



Impact Story

Developing a Maritime Tourism Strategy for Saint Lucia

Countries: Saint Lucia

Program: Canada CARICOM Expert Deployment Mechanism (CCEDM)

Partners: Saint Lucia Tourism Authority (SLTA)

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Context

Saint Lucia has a lucrative tourism industry with over 1.17 million visitors annually, bringing in 989 million USD in revenue and contributing to almost 48% of Gross National Product in 2018, pre-COVID-19 pandemic.¹ The island's unique beauty, tropical climate and cultural heritage makes Saint Lucia a prime destination for destination weddings, spa retreats, and cruising. With Saint Lucia being the 6th most tourism dependent country in the world, the **Saint Lucia Tourism Authority** has a key role in the economic and social development of the country.

Like many countries in the world, the COVID-19 travel restrictions had an adverse effect on Saint Lucia and it continues to be felt especially by the poor and most vulnerable populations. However, Saint Lucia took this as an opportunity to proactively strategize the growth of the industry. Through our Caribbean project, **CCEDM (Canada-CARICOM Expert Deployment Mechanism)**, a Catalyste+ Marketing and Destination Advisor, Peter Kibiuk, worked with the **Saint Lucia Tourism Authority** on the development of a Maritime Tourism Strategy that supports the sustainable growth of the industry.



The tourism service industry employed 48% of the population, mostly women, and contributed 81% of national exports in 2018.² The COVID-19 pandemic brought on a series of challenges for the small island state. In 2020, Saint Lucia's GDP contracted by 20.4%, going down to 2014 levels³ with 45% of the working population losing their employment by May and a 30% drop in tax revenue.⁴ The tourism industry suffered immense loss and it affected disproportionately the most marginalized and vulnerable populations, increasing the income gap further. Today, the Saint Lucian economy is recovering and many tourism workers have resumed their employment. However, the effects of the pandemic continue to linger and the industry has not yet returned to pre-pandemic levels. The Government of Saint Lucia decided to focus on developing a more resilient and proactive strategy in order to bring growth back to the industry and partnered with Catalyste+ to work on their Maritime Tourism Strategy.

The government of Saint Lucia has committed to developing the maritime tourism industry from a holistic standpoint taking into account the sub-sectors that often get overlooked in the tourism industry. These sub-sectors were cruising, yachting and ferry services. Special focus was placed on how to connect local services, and micro and small enterprises with the industry, with emphasis on women and youth owned and operated business.

¹ <https://www.worlddata.info/america/saint-lucia/tourism.php>

² <https://www.thestkittsnevisobserver.com/impact-of-covid-19-on-island-nations-st-lucia-a-case-study/>

³ <https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=LC>

⁴ <https://pubdocs.worldbank.org/en/681431582655269212/mpo-lca.pdf>

A Locally-Led Partnership

As the principal marketing and promotion agency for the destination, the central role of the **Saint Lucia Tourism Authority (SLTA)** is to continue to grow tourism and promote the island to both consumers and the travel trade industry. The advisor, Peter Kibiuk, worked with a ten-member Maritime Tourism Committee (MTC) on the development of a maritime tourism strategy. The MTC was led by the Deputy Chair of the SLTA Board of Directors, Mrs. Grace Parkinson. Mrs. Parkinson is also the COO of the **Saint Lucia Air and Sea Port Authority (SLASPA)**, the government organization responsible for managing and providing quality services at the main ports of entry on the island. Besides the MTC members, the strategy involved consultation from other staff members within the Ministry of Tourism, the SLASPA, the SLTA and members from tourism associations and the private sector.



Figure 1. The components of the Strategy Development Process

The Strategy Development Process

1 Current State: Where are we now?

Assess the current maritime tourism sub-sectors, the stakeholders and the linkages between them. A SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis was prepared for each subsector.

2 Vision: Where are we going?

Define the long-term vision for maritime tourism with environmental sustainability considerations such as the blue economy.

3 Roadmap: How are we going to get there?

Analyze the data, identify relevant sub-sector trends, and prepare sub-sector strategic objectives, goals and supporting actions that will pave the road to achieving the vision.

4 Evaluation: How will we measure progress?

Identify the risks to strategy and develop an implementation plan to monitor and evaluate the strategy's progress towards achieving the vision.

