

2017-2027



Tourism: Synergizing people & nature for a better tomorrow



The Caribbean's 1st Blue Destination



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To download this report please visit:
www.tourismbonaire.com/strategictourismplan

To download the Statistical Addendum visit:
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Chapter 1



EXECUTIVE SUMMARY





Rationale

Impressively, since the 1970's Bonaire has championed efforts to protect its natural environment and resources. There is no doubt that these efforts have interlaced themselves with the resident's everyday life and are a fiber in the fabric of Bonaire's culture. Bonaire is a global gem that has received recognition for its natural areas and enjoys an international reputation for some of the world's best ocean activities thus leading to a potent economic sector for the island – the tourism industry.

Currently, the tourism industry underperforms for the economic welfare of the majority of Bonaire's residents. Although the tourism industry could provide Bonaire with economic opportunities for the majority of residents, the professional opportunities linked to tourism have not transpired. This is largely due to two main reasons. The first reason being that natural conservation efforts have displaced development that could provide professional and educational opportunities for Bonairians. This has resulted in a dilution of Bonairian culture where nearly 60% of the island's population was not born in Bonaire. Bonairians have transplanted to other countries to seek opportunities. The second reason is that the tourism sector does not contribute to the economic wellbeing of the majority of residents but rather contributes to a select few.

With the lack of educational and professional opportunities available on the island, Bonairians have developed a relatively low perception of their quality of life and their satisfaction with their lives. In the last year, about 50% of Bonairians have observed a decrease in their income. Many residents and industry stakeholders feel that the tourism industry can direct and improve the future of the island. In order for this to occur, there must be changes in the distribution of the economic benefits to increase their reach to local households; as well as the industry must be capable of stimulating changes in Bonairians' quality of life. Thus, this strategic tourism master plan (STMP) was designed to ensure that the tourism industry is capable of generating money, creating jobs, and stimulating sustainable economic linkages to other sectors on the island.

First Blue Destination





Tourism is the right choice

In 2017, the tourism industry contributed in direct economic spending nearly US\$229 million to the local economy while the value added was approximately 20% of the economy. Given that the industry is currently underperforming, tourism still boasts significant value to the island of Bonaire where about 25% of the jobs are tourism related. However, it is possible for Bonaire's tourism industry to contribute much more to the island's economy as there is considerable evidence to suggest that small islands that specialize in tourism experience increased economic growth compared to those destinations that do not.

While Bonaire has struggled with the concept of growth, it is clear that the local people would like to see continued tourism development. The residents clearly expressed that they would like for this growth to occur in pace and level. A primary reason for why tourism is the right choice for Bonaire is that the industry can deliver increased economic gains with a focus on soft tourism products (experiences) as opposed to severe infrastructure development, the environmental consequence of which concerns many Bonairians. Thus, it is possible for the tourism industry to contribute to the welfare of the island without Bonairians having to sacrifice their inherent interest in protecting their natural environment.

The STMP provides a cohesive vision for tourism that was developed in collaboration with all of Bonaire's tourism stakeholders. Thus, acceptance of the suggested goals, strategies, and tactics in the STMP is expected to be wide as all of the recommendations were derived from the inclusion of all stakeholders. The plan also addresses prominent challenges that Bonaire's tourism industry will face when converting the tourism industry into an economic engine that serves all of Bonaire. These challenges include: a significant increase in competition within the Caribbean, Bonaire's competitive position has waned over time, an underperforming mainstay tourist segment (scuba divers), the need for a diversified tourism product portfolio, inadequate pricing of eco-tourism related activities, the need for an improved accommodation sector, and improved accessibility.





Bonaire's Opportunity

Bonaire has a unique opportunity to become a high-end boutique destination that is founded on a fusion between nature and people. Becoming the Caribbean's first Blue destination will create this fusion. The plan is premised on Bonaire being a destination that is restricted and focuses on keeping the tourist density low while achieving societal goals of increased opportunities and quality of life.

Bonaire has led the Caribbean in conservation efforts since the 1970's, creating a legal framework for blue conservation will continue to place Bonaire as the leader of conservation efforts in the Caribbean. Becoming the first Blue Caribbean destination may also provide Bonaire with opportunities to receive external funding for the necessary capital investments required to convert the destination to a Blue economy.



The Caribbean's 1st Blue Destination

For details about Blue Economy see World Bank Report: www.worldbank.org/en/news/infographic/2017/06/06/blue-economy



The Process

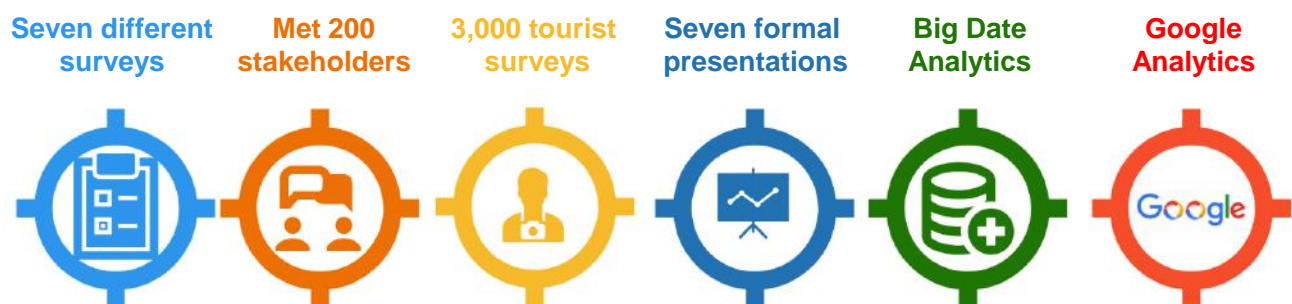
The Tourism Corporation Bonaire (TCB) commissioned (December, 2016) the Dick Pope Sr. Institute for Tourism Studies (DPITS) at the Rosen College of Hospitality Management at the University of Central Florida to develop a Strategic Tourism Master Plan 2017-2027. At that time, the TCB was of the opinion that the destination is at an important crossroad in terms of how to make the tourism industry sustainable now and for the future, and how to optimize participation of local residents in the benefits that sustainable tourism could afford to them.

The STMP designs a blueprint that guides and directs the Bonaire tourism sector to new heights while considering its core attributes of ocean, nature, and heritage. The STMP puts people first while maintaining the environment. The main initiative of the master plan is for Bonaire to thrive as a destination that enhances people's quality of life. In order to accomplish this it is required that an optimal balance between tourism supply and demand (arrivals) be obtained while considering the increasing competition in the Caribbean. The optimal balance between supply and demand will include product innovation, industry restructuring, and unique marketing efforts in order to compete on a global platform.

This master plan addresses Bonaire's approach to tourism and explains why tourism will be beneficial to the island and its residents. It also lays out the timing of the phases in which the plan should be implemented. Further, the plan's underpinnings are validated via a bottom-up research approach. That is, all the suggested actions, solutions, and goals reported in this plan were derived from empirical research gathered in accordance with a wide and diverse range of tourism stakeholders.

The DPITS met with more than 200 stakeholders face-to-face to conduct formal and informal interviews. The purpose of the stakeholder meetings was to obtain feedback on the overall project, share ideas pertaining to Bonaire's tourism challenges, provide informational sources of value to the DPITS research team, and actively involve many types of stakeholders in the drafting of the STMP project.

In addition, seven surveys were created and administered from March to July 2017 with the participation of nearly 3,000 respondents who completed the surveys. The respondents included stay-over tourists, cruise tourists, Caribbean tourists who had never visited Bonaire (i.e. latent demand), tourism employees, and the local population. Moreover, the DPITS team delivered seven formal presentations: two were given to the members of the Island Council, two to the TCB, one was disclosed to BONHATA and the Chamber of Commerce, and one to the Commission Nature Bonaire. Finally, the DPITS conducted a tourism summit in August 2017 where the findings were presented and shared with the tourism community. The plan also adopted the use of "big data analytics" on nearly 11,000 ED cards and evaluated over 3,200 comments from TripAdvisor and online traffic statistics for the TCB website .





The What

In order for the tourism industry to be used as Bonaire's economic engine, it is necessary that Bonaire address a number of critical attributes that the destination lacks compared to its competitive set. The plan recommends updating and upgrading its existing hotel room inventory and building an additional 600 new hotel rooms within the next ten years. These hotel rooms should have four star features for boutique hotels. The size of these boutique hotels should range from 60 to 100 rooms each. The capital requirement is \$150 million and would generate 2,400 new jobs.

The plan also recommends an increase of 60,000 new arrivals over the next ten years. These additional arrivals will stimulate job creation in the form of full time employment opportunities for residents. The arrivals will enable Bonaire's airport to achieve threshold scale economies (breakeven), as well as support the growth and dynamism of the tourism industry. The tourism industry is expected to become the most strategic sector in the local economy by 2021, reaching nearly 45% from its current 20% level of the total economy. Chapter 11 provides a complete list of actions that are necessary in order to optimize the benefits of the tourism industry to the island of Bonaire.



Capital requirement is \$150 million



Generate 2,400 new jobs



Generate 60,000 arrivals



Additional 600 new hotel rooms




Reaching nearly 45% from its current 20% level of the total economy



The Value Proposition

Bonaire's value proposition is becoming the Caribbean's first Blue destination. The destination has centrally focused on green conservation practices. It is time to put those efforts to good use through the conversion process in developing a Blue destination. A Blue destination is a sustainable use of ocean resources for growth, well-being, jobs, and ocean ecosystem health. A Blue destination is more aligned with Bonaire's history and heritage of people who have embraced the ocean for their livelihood. The world has not yet experienced a Blue destination in the Caribbean. This is a rare opportunity for Bonaire to convert its green culture to a Blue economy. To accompany the Blue economy efforts, the DPITS has suggested the following slogan, "Pure. Natural. Simply Bonaire!" with the tagline, "The Caribbean's 1st Blue Destination."



**"Pure. Natural.
Simply Bonaire!"**

For details about Blue Economy see World Bank Report: www.worldbank.org/en/news/infographic/2017/06/06/blue-economy



The Goals of the STMP

The master plan pursues two main goals:



Enhancing the destination's competitive position



Developing an integrated destination management approach

Both goals are premised on enhancing residents' quality of life by way of converting the tourism industry to a high-end destination product. Converting Bonaire to a high-end destination is recommended due to residents' wish to have measured growth. Measured growth allows for a tapered number of arrivals providing incoming tourists produce higher tourist receipts. Increasing residents' quality of life requires income (revenues). This income can be generated through premium prices based on quality tourism offerings. The master plan suggests the following four main objectives to achieve a high-end destination that advances a vision that intertwines people and nature.

