as well as a fast ferry service are based in Antigua. These create a critical umbilical cord for Montserrat to the outside world. In addition, Antigua boasts of some 1 million tourism arrivals (247,000 stay over arrivals and 768,000 cruise passenger arrivals) in 2017. Building partnerships with Antigua to create twinning opportunities should be explored. Target particularly stay over visitors to do day trips or short stays in Montserrat.

Montserrat has tourism products that Antigua cannot compete with – the volcano, the Buried City, and St Patrick's, to name a few.

The short ferry ride of 1.5 hours makes it easy to do one-day excursions or short trips of one or two nights.

In addition, many avid travellers (particularly from Europe) are doing multi-destination trips. Five days in Antigua followed by four days in Montserrat is not a far-fetched notion.

In addition, marketing should be carried out in Antigua.

28.4.2 The French Connection

The opportunity for destination partnership is not mutually exclusive to Antigua. Possibilities exist in other neighbouring islands such as Guadeloupe and to a lesser extent Martinique. There is a ferry service that runs between Guadeloupe, Martinique, Dominica and even extends as far south as St. Lucia. The potential to include Montserrat on the itinerary for at least once or twice per week can be realised. Consider that Guadeloupe is just about two hours away by ferry. Consider that there are a number of Haitians living in Montserrat. Use these persons to provide French-speaking service to arriving guests.

Montserrat has tourism products that Guadeloupe cannot compete with such as the volcano, the Buried City and St. Patrick's Day.

The French connection extends beyond visitor arrivals. The Guadeloupe market also provides an ideal opportunity to access European provisions and goods such as wines and spirits, cheeses, desserts, etc. The prices of goods coming out of Antigua are very expensive. The French connection is an opportunity that should not be ignored.

In addition, marketing should be carried out in Guadeloupe.

28.4.3 Trinidad Market

The most lucrative travel market with CARICOM is the Trinidad market. Consider that although Trinidad has half the population size of Jamaica (1.4 million vs. 2.9 million), it has

double the travel propensity as Jamaica (28% vs. 14%¹⁵). In addition, Trinidad has the highest per capita income levels in the region (US \$31,578 in 2017, according to the World Bank).

Montserrat's safe environment is a very attractive hook for Trinidadian families wishing to escape the high crime rates for a safe and fun family get-away. Consider also, that there is a 'wild meat' contingent of the population who will be happy to consume agouti and iguanas that are considered pests in Montserrat.

To succeed in this market, however, the Division of Tourism will need to take a more organised approach. Many Trinidadians are looking for safe and hassle-free travel. For this reason, travel agents are very popular. They can make all of the arrangements for the visitor. Partnering with the Trinidad travel trade will be a key strategic initiative to penetrate this market.

28.5 Engage the Diaspora

The Diaspora is defined as the collective of long-term emigrants and the descendants of long-term emigrants (up to the third and fourth generations), who are currently living abroad.

As part of its development planning, the Government of Montserrat (GoM), is keen to understand what role the Montserratian Diaspora can play in the redevelopment of the Island. The Diaspora will therefore play a key role in tourism development, particularly as a target market as well as playing the role of brand ambassadors.

While not a specific geographic market, the Diaspora is a critical and natural tourism source market. It is therefore, fitting that marketing activities should pay close attention to the geographic areas where the Diaspora is in the highest concentrations, such as London and New York and Antigua in the regional market.

It is estimated that 70% of the Diaspora is located in the United Kingdom, particularly in and around the areas of London, Leicester, Preston and Birmingham.

Table
Montserrat Diaspora Distribution by Country and Location

| Country | Location | % of Diaspora Population | Demographic |
|---------------|---|--------------------------|--|
| UK | London, Leicester, Preston and Birmingham | 70% | All |
| USA | New York, Boston and Atlanta | 10% | Montserrations that left after the Volanic Activity, Friends of Montserrat |
| Canada | Montreal and Toronto | 10% | Montserrations that left after the Volanic Activity, Friends of Montserrat |
| Other | e.g. Caribbean, Germany and Ireland | 10% | Unknown |

Source: Montserrat Investment Survey 2012, Government of Montserrat

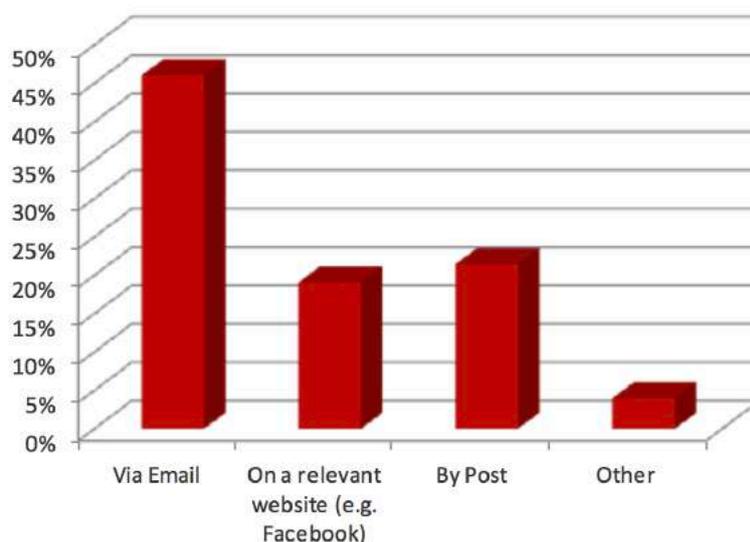
In terms of sheer size, the UK is an attractive target. However, the competitive environment, and the strong destination brands that already exist in this market, pose a challenge for

¹⁵ Tourism Intelligence International estimates, 2019

Montserrat. In other words, how do you encourage the Diaspora to travel to Montserrat over choices like Paris, Barcelona or Rome which can be accessed at very cheap rates.

The Diaspora generally prefer to be engaged electronically via email and also online options such as social media. The older generation (over 40) still consider post as a good source of communication and engagement. Reaching these potential customers therefore must be carried out via the Internet and other forms of digital media that possess the potential to pool these individuals into one ‘cyber space’.

Figure 41
Preferred Means of Engagement



Source: Montserrat Investment Survey 2012, Government of Montserrat

29 Need for More Marketing at the Destination

There needs to be more targeted actions and strategies within Montserrat to engage visitors on island and increase visitor spend. For example, advertising at sites and attractions, the use of technologies to engage customers on the ground and to promote the local culture, festivals, attractions, weekly newsletters, etc. Collecting visitors email details will be an important strategy in this regard.

In addition to marketing to visitors on the ground, more needs to be done to facilitate visitor spend – high-spend. It will bode well for Montserrat to focus on higher value products, services and experiences and create an enabling environment to make spending easier, e.g. credit cards-enabled payment, mobile money, at sites, attractions and taxis. It is the total visitor spending that matters. This can be achieved through more arrivals as well as more spending per visitor. Marketing strategies need to focus on both.

30 Market Intelligence

Market intelligence is the lifeblood of marketing. The availability of credible and up-to-date information is important for the facilitation of making informed decisions. For both the public and private sectors, access to timely information opens windows to identifying market opportunities and promoting tourism in Montserrat. However, tourism information is not always readily available. The Division of Tourism needs to strengthen its research capabilities and carry out specific market surveys and work closely with Statistics Department Montserrat to collect and collate tourism arrival information.

While a number of data points and key indicators is available, it is predominantly focused on arrivals. Overall market intelligence needs to be strengthened and tourism given the same prominence as other sectors, such as, agriculture where more in-depth data is available. For example, there are limited information on the specific markets, who are they, where are they from, what specific source markets within the larger geographic regions should be targeted, etc. Little or no information is available for tourism expenditure.

31 Website Audit

31.1.1 Layout and Design

The current website, visitmontserrat.com is a more modern and industry relevant website than its predecessors. Established in late 2017, the current version of the website has additional features such as video and flash. It is a cleaner and fresher look than what existed in the past.

Figure 42
visitmontserrat.com – 2017 to Present

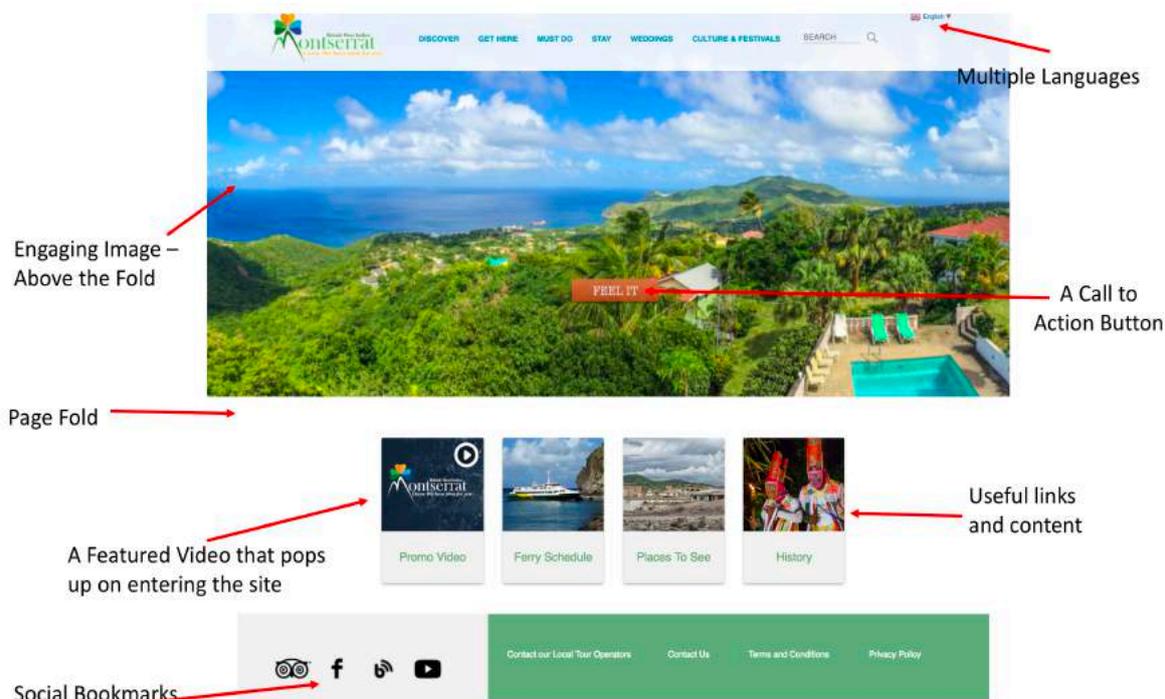


Figure 43
Older Versions of the visitmontserrat.com Website

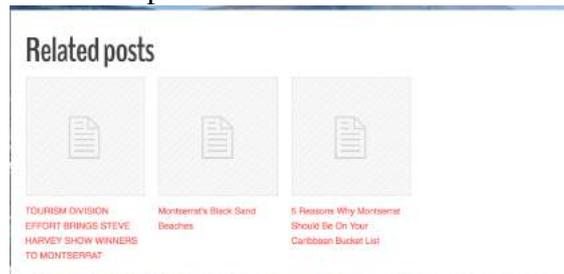


Key recommendations for improving the look and feel of the website.