The Board of SLTA issued a Terms of References (TORs) to be utilized by the MTC in strategy development which helped define a focus on sub-sectors of cruising, ferries and yachting for the new maritime tourism strategy. The MTC ensured alignment with these TORs, as well as Saint Lucia's 2020-2030 Tourism Strategy and Action Plan (TSAP). Where necessary, the strategy also took into account the assessment of the broader tourism eco-system to ensure alignment and successful linkages.

Peter acted as a facilitator leading stakeholder meetings to gather information, facilitate the discussions, and conduct the required analyses with MTC in order to develop the overall strategy for maritime tourism. The Strategy Development Process (see Figure 1) involved an analysis of each sub-sector to understand

the current state of maritime tourism on the island, and identifying and examining the key business, public sector and international stakeholders in the process. The findings were reviewed with the MTC and strategic themes for maritime tourism were formed.

The Advisor's expertise in international business development, tourism & destination marketing and a personal interest in sailing helped shape the strategy with the necessary elements such as strategic planning, industry & market research, regulatory review, SWOT and competitive analysis, and sustainable environment considerations.

With Peter's guidance, MTC used the current map of the industry and the TSAP to define a mission statement and a future vision for Saint Lucia's maritime tourism industry. The team then developed a comprehensive, targeted and results-oriented roadmap with short-term goals that lead to achieving the vision. Many issues were identified in the analysis, which helped highlight critical linkages, leading to the development of a set of strategic themes and objectives that are incorporated into the strategy.

“ The committee did an excellent job in engaging the Consultant on several fact-finding assignments to assess the current maritime environment, while also contributing to a strategy that is not only achievable, but sustainable. ”
- Grace Parkinson, COO of the Saint Lucia Air and Sea Port Authority (SLASPA)



The SLTA Board of Directors and the Maritime Tourism Committee (MTC) Members

Preserving the Environment

Through Blue Economy Principles



Saint Lucia is known for its striking volcanic formations, beautiful coastlines and breathtaking sunsets. Preserving the beauty of the island, the environment and the ocean is of utmost importance to Saint Lucians. Therefore, one of the major recurring themes in the strategy development process was sustainable tourism and the blue economy. People are well aware of the disruption tourism could cause the island. To address this, the country employs a recovery and a prevention method. To recover from any environmental damage, the island can reassess whether the 'head tax' (tax charged per visitor) and port tax (tax for every cruise ship or boat) are sufficient to cover the long and short-term infrastructural and environmental damage by the industry.

The prevention method is arguably more effective and this is why Saint Lucia has a robust series of environmental action plans such as the National Ocean Policy and Strategic Action Plan 2020–2035, as well as the Resilient Ecosystems Adaptation Strategy and Action Plan (REASAP) 2020–2028. Connecting these environmental plans with the maritime tourism industry, the advisor recommends the development of a Maritime Economy Plan (MEP), which will support the sustainable and responsible management of maritime resources by the tourism sector. The MEP should focus on minimizing the environmental impact of maritime tourism, conserve natural resources, and support local communities. The plan must also consider climate change effects and align with relevant UN2030 SDGs such as Goal 13 – Climate Change, 14 – Life below Water and 15 – Life on Land.

To support MEP development, Saint Lucia can also work with the Commonwealth Marine Economies (CME) Programme. It supports Caribbean and Pacific islands to preserve their marine environments and utilize their maritime resources to catalyze sustainable economic development.⁵

⁵ <https://www.gov.uk/guidance/commonwealth-marine-economies-programme>

Empowering Institutions

Through Competitive Analysis

Saint Lucia's cruising, ferry and sailing experiences have lots of potential for growth. The advisor took the approach of analyzing neighboring islands from the Organization of Eastern Caribbean States (OECS) and their cruising, ferries and yachting sub-sectors to help define a competitive strategy for Saint Lucia in the context of the blue economy.

Based on this research, a few trends came into focus. Taking the cruising sub-sector as an example, Antigua and Barbuda is the highest ranking country in the OECS in cruise line port facilities and services. The country has developed an effective strategic business relationship with Royal Caribbean International (RCI) which has resulted in multimillion dollar investments on the island from the cruise line company⁶. RCI has also made significant investment in Barbados to support local cruise-related job creation⁷. **A strategic account relationship** with the cruising sector is crucial for Saint Lucia. The potential benefits would include improving customer experiences, potential investment in local infrastructure, job creation and the overall opportunity for the country to strengthen its blue economy ambition.