Objective 1

Expand the benefits stemming from tourism development to a broader segment of the Bonaire population

Objective 2

Convert Bonaire to a high-end destination that consists of at least 30% of the hotel inventory at a four star level or more

Objective 3

Practice a cohesive branding strategy to attract more tourists and increase revenue and profitability

Objective 4

Elevate the tourist experience



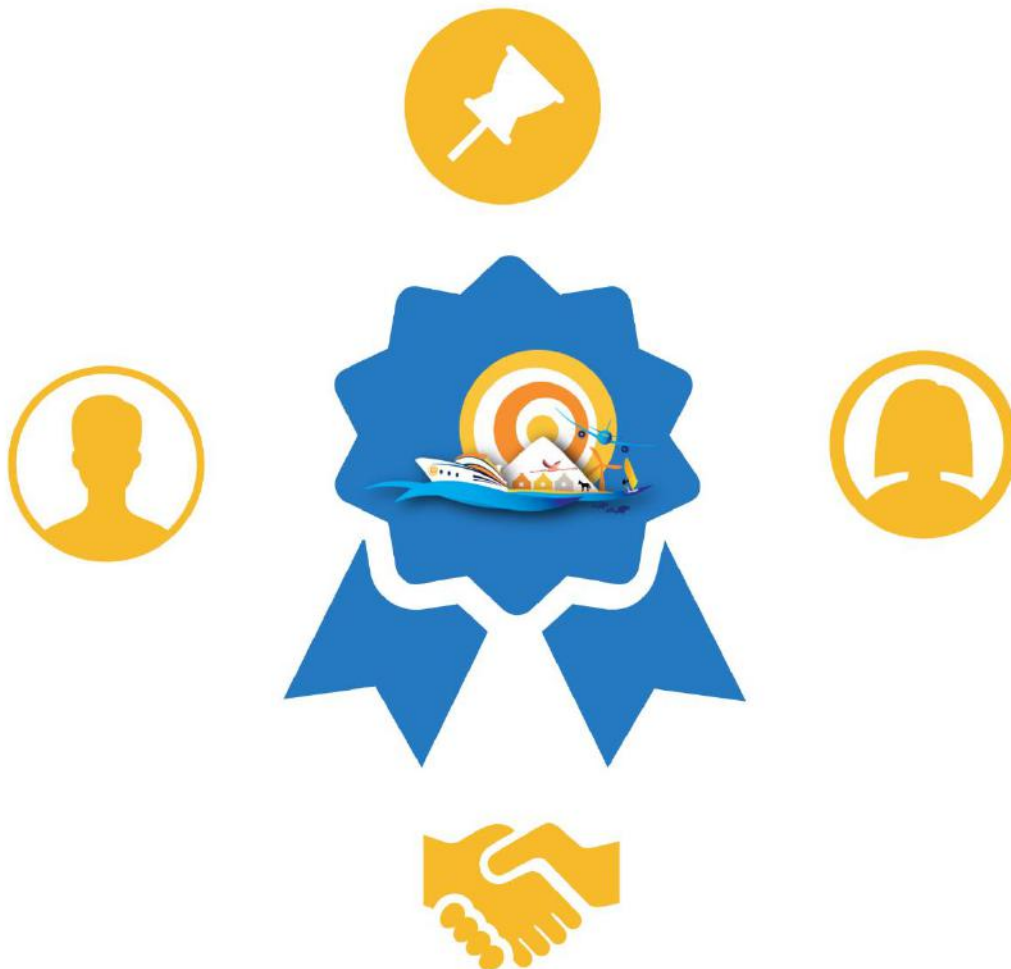
The How: Strategy #1

Strategy 1: A strong and professional TCB

The plan suggests a new privatized TCB infused with a new business model. The new privatized TCB consists of a new governance structure directed by inclusiveness, partnership, transparency, and clear and measurable value added benefits to the destination and people. The plan recommends converting the TCB to a destination management organization (DMO).

The two most important tasks of the TCB are building common objectives such as beneficial relationships under their capacity to meet the issues of the complex industry ecology, and connecting the industry with external resources and influences. The TCB lacks resources to carry out the organizational responsibilities required of a high-end destination management organization (DMO).

The TCB should be furnished with the necessary resources (human and financial) to carry out its assigned tasks and responsibilities. The STMP recommends adjusting the room tax ordinance to include the 7% room tax, which should be paid by all short-term rentals. The collection of room tax should be strictly enforced.





The How: Strategy #2

Strategy 2: A strong accommodation sector performance and skilled human capital

The hotel sector generates the largest multiplier effect when compared to other tourism sectors and subsectors. Currently, the Bonaire hotel sector has an occupancy rate of 68%. The breakeven benchmark in the Caribbean is 65%, which leaves Bonaire's hotel sector barely surviving. Only 41% of the tourists visiting the destination stay in hotels, while 12% stay with friends or family. Those tourists staying with friends and family spend much less (US\$98) per day when compared to those staying in hotels (US\$220). The STMP recommends targeting several new market segments (Dutch Lifestyle Tourist, American SSSSS Tourist, and Business and Pleasure Tourist) that will stay in the hotels and increase the multiplier effect of this sector to the benefit of the island economy (See Chapter 10).

In order to satisfy the needs of the aforementioned market segments it is necessary to update and upgrade the current room inventory to meet current and projected demand growth. In addition, the plan recommends about 600 additional new boutique style rooms to accommodate the projected demand growth over the next 10 years. The plan states that these 600 new boutique style rooms must be of four star quality according to international standards.

The construction of these 600 new rooms would require some US\$150 million. The addition of 600 four star rooms, if accomplished, would bring the destination to its 30% benchmark. This benchmark defines the island as a high-end destination. This inventory mix will also give the destination a solid foundation to attract a diversified marketing mix of tourist arrivals.

It is imperative that the destination also enhances its human capital. The service delivery for all tourism products should be laced with creativity and prowess in order to make the destination product offerings more competitive and of higher quality. The focus on human capital should also undergird the image of Bonaire as a Blue destination, churning creative and authentic offerings (product development). The destination should, for example, create a new generation of local professional divers interfacing between business and research as well as business diversification in diving.



Source: 2017 Tourist Exit Survey (STMP Bonaire)





The How: Strategy #3

Strategy 3: Increased tourism demand

This plan aims to increase tourist arrivals by 60,000 from its baseline of 140,000 to 200,000 arrivals over the next ten years. This growth entails a 5% increase per year on average. This suggested growth figure is feasible based on the growth experience of the past five years. This increased demand will be primarily generated from the Dutch, the North American market (including USA and Canada), and regional markets. Secondary markets in Europe, including Germany and Belgium, and Latin America, including Colombia and Brazil, could eventually be pursued strictly based on ROI considerations. Any collaboration with tour operators and/or carriers should be directed by these ROI considerations and by a marketing mix that supports the high-end destination concept that is undergirded by at least 30% of the hotel inventory as four star quality.

The attraction of these additional 60,000 new arrivals should support the objective of converting Bonaire to a high-end destination, which means that at least 20,000 arrivals should stay in four star hotels on the island. These four star hotels should include in total at least 600 new hotel rooms.

The direct economic impact of the additional 60,000 tourists would increase tourism receipts from US\$229 million in 2017 to nearly US\$400 million in 2027. The addition of 600 new hotel rooms would create 2,400 new jobs (one job in the hotel, one in the tourist sector, and two jobs in the private and public sectors).

The pace of building these hotels is important to resonate with the authentic nature of the Bonaire's population. Therefore, hotels should be built based on local labor supply and the ability to attract Bonaire born people from overseas. Authenticity is the core fiber of a unique Bonairian product that reflects history, culture, and nature. The plan encourages a product development strategy that focuses on island diversity (region and culture) as well as the use of everyday practice and social protocols (local festivities, etc.) as inputs of offerings.



Tourists: 60,000 new arrivals 10 years



Rooms: 600 new hotel rooms



Investment: \$400 million by 2027



The How: Strategy #4

Strategy 4: Increased airlift

The island has suffered from limited airlift. The master plan suggests increased airlift from three regions, which are the most important arrival sources for the destination. These three regions are the Netherlands, the islands from the Dutch Caribbean (Aruba, Curacao, and St. Maarten), and the United States and Canada. The marketing focus should be primarily aimed to attract the Dutch Lifestyle Tourist, the American SSSSS Tourist, and the Business and Pleasure Tourist.

A transportation policy that is focused on route development is necessary if Bonaire is to increase its competitive position in the Caribbean. This policy could rest on a subsidy scheme that includes revenue guarantees and marketing support. The subsidy scheme will aim to increase airlift while considering tourists' spending power, brand allegiance, and source market reach in terms of capitalizing on alliances, networks, and interlines.

Dutch Lifestyle Tourist



American SSSSS Tourist



Business & Pleasure Tourist



Note: See Chapter 10 for segmentation definition and details.
Source: 2017 Tourist Exit Survey (STMP Bonaire)



The How: Strategy #5

Strategy 5: Governing the cruise tourism flows

The tourism master plan assumes that managing cruise growth while maintaining the viability of natural ecosystems is possible. The plan recommends to enhance the enforcement authority of the harbor master and to structure the information flow through the harbor master. Currently, the harbor master lacks the governance rules in order to streamline information which would allow the harbor master to manage more effectively the cruise movements towards the destination. All the information would go first to the shipping agencies, which do not always provide timely information to the harbor. Arguably, this system does not facilitate a governance structure that could manage the visitors' flow in a more pro-active way. The plan recommends improving the capability and information position of the harbor master regarding the cruise industry.

Cruise visitors should be deemed potential tourists for Bonaire. The survey analysis revealed that 55% of cruise visitors express an interest to return to Bonaire as a stay over tourist. This suggests that cruise visitors and stay over tourists may be complementary markets and not competing markets.

Applying price strategies and controlling the amount of visitors allowed to visit Klein Bonaire makes it possible to mitigate potential eco stressors. Head tax can be increased as well as applied to Klein Bonaire and diving opportunities. The master plan recommends to increase the head tax to US\$5 and to introduce a progressive head tax. In other words, when the amount of cruise passenger exceeds 250,000 to levy a higher head tax in the order of US\$10; when exceeding 300,000 to levy a head tax of US\$20, etc.





Timeline

The implementation of the suggested STMP actions are broken down into 40 quarters. Chapter 11 provides a list of actions that must be accomplished in order to propel the tourism industry forward for Bonaire. It is important to note, that the STMP must be a breathing document. This means that although the TCB should strive to adhere to the suggested timeline it may be necessary to adjust outcomes and the quarter they are achieved based on outcomes that are derived from the actions that are executed.





The Role of the TCB

The successful implementation of the STMP relies on the effectiveness and efficiency of the TCB. The plan recommends a strong and professional TCB, which will require some restructuring. The main goals of the TCB will be to enhance Bonaire's competitive position and to develop an integrated destination management approach. The TCB will be the hinge that will determine if the tourism industry can serve the greater good of Bonaire.

As the TCB moves forward in implementing the STMP it is important that the TCB gain the necessary credibility to act as a DMO. The immediate and successful launch of the STMP will assist the TCB in establishing this credibility as well as the accurate monitoring of the actions suggested within the plan. This means that it will be necessary for the TCB to take an initiative to rigorously and routinely assess the outcomes of any product and/or market development as well as policy development by using the following criteria:



What value-added benefits will the product/market/or policy bring to the people and Bonaire?