- The promotional video is too short and it does not capture each element sufficiently. Each area only receives two to three seconds of coverage. This is too short. Give the audience enough time to savour the experience. The intro is 3 seconds and the outro is 4 seconds, leaving 23 seconds of promotional content covering 6 different areas. Consider doing a longer video or creating multiple videos for each of the areas – diving, the volcano experience, shoreline excursions, rugged expeditions, hiking, tour of the buried city, festivals, etc.
- Use more video content. One video alone on the website is not enough.
- Since the volcano is going to be a strategic hook to capture visitors’ attention and is the differentiating feature of Montserrat, it should be given more prominence. Many destinations in the Caribbean have hiking trails, underwater vistas, festivals, island tours, etc. But only Montserrat has an active volcano. Use this USP to the destination’s advantage. More content is needed on the volcano and related activities.
- The quality of some images appear to be medium to low resolution. Use higher resolution images.
- There is no link on the main site to the blog sub-domain – blog.visitmontserrat.com. Conversely, there is no link on the blog to the main website. This needs to be fixed as visitors may stumble on the blog content through organic search and cannot navigate to the main website, defeating the purpose of the blog entirely.
- The positioning of the website is clearly leaning towards eco/adventure/nature tourism. However, the visitor is not sufficiently guided through the purchasing process. What do we

want the visitor to do? We need to guide them to take appropriate action. The Call-to-Action button ‘Feel It’ is too vague and does not complete the sales process. What do we want them to feel? Evoking emotion is important but we need to take them beyond feeling (interest) to desire and eventually to action. Key recommendation, redo the website with more thought on the visitor purchasing process (from researching to booking) and guide them through the sales funnel using the AIDA approach (from Awareness to Interest to Desire to Action). The current website stops at the second step – Interest.

- The blog content is being entered by username ‘admin’. This is too impersonal. Give the admin a name. Whether it is a real person or not, a name makes it more personal.
- Posts should have a featured image so that the ‘Related Posts’ widget does not appear unfinished/blank as in the example below:

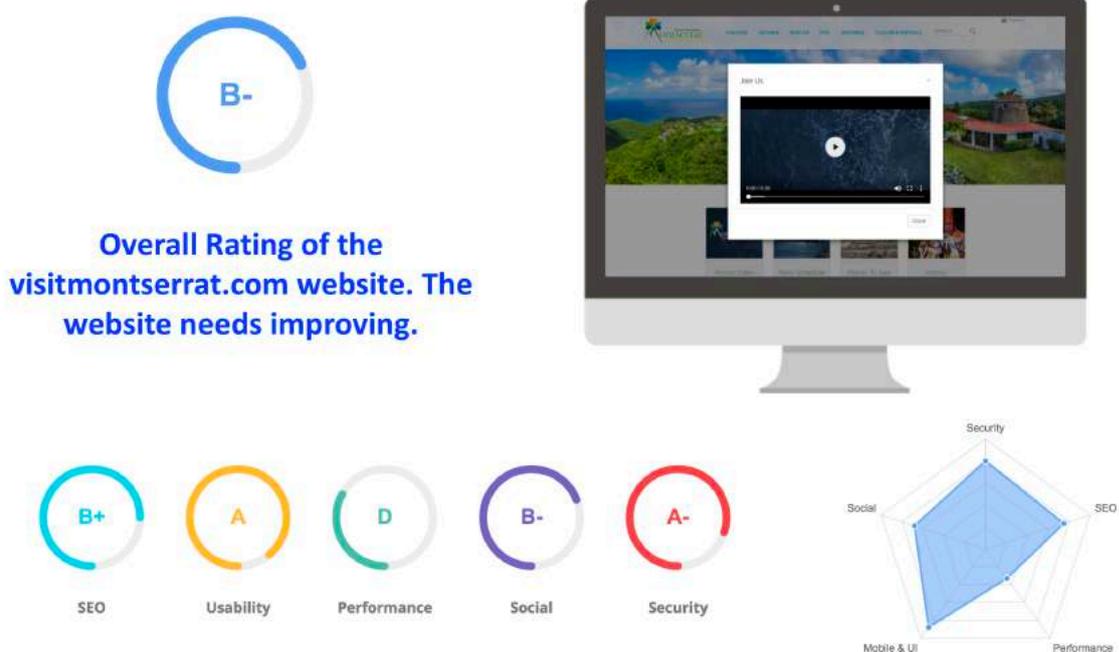


- The last blog post was April 2018. Content marketing will be a critical strategy moving forward. Regular posts need to be created at least one post per week.

31.2 Website Performance

The diagram below show the overall ranking of the visitmontserrat.com website focusing on five key areas: search optimisation, usability, performance, social strength, and security.

Figure 45
Overall Rating of VisitMontserrat.com



The visitmontserrat.com website fairs well on a number of fronts. The website appears to have some level of search engine optimization (SEO) but it could be improved further. SEO is important to ensure that the site can maximize ranking potential and drive organic traffic to the website from search engines such as Google and Bing. The website content should be focused around particular keywords targeted for ranking purposes. Ideally these keywords should also be distributed across tags such as the title, meta and header tags.

The website has a low volume of text content which search engines can interpret as 'thin content'. It has been well researched that higher text content volumes are related to better ranking ability in general. The blog could play an important role in improving content marketing. Linking the blog (which is currently a separate sub-domain) to the main website is key.

The usability and functionality of the site is high. The site is also well protected. However, there are two main areas that need to be improved.

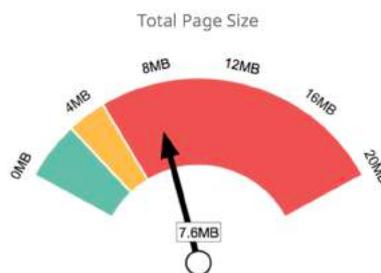
31.2.1 Website Speed

The website's server response time is slow. We recommend optimizing this to improve user experience. There are a variety of technical factors such as the web server engine and routing rules that can affect server responsiveness.



31.2.2 Website Size

The website's file size is quite large. Regardless of other optimizations, a large file size can reduce load speed and impact user experience. A general rule is to keep your page under 5MB in total file size.



31.2.3 Optimize Images

The website appears to include images that are poorly optimized. Properly formatting and compressing images can have a significant impact on page load performance. Consider using free image optimization tools such as <https://imagecompressor.com>

Table
Priority Areas for Improving Website Performance

| | | |
|-------------|---|-----------------|
| Performance | Reduce your total page file size | High Priority |
| Performance | Optimize your images to reduce their file size | Medium Priority |
| SEO | Increase Page text content | Medium Priority |
| SEO | Use your main keywords across the important HTML tags | Medium Priority |
| SEO | Implement a XML sitemaps file | Medium Priority |
| Performance | Improve server response time | Medium Priority |
| Security | Implement a redirect to HTTPS on your website | Low Priority |
| SEO | Add ALT attributes to all images | Low Priority |
| Social | Link Your Website to all Social Media Accounts | Low Priority |

32 Digital Strength of the Montserrat Brand

The vast number of searches—trillions take place every year—make Google one of the most effective tools in examining what people search for. Using Google’s trend analysis tool provides a unique perspective on what people are interested in over time. Google collects a digital footprint of people’s searches and one can ascertain the digital strength of certain keywords over time.

The Figure 46 (A, B & C) below shows Google’s relative search ranks for selected keywords¹⁶ – Montserrat, St. Lucia, Grenada, St. Kitts & Nevis and St. Vincent & the Grenadines (all as country search terms) worldwide, in the US and in the UK, respectively. The rank is partly based on volume of searches but more specifically is based on performance of the specific keyword over time. Using the name of the destination as the keyword helps to give an idea of the digital strength of the respective destination brands (keywords).

As shown in the Figure 46 (A, B & C) below St. Lucia and Grenada have the strongest digital brand strengths in all markets (worldwide, USA and UK). Montserrat, St. Kitts and St. Vincent all have similar digital brand strengths. However, Montserrat, has a slightly stronger digital brand strength in the UK market than St. Kitts and St. Vincent. This shows that the interest in Montserrat in the UK market is relatively stronger when compared to St. Kitts and St. Vincent. This bodes well for digital marketing strategies in the UK market.

¹⁶ Note that searches do not only relate to tourism but can also include mere research or curiosity.

Figure 46 A
Worldwide Digital Strength Of Selective Country Brands (Feb 2014 Feb 2019)

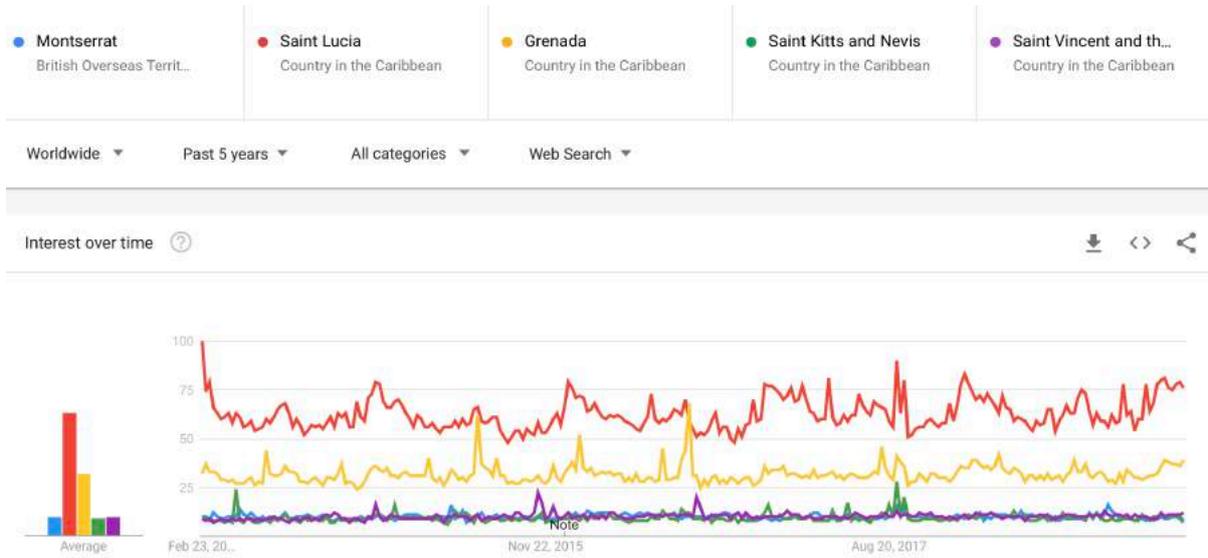


Figure 46 B
USA Digital Strength Of Selective Country Brands (Feb 2014 Feb 2019)