Through such a strategic relationship, Saint Lucia's maritime tourism stakeholders could learn more about the cruise line operator's needs and their customer interests. This information can help the stakeholders enhance visitor experience and keep pace with emerging industry trends. For example, many people have now become interested in authentic local experiences. Therefore, supporting programs that include staying with a local Saint Lucian family, hiking the Pitons and peeking at the volcano rim in Soufriere could attract more customers and highlight the uniqueness of Saint Lucia. A relationship with cruise line companies would also help the SLTA improve their digital, social and AI marketing techniques to promote experiences, attract tourists and create customer loyalty programs.

In the yachting sub-sector, it was recommended for Saint Lucia to strengthen its maritime regulatory framework by reviewing the policies and regulations of neighboring OECS countries to help the country stay competitive in the region. Especially strengthening regulations to ensure safety and security for the sailing and power-yacht community will help attract more yachting customer segments. The strategy incorporates these ideas and breaks them into small implementable goals and steps.

At the international level, being more active and taking a leadership role in projects and initiatives such as the World Bank's OECS Regional Tourism Competitiveness Project (ORTCP) and regional inter-island ferry service projects will help the country reap the benefit of these investments.

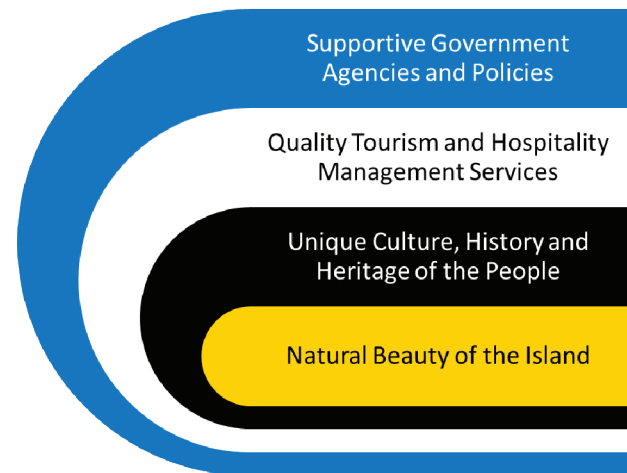


Figure 2. The competitive advantage of Saint Lucia's tourism industry

⁶ <https://www.travelpulse.com/news/cruise/antigua-inks-deployment-and-development-pact-with-royal-caribbean.html>

⁷ <https://wheelsupnetwork.com/news/barbados-announces-landmark-recruitment-drive-with-royal-caribbean>

Making the Strategy a Reality

The Maritime Tourism Committee has the leadership and commitment to making the strategy a reality. According to the Chairman of the Board of Directors of the Saint Lucia Tourism Authority, Mr. Thaddeus M. Antoine, "This project was timely and is a strong indication of the commitment of the Ministry of Tourism and the Government of Saint Lucia, towards adopting a focused approach in helping Saint Lucia capitalize on competitive advantages and further develop related sectors".

The Maritime Tourism Strategy was accepted by the partner and is getting ready for implementation. The strategy is broken down into a series of short-term, medium and long-term objectives and supporting actions that are achievable and realistic. The advisor also provided guidance on implementation and monitoring of the strategy, which involved having regular meetings with key stakeholders in the industry and collaborating with them on defining key performance indicators moving forward.

The objective of the strategy is to achieve the "Stimulated Growth" scenario from the Tourism Strategic Action Plan by the Ministry of Tourism, which is expected to result in 997,073 annual stay-over visitors and 2.203 billion USD in related expenditures in 2030. This amount of growth in visitors and tourism income means more economic growth, more jobs and more business. Majority of tourism workers are women and we expect this strategy to help provide more leadership opportunities for women and open doors for women entrepreneurs to establish their own small and medium enterprises, leading to better quality of living for Saint Lucian families.

We already see some positive developments in Saint Lucia's tourism industry. The SLASPA has established a Memorandum of Understanding (MOU) with a global cruise port operator. This partnership is expected to develop port infrastructure, bring more opportunities for local SMEs and transform the island's cruising experience for visitors.⁷

Catalyste+ will continue to work in partnership with the Saint Lucia Tourism Authority to support Saint Lucia's tourism industry and its growth.

For more information on Catalyste+'s partners, please visit:

<https://www.stlucia.org>

<https://www.slaspa.com>

⁷ <https://www.caribbeannewsglobal.com/st-lucia-sea-ports-surrender-to-cruise-tourism/>



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