Will the product/market/policy development help achieve the goals set forth in the STMP?



Is there a clear demand or need for the product/market/policy?



What is the comparative advantage that the product/market/policy development will bring to Bonaire?



What are the short and long-term costs of the product/market/policy and does Bonaire possess the necessary resources to assume the costs?



The Way Forward

The plan was directed by two main principles: impact and relevance. Impact refers to the tourism sector's components such as accommodations, restaurants, and attractions, while relevance refers to how tourism benefits would support and align with the population's quality of life. Allowing the principles to develop requires the type of strategic planning that is specifically intended to focus resources in a manner that opens opportunities for success. This involves the deliberate allocation of resources to vital targets necessary to achieve key goals. In addition, strategic planning requires ongoing consideration and adaptation of the policies and procedures governing tourism as trends and needs of tourism, tourists, and Bonairians change. Moreover, attention to the tourism industry must remain as dynamic as the changing times. Thus, while Bonaire continues to secure the assets of its heritage, it must also lean into and seize opportunities that could forward the tourism industry.

This is the time for decisive actions to move the tourism industry forward for the benefit of the people. Failure to act may be costly for economic growth and the stability of the island's heritage. The way forward is crafted through this plan. Success, however, depends upon the will to succeed and to thrive despite the challenges to stimulate change.

***“Don’t
wait for the right
opportunity:
Create it.”***

George Bernard Shaw



Chapter 2



Overview of Bonaire's Tourism





An Overview of Bonaire

Since the end of the 1970s, the island of Bonaire has chartered a direction to conserve and protect nature as its main strategic orientation. This strategic bedrock has served Bonaire in that it distinguishes the destination from other Dutch Caribbean islands, and by becoming the first island in the Caribbean with a clear nature orientation and framework.

The island of Bonaire has founded its tourism industry on the protection of its ecosystems. For example, the entire coastline of the island is designated as a marine sanctuary in order to protect its coral reefs. The island has two protected natural areas, i.e., the Bonaire National Marine Park and the Washington-Slagbaai National Park¹. Bonaire seems to have a high dependency on its natural environment, and the latter natural area seems to be the main draw to attract tourists to the island.

With pristine coral reefs, Bonaire became a destination known for its diving tourism and has been consistently ranked as one of the most appealing diving destinations in the Caribbean and Atlantic². Indeed, the diving segment has become the mainstay of Bonaire's tourism industry. Today, Bonaire is one of the global gems of ocean tourism, enjoying an enviable position in world nature conservation.

Overtime Bonaire has promoted an image of a green destination. That image has earned Bonaire the Silver Quality Coast Award and the island was named one of the World's top 100 sustainable destinations. It is evident that the tourism stakeholders have embraced the green concept.

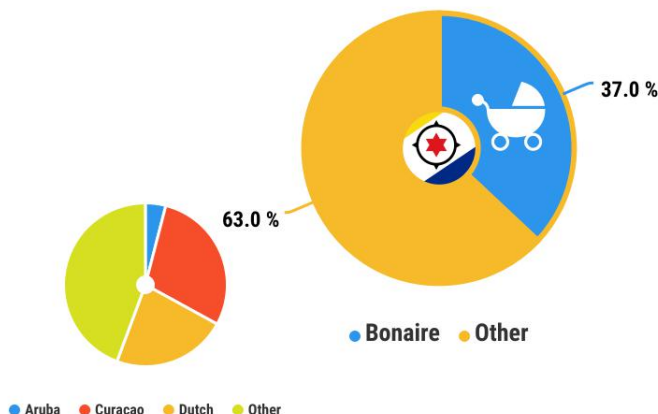


Bonaire Conservation Efforts: Protected Areas

For example, Bonaire recently hosted the first green destination conference demonstrating that there is a strong interest in nature, clean energy and proper waste management. The conference was organized by the TCB.

While Bonaire's focus on natural conservation strategies and efforts has delivered a positive sustainable image for Bonaire there has also been some unintended consequences. That is, the central focus on sustainability was defined as environmental protection without sustainable consideration for people's welfare. In other words, the narrow focus on the environment has stunted development to the detriment of the local population. This has resulted in the local population being largely displaced for lack of professional and educational opportunities. Indeed, less than four out of ten residents currently inhabiting the island were born on the island. Livelihood opportunities have stagnated, if not dwindled, over the past twenty years.

Who are the Bonairians?

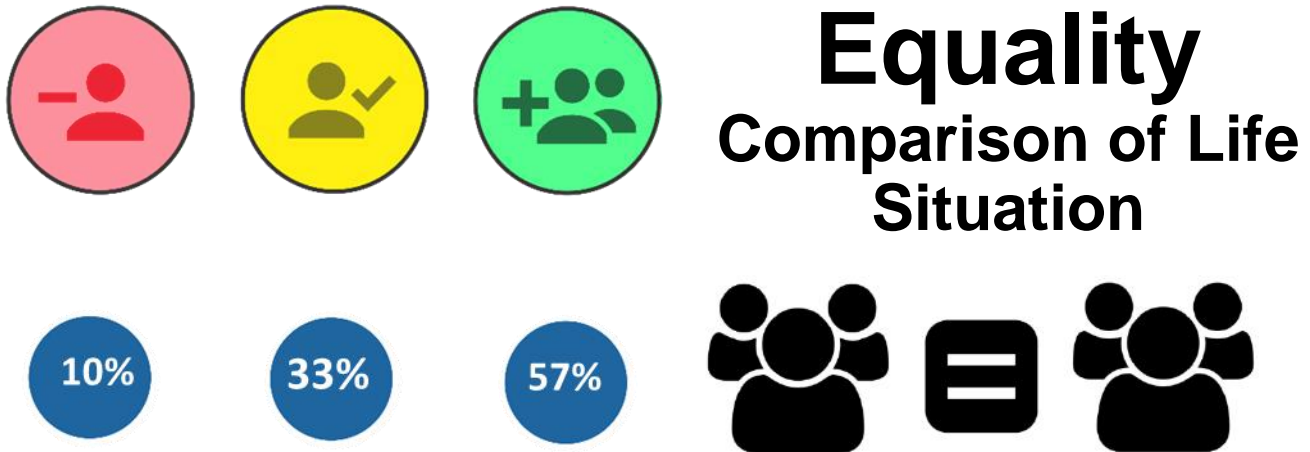


Source: Residents Survey 2017 STMP Bonaire



An Overview of Bonaire

As a consequence, the current island residents have revealed a relatively low quality of life perception and life satisfaction. For example, only 48% agree with the statement, “I am satisfied with my life,” and 68% perceive their life as worse when compared to the lives of others.



Source: 2017 Residents Survey (STMP Bonaire)

Negative experiences with life satisfaction as promoted by lack of opportunities are corroborated by the objective reality of many Bonairians. This objective reality is reflected in Bonaire's lagging standard of living as measured by the real income per capita when compared to the other Dutch Caribbean Islands. Moreover, according to CBS, Netherlands Statistics 45% of the population saw their income reduced in the past year, and about 50% of young Bonairians are not looking for a job. This dire situation seems to reveal a lack of employment opportunity - the result of which may hinder the further development of the island, and may even jeopardize the island's sustainable approach. The lack of opportunities is clearly revealed in the national statistics, which indicate that only 16% of young employees work in a job that is consistent with their areas of education³.

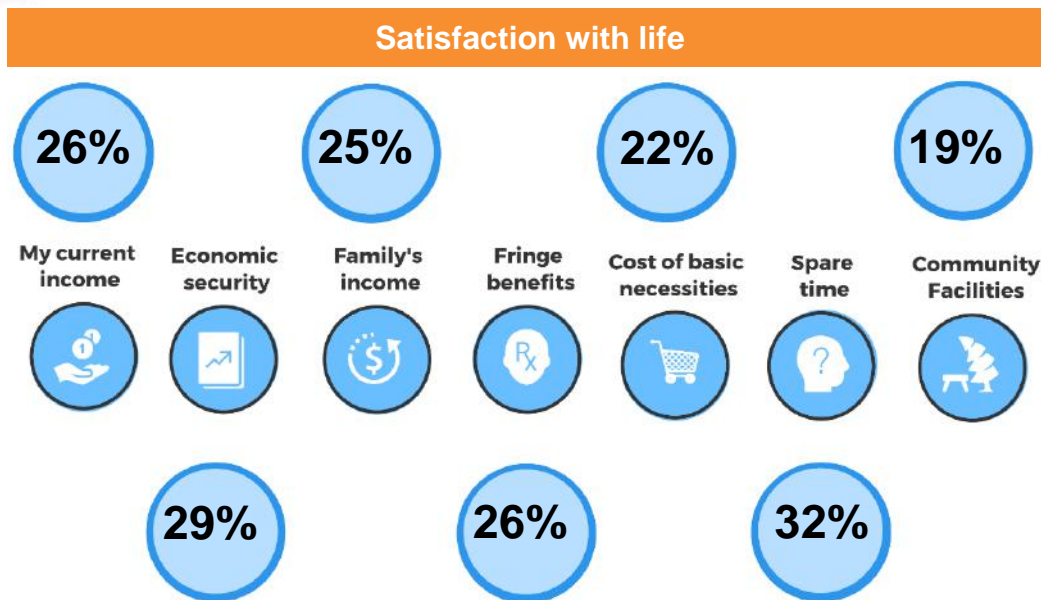
Happiness Satisfaction w/ Life



Source: 2017 Residents Survey (STMP Bonaire)

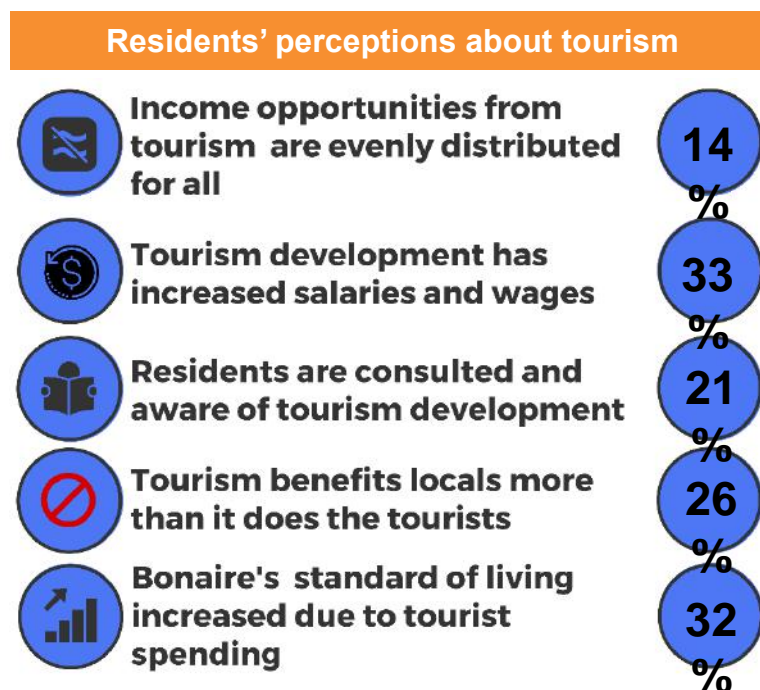


An Optimistic Future



Source: Residents Survey 2017 STMP Bonaire

Despite this ominous reality, Bonairians are optimistic regarding a changing future that has the potential to build the kind of opportunities that could improve their life perception and life satisfaction. Bonairians see tourism as a vehicle for change, providing that tourism can develop opportunities for everyone. Thus far, Bonairians' experience with tourism as a vehicle for change has been stifled, as tourism's economic benefits have not been widely shared by many. Only 32% think that, "Bonaire's standard of living has been increased by tourism." For tourism to direct the future of the island, changes in the distribution of tourism's economic benefits must reach local households and resonate with positive changes in the quality of life perception, and satisfaction of the people.