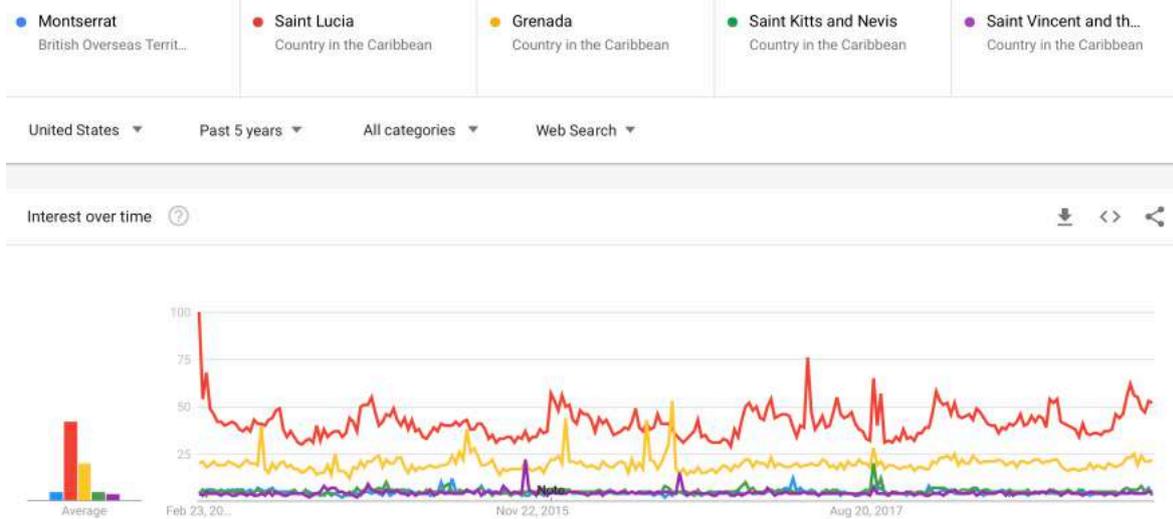
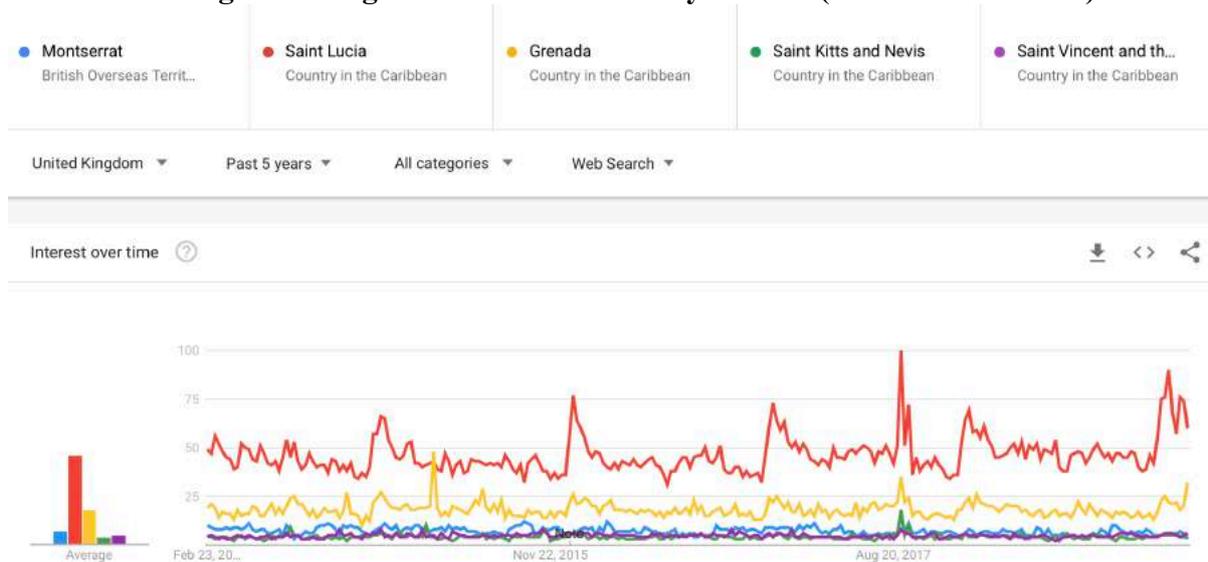


Figure 46 C
UK Digital Strength Of Selective Country Brands (Feb 2014 Feb 2019)



33 Marketing Initiatives

33.1 Influencer Marketing

Influencer marketing is a form of marketing in which focus is placed on influential people rather than the target market as a whole. It identifies the individuals that have influence over potential buyers, and orients marketing activities around these influencers.

For this element of the strategy identify top influencers from the Montserrat Diaspora who have strong brand image and presence in North America and the UK. Failing Montserratians, influencers could include popular icons in the key markets (e.g. DJ Khalid), radio and TV personalities and top bloggers and vloggers with a large following. Create a list of these influencers and target them with an offer of a free, all-paid expenses trip to Montserrat in exchange for free coverage / content about Montserrat. Partnership with top-level villas will be critical for this to be a success. Get the private sector to contribute in kind. Everyone stands to benefit through partnerships.

33.2 Create a Comprehensive Destination Guide

Develop a top destination guide that covers all of the top attractions, activities, places, spaces and people in Montserrat. This destination guide should be available in both hard and electronic versions.

The destination guide should be made available to all key travel trade partners, journalists, bloggers, influencers and at all accommodation.

33.3 Hire and Train for Digital Marketing

It is critical that the Division of Tourism identifies those personnel that will be responsible for the maintenance of the website. Once this is done that person or persons, need to be fully trained on the ins and outs of Internet marketing.

In addition, the Division of Tourism needs to hire a Digital Marketing expert to deal with all of the e-marketing activities. Internet marketing has grown to such an extent that it has become a function all on its own. It must be properly integrated into the entire marketing strategy, but having a Digital Marketing expert separate from the other marketing functions is a trend that is growing. This Digital Marketing expert should report directly to the Director of Tourism.

33.4 Search Engine Optimisation

Ensure that the website is effectively optimised for search engine use. Search engines are those websites such as Google, Yahoo and Bing that allow users to type in certain search words or phrases to create search results. To effectively use this feature, content and effective keywords will be critical. Search engine optimisation (SEO) is still a learning process for many marketers but there are some clear-cut ways that can put the website in a top position on search engines such as Google. Some of these techniques are free, while others can be costly depending on the search terms being used, the level of competition for those search terms and what budgets have been set aside for this activity.

Conduct effective keyword search before setting up keywords on the website. Keywords are words/phrases that consumers use to search for a product, service or website. It is important to have an understanding of what people type into the search engines when they are looking for information on a particular subject. Google provides an excellent free keyword research tool called Keyword Tool. This tool shows how popular a keyword is on their search engine and determines the competitiveness of that keyword based on how many websites are bidding for that very same keyword.

There are a number of ways to achieve effective search optimisation:

- The content on the website must be relevant to the specific niches – volcano, diving, ecotourism, culture/festivals;
- Understand the customers – how they search online, what other sites interest them;
- Research what the customers search for to find similar websites;
- See what the competition is doing;
- The website title (not to be confused with its domain name) and meta description must be relevant to its niche;
- Images used on the website must also be optimised – image titles, alt titles and captions.
- Create a significant amount of written content that is placed as text into website pages. This must be done on an ongoing and regular basis;
- The content must reflect the keywords that prospective visitors search for;
- Get as many other websites as possible to link to the website and these links should reflect the keywords you are focusing on, e.g. dive sites, reef operators, tourism and travel sites, etc.;

- Keep the website content up-to-date and keep adding relevant content to it;
- Frequently review this e-marketing strategy and the implementation plan to see how they are doing;

Another important SEO strategy is to outline the key target markets. It is critical to know who are the target visitors. By understanding the website's various audiences, then the relevant content and features to attract and retain these groups can be provided. This can be done for free on Alexa and Semrush. There are paid options on these sites for more detailed information and insights.

33.5 Content Marketing

The visitmontserrat.com is a well-developed website. However, content marketing / content creation should be an ongoing strategy. Content marketing (including video) should be used as a key strategy to tell the story and create interest and desire.

In this regard, the Division of Tourism needs to employ a copywriter. As such, training should be provided to the existing staff of the DoT on copywriting techniques and strategies. The ultimate objective is to create more conversions.

The purpose of creating consistent and valuable content is to optimize the website and increase the chances of being ranked high in organic searches; to increase the chances of conversion; and to keep the website fresh and engaging. A list of long-tail, key search terms should be developed to help determine which articles to write.

Each article should aim to offer real value and help website visitors to make their search/research an easy and enjoyable experience. The content should be developed with the intent of convincing visitors that they need to visit Montserrat.

Content marketing is critical for search engine optimization. Each article should contain at least 1500 words and offer a rich experience for readers (images and videos should be included as often as possible).

33.6 Video Marketing

Video is fast becoming the most important medium for online visitors. It is therefore recommended to develop rich, engaging and experiential videos to be posted on YouTube, Facebook, Instagram, Vimeo and other video sharing and social sites and these sites used to drive traffic to the visitmontserrat.com website.

33.7 Email Marketing

Email is proven to be the top converting digital marketing medium¹⁷. In addition, there are over 4 billion persons with at least one email address¹⁸. This is a marketing medium that should not be ignored. It is also a free source of advertising and can be used repeatedly.

¹⁷ OptinMonster.com, 2019

¹⁸ Radicati.com, 2019

There are thousands of visitors to Montserrat each year. Every opportunity should be taken to collect their email addresses – landing cards at ports of entry, exit surveys, and at activities and attractions and even before they get to the destination.

Offer something for free to get website visitors to share their email address. For example, develop an article on the blog offering some form of free guide – e.g. “Your Complete Guide to Having the Best Caribbean Vacation This Winter!” or “The Ten Critical Things to Avoid When Holidaying in the Caribbean”. These examples are targeting people interested in or actually travelling to the Caribbean. By collecting their email addresses you could then send them free marketing to get them to choose Montserrat the next time they travel.

In addition, the website should be enabled with opt-in forms to collect email addresses. There are many email marketing tools available on the web that could be used to facilitate this, e.g. Aweber, MailChimp, etc.

33.8 Social Media Marketing

Social media marketing is becoming increasingly important. Facebook for example, commands an active user population of 2 billion. After Google, Facebook is the second largest digital advertising medium.

It is therefore recommended that an active social media marketing initiative be targeted to the international and regional markets. Use Facebook advertising to target specific cities, age groups and interests of travellers.

Target spend of US \$1,000 per week based on professionally developed Facebook ads.

Target social media platforms will include Facebook, Instagram (which is integrated with Facebook) and YouTube.

Another strategy to help increase visitors to the website is to provide methods for users to spread the word about the website. This can be done by a ‘tell a friend’ tool or integration with a social networking website, such as Facebook. Social bookmark buttons prominently placed on the website will help with social integration.

- Target Markets: All markets

-

Marketing Pillars: Drive Awareness, Educate and Engage, Tell the Story, Track and Measure

33.9 Google Ads

A very powerful strategy to adopt in order to drive visitors to the website, and stay competitive through the Internet marketing campaign, is to employ PPC advertising. The most important form of PPC advertising is through Google AdWords. AdWords provide the simple and effective way to market your products or services on the Internet without necessarily having the formal IT or marketing training or qualifications.

Gaining a thorough understanding of what Google AdWords is and how it works is the first step to using the Ad network to your benefit. Make sure that your Ads (your text) are directly relevant to the keyword(s) associated with them.

The keys to success in an effective AdWords campaign are as follows:

- Ensure that keywords are chosen wisely through proper research and analysis. Use Google's Keyword Tool;
- Create a budget that achieves your objectives;
- Create attractive Ads that grab the attention of online users;
- Effectively plan, design and implement your campaign;
- Get an expert to develop your campaign if you are a novice;
- Create killer headlines and descriptions that grab the attention of your target audience;
- Be very targeted and specific in your market selection;
- Ensure you develop mechanisms to capture contact details from visitors and build a leads database; and
- Monitor, review and evaluate the AdWords campaign's effectiveness through the AdWords analytics tools.

33.10 YouTube

Video is a key component of digital marketing. If a picture tells a thousand words, then video tells one hundred thousand words. Video is more experiential than text or images and therefore should be critically used. Develop a video for each niche or area of focus – ecotourism, volcano tourism, festivals and culture, etc.

YouTube ads will also be used in the marketing strategy. Using the target keywords and target audiences roll out YouTube ads based on existing and newly developed video content.

- Target Markets: All markets

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Marketing Pillars: Drive Awareness, Educate and Engage, Tell the Story, Track and Measure

33.11 Destination Challenge

Develop and widely publicize a Montserrat Volcano destination challenge. Destination challenges are great ways to get viral following on social media.

33.12 Public Relations

There are two main activities that are recommended for the PR component of the marketing strategy. These include:

- Press Visits
- Press releases

33.12.1 Press Visits

The most common aspect of Public Relations is ensuring that the press commits pen to paper to communicate the key selling points of destination Montserrat to the general public. Invite the press to sit and chat with the Division of Tourism.

Develop Press Familiarisation Trips for them to get to know the destination better. This is an effective way to get the press to write naturally about their own experiences and to recommend

Montserrat to others. Today, people give greater credence to product recommendations and reviews. Using the press to achieve this objective is a most effective strategy. What better way to market Montserrat than to have the press try it out and then write a testimonial about it in the popular press. The cost of this is relatively minimal. It may involve airline tickets and accommodation for international press and press from the region. Partner with accommodation providers, Fly Montserrat and tour operators to keep costs down where possible.