Source: Residents Survey 2017 STMP Bonaire



Underleveraging the Product

\$ 10.00



**Price per dive
is less than
going to the
movies!**

*TAX NOT INCLUDED

Tourism can empower the people of Bonaire. Thus, the relevance of tourism is clearly evident in Bonaire. Its importance lies in generating new money and creating jobs, as well as generating sustainable economic linkages to other sectors on the island. As a small island economy, Bonaire is faced with limited economic opportunities - tourism being perhaps its best hope for the future. Tourism's direct spending in 2017 accounts for nearly US\$229 million of the local economy while value added hovers around 20% of the economy. Currently, nearly 25% of the available jobs on the island are related to tourism.

However, there are some major challenges facing Bonaire's tourism industry. Competition within the Caribbean has significantly increased while Bonaire's competitive position seems to have waned over time. This may be due to the underperformance of Bonaire's mainstay market segment (divers). The diving market is not sufficiently growing to carry the island's economy forward. The accommodation sector is in urgent need of updating its current inventory. And, the destination is lacking a more diversified tourism product portfolio.

\$ 9.50



Furthermore, Bonaire's tourism activities rely on the consumption of natural resources, which by their nature are public or free goods that are based on an unlimited use of environmental assets. These natural assets are mainly unpriced and are subject to overuse and abuse. The stagnating diving segment⁴, the constraints and the costs incurred by the sustainable model, the mainly free consumption of natural resources and under leveraging of nature, and the need for new opportunities converge at a challenging crossroad. The destination is underselling the value of its product. For example, the cost per diving is US\$9.50 compared to going to the movies in Orlando, Florida (US\$10.00).

These challenges result in Bonaire underleveraging its tourism product.



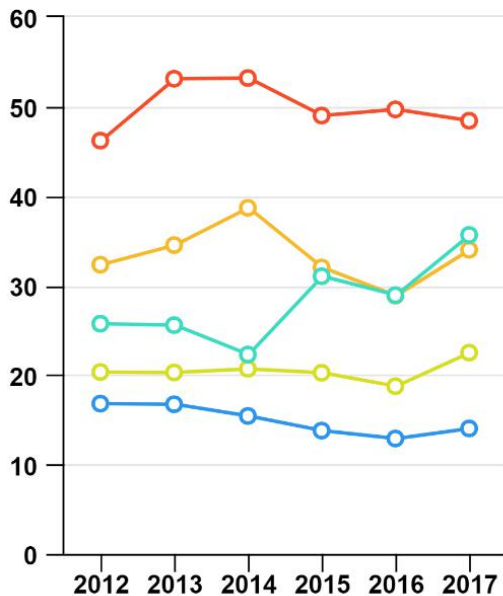


The Dive Market: Adrift or Afloat?



Google Analytics

Term Diving+ Country



- Average of Bonaire Diving: (United States)
- Average of Bahamas Diving: (United States)
- Average of Curacao Diving: (United States)
- Average of Aruba Diving: (United States)
- Average of Cuba Diving: (United States)

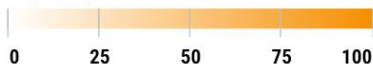
Given the opportunities that tourism may offer to Bonaire, a Google Trends analysis⁵ was conducted in order to determine the frequency for which Bonaire is searched by potential travelers on Google. The analysis included Google searches with the keyword, “Bonaire,” for the years 2005 – 2017. According to Google Trends, there is a reduction slope (decline) for the term Bonaire. There also appears to be stagnation in the amount of times the phrase “Bonaire Dive” is searched by people using Google. This is an important observation in that the diving segment has become the mainstay of Bonaire tourists.

In order to determine if this trend was exclusive to Bonaire or a Caribbean trend, the same analysis was performed on Curacao’s competitive set (i.e. Aruba, Curacao, Bahamas, Belize, Mexico, and Cuba). For example, the following phrases were entered into Google Trends: Aruba Dive, Curacao Dive, Bahamas Dive, Belize Dive, Mexico Dive, and Cuba Dive. The results of the trend analysis reveal that there are more hits on Mexico Dive, Belize Dive, and Bahamas Dive than Bonaire. Cuba is close to Bonaire in the amount of times diving is searched for both these destinations. All of the destinations reveal a seasonal trend of highs and lows, but overall the dive market does not demonstrate an increasing trend or search on Google. Although it remains important for Bonaire to service a long-term market segment – scuba divers – it becomes important for the destination to search for new segments that would supplement this market and be compatible with the sustainable values and infrastructures that have been in place to support the diving industry.

Search term: Bonaire Diving



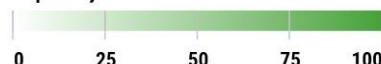
Popularity as a fraction of total searches in that location



Search term: Mexico Diving



Popularity as a fraction of total searches in that location



Note: Numbers represent search interest relative to the highest point on the chart for the given region and time. A value of 100 is the peak popularity for the term. A value of 50 means that the term is half as popular. Likewise a score of 0 means the term was less than 1% as popular as the peak.
Source: Google Analytics



Unlocking Opportunities



In order to unlock opportunities for the future, Bonaire must understand and practice a collaborative economy whereupon transformational tourist experiences can be delivered. Transformational tourist experiences encompass the immersion of tourists with the attitudes and behaviors of the local people and the natural environment. This immersion creates an atmosphere or uniqueness that is shaped by the people's inclusion and interaction with tourists according to residents' everyday life. The emphasis is on local people, local products, and local hospitality. This critical understanding must respond to the tourists' wants and needs for varied opportunities to embrace authentic relationships with the residents and the natural environment.

The people of Bonaire are proud of their heritage. This is revealed in their everyday life culture and in their transformative power and creativity in preserving their local habitat, such as is revealed in their marine park and national park. Building on this power and framing people and nature as one is the new bedrock for Bonaire's tourism industry. However, as the Bonairians possess an invaluable respect for their natural resources, they may harbor an element of trepidation regarding tourism growth. Thus, while local people wish to see continued tourism development, they favor a measured tourism development in pace and level.

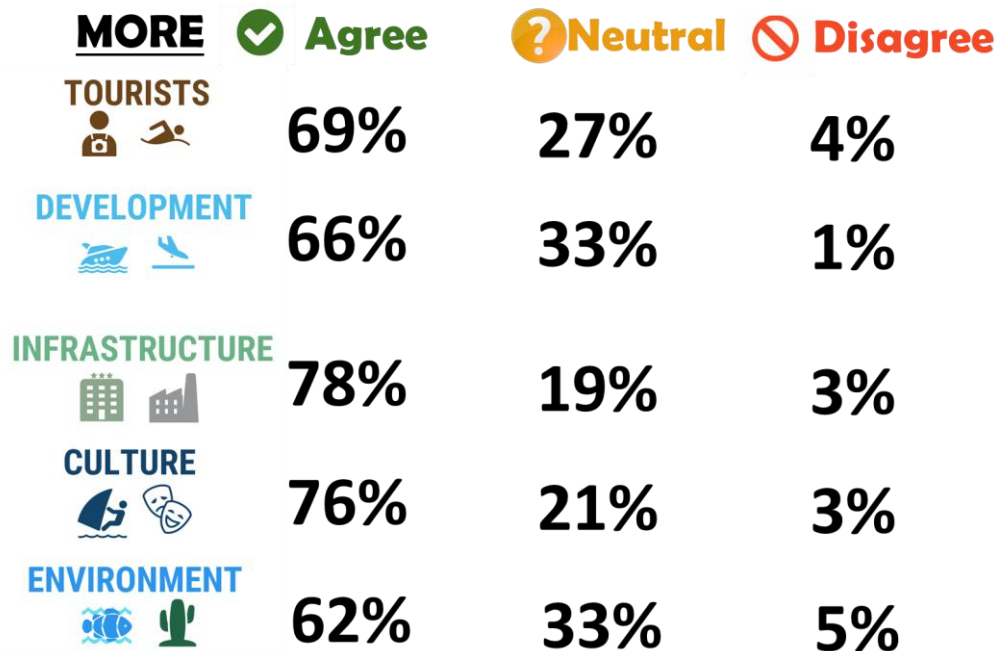
The ardently important fact is that the destination has been struggling with the concept of growth. That is, there is question as to whether growth is compatible with sustainability. Will tourism growth push or jeopardize the careful tourism development and conservation efforts that have been based on strong sustainable values that Bonaire has undertaken thus far? The strict preservation tourism policy, while protecting the environment and the ecosystems, seems to have limited opportunities and benefits to the local population, thereby affecting the well-being of the local population. The strict preservation policy has prompted a lack of infrastructure development and proper institutional arrangements, thus creating a fragmented vision for tourism in Bonaire.



Synergizing People & Nature

The need for an integrated vision of the tourism business is clear. For example, the strict preservation policy has limited tourism growth on the island with the consequence that a number of crucial infrastructures are under water. For example, the volume of passengers going through the airport has resulted in negative financial flows for the airport. This situation means that the airport has lost money all these years, and thus requires a focus on scale and profitability of entities that could support the tourism industry. The scale issue reveals the major paradoxes in the industry: limiting tourism growth, while at the same time staking claim to the most efficient quality offerings and services. For quality offerings to emerge, there is a need for a critical mass of tourists to justify that emergence.

However, the fragmentation has hampered an in-depth discussion regarding the specific benefits that could stem from a sustainable orientation, which could then accrue to the local population. In other words, it is imperative that the stakeholders acquire a clear understanding of the linkages among environment, society, and development with the ultimate goal of benefits going to the local community. Thus, the mobilization framework that would allow the destination to negotiate the road to tourism growth while maintaining existing values and infrastructures is vital to the well-being of the Bonairian.



Source: 2017 Employee Survey and Residents Survey (STMP Bonaire)

The tourism master plan charts the direction of how to comply with the people's wish to pace tourism development, which is embedded in synergizing people and nature. Achieving this synergy requires bold and immediate actions to secure increased productivity from this industry for the prosperity of Bonairians. The plan was developed from a strong partnership with tourism stakeholders, the Bonaire community, and the Tourism Corporation Bonaire (TCB). The master plan is premised on discovering and seizing opportunities for a better tomorrow for Bonairians.

Chapter 3



The Framework





The Framework

Tourism development has been utilized as a clear and conscious policy choice to increase well-being in Bonaire. The reason for this choice may be found in the competitiveness framework, which claims that tourism development is an antecedent to residents' quality of life. Residents are vital resources in tourism offerings at a destination. Once a destination actively pursues attracting tourists to a destination, the lives of the residents in the community are affected, and the entire community is required for the successful transformation of a tourism economy. Thus, residents' quality of life (QOL) becomes important in order to understand how tourism may impact the residents. Improving residents' QOL will, in turn, enhance and sustain tourism development.

TMP Framework for Bonaire



This 2017-2027 Bonaire Tourism Master Plan seeks to optimize the alignment between environment, society, and development. Optimizing this alignment between economic, environmental, and social capabilities requires a careful consideration for the necessary balance to improve the QOL and life satisfaction of Bonaire's residents. Trade-offs among these three dimensions should be carefully crafted in order to prevent any deleterious effects to the QOL on the island.



Objectives

Improve the competitiveness position of Bonaire in the Caribbean

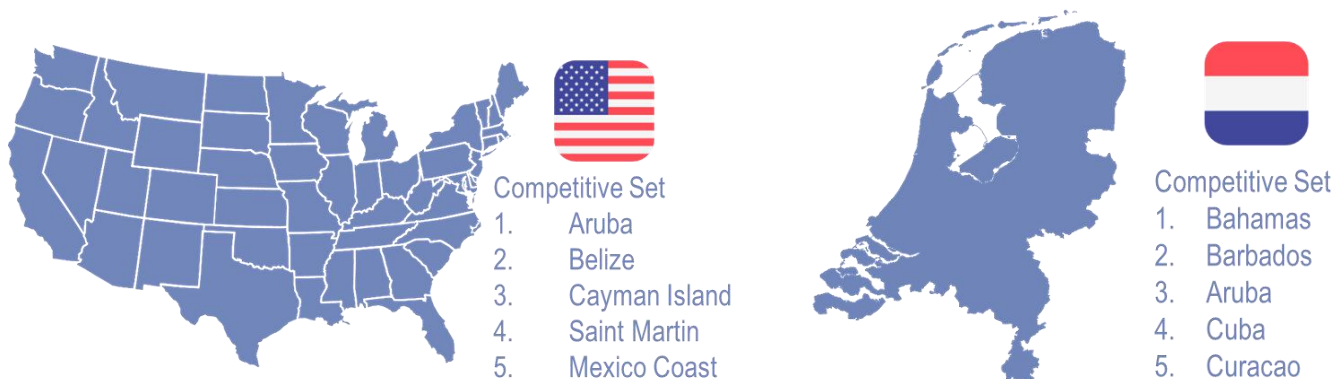


Improve the synchronization of Bonaire's tourism with other economic sectors

Sustainability will be considered in the context of assessing the potential trade-off between resource utilization and investments, as well as how the sustainable protocols and practices advance the QOL of the local population. Therefore, the relevance of incorporating sustainability as an assessment filter to evaluate Bonaire's current destination management is to identify management pitfalls, challenges, and successes. This will reveal the habitual practices within the industry.

Two objectives emerge from this perspective. The first objective refers to the competitiveness position of Bonaire in the Caribbean. Competitiveness is a construct that reveals the destination's configuration of resources, assets, and services - that when successfully combined may provide an authentic and memorable tourist experience that may improve the competitive position of a destination. The end outcome results in benchmarking Bonaire within its appropriate competitive set (i.e. other Caribbean destinations). Bonaire's competitive set was determined via a latent demand analysis. This analysis was based on a survey conducted during April and May 2017 among tourists who had been to the Caribbean in the last five years but had never been to Bonaire. 727 respondents were asked four questions: 1) Have you visited any Caribbean island or any of Mexico's Caribbean coast destinations for leisure purposes in the last 5 years? 2) Have you visited Bonaire? 3) Which of the following destinations (18 choices) have you visited in the last 5 years? 4) Rank your top 3 destinations?

The second objective concerns the synchronization of Bonaire's tourism with other economic sectors the process of which may optimize the QOL for local residents. Ultimately, the aim is to develop a tourism master plan for Bonaire that identifies pathways to craft a roadmap that can enhance the opportunities for the local residents within a sustainable tourism framework.



Source: 2017 Latent Demand Survey (STMP Bonaire)



Phases

The model below will govern the compilation of the Strategic Tourism Master Plan for Bonaire. The methodology will be divided into three phases. Phase 1 answers the question: “Where are we now?” This phase consists of a demand and supply analysis in order to determine the growth potential of the destination. The growth potential is measured by way of three objectives that include: 1) product image, 2) tourist/customer acquisition and portfolio management, and 3) destination brand equity. Each of these objectives is evaluated upon specific product attributes that may enhance or hamper the forward growth of the industry.

The technical, operational, and functional aspects of the product assess product image. In addition, the market segment mix is assessed according to each segment's market efficiency with regard to forecasted lifetime values and contributions to Bonaire's economy for each market segment.



Where are we now

1. Contextual & Situational Analysis
2. Destination SWOT and gap analysis



Where do we want to go?”

1. Visioning
2. Objectives & Indicators



How do we get there?

1. Strategies & Projects
2. Action Planning
3. Implementation



Setting Bonaire's Course



Phase two of the process determines, “Where do we want to go?” This phase identifies and establishes the vision and objectives of tourism in Bonaire and also puts tourism indicators (such as return on investment, arrivals, hotel occupancy rates, happiness index and life satisfaction, human development index and competitiveness index) into place. Crucial in this phase is the employment of the construct of sustainability. This construct includes three items, i.e., economic carrying capacity, environmental carrying capacity, and social carrying capacity. The sustainability construct is examined by assessing the potential trade-off between resource utilization and investments and the perceived quality of the destination's resource endowment.

Additionally, investigating the impact of tourism development on residents' QOL assesses the social capacity of tourism development. The investigation includes a methodological relational assessment of increasing resource investments together with the degree of tourism sophistication: for example, assessing the relationship between a larger variety of product offerings that generally results in increased tourism revenues and economic contribution to the destination. However, increases in tourism activities should not be at the expense of the perceived quality of the resource endowment or the QOL for the residents.



Return on investment (ROI)



Tourist arrivals



Cruise visitors



Occupancy rate



Happiness index



Life satisfaction



Human development



Competitiveness index



Carrying capacity



Economic benefits



Making Headway



Surveys



Inferential Statistics



Brand image



Demand analysis

Phase three, “How do we get there?” identifies possible marketing and promotion strategies, product development strategies, and infrastructure development strategies within the tourism sector plan. In particular, demand challenges facing Bonaire are assessed in terms of brand image, lack of penetration in the dive market, and the potential of new segments. Also the phase aims to discover insights as to the reasons why tourists do not include Bonaire in their evoked decision set as a final destination of selection. In particular, the Dick Pope Sr. Institute for Tourism Studies has assigned value to the island’s eco- systems (natural assets). In order to accomplish this task, the team used a contingent valuation method that assigns market value and optimizes revenues earned from natural assets.



Focus on public participation



Bonaire's Human Capital

The service gap



Lack of products for consumption



Lack of airlift



Lack of professional opportunities



Lack of awareness and diversity

In addition, human capital as crucial for defining and enhancing the quality of the tourist experience must also be addressed as an asset. An examination of the human capital was therefore performed. The evaluation of human capital was founded in two frameworks (i.e. service profit chain and customer satisfaction). There are a few human capital issues affecting the service quality level and hence hampering productivity and profitability levels. Job satisfaction with working conditions seems low when considering the working conditions. For example, only 52% of hospitality employees reported being “satisfied with my working conditions”, and only 42% were “satisfied with the opportunities to grow”.

Overall, hotel profitability levels are poor with low scores in terms of customer service and value for money. Restaurants seem to be the high point among all suppliers in terms of customer satisfaction when visiting the destination. It should be noted that the cruise visitor, unlike the stay-over tourist expressed a much higher satisfaction with the product. For example, 84% of respondents reported being “delighted with my experience.”

Bonaire Service Profit Chain Model



Chapter 4



The Process





The Process

The Tourism Corporation Bonaire (TCB) commissioned (December, 2016) the Dick Pope Sr. Institute *for* Tourism Studies (DPITS) at the Rosen College of Hospitality Management at the University of Central Florida to develop a Strategic Tourism Master Plan 2017-2027. At that time, the TCB was of the opinion that the destination is at an important crossroad in terms of how to make the tourism industry sustainable for and in the future and how to optimize participation of local residents in the benefits that sustainable tourism could afford to them. Consequently, the TCB invited a DPITS research team in the 2016 summer to visit the destination for the purpose of ascertaining the state of the tourism industry and to suggest pathways that could move the tourism industry forward.

The DPITS team submitted a report in August 2016 to the TCB which depicted an industry that is fragmented, polarized, and that lacks a clear vision of how to transition to a new tourism platform in the future. Specifically, these challenges are revealed in five prevalent topics that are defining the current situation in the tourism industry. These five topics are high industry fragmentation, lack of stakeholder integration, lack of an integrated view, a narrow view of sustainability, and lack of reliable data. The report suggested the formulation of a tourism master plan for the island of Bonaire.



The plan designs a blueprint that guides and directs the Bonaire tourism sector to new heights while considering its core attributes of ocean, nature, and heritage. The plan puts people first: people as the core of the destination product and people as tourists mingling with the local people. Thus, transformative tourist experiences are beneficially created between hosts and guests by way of personal connections. The byproduct of these connections could produce positive conditions for Bonaire's residents.

That is, as residents adjoin the tourism movement, they also invest in tourism, increase economic status and available employment opportunities. The result is a happier people. Such people are healthier, more productive, and more willing to deliver a quality tourism product - thus resulting in more satisfied tourists who may return and recommend the island to others. Happier people and tourists can create a virtuous circle that may support and sustain the destination.

The main premise of the master plan is that for Bonaire to thrive as a destination enhancing people's QOL, an optimal balance between tourism supply and demand with consideration for the increasing competition in the Caribbean is required. The optimal balance between supply and demand will include product innovation, industry restructuring, and unique marketing efforts in order to compete on a global platform.

Additionally, the master plan is grounded within the local context of Bonaire, whereupon the local human and social capital is considered a source that could enhance the quality of the tourist experience and residents' QOL. The logic of enhancing the quality of the tourist experience is in its impact on the direct and secondary (i.e. indirect and induced) effects, as well as the dynamic effects in the economy and growth trajectories. Finally, the master plan is framed within a sustainable tourism development paradigm for Bonaire's tourism industry.