Target markets: Domestic, on-island visitors and International markets

Marketing Pillars: Drive Awareness, Educate and Engage, Tell the Story

33.12.2 Press Releases

Develop and plan a calendar that involves key events and milestones, e.g. a launch event to drive awareness that Montserrat is indeed open for business, the declaration that Montserrat is aiming for UNESCO World Heritage Status, key partnerships for events e.g. Kerrygold St. Patrick's Day, etc. On the occasion of these milestones or events a suitable press release can be drafted (either in-house or outsourced) to highlight the salient aspects of the event/occasion in the press.

Target markets: Domestic, on-island visitors and International markets

Marketing Pillars: Drive Awareness, Educate and Engage, Tell the Story

33.13 Create Attractive Packages

Creating attractive packages is a destination-wide initiative that the Division of Tourism needs to spearhead. Packages should include site tours, food, transportation, and accommodation. The packages have to be attractive and appealing to the specific target markets and priced accordingly.

These packages will be negotiated and agreements will be forged between tourism operators (tour operators, hoteliers, dive operators, etc.) and the Division of Tourism to sell packages on a regular basis. The package information must be included on the destination website and on flyers and other collateral material.

In order for these packages to be effectively developed it will be critical to reach the main channels of distribution. The various channels of distribution are the main linkages to reach the stayover visitors (both in Montserrat and neighbouring islands such as Antigua and Guadeloupe), cruise passengers (in Montserrat and even Antigua) and in some instances yachts people.

Target markets: on-island visitors, international and regional tourists, cruise passengers, yachters

Marketing Pillars: Tell the Story

33.14 Engaging Taxi Trade and Barmen

Discussions and interviews with stakeholders revealed that taxi operators and barmen are key allies to work with in promoting the destination as they typically recommend things to do and places to visit to their customers. It is essential therefore, to attract and educate taxi drivers and barmen in Antigua and within Montserrat and offer some form of incentive to help them to formulate their opinions, awareness and first-hand knowledge of Montserrat in the hope that they will influence their customers to do day trips to Montserrat and to visit specific attractions. A program could be developed where taxi drivers and barmen are afforded the opportunity to experience Montserrat for a weekend or couple of nights including travel, accommodation, meals and site visits. Partnering with tourism operators will be critical to make this a reality.

Target markets: locals, on-island visitors in Antigua, cruise passengers in Antigua.

Marketing Pillars: Drive Awareness, Educate and Engage, Tell the Story

33.15 Overseas Travel Trade

- The international market is important to Montserrat as this market brings in foreign exchange and international visitors are more likely to stay longer and pay for tours. Therefore, a strong marketing thrust must ensue within the international markets. Important to note is the strong role the international travel trade continue to play in the travel process for international visitors to Montserrat. It is therefore, important to have a two-pronged approach to targeting the international markets: marketing to the consumers directly (via digital platforms and other advertising) and also to the travel trade. A promotional blitz will be carried out in partnership with the Division of Tourism in the various markets including road shows and travel fairs where the travel trade will be present. This blitz will include meetings in the various markets (USA, UK, Trinidad) to increase awareness and knowledge of Montserrat to the travel trade partners.

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Target markets: All markets

Marketing Pillars: Drive Awareness, Educate and Engage, Tell the Story, Track and Measure

33.16 Printed Collateral Material

- The development of collateral material will bring the sites and attractions within Montserrat to life and provide colourful depictions of the various aspects of Montserrat's tourism landscape. Critically important is the development of collateral material around the volcano and the buried city.
-
- Collateral material, such as, brochures, flyers and posters, despite the new digital age are still widely used and beneficial in marketing and promoting destinations and products within a destination. The Division of Tourism will play an instrumental role in promoting the destination to consumers and travel agents. And therefore, keeping them informed and excited about what's happening in Montserrat with adequate promotional material to distribute is critical.

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Target Markets: Domestic, on-island visitors, regional and international, cruise passengers

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Marketing Pillars: Educate and Engage, Tell the Story, Track and Measure

33.17 Signage

Signage will be an important marketing tool within the destination itself. Identification of key sites and attractions is an important form of marketing. It helps visitors find where these attractions are located and helps to educate people about the site/attraction. Signage includes both road signs and interpretative signs.

Target Markets: Domestic and on-island visitors

Marketing Pillars: Drive Awareness, Educate and Engage

33.18 Out of Home Advertising

The use of out of home (OOH) advertising is also proposed. Billboards, posters and/or digital displays will be placed at strategic locations such as the VC Bird International Airport, on the Jaden Sun Ferry, at the Pointe-à-Pitre International Airport in Guadeloupe and at strategic locations within Montserrat (to advertise to on-island visitors and the domestic public).

Opportunities for OOH advertising in other strategic locations will also be explored and exploited where possible.

Target markets: Domestic and on-island visitors, international visitors at nearby destinations.

Marketing Pillars: Drive Awareness, Tell the Story

33.19 Special Events

There are a number of events that take place at nearby destinations such as the Sailing Regatta in Antigua or Carnival in Guadeloupe. These could be used as opportunities to have a presence to market Montserrat to stay over visitors.

33.20 Road Shows

Road shows are effective ways to build trust and intimacy with enthusiastic fans and to target new customers. Road shows have proven to be more effective than trade shows in targeting the customers. In addition, road shows are more effective as the competition is a lot less than at trade shows. Consider the World Travel Market in London. There are literally thousands of competing destinations. Marketing efforts can be diluted and drowned out by other ‘louder’ competitors. Through road shows you can have a captive audience without direct interference or noise from competing destinations. Road shows should take place, where possible, in target cities in the USA, UK, Antigua, and Guadeloupe.

Target markets: Domestic and international

Marketing Pillars: Educate and Engage, Tell the Story

33.21 Marketing Initiatives in the Target Markets

33.21.1USA

The US is the largest international market for Montserrat (slightly ahead of the UK). Consider that the Caribbean in general, is the next highest destination after Mexico, Canada and Europe for American travel, according to the US National Office of Travel and Tourism. The following table lists the various recommended marketing initiatives for the American market.

| MARKETING INITIATIVES | USA |
|--|-----|
| Pillar 1 - Drive Awareness (Indirectly through digital) | X |
| Pillar 2 - Educate and Engage | X |
| Pillar 3 - Tell the Story | X |
| Pillar 4 - Track and Measure | X |
| Back-Drop Banner (for events and road shows) | X |
| Brochures | X |
| Free Standing Banners (aka. Vertical roll-ups) - Use at Events and Roadshows | X |
| Website (with responsiveness and Mobile-ready features) | X |
| Social Media | |
| Facebook and Instagram | X |
| YouTube | X |
| Email marketing | X |
| <i>Digital Media Placement</i> | |
| Targeted Facebook Ads | X |
| Search / AdWords PPC Ads | X |
| YouTube Ads | X |
| Use of videos developed for online teasers and boosted posts on Facebook and YouTube | X |
| Digital Magazines | X |
| Public Relations | |
| Press Releases | X |
| Roadshows | X |
| Trade Show Participation / Presence (Sponsored by the Division of Tourism) | X |
| Familiarisation Trips – American tour operators and Travel Agents | X |
| Collaboration or outreach to influencers such as bloggers, vloggers and key personalities within the region. | X |

33.21.2UK

The UK is the second largest international market to Montserrat, closely following the USA. The following table lists the various marketing initiatives recommended for the UK market.

| MARKETING INITIATIVES | UK |
|---|----|
| Pillar 1 – Drive Awareness (Indirect through Digital) | X |
| Pillar 2 - Educate and Engage | X |
| Pillar 3 - Tell the Story | X |
| Pillar 4 - Track and Measure | X |
| Back-Drop Banner (for events and road shows) | X |
| Brochure | X |
| Free Standing Banners (aka. Vertical roll-ups) - Use at Events, Roadshows, | X |
| Website (with responsiveness and Mobile-ready features) | X |
| Social Media | |
| Facebook and Instagram | X |
| YouTube | X |
| Email marketing | X |
| <i>Digital Media Placement</i> | |
| Targeted Facebook Ads | X |
| Search / AdWords PPC Ads | X |
| YouTube Ads | X |
| Use of videos developed for online teasers and boosted posts on Facebook and YouTube | X |
| Digital Magazines | X |
| Public Relations | |
| Press Releases | X |
| Roadshow | X |
| Familiarisation Trips – UK tour operators and Travel Agents | X |
| Collaboration with Caribbean Tourism Organisation to be incorporated in their marketing initiatives in the UK | X |
| Collaboration or outreach to influencers such as bloggers, vloggers and key personalities within the region. | X |

33.21.3 Caribbean

The Caribbean region (particularly the English-speaking countries) has a high potential for tourism growth in Montserrat. The close proximity and shared history make the Caribbean a natural market for Montserrat. The following table presents the various marketing initiatives recommended to target to the Caribbean market.

| MARKETING INITIATIVES | Caribbean |
|--|-----------|
| Pillar 1 - Drive Awareness (indirectly through Digital media) | X |
| Pillar 2 - Educate and Engage | X |
| Pillar 3 - Tell the Story | X |
| Pillar 4 - Track and Measure | X |
| Back-Drop Banner (for events and trade fairs) | X |
| Brochure | X |
| Free Standing Banners (aka. Vertical roll-ups) - Use at Events, Trade Shows, e.g. CHTA Marketplace | X |
| Website (with responsiveness and Mobile-ready features) | X |
| Social Media | |
| Facebook and Instagram | X |
| YouTube | X |
| Email marketing | X |
| <i>Digital Media Placement</i> | |
| Targeted Facebook Ads | X |
| Search / AdWords PPC Ads | X |
| Use of videos developed for online teasers and boosted posts on Facebook and YouTube | X |
| Digital Magazines | X |
| Press Releases targeted at regional and country press | X |
| Roadshows – Antigua, and Trinidad | X |
| Electronic displays and other OOH advertising at key regional airports e.g. VC Bird and Pointe- à-Pitre International airports | X |
| Collaboration or outreach to influencers such as bloggers, vloggers and key personalities within the region. | X |

33.21.4 The Diaspora

Although the Diaspora is difficult to measure exactly, we do know that they are predominantly located in key markets such as the UK and to a lesser extent the USA. Marketing to this market will rely on digital marketing, as well as, indirectly marketing to them via word of mouth in the local market (Montserradians communicating with friends and family abroad). The following table lists the various recommended marketing initiatives for the Diaspora market.

| MARKETING INITIATIVES | Diaspora |
|--|----------|
| Pillar 1 - Drive Awareness (Indirectly through digital) | X |
| Pillar 2 - Educate and Engage | X |
| Pillar 3 - Tell the Story | X |
| Pillar 4 - Track and Measure | X |
| Brochure | X |
| Website (with responsiveness and Mobile-ready features) | X |
| Social Media | |
| Facebook and Instagram | X |
| YouTube | X |
| Email marketing | X |
| <i>Digital Media Placement</i> | |
| Targeted Facebook Ads | X |
| Search / AdWords PPC Ads | X |
| Use of videos developed for online teasers and boosted posts on Facebook and YouTube | X |
| Digital Magazines | X |
| Public Relations | X |
| Press Releases | X |
| Partnership with Diplomatic Missions and other Montserratian Diaspora communities or organisations | X |
| Identification of Diaspora influencers | X |
| Participation at Government organised Diaspora outreach programmes and events | X |