The Bottom-up Approach

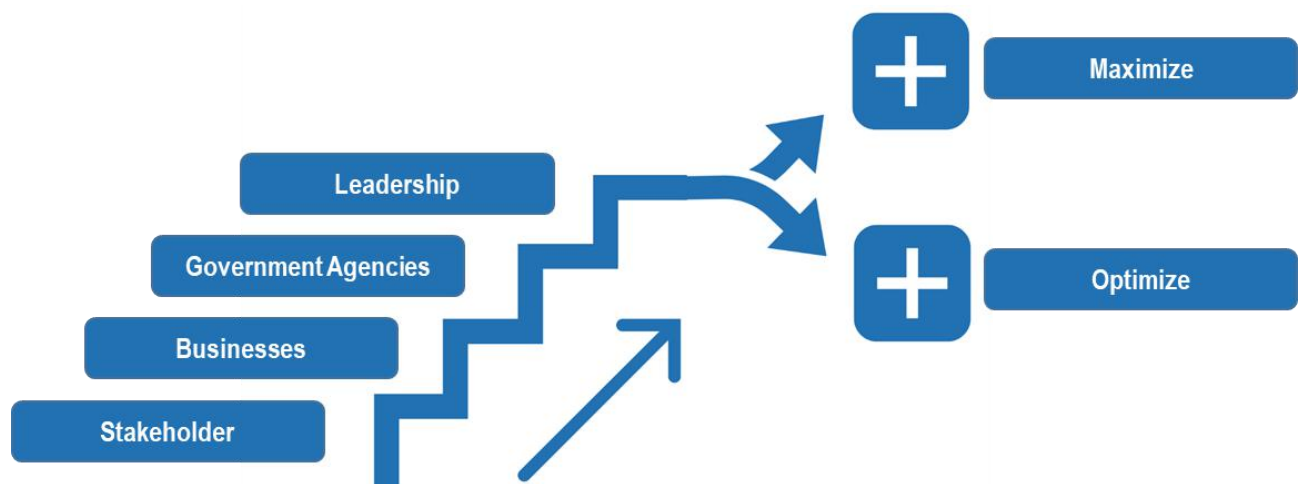
This master plan addresses Bonaire's approach to tourism and explains why tourism will be beneficial to the island and its residents. It also lays out the timing of the phases in which the plan should be implemented. Further, the plan's underpinnings are validated via a bottom-up research approach⁵. That is, all the suggested actions, solutions, and goals reported in this plan were derived from empirical research gathered in accordance with a wide and diverse range of tourism stakeholders.

During the data collection process, the DPITS team found that the necessary information required to construct the plan was not only profoundly limited, it was hindered by the inconsistency of Bonaire's collection process. As a result, it became necessary that the research team create the master plan according to detailed and extensive methods and techniques that encompassed both primary and secondary data sources. Data triangulation⁶ was used to ensure that the research findings were both valid and reliable. Thus, the research findings and the Strategic Tourism Master Plan are relevant to Bonaire's current tourism industry. Moreover, the development of the Strategic Tourism Master Plan has not only been empirically comprehensive, it has also involved the use of pertinent case studies in an arduous process of methodological and theoretical foundations⁷.

The DPITS met with more than 200 stakeholders face-to-face to conduct formal and informal interviews. The purpose of the stakeholder meetings was to obtain feedback on the overall project, share ideas pertaining to Bonaire's tourism challenges, provide informational sources of value to the DPITS research team, and actively involve many types of stakeholders in the drafting of the Strategic Tourism Master Plan project.

In addition, seven surveys were created and administered from March to July 2017 with the participation of nearly 3,000 respondents who completed the surveys⁸. The respondents included stay-over tourists, cruise tourists, Caribbean tourists who had never visited Bonaire (i.e. latent demand), tourism employees, and the local population. Moreover, the DPITS team delivered seven formal presentations: two were given to the members of the Island Council, two were exposed to the TCB, one was disclosed to BONHATA and the Chamber of Commerce, and one to the Commission Nature Bonaire. Finally, the DPITS conducted a tourism summit in August 2017 where the findings were presented and shared with the tourism community. The plan also adopted the use of "big data analytics"⁹ on nearly 11,000 ED cards and evaluated over 3,200 comments from TripAdvisor.

Bottom-up Approach for Bonaire TMP





Guiding TMP Principles

The plan was directed by two main principles: impact and relevance. Impact refers to the tourism sector's components such as accommodations, restaurants, and attractions, while relevance refers to how tourism benefits would support and align with the population's QOL. Overall, the principles can be summarized as:

Guiding principles for TMP



The master plan is designed on an incremental approach to product development and an optimization strategy to increase demand. Product development is guided by the discovery of low hanging fruit that can be quickly brought to fruition. Optimizing demand is centered on tourist arrivals, pace, and level management, which is aimed at low volume and high yields. Suggested actions are grounded on the return on investment (ROI) concept.

People



Product



Demand



Impact



Relevance



Chapter 5



Vision & Mission: Bonaire





Vision & Mission: Bonaire

Bonaire is a destination moored in a rich history of foresighted men and women. Their history attests to the recognition of the relevance of their heritage anchored in nature and the ocean. Historically, Bonairians have creatively immersed the ocean as a resource to support their livelihood as sailors, fishermen, and an access provider for the world to consume the ocean. Because the ocean was a central component of their livelihood they devoted much of their attention to understand the necessity of preservation. For example, Bonaire was the first Caribbean destination to create a marine park to preserve marine life.

The preservation tactics and strategies used by Bonaire were largely labeled green practices. These practices enabled Bonaire to protect much of its natural resources. Today, there are more specific preservation strategies for coastal destinations. These strategies are coined “blue growth” initiatives, which emphasize a connection between the ocean’s ecological systems and the human activity that takes place in the ocean economy. Based on Bonairians’ historic use and preservation of the ocean, blue growth is more aligned with the heritage of the people.

By creating a legal framework for blue conservation, Bonaire will continue to lead the Caribbean in employing nature and the ocean as a core livelihood resource. Conservation is a dynamic concept among Bonairians. Conservation addresses the effective and responsible use of nature for the benefit of mankind and the earth. According to this perspective, Bonaire converted 40% of its energy use to alternative energy. This achievement makes the island one of the largest consumers of a more environmentally friendly energy source. This transformative and creative power of Bonaire’s people is an example of their respect for the environment and the manner in which man intersects with that environment. This power is representative of Bonaire’s proud heritage to function and live in harmony with nature. In order to emphasize this power, Bonaire should subscribe to the Declaration of Underwater Heritage in Marine Protected Areas.



Windmills for off shore renewable energy



Solar energy use as opposed to fossil fuels



Waves and tides as forms of alternative energy as well initiatives to conserve water





Vision & Mission: Bonaire

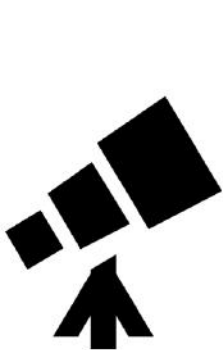
Bonaire's people are recognized as a happy, confident, and hospitable people with the capacity to interact with tourists to create an inviting, pleasant, fun, and diverse atmosphere that can enrich themselves, as well as tourists. This cultural empowerment has received global attention and has instilled in the local people a sense of pride and achievement. Such conviction propels Bonaire's actions in a highly competitive tourist global setting to achieve new heights for the benefit of its people.

This is the beginning of all new endeavors and the foundation for Bonaire's bright tourism future. In this vision, tourism can provide much needed material resources to many needy households while still respecting Bonairians' desire to protect natural resources (blue growth initiative). Tourism can revitalize neighborhoods and can generate pride and enthusiasm for the local population. By becoming the front door for development and well-being, tourism can stimulate the return of those who were born on the island, but left due to lack of opportunities. The return of these Bonairians can strengthen the cultural fabric of Bonaire and create a strong eclectic cultural diversity with a strong Bonairian core. This diversity could ultimately be the fiber that makes Bonaire unique in terms of its everyday life. This unique cultural blend could attract those tourists who are interested in self-growth via the distinctive and exceptional experiences that Bonaire could offer.

SMART



Tourism Vision for Bonaire



Tourism must serve as the stepping-stone for development and well-being for all Bonairians. Tourism must enable all Bonairians to unleash their transformative and creative power to create a blue economy and live in harmony with nature.



Vision & Mission: Bonaire

Bonaire has a rich history and heritage in its residents' desire to nurture and protect nature for the residents' well-being. This plan was crafted keeping this history and heritage in mind but also identifies that Bonairians need and desire professional opportunities. It is time to apply tourism in a smart way that will continue to conserve nature while also providing opportunities to Bonairians. This smart approach will increase the sustainability and resilience of the Bonairian economy and will enhance residents' quality of life. A sustainable and resilient economy will not likely be vulnerable to external shocks (e.g. global recession and natural disasters). That is why, the tourism master plan recommends as the destination's mission:

Tourism Mission for Bonaire



The destination tourism mission is to develop a smarter, sustainable, inclusive and resilient Bonaire by way of a blue economy that entwines tourism and nature.

When combined, the tourism vision and mission statements will stimulate the creation of creative opportunities that bind tourism and nature in a way that local people may reap the economic benefits from a unique blue tourism product. In turn, these economic benefits will contribute to enhancing the local population's quality of life. For the destination of Bonaire, it is necessary that tourism take on a new role that serves all residents and acts as a vehicle to enhance all people's quality of life on the island. Tourism can no longer benefit the few. In its new role, tourism will attract the majority of people to the opportunities that the industry can provide. Through the engagement of the majority of locals, the tourism product will integrate all economic sectors resulting in a high quality travel product that infuses both nature and tourism. This high quality travel product will increase the competitive position of Bonaire. However, in order for this to transpire, Bonairians must learn how to identify and reap these opportunities which means that improved human capital is necessary.



Chapter 6



Bonaire's Image





Bonaire's Image

Image is a powerful identity signal to position and provide a competitive advantage to a destination in the market place. Bonaire's image up to now has conveyed an informational and utilitarian message to the market place with little decoupling from the rest of the Dutch Caribbean. The destination has not been able to nurture an image that expressed key differences with the other islands despite having practiced a distinct management approach regarding its natural environment. The current image based on "once a visitor, always a friend" does not adequately cover the destination heritage and potential.



Overall, the destination has a good image in the market place with 63% of respondents reporting this positive perception. This good image is driven mainly by its diving activities and ocean tourism, which limits the island potential for attracting new tourism markets, limiting island's potential for new tourism markets. While comparing two major markets the US on average has a slightly better impression about Bonaire than the Dutch. For example, American tourists perceive Bonaire as a safer destination with friendlier locals and have a higher appreciation for local food when compared to the Dutch.

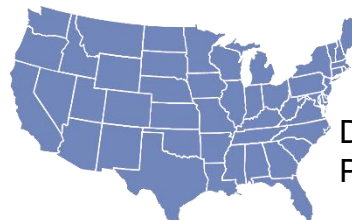
The Destination image of the Dutch and American tourists is derived from the latent demand survey which consists of 727 respondents (USA: 316 respondents, and the Netherlands: 411).



Destination Image:
Potential Dutch Tourists

Percentage of potential tourists with favorable image of Bonaire

- 67% Bonaire is safe and secure
- 66% I am familiar with Bonaire
- 61% Bonaire offers activities that I look for in a vacation
- 61% A trip to Bonaire would be worth my time
- 61% Bonaire has a good image
- 60% A trip to Bonaire is worth the money
- 59% A trip to Bonaire would make me look good among friends and family
- 59% Bonaire offers attractions that I look for in a vacation
- 59% A trip to Bonaire is affordable
- 58% Bonaire has high service quality
- 58% Bonaire has high quality tourism products
- 57% I intend to visit Bonaire in the near future



Destination Image:
Potential USA Tourists

Percentage of potential tourists with favorable image of Bonaire

- 69% A trip to Bonaire would be worth my time
- 68% Bonaire offers activities that I look for in a vacation
- 67% Bonaire is safe and secure
- 66% Bonaire offers attractions that I look for in a vacation
- 65% Bonaire has high service quality
- 64% Bonaire has a good image
- 64% A trip to Bonaire is worth the money
- 64% A trip to Bonaire would make me look good among friends and family
- 64% Bonaire has high quality tourism products
- 64% I intend to visit Bonaire in the near future
- 60% A trip to Bonaire is affordable
- 57% I am familiar with Bonaire

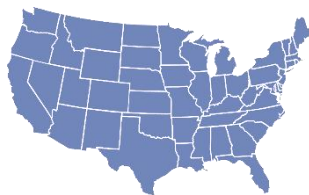
Source: 2017 Latent Demand Survey (STMP Bonaire)



Bonaire's Image

Overall potential US tourists (56%) are less familiar with Bonaire than their Dutch counterparts (65%). It must be emphasized that familiarity with the island is not very high compared to neighboring islands such as Aruba and Curacao. One out of two potential tourists find Bonaire affordable, and 64% of potential American tourists find that the island has high-quality tourism products compared to 58% of potential Dutch tourists.

Essential drivers of the Bonaire image for both countries are prices of accommodations, and an ability of locals to speak their language. The Dutch are more influenced by cultural and water activities, while American tourists are more influenced by land-based activities and quality of food at restaurants. The most important determinants for both markets to visit Bonaire in the future are the cost of the trip to Bonaire and food and water safety. Quality of service in restaurants, ecotourism activities, night life, and shopping opportunities are essential for potential American tourists to visit Bonaire in the future. While potential Dutch tourists indicate that the most important determinants are prices in restaurants, quality of diving, mobility at destination, cleanliness, natural conservation efforts and ease of mobility at the destination.



Destination Impressions

Percentage of potential tourists with favorable impressions of Bonaire

- 82% Climate and weather conditions
- 80% Quality of the beaches
- 78% Locals' friendliness and hospitality
- 77% Quality of services in accommodation facilities
- 77% Variety of water activities
- 76% Availability of beach facilities
- 76% Overall cleanliness and hygiene
- 76% Taste of local food
- 75% Overall safety and security
- 75% Quality of food and beverages in restaurants, bars, & clubs
- 74% Food and water safety
- 74% Variety of land-based activities
- 73% Variety of nightlife and entertainment opportunities
- 73% Ease of access to the destination
- 73% Quality of services in restaurants



Destination Impressions

Percentage of potential tourists with favorable impressions of Bonaire

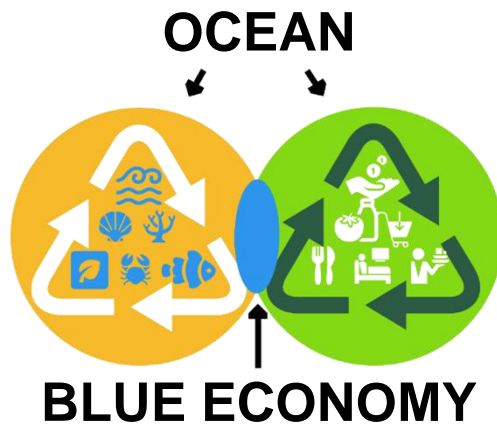
- 75% Climate and weather conditions
- 71% Quality of the beaches
- 70% Overall safety and security
- 66% Locals' friendliness and hospitality
- 61% Variety of water activities
- 61% Availability of beach facilities
- 60% Overall cleanliness and hygiene
- 60% Quality of services in accommodation facilities
- 59% Variety of shopping opportunities
- 58% Quality of food and beverages in restaurants, bars, & clubs
- 58% Ease of access to the destination
- 58% Food and water safety
- 58% Taste of local food
- 57% Variety of nightlife and entertainment opportunities
- 57% Availability of island safari

Source: 2017 Latent Demand Survey (STMP Bonaire)



Bonaire's Image

“First Blue Caribbean Destination”



Ocean Principles for Investment in a Caribbean Blue Economy

Principle 1:

Sustainable Development/Sustainable Livelihoods

Principle 2:

Marine Ecosystem Health

Principle 3:

Integrated Ocean Governance

Principle 4:

Science-based, Precautionary, and Adaptive Decision Making

Principle 5:

Duty of Care and Accountability

Principle 6:

Inclusive and Transparent Decision Making

Principle 7:

Ecosystem-based Management

Principle 8:

Develop Ocean Solutions that will Reduce Climate Change Risks & Allow the Development of Climate Change-Related Opportunities

Principle 9:

Sharing of Benefits Derived from the Blue Economy

Principle 10:

The Right to Development

In order to bolster Bonaire's image, the master plan recommends Bonaire to identify itself as a Blue small island destination thus promoting Blue Growth. Blue Growth is a long-term development strategy that supports sustainable growth in coastal and marine based destinations. Blue Growth has caught the recent attention of the European Union, which sponsors a large program in the Mediterranean called BlueMed as well as the World Bank that recently released a report entitled, "Toward a Blue Economy: A Promise for Sustainable Growth in the Caribbean."¹⁰

Within the World Bank report the goal of a blue economy is defined as "...a lens to emphasize the connection between the ocean's ecological systems and the human activity that takes place in the ocean economy." To date, Caribbean destinations remain rather sluggish in adopting Blue Growth standards as well as drafting policies that would support a Blue Growth initiative. The World Bank estimates that approximately 75% of the Caribbean's coral reefs are to be considered at risk from human activity. This is a dangerous estimate from the World Bank for Caribbean destinations (such as Bonaire) that depend heavily upon ocean tourism (e.g. scuba diving).

One of the goals of this plan is to increase the competitive position of Bonaire. This goal will require that Bonaire not only protect one of its most valued tourism attractions (coral reefs) but must also become a world leader in the preservation of the assets that a Blue Economy can offer. Currently, there are green Caribbean destinations such as Grenada and Dominica. So, labelling Bonaire as yet another green destination will not provide a unique marketing position for Bonaire. Consequently, Bonaire should take the initiative to become the first "Blue Caribbean Destination." Such an initiative will position Bonaire as a progressive island in terms of synergizing people and nature. This position will likely gain international media attention, which will increase the marketing reach for the TCB.

Source: The World Bank Report, "Toward a Blue Economy: A Promise for Sustainable Growth in the Caribbean." Retrieved from <https://openknowledge.worldbank.org/bitstream/handle/10986/25061/Demystifying0t0the0Caribbean0Region.pdf?sequence=4>

See: www.worldbank.org/en/news/infographic/2017/06/06/blue-economy



The destination's current appeal rests on price and its available variety of experiences, especially cheap access to the sea for scuba diving. However, these components cannot offer Bonaire a sustainable competitive advantage. Any other destination in the Caribbean could price cut or put together more variety if they are so inclined. Therefore, Bonaire must market and enhance components that other destinations cannot develop, such as Bonaire's simple charm. Bonaire's purity. Bonaire's nature. Bonaire is truly the untouched beauty of the Dutch Caribbean.

Note: Please refer to the written description of the slogan . This is just an illustration and not a professional art graphic

Chapter 7



Quality of Life in a high end destination





Quality of Life in a High-end Destination

For too long Bonaire's development vision was grounded on a narrow vision of nature first. This narrow vision has shaped and hindered the frontier of possibility for Bonairians. The time has come to broaden this vision for people and nature to live in harmony by way of a blue economy. This vision expands the frontier of possibility for Bonairians by centering its objectives and actions to improve the quality of life of all Bonairians. Tourism can enable this transformation as long as Bonairians understand and accept that tourism rests on social efforts.

Main goals

Improve the competitiveness position of Bonaire in the Caribbean

Improve the synchronization of Bonaire's tourism with other economic sectors

The master plan pursues two main goals, which include enhancing the destination competitiveness and developing an integrated destination management approach. Both goals are premised on enhancing residents' quality of life in a high-end destination. Based on this premise, the master plan suggests the following four main objectives to advance the harmony vision that intertwines people and nature.



Expand the benefits stemming from tourism development to a broader segment of the Bonaire population



Convert Bonaire to a high-end destination



Practice a cohesive branding strategy to attract more tourists and increase revenue and profitability



Elevate the tourist experience



Objective 1



The main objective of the Strategic Tourism Master Plan is to expand the benefits stemming from tourism development to a broader segment of the Bonaire population. These benefits should support and solidify the local population's quality of life in a material and non-material sense. Achieving this goal is crucial for Bonaire's future - not only because QOL should be an ultimate goal of tourism and development, but also because it is the people rather than nature that can create a unique atmosphere capable of triggering a transformative and memorable tourist experience.