33.21.5 On-site Marketing

| MARKETING INITIATIVES | On-site Visitors |
|--|-------------------------|
| Pillar 1 - Drive Awareness | X |
| Pillar 2 - Educate and Engage | X |
| Pillar 3 - Tell the Story | X |
| Pillar 4 - Track and Measure | X |
| Posters | X |
| Brochure | X |
| Billboards 40' x 16' | X |
| Signage (road and interpretive) | X |
| Website (with responsive and Mobile-ready features) | X |
| Social Media | |
| Facebook and Instagram | X |
| YouTube | X |
| Email marketing | X |
| <i>Traditional Media Placement</i> | |
| Radio - 30-second Teaser Series | X |
| Radio - 30-second Educational / Promotional Series | X |
| Press / Print | X |
| - Newspaper | X |
| - Magazines | X |
| Television - 15-second TV Teaser Ad (also to be used on Digital) | X |
| Television - 30-second TV Commercial | X |
| <i>Digital Media Placement</i> | |
| Targeted Facebook Ads | X |
| Search / AdWords PPC Ads | X |
| Use of videos developed for TV teaser and boosted posts on Facebook, and YouTube | X |
| Digital Magazines | X |
| Public Relations (Campaign only) | X |
| Press Releases | X |
| Press Visits | X |
| Media Launch / Press Conferences | X |
| Familiarisation Trips | X |
| Media Partnership Development | X |
| Corporate Montserrat partnerships | X |
| International Brand Partnerships | X |

33.21.6 Targeting the Creative Class

The Creative Class must be targeted with appropriate working and holidaying opportunities. By creating co-working spaces and networks, cultural events and attractive places and things to do with the backdrop of tolerance and technology, Montserrat will be able to attract the Creative Class. Specifically target the core professions of the creative class through digital marketing.

| MARKETING INITIATIVES | Creative Class |
|---|----------------|
| Pillar 1 – Drive Awareness (Indirect through Digital) | X |
| Pillar 2 - Educate and Engage | X |
| Pillar 3 - Tell the Story | X |
| Pillar 4 - Track and Measure | X |
| Website (with responsiveness and Mobile-ready features) | X |
| Social Media | |
| Facebook and Instagram | X |
| YouTube | X |
| Email marketing | X |
| <i>Digital Media Placement (targeting core professions of the creative class)</i> | |
| Targeted Facebook Ads | X |
| Search / AdWords PPC Ads | X |
| YouTube Ads | X |
| Use of videos developed for online teasers and boosted posts on Facebook and YouTube | X |
| Digital Magazines | X |
| Collaboration or outreach to influencers such as bloggers, vloggers and key creative personalities. | X |
| Partnership with organisations promoting co-working spaces such as Selina.com | X |

34 Marketing Action Plan

| Ref. # | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|--------|---|---|-------------|---------------|-----------------------------------|
| | Deploy a Strong 3-year Digital Marketing Campaign | DoT | Immediately | 1,184,264 | |
| | Change the current marketing claim. Hire a company to develop a new claim. The logo will remain the same. | DoT | Immediately | 25,000 | |
| | Create a new positioning around ecotourism, volcano tourism and co-working tourism. To be reflected in all marketing messages, materials and communications | DoT | Jun 2020 | - | |
| | Rebrand the Soufriere Hills Volcano as the Montserrat Volcano. Carry out consultations to get the buy-in of citizens. | DoT / Office of the Premier | May 2020 | 10,000 | |
| | Get the UNESCO World Heritage site designation for the volcano and surrounding area (See Strategic Area #1) | | | | |
| | Do a press conference and officially declare that Montserrat is working towards getting the UNESCO World Heritage site designation | DoT / Office of the Premier | Nov 2019 | 10,000 | |
| | Ensure that the name of the country, 'Montserrat' is given pride of place in all communication and marketing activities both within and outside of tourism | Office of the Premier / All government ministries, divisions and agencies | Immediately | - | |
| | Work towards getting Blue Flag status for Little Bay, Old Road Bay and Lime Kiln Bay | DoT / Min. Environment | Sep 2019 | 50,000 | |
| | Change the brand to include the word Caribbean to leverage the strength of the Caribbean brand. Replace the | DoT / Graphic designer | Sep 2019 | 1,000 | |

| Ref. # | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|--------|---|--|-------------|---------------|-----------------------------------|
| | “British West Indies” with the word Caribbean in the Montserrat tourism logo. | | | | |
| | Explore co-branding opportunities for festivals, events, projects, and other aspects of the destination | DoT | Immediately | - | |
| | Strengthen Regional partnerships and target new regional markets | DoT | Immediately | - | |
| | Develop twinning partnerships with Antigua to create multi-destination packages and one-day visits from stay over arrivals in Antigua | DoT | Immediately | 5,000 | |
| | Explore access to the French markets of Guadeloupe and Martinique and multi-destination opportunities | DoT | Immediately | 10,000 | |
| | Explore the possibility of attracting the Trinidad market. Meet with travel agents in Trinidad and determine what possibilities exist | DoT | Oct 2020 | 2,000 | |
| | Develop more opportunities to engage the Diaspora and to use them as influencers and brand ambassadors | DoT | Immediately | - | |
| | Strengthen the research capabilities of the DoT and carry out specific market surveys | DoT | Immediately | 50,000 | |
| | Work closely with Statistics Department Montserrat to collect and collate tourism information (not only arrivals but also expenditure) | DoT / Statistics Department Montserrat | Immediately | - | |
| | Redo the website with more thought on the visitor purchasing process (from researching to booking) and guide them through the sales funnel using the AIDA approach (from Awareness to Interest to Desire to Action). The current website stops at the second step – Interest. | DoT | Sep 2019 | 30,000 | |

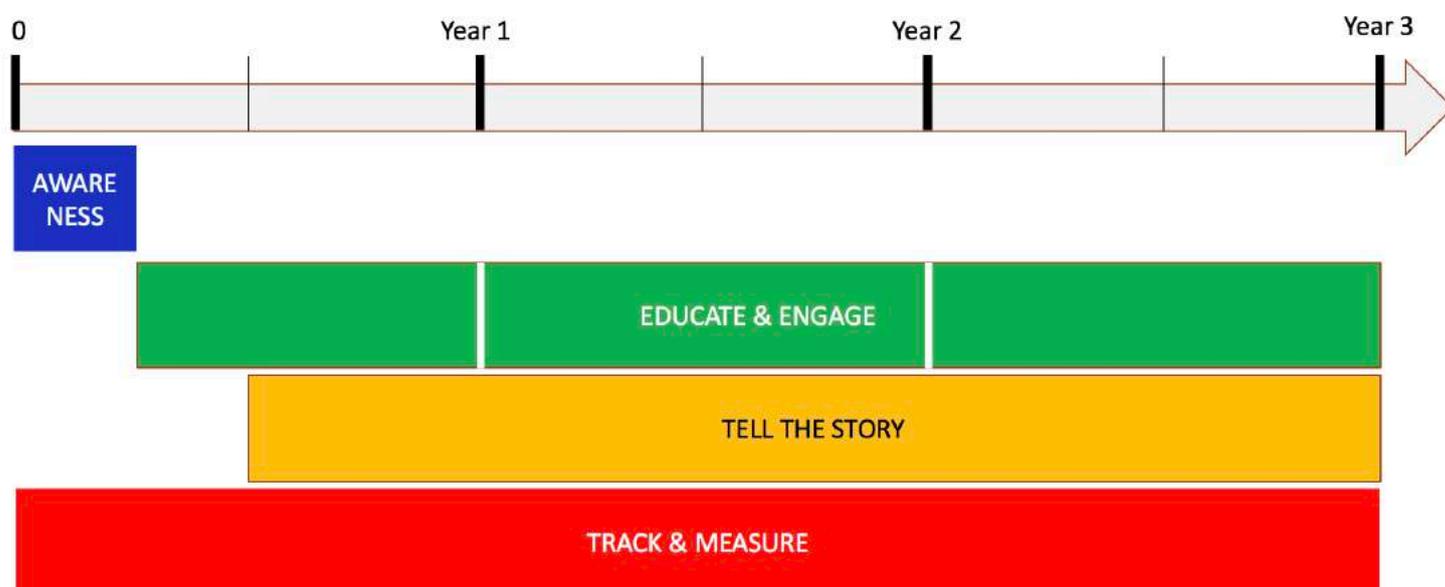
| Ref. # | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|--------|---|---------------------------------|-------------------------|---------------|-----------------------------------|
| | The blog content is being entered by username 'admin'. This is too impersonal. Give the admin a name. Whether it is a real person or not, a name makes it more personal. | DoT | Immediately | - | |
| | Ensure that all blog posts have a featured image | DoT | Immediately | - | |
| | Develop a greater focus on content marketing to drive organic traffic to the visitmontserrat.com website. Post 1 article per week. | DoT | Jun 2019 and ongoing | | |
| | Ensure that the blog is effectively linked to the main website and vice versa. The website link should appear on every blog article as well as the main blog page. | DoT | Immediately | | |
| | Add the blog link to the main menu of the visitmontserrat.com website | DoT | Immediately | | |
| | Develop a list of target keywords that the website will focus on | DoT | Immediately and ongoing | | |
| | Create a list of top influencers in the key markets and target them with an offer of a free, all-paid expenses trip to Montserrat in exchange for free coverage / content about Montserrat. | DoT | Jan 2020 | 200,000 | Five influencers targeted |
| | Provide training to existing DoT Staff on copywriting techniques and strategies | DoT | Sep 2020 | 5,000 | |
| | Carry out Agent promotions, webinars and sales calls | DoT | Jun 2019 and ongoing | 100,000 | |
| | Press Trips for each of the target markets | DoT | Mar 2020 and ongoing | 300,000 | |

| Ref. # | Activities | Responsibility (Lead / Support) | Time Frame | Budget (US\$) | Objectively Verifiable Indicators |
|--------|---|---------------------------------|-----------------------------------|---------------|-----------------------------------|
| | Fam Trips for Agents for each of the Target Markets | DoT | Mar 2020 and ongoing | 300,000 | |
| | Travel Trade Advertising in each of the main markets | DoT | Jun 2019 and ongoing | 90,000 | |
| | Launch and Promote an annual Montserrat Volcano destination challenge | DoT | July 2020 and annually thereafter | 90,000 | 2 challenges |

Total Budget for Strategic Area #6 – USD 2,462,264.00

35 Campaign Implementation and Roll Out

Figure 47
The Four Pillars of the Marketing Strategy Over the Three-Year Period



35.1 Awareness Phase: Months 1 – 3

This pillar will cover a three-month period. It will focus on the story building up to the full roll-out of the campaign. This element will pique interest in Montserrat. This will be the teaser phase building up to the education and engagement phase where people will learn more about Montserrat. This will also give the Division of Tourism enough time to create sufficient content for phase 2 – education and engagement.

| Core Goals of Pillar | Key Deliverables | Key Measures |
|--|--|--|
| <ul style="list-style-type: none"> - Create Interest - Create Desire to Learn more - Spark Conversation - Generate buzz - Encourage public to take action | <p>Digital:</p> <ul style="list-style-type: none"> - Website (Awareness Phase Version) - Mobile Site (Awareness Phase Version) - Online ads campaigns awareness focus (Facebook post boosts, Google AdWords PPC campaigns) | <ul style="list-style-type: none"> • Ad Views & Impressions (Emphasis on digital, along with traditional media monitoring) • Email Sign-ups for ongoing communications (1,000 subscribers after 3 months) • Social Media Conversation & Sentiment (likes, shares, views) • Website Visits & Unique Visitors • Views of supporting video content (web / social media) • Increased awareness of Montserrat |

35.2 Education and Engagement Phase: Months 4 – 36

This component of the marketing strategy will be implemented over months 4 to 36.

| Core Goals of Pillar | Key Deliverables | Key Measures |
|---|--|---|
| <ul style="list-style-type: none"> - Educate and Engage for positive impact - Drive interest - Boost Desire - Encourage public to take action - Make public part of the discussion | <p>Digital:</p> <ol style="list-style-type: none"> 1. Educational content on Website & Mobile Site (awareness and education version) 2. Education Phase Evolved Facebook Page 3. Update of YouTube content to Educate and Engage 4. Digital Educational posts 5. Online ads campaigns – Educate and Engagement (Facebook post boosts, Google AdWords PPC campaigns) <p>Content Creation:</p> <ol style="list-style-type: none"> 6. Exciting Videos 7. Blog content development and deployment | <ol style="list-style-type: none"> 1. Ad Views & Impressions (Emphasis on digital, along with traditional media monitoring) 2. Email Sign-ups for ongoing communications (10,000 subscribers after 3 years) 3. Social Media Conversation & Sentiment (likes, shares, views) 4. Greater Click Through Rates (CTR) 5. Better understanding of destination Montserrat 6. Web/Mobile Sites visits & unique visitors 7. Views of content (web and social media) 8. Attendees at Roadshow events 9. Increased organic traffic 10. Improved search rankings on Google and Bing 11. Increased paid traffic 12. Analytics on digital ads |

35.3 Telling the Story Phase: Months 7 – 36

| Core Goals of Pillar | Key Deliverables | Key Measures |
|---|---|--|
| <ul style="list-style-type: none"> - Share the story and inspiration of the volcano - Celebrate Montserrat's new tourism icon / attraction - Promote the volcano and the buried city | <p>Interactive Events:</p> <ul style="list-style-type: none"> (i) Roadshow participation in the various markets (ii) Familiarisation trips (iii) Press trips <p>Digital:</p> <ul style="list-style-type: none"> 8. Promotional content on Website & Mobile Site (tell the story version) 9. Tell the Story Phase Evolved Facebook Page 10. Update of YouTube content to Tell the Story 11. Digital Promotions on website and social media 12. Online ads campaigns (Facebook post boosts, Google AdWords PPC campaigns, YouTube Ads) <p>Content Creation:</p> <ul style="list-style-type: none"> 13. Education and engaging Videos 14. Tell the Story content for blog 15. Development of artwork for brochures and collateral material <p>Traditional:</p> <ul style="list-style-type: none"> • Out of Home ads at strategic locations | <ul style="list-style-type: none"> 13. Ad Views & Impressions 14. Email Sign-ups for ongoing communications (10,000 subscribers after 3 years) 15. Social Media Conversation & Sentiment (likes, shares, views) 16. Greater Click Through Rates (CTR) 17. Better understanding of Montserrat 18. Greater Desire to want to travel 19. Increased visitor arrivals 20. Web/Mobile Sites visits & unique visitors 21. Views of and engagement with content (web and social media) 22. Attendees at Roadshow events 23. Analytics on digital ads 24. Increased organic traffic 25. Improved search rankings on Google and Bing 26. Increased paid traffic 27. Video views |

35.4 Three Year Marketing Implementation Matrix – by Activity

| DESCRIPTION | QTY | M1 | M2 | M3 | M4 | M5 | M6 | M7 | M8 | M9 | M10 | M11 | M12 | M13 | M14 | M15 | M16 | M17 | M18 | M19 | M20 | M21 | M22 | M23 | M24 | M25 | M26 | M27 | M28 | M29 | M30 | M31 | M32 | M33 | M34 | M35 | M36 | |
|--|-------|----|----|----|----|----|----|----|----|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|
| Pillar 1 - Drive Awareness | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pillar 2 - Educate and Engage | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pillar 3 - Tell the Story | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pillar 4 - Track and Measure | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| I. Design, Artwork, Production and Content Creation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <i>I.1 Branding Design Elements</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Design & Technical Artwork for full-colour Brochure | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Design & Technical Artwork for full-colour poster | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Design of Facebook Posts inclusive of video (one new and ongoing boosted ad every 3 months) - Consider shared video content with YouTube and Instagram | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Design of YouTube videos inclusive of video (one new and ongoing boosted ad every 3 months) - consider shared content between Facebook and YouTube | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <i>I.2 PR Brand Items</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Back-Drop Banner | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Print and Production of 4 to 8-page Brochure | 30000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Free Standing Banners (aka. Vertical roll-ups) | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <i>I.3 Outdoor Branded Items</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Billboards 40' x 16' | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| - Design and Artwork | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| - Printing of full-color, UV protected wraps & installation | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <i>I.4 Digital Design and Production</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Website (with responsiveness and Mobile-ready features) | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Digital ad production (banners, Facebook Ads, PPC ads, YouTube videos) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Email Marketing Software / Tool | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <i>I.5 Video Creative and Scripting</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 30-second Teaser Series Creative and Scripting | 2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 30-second Educational Series Creative and Scripting | 4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 to 5-minute Telling the Story Video series Creative and Scripting | 10 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| DESCRIPTION | QTY | M1 | M2 | M3 | M4 | M5 | M6 | M7 | M8 | M9 | M10 | M11 | M12 | M13 | M14 | M15 | M16 | M17 | M18 | M19 | M20 | M21 | M22 | M23 | M24 | M25 | M26 | M27 | M28 | M29 | M30 | M31 | M32 | M33 | M34 | M35 | M36 |
|---|-----|----|----|----|----|----|----|----|----|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Pillar 1 - Drive Awareness | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pillar 2 - Educate and Engage | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pillar 3 - Tell the Story | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pillar 4 - Track and Measure | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Video Production (studio, music, talent, etc.) | 16 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <i>I.8 Branding of Events</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Media Press Kits | 50 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| II. Media Placement | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <i>II.1 Traditional Media Placement</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Out of Home (OOH) | 3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <i>II.2 Digital Media Placement</i> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Targeted Facebook Ads | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| YouTube Ads | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Search / AdWords PPC Ads | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| III. Public Relations | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Public Relations (Campaign only) | 9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Storytelling Content | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| IV Promotional Events | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Media Launch | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Roadshows (Antigua, Guadeloupe, USA, UK) To be determined | 18 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

36 Marketing Campaign Budget

Values are quoted in US Dollars

| DESCRIPTION | QTY | 2019-2020 | 2020-2021 | 2021-2022 | Total |
|--|-------|-----------|-----------|-----------|---------------|
| I. Design, Artwork, Production and Content Creation | | | | | |
| <i>I.1 Branding Design Elements</i> | | | | | |
| Design & Technical Artwork for full-colour Brochure | 1 | 5,000 | | | 5,000 |
| Design & Technical Artwork for full-colour poster (backdrop and free-standing banner) | 2 | 2,000 | | | 2,000 |
| Design of Facebook Posts inclusive of video (one new and ongoing boosted ad every 3 months) - Consider shared video content with YouTube and Instagram | 12 | 6,000 | 6,000 | 6,000 | 18,000 |
| | | | | | |
| <i>I.2 PR Brand Items</i> | | | | | |
| Print of Back-Drop Banner | 1 | 1,000 | | | 1,000 |
| Print and Production of 4 to 8-page Brochure | 30000 | | 30,000 | | 30,000 |
| Print of Free Standing Banners (aka. Vertical roll-ups) | 2 | 2,000 | | | 2,000 |
| | | | | | |
| <i>I.3 Outdoor Branded Items</i> | | | | | |
| Billboards 40' x 16' | | | | | |
| - Design and Artwork | 1 | 2,000 | | | 2,000 |
| - Printing of full-color, UV protected wraps & installation | 3 | 6,000 | | | 6,000 |

| DESCRIPTION | QTY | 2019-2020 | 2020-2021 | 2021-2022 | Total |
|--|-----|-----------|-----------|-----------|----------------|
| <i>I.4 Digital Design and Production</i> | | | | | |
| Website upgrades (inclusive of new content) | 1 | 10,000 | | | 10,000 |
| Digital ad production (banners, Facebook Ads, PPC ads) | | 3,000 | 3,000 | 3,000 | 9,000 |
| Email Marketing Software / Tool | 1 | 348 | 588 | 828 | 1,764 |
| <i>I.5 Video Creative and Scripting</i> | | | | | |
| 30-second Teaser Series Creative and Scripting | 2 | 3,000 | | | 3,000 |
| 1 to 2 minute Educational Series Creative and Scripting | 4 | 6,000 | | | 6,000 |
| 5 to 10-minute Telling the Story Video series Creative and Scripting | 10 | 5,000 | 10,000 | 10,000 | 25,000 |
| Video Production (studio, music, talent, etc.) | 16 | 36,000 | 40,000 | 40,000 | 116,000 |
| <i>I.8 Branding of Events</i> | | | | | |
| Media Press Kits | 60 | 1,000 | 1,000 | 1,000 | 3,000 |
| II. Media Placement | | | | | |
| <i>II.1 Traditional Media Placement</i> | | | | | |

| DESCRIPTION | QTY | 2019-2020 | 2020-2021 | 2021-2022 | Total |
|--|-----|----------------|----------------|----------------|------------------|
| Out of Home (OOH) | 3 | | 12,000 | 12,000 | 24,000 |
| | | | | | |
| <i>II.2 Digital Media Placement</i> | | | | | |
| Targeted Facebook Ads (6 markets at an avg. of \$2,000 per market per month) | | 96,000 | 144,000 | 144,000 | 384,000 |
| YouTube Ads (target top trending videos in key niches) \$2,000 per month | | 16,000 | 24,000 | 24,000 | 64,000 |
| PPC Ads - avg. of 20,000 clicks per month at an average of \$2.5 per click | | 33,500 | 50,000 | 50,000 | 133,500 |
| | | | | | |
| III. Public Relations | | | | | |
| Public Relations (Campaign only) | 9 | | 3,000 | 6,000 | 9,000 |
| Storytelling Content | | 15,000 | 25,000 | 25,000 | 65,000 |
| | | | | | |
| IV Promotional Events | | | | | |
| Media Launch | 1 | 5,000 | | | 5,000 |
| Roadshows (Antigua, Guadeloupe, USA, UK) To be determined | 15 | 60,000 | 100,000 | 100,000 | 260,000 |
| | | 313,848 | 448,588 | 421,828 | 1,184,264 |

SECTION 6 - ENVIRONMENTAL EDUCATION AND AWARENESS CAMPAIGN

37 Campaign Introduction

Everyone has to play a key role in conserving and protecting the environment. However, if they do not see the importance of the environment as a source of wealth they will not take action. This is why the connection between tourism and the environment becomes a critically important strategy in creating environmental awareness.

The environment in the context of tourism currently plays a limited role in the economy of Montserrat. However, the potential for the country to grow its tourism industry, to increase its contribution to national income, to create much needed jobs and generate foreign exchange earnings is very real. Once Montserratians first understand and recognise the significance of tourism and then understand the connection between tourism and the environment, then it will become clear that the environment needs to be preserved in order to ensure the sustainability of the tourism sector.

Tourism is a fiercely competitive business. However, it is not simply the stock of natural resources of the country that will determine its competitiveness in tourism, but rather, how these resources are managed and organised, and the extent to which they are complemented with man-made interventions.

However, in spite of the many man-made strengths, a critical man-made element is lacking. Montserratians, with all of the exposure to education and technology, still remain largely unaware of the economic, and social potential of travel and tourism. Furthermore, they are not aware of the close connection between the environment and tourism. Without this key understanding of the potential of tourism and its link to the environment, it will be difficult to get citizens of Montserrat to fully get involved in and contribute to protecting the environment.

Montserrat's natural environment (volcano, vistas, valleys, flora, fauna, forests, wind, water and waves) forms the basis of the tourism experience. As such, Montserrat's natural environment is indispensable to tourism development, competitiveness and the strengthening of the national brand. It is therefore critical that all measures are put in place to ensure the preservation of the natural environment. And everyone has a key role in environmental preservation.

However, many Montserratians do not see the nexus between tourism and the environment. They do not understand that the environment is an important resource base for tourism and by extension for the wider economy. Without the environment, there can be no tourism and without tourism, there can be no food on the table.

With this limited knowledge and lack of appreciation of tourism's contribution to economic development and the role that tourism plays in the environment and vice versa, it becomes apparent that a comprehensive Environment Awareness Campaign is Required.

The Division of Tourism, therefore has a critical role to play in the development and delivery of an awareness and education campaign.

37.1.1 The Objectives of the Awareness Campaign

The environment awareness campaign has five objectives as follows:

- To create and build a Human Resource capital for the environment sector
- To inform the public about the unique Montserratian environment and its importance
- To foster behavioural change and stimulate environmental activism
- To engender a sense of personal pride in Montserrat
- To educate the public about the policies and programmes of the Government of Montserrat

37.1.2 The Creative Focus of the Campaign

The awareness campaign will attempt to make the environment more **personal**. Montserratians need to begin to see themselves at the centre of the environment. They need to realize that the environment is not merely dependent on the efforts of the Government or a select few in the country but that they too (school children, housewives, fisherman, taxi drivers, mechanics, hair braiders, bankers, entertainers, etc.), can and should contribute to the protection of the environment.

Figure 48

The Creative Focus of the Environment Awareness Campaign



It's all about putting the 'I' and the 'ME' in environment.

The campaign will also attempt to make the environment more **relatable**. Montserratians will begin to become aware and learn that the environment exists all around them and that it can be used to transform the economy and their lives. Here the nexus between tourism and the environment becomes apparent. Tourism is a creator of jobs and a generator of foreign

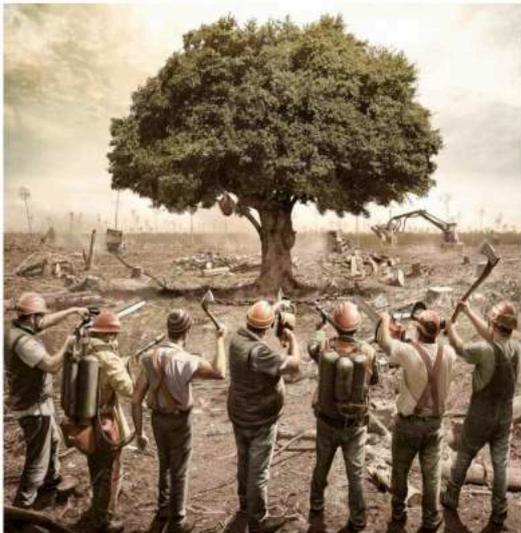
earnings. They will begin to understand that tourism is the engine that keeps the economy of moving. However, tourism is built squarely on the environment. No environment means no tourism.

Thirdly, the campaign will attempt to make the environment more **relevant** to the average Montserratian. In addition to understanding the broader economic impact of the environment, citizens will begin to understand that they too can personally benefit from the environment – economically, in terms of their health, entrepreneurial opportunities, better quality of life and the security of their future wellbeing.

**The Environment is All Around Me.
It is about everyday life.**

37.2 Deliver the Message

The campaign has to evoke strong emotions and drive the recipient to take immediate action. The use of strong content and imagery will be crucial in delivering the message.



37.3 Core Selling Points

| Creative Focus | Core Selling Points |
|---|--|
| Making the environment personal | The Environment is My Responsibility |
| Making the environment relatable | The Environment and the Economy 1. There is no Tourism without the Environment 2. Environmental Entrepreneurial Opportunities |
| Making the environment relevant | There is No Planet B 1. Avoiding Pollution 2. Reduce, Reuse, Recycle 3. Cleanliness is wellness 4. Saving the environment is saving money 5. A stitch in time, saves nine |

37.4 Target Audience of the Awareness Campaign

The campaign must touch all levels of society from children in primary and secondary schools to business owners and operators such as hoteliers, tour guides, manufacturers, farmers to government agencies and the public services such as Government Ministries, Immigration Division, Customs, the Police Service. Communities will also play a critical role and need to be involved as well.

37.5 Delivery Tools and Methods

The tools, content and methods of the awareness campaign must be delivered in an innovative, state of the art, hip and interesting way in order to excite and engage recipients to inculcate real learning.

The traditional delivery mechanisms may not be as effective at achieving the desired transformation. The use of new media and new forms of delivering the awareness campaign to create the required level of engagement and excitement will be required.

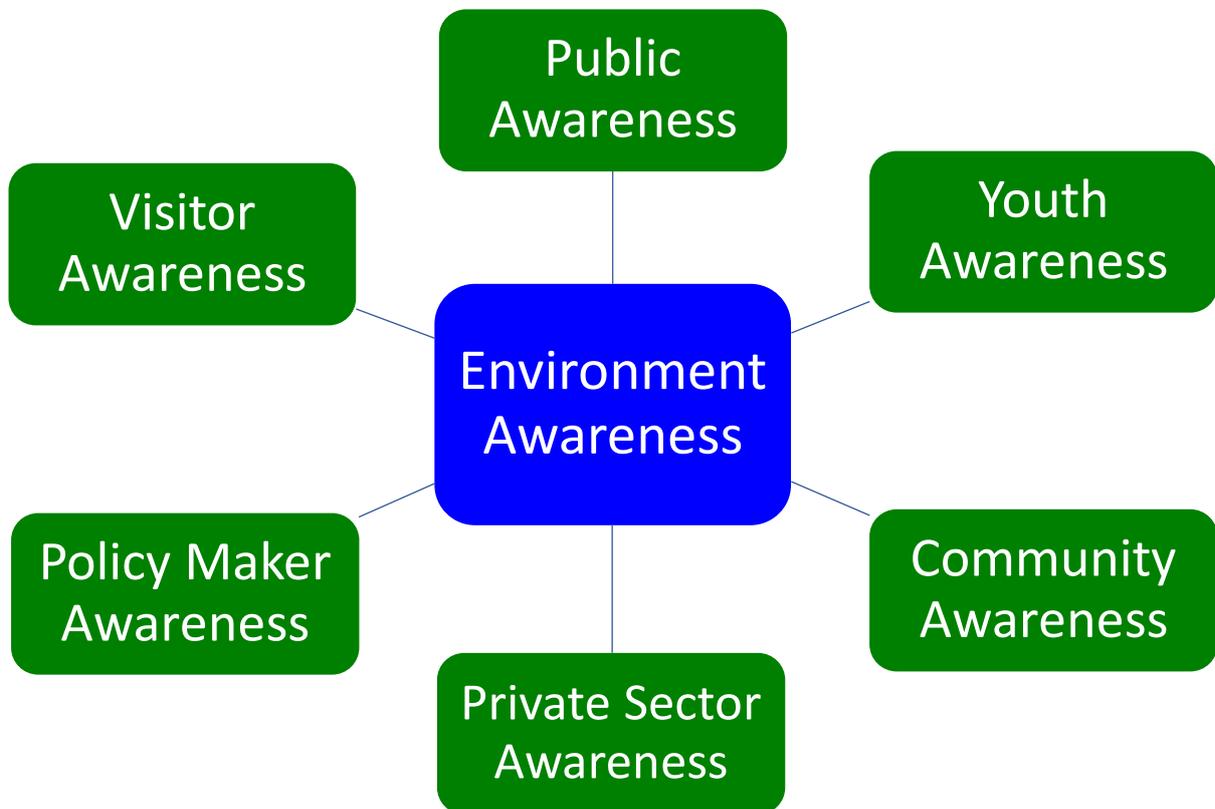
Traditional training tools and methods are failing to engage and excite. This awareness campaign aims to use creative content, culture, history, heritage, modern tools and techniques, and engaging methods such as, music, art, entertainment, song, humour, competitions, and fun activities that engage citizens at all levels.

Figure 49
Delivery Tools and Methods of the Campaign



37.6 Key Areas of Awareness

The campaign will be expected to have a national focus and to target the 5 major groups through a series of interrelated activities. These interrelated activities consists of six focal areas of awareness as follows:



- **Public Awareness:** A national public awareness and education programme geared towards public education and motivation. It will be based on a multi-media approach including radio, television, newspaper, event planning and community outreach.
- **Youth Awareness:** The in-school and youth education programme that will focus on the provision of information and increasing the knowledge of the environmental awareness and activities within the schools and at the community level. The 3R's (reduce, reuse, recycle)
- **Community Awareness:** A community component targeting communities especially those adjacent to parks, proposed marinas, and other major tourism facilities and environmentally sensitive areas. The community component will seek to prepare the targeted communities to understand the importance of conserving the environment and to develop products and services that would allow them to conserve the environment and importantly, to benefit from the environment – the 3R's, recycling of products, development of organic manure through composting, community beautification projects and landscaping. Recommended methods for bringing the message to the communities include competitions, gatherings, roadshows and community workshops.
- **Private Sector Awareness:** A private sector component aimed at the private sector tourism stakeholders, commercial groups and civic society. The goal of the private sector component is to encourage and develop strong Public / Private / Community partnerships (PPCP) and support for the concept of environmental education, conservation and business best practice.
- **Policy Makers:** To raise awareness among policy makers on the environmental issues and on the nexus between the environment and many sectors of the economy, particularly tourism. To engender an appreciation among policy makers of the importance of the environment to sustainable development and the need to integrate it into existing and proposed policies and programmes and to develop and enforce relevant legislation through the development of regulations
- **Visitor Awareness:** The visitor is an important target group of the environmental awareness programme. And it all starts with the kind of visitors Montserrat is targeting. Visitors such as the Creative Class, are more knowledgeable, sophisticated and caring. All marketing initiatives should underscore the importance of our environment to visitors. In addition, they should be targeted while on island as well.

37.7 An Integrated Approach to the Campaign

The Environment Awareness Campaign will utilize a mix of areas consisting of both online and offline marketing elements, as well as, events, competitions, and sound education and training and experiential learning. These elements will assist in creating a very integrated programme that meets the population where they spend their time.

The programme will provide a blend of traditional and new media options – television, radio, newspaper, and digital media. Moreover, the digital options will be very integrated and will not merely focus on a website as a key tool for driving awareness but will also incorporate social sites such as Facebook, Instagram and YouTube as well as blogs, online advertising, search options and optimization.

Figure 50
An Integrated Approach to the Campaign



37.8 Components of the Campaign

37.8.1 Digital

Build a dynamic digital presence, leveraging the official Montserrat tourism and government social media channels to drive the digital component of the Environmental Awareness Campaign.

- Develop a website for the Awareness Campaign. Ensure that it populated with relevant content and is regularly updated with the latest news and information relating to the environment.
- Create new profiles across Facebook, YouTube and Instagram that are dedicated to the Environmental Awareness Campaign.

- Create content that will attract and engage key audience segments and develop annual blog calendar and post at least one blog per month
- Curate and create regular posts that educate, entertain, inspire and inform

37.8.2 Traditional

37.8.2.1 *Media Outreach/Advocacy*

Media collaboration will be important in the implementation and success of the communications strategy. It will be important to build strategic relationships with the public and private sector media to ensure their buy-in into the programme and their commitment in its implementation.

37.8.2.2 *Print Media*

This will entail the production of newsletters, flyers, public service announcements, posters etc. for distribution to various target groups and the general public.

37.8.2.3 *Distribution*

This should be done in collaboration with existing government public awareness and information programmes e.g. the Government Information Service (GIS).

The final product will be distributed in the community to major stakeholders- farmers, private sector, fisher-folks, school, youth and adults.

37.8.2.4 *Radio and Television*

Create targeted 15, 30 and second radio and TV public service announcements (PSAs) using creative scripts and sound bites focusing on one message point only, e.g. the 3R's or energy conservation or maintaining a clean surrounding or the importance of environment to tourism and the economy.

Create longer documentary type television and radio programmes of around 5 to 10 minutes focusing on the wider environmental message.

37.8.2.5 *Public Relations*

Development of press releases and press articles for the newspapers, radio and television.

37.8.2.6 *Out of Home Advertising*

Produce at least three billboards or signs to be strategically placed throughout the island, e.g. at public hot spots such as Little Bay or high-traffic areas such as the intersection by Carrs Bay.

37.8.3 Events

37.8.3.1 *Consultations*

The target groups listed above will be targeted through meetings and consultations. Develop meetings within the communities (both the physical communities as well as the business and

public sector groups) to hold discussions and to raise awareness and educate the different target groups on how they can take responsibility of the environment and how they stand to benefit. Get participants to make concrete actions that they personally promise to uphold.

To ensure that the communities are part of the communications strategy, it is important that regular meetings are held with them to focus attention on environmental awareness. The community should be encouraged to evaluate practical aspects of environmental degradation within and external to their communities and to undertake activities that will reduce any impact environmental conservation measures.

37.8.3.2 Roadshows

Develop an environment roadshow / caravan which visits grass roots communities and conducts community conversations raising awareness and educating them on the environment – the 3R's, recycling of products, development of organic manure through composting, community beautification projects and landscaping.

The roadshows are filmed and posted on a YouTube and Facebook for later viewing.

37.8.3.3 World Environment Day Observation

Create an event around World Environment Day, June 5th. The observation could be a week-long event coupled with entertainment, presentation of awards for competitions, displays and exhibitions, etc. The area will be referred to as the Environmental Village. Each year the event could be hosted in a different location where possible. Next year, 2020 will be the 50th Anniversary and suitable time to launch the very first Environment Village and World Environment Day Observation.

37.8.4 Education

- Encourage environmental education to be part of everyday education from primary to secondary schools.
- Create online educational videos covering key environmental education points as shown below.
- Create a handbook / guide for teachers at all levels to use in their environmental education and training in the classroom.

The education content / curriculum will include the following areas.

- ✓ What is the Environment
- ✓ The Elements of the Environment
- ✓ The Importance of Forests
 - For the air we breathe
 - For livelihoods
 - For food
 - For shelter
 - For ecological balance
- ✓ The Importance of Oceans and Seas

- For the air we breathe
- For our livelihoods
- For food
- For ecological balance
- For trade and transport
- ✓ The Importance of Coral Reefs
 - The most diverse eco-system on the planet
 - Protection of coastlines
 - Provide habitat and shelter for a variety of ocean life
 - For food and the fishing industry
 - Purification and filtration of water
 - Economic development through tourism
- ✓ The Importance of Glaciers and Ice Formations
 - Stabiliser of the planet's temperature
 - Maintaining sea levels and avoiding floods and complete coverage of islands and coastal regions
 - Regulation of weather patterns

You Do Not Live in a Vacuum

- ✓ The Importance of the Ecological Balance of the Planet
- ✓ The Ripple Effects that Your Actions Create: Garbage In - Garbage Out
 - On the Planet (land, air, water, sea, etc.)
 - On your Community
 - On your life
- ✓ Impacts on the Environment
 - Urban Development
 - Agriculture
 - Industrial practices
 - Energy Consumption
 - Transportation
 - Recreation
 - Food production

The Environment and Your Health

- ✓ You are what you Eat, Drink and Breathe
- ✓ Water Pollution

- ✓ Air Pollution
- ✓ Land Pollution
- ✓ Noise Pollution
- ✓ Light pollution
- ✓ Solar Pollution (Ozone)

Climate Change is Real – There is no Planet B

- ✓ Rising Sea Levels
- ✓ Increasing Temperatures
- ✓ Extreme weather patterns (heat waves, storms, flooding)
- ✓ Coral Bleaching
- ✓ Extinction of Species
- ✓ Extinction of Mankind?

The Environment in Your Pocket

- ✓ Human willingness to compromise the environment for economic gain
- ✓ The Environment as an industry and source of wealth
- ✓ The economic and social costs of a deteriorating environment

You Are the Solution - A Practical Guide to Environmental Preservation

- ✓ Respect (respect for the environment = respect for self, neighbour and God)
- ✓ Reuse
- ✓ Reduce
- ✓ Recycle
- ✓ Re-educate (teach yourself and teach others)

37.8.5 Competitions

37.8.5.1 School Competition

Different years / classes within the Primary and Secondary school network will be asked to compete as follows:

- Adopt Montserrat Competition
 - Schools entering the contest will be asked to adopt a local environmental resource (e.g. a beach, a trail or some area where trees could be planted or beautified or cleaned) and to creatively reflect how they (citizens) are responsible for protecting this resource
 - Students can make posters, write essays, compose songs, make models, write poems, perform skits, etc.
 - Teachers from each class/year must compile the best 3 entries for submission
 - The pool of entries will be then judged and the top three winners at the Primary level and then the Secondary level will be selected based on which submissions created the greatest impact and reflected the core message of the campaign

The competition will be developed through the Ministry of Education, Health, Community Services, Sports & Youth. A series of radio, television, social media ads will be developed to communicate and promote the competition. Posters will be created and placed in schools. Attractive prizes will be given to the winning class.

37.8.5.2 The Montserrat Sustainability Competition

To promote and encourage environmental best practice amongst the private sector in Montserrat, develop a Sustainability and Corporate Social Responsibility drive that encourages businesses at all levels to adopt best practice within their businesses and to create outreach programmes to improve the environment and the communities in which they operate.

This event / competition will also recognise the efforts of the Diaspora and private citizens in contributing the betterment of the environment and communities.

The competition will be annual and will come to an end on World Environment Day. The awards will be distributed through a formal gala event that would attract the attention of press and policy makers, giving the competition a special place in the calendar of all Montserratians.

37.8.6 Experiences

37.8.6.1 School Field Trips

Encourage field trips to different locations in Montserrat of environmental interest, e.g. hiking trails, the Montserrat Volcano Observatory, Jack Boy Hill, etc.

37.8.6.2 A Tourist in Your Own Back Yard

A critical element of this campaign must involve Montserratians experience of the destination as tourists themselves. This will involve experiences of the environment on land and under water. This is where private sector partnership will be key. Reach out to the private sector such as tour guides, dive operators, the National Trust and the MVO to create experiential programmes to offer to the public.

For example, discussions have already been held with Scriber Tours with a view to offering a tour for local Montserratians once every month (e.g. on the third Sunday of every month from 2.00 pm). Scriber agreed to charge a small fee of EC\$10.00 for adults and kids will be free or half price. This opportunity allows locals to personally relate to and begin to appreciate the beauty of their environment and the need to conserve it.

Other tour guides could also contribute to doing such a tour and encourage locals to not only get an appreciation of the environment but also to become more active.

Dive operators could offer free or very reasonable snorkeling tours once per month under similar conditions as the Scriber experience.



37.9 Campaign Monitoring and Evaluation

Develop a monitoring and evaluation framework to assess the impact of the awareness programme.

Evaluation criteria could include the following:

- Social media engagement
- School participation
- Participants at events and competitions
- Clean up drives and buzz within communities and schools
- Reduction in litter
- New trees planted

Environment Awareness Campaign

| Description | Amount (USD) |
|--|--------------------|
| I. Media Production & Content Creation | \$250,000 |
| II. Campaign Elements | |
| - Traditional Media | \$360,000 |
| - Digital Media | \$250,000 |
| - Events | \$200,000 |
| - Education | \$150,000 |
| - Competitions | \$75,000 |
| - Experiences | \$60,000 |
| Total Budget | \$1,345,000 |

SECTION 5 – IMPLEMENTATION

38 Implementation Framework

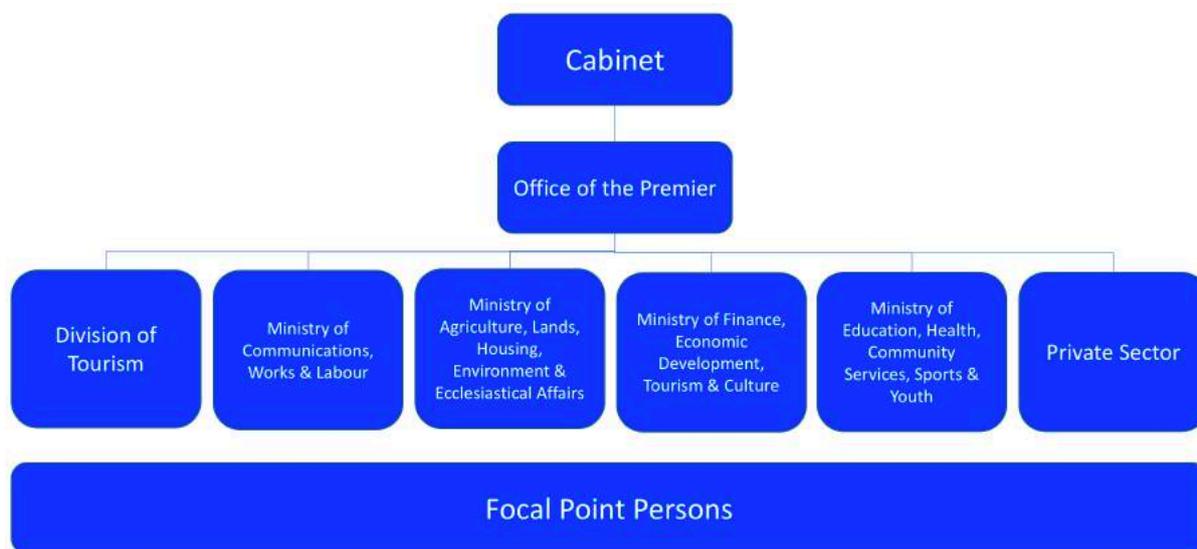
In order for the Strategic Plan and Actions to be effectively implemented proper implementation framework is required.

Strategic Area # 3. A champion of the Strategy has to be identified. It is recommended that the Champion be the Permanent Secretary of the Office of the Premiere.

Strategic Area # 4. Establish a Tourism Strategy Steering Committee which will oversee the implementation of the Strategic Plan and Actions. Representatives from both the Public and Private sectors and both within and outside of tourism will need to be on the committee. No more than ten persons and no less than five persons should form the Committee.

Strategic Area # 5. Identify and appoint Focal Point Persons in all of the key Government agencies as well as from the Private Sector. These Focal Point Persons will be responsible for on the ground implementation and will report to the Tourism Strategy Steering Committee on progress.

Figure 51
The Implementation Structure of the Tourism Strategy



39 Annex 1 – Methodology

The Tourism Strategy was developed by Tourism Intelligence International.



The development of the Tourism Strategy did not take place in a vacuum. The strategy was developed in close alignment to the National Tourism Policy and the Tourism Master Plan.

The Tourism Strategy development process involved a number of methodologies including:

- Literature Review and Data Analysis
- Review and Definition of Existing Destination Conditions
- Secondary Research and Analysis
- Global Trends & Best Practice Analysis
- Competitive Analysis
- Market Attractiveness Assessment
- Market Analysis and Niche Prioritisation
- Marketing Audit
- Big Data and Indexing Techniques
- Assessment of Tourism Assets, including:
 - Infrastructure
 - Facilities and Amenities
 - The Environment
- Human Resource Analysis
- Tourism Value Chain Analysis

A very important aspect of the planning process was stakeholder consultation. A number of stakeholders were consulted one on one. In addition, a Tourism Strategy Planning workshop was delivered to engage and involve stakeholders in the tourism master planning process.

There were approximately 40 persons in attendance at the workshop and another estimated 800 persons intermittently participating online via live stream on Facebook.

In addition, an online survey instrument was deployed and a total of 69 persons consisting of local residents and the Diaspora in the UK, USA and Canada, responded to the survey.

40 Annex 2 – Montserrat Stakeholder Consultations and Site Visits







41 Annex 2 – Montserrat Stakeholder Workshop