Quality of work life: Tourism employees

- 47% • allows a person to care for their family
- 39% • provides adequate work hours
- 44% • the workload is reasonable
- 36% • ensures balance between work and life
- 47% • is easily accessible (transport)

Note: Figures represent the % that agree

Job perception: Tourism employees

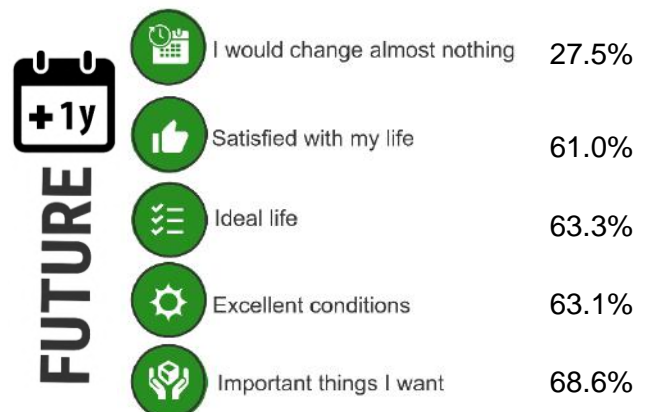
- 36% • benefits are adequate
- 23% • average starting salary
- 38% • job security and stability
- 33% • advantages outweigh disadvantages
- 39% • advancement opportunity

Note: Figures represent the % that agree

Life Satisfaction



Note: Figures represent the % that agree



Note: Figures represent the % that agree

Source: Employee Survey (STMP Bonaire)

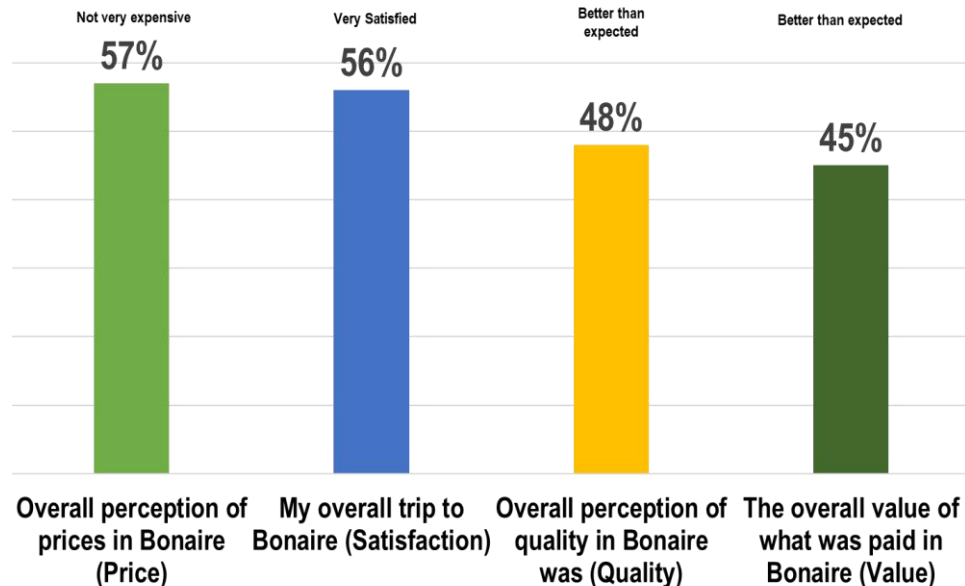


Objective 2



The second main objective is to convert Bonaire to a high-end destination. This objective is to provide material support for the well-being of the population, and to resonate the non-material foundations such as pride and recognition of the local heritage. The concept of high-end destination also responds to the expressed desire of Bonaire's people that tourism development should reveal measured growth over time, and that such growth should provide more opportunities without compromising the local heritage and natural landscape. The main focus to achieve this high-end destination status is to develop four star hotels according to international standards, which should constitute a minimum of 30% of the hotel inventory on the island. The TCB together with the Bonairian government should arrange an incentive package to attract these four star hotel investments.

Overall Experience: Bonaire



The Tourist Intentions

- 69% Come back to Bonaire
- 66% Recommend Bonaire to others
- 52% Encourage my family & friends to visit Bonaire
- 51% Share my vacation experience on social media
- 30% Consider Bonaire my first choice for vacation
- 23% Continue to come even if prices were higher

Note: Figures represent the % that agree



Objective 3

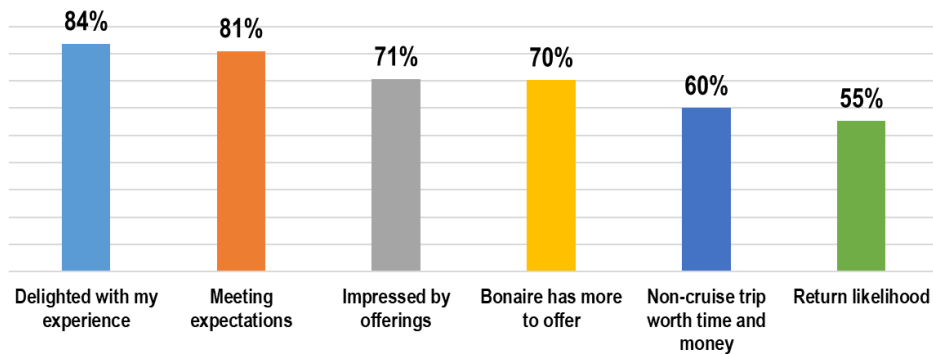


The third main objective is to practice a cohesive branding strategy to attract more tourists and increase revenue and profitability. This cohesive branding strategy must align the destination image with the tourism portfolio and strive to make Bonaire more competitive. Currently, the largest visiting segment (Dutch) ranks Bonaire low on nearly all destination attributes with the exception of safety and security. This segment is considered to have sufficient market information to evaluate the destination.

Thus, these rankings are concerning. The American segment does not have as much market information to evaluate Bonaire. This segment favorably ranks more of Bonaire's attributes than the Dutch. Americans perceive Bonaire's quality of the beaches, windsurfing, and national parks as all high. Americans also rank the availability of eco-tourism and conservation efforts as high. An alarming concern is that both market segments rank the quality of diving in Bonaire as low.

The findings from the destination attribute rankings for both markets presents a branding opportunity for Bonaire. The current slogan "Once a visitor always a friend" does not resonate with the charm and the way of doing things in Bonaire. The current slogan also does not accent Bonairians' value of their natural environment. A cohesive branding strategy will link the people's culture, destination attributes, environmental interests, and societal norms to help form tourists' perceptions of what to expect when staying in Bonaire. The idea behind this objective is to keep the tourism business steady, entrepreneurial, expanding, and to improve the tourists' overall experience.

Cruise Overall Experience: Bonaire



Source: Cruise Survey (STMP Bonaire)

Stayover Overall Experience

54%	Attractiveness of restaurants	49%	Payment options in restaurants
52%	Friendliness and attitude of the restaurant staff	47%	Payment options at hotel
52%	Security of accommodation	47%	Friendliness and attitude of the hotel
51%	Restaurant security	45%	Cleanliness of accommodation
51%	Restaurant cleanliness	44%	Attractiveness of accommodation facilities

Note: Figures represent the % that agree
Source: 2017 Tourist Exit Survey (STMP Bonaire)



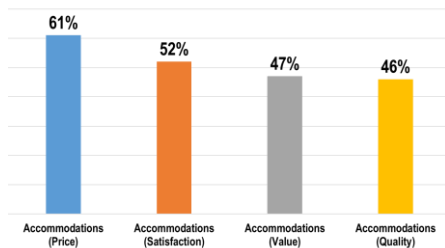
Objective 4



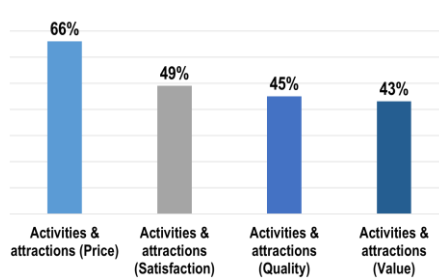
Finally, the fourth main objective is to elevate the tourist experience. As Bonaire has recently been benefiting from the increased tourism demand, it is crucial that Bonaire manages that growth and elevates the quality of the tourist experience. The marketing and product development focus will shift away from a mainly marketed diving paradise to a more comprehensive image of people and nature as one. It is important for Bonaire to recognize that product development does not only pertain to infrastructure development.

A quick conversion of product development can also be in the form of unique experiences such as special events and festivals. These experiences must be built to answer the needs, wants, and desires of a specific target audience while also supporting the cohesive branding strategy. A unique Bonairian experience should be embedded with its rich history, people, and culture. When possible these new offerings should reflect the cultural values and everyday Bonairian social protocols and practices. The plan recommends a diversified product development based on the island diversity that is embedded in the island's regional and cultural base.

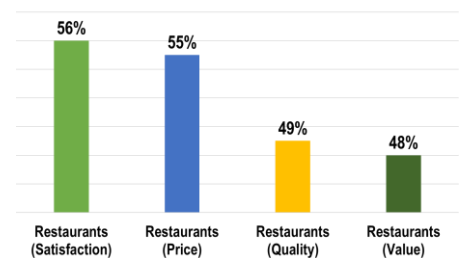
Overall Experience: Accommodation



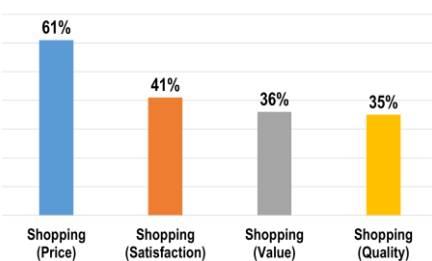
Overall Experience: Activities



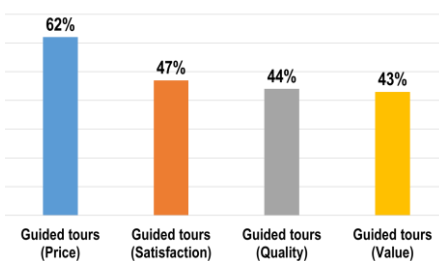
Overall Experience: Restaurants



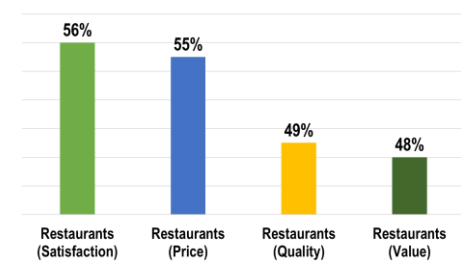
Overall Experience: Shopping



Overall Experience: Guided Tours



Overall Experience: Rental Car



Note: Figures represent the % that agree
Source: 2017 Tourist Exit Survey (STMP Bonaire)

Chapter 8



Challenges on the Horizon





Challenges on the Horizon

The destination faces several daunting challenges that must be overcome in order to become a QOL setting within a high-end destination. As a small island destination (SID), Bonaire faces limited human, financial, and institutional capacities, as well as weak political leverage to manage and steer the destination to new heights in a sustainable way. The island is subject to the vagaries of global reality. For example, the future of the island is seriously compromised by climate change and the island does not possess the capability to counter this ominous threat.

Another challenge exists in that tourism and the economy do not seem to be optimally synchronized. There is a weak relationship between the two resulting in unrealized and lost opportunities in terms of investments, jobs, and entrepreneurship. This weak relationship is shaped by the steep seasonality present in the local tourism industry.

In addition, tourism reveals a relatively low multiplier effect with a value of only 1.19 in comparison to other Caribbean destinations such as Aruba and Curacao. This value has little tourism overflow to other sectors resulting in minimal absorption by forward and backward economic linkages to other industries. Tourism spending spawns low linkages to the other economic sectors. For example, for each additional dollar floating in the economy, only three cents go to the banking system.

This is an indication that either tourists pay their consumption through packages or they pay for their stay overseas. What seems to be occurring here is that the destination seems dependent on tour operators that are squeezing business profit levels. The destination seems captured by the notion of arrivals (amount of tourists) while forgetting about the return on investment (marginal profits).





Challenges on the Horizon

Bonaire's mainstay segment is the diving tourists. Those tourists visiting Bonaire specifically for diving mainly stay in hotels (56.3%) and apartments (37.5%) for eight and nine nights respectively. Those staying in apartments spend US\$222.00 compared to US\$217.75 per day per person staying at hotels. Those staying in houses of friends and family spend much less (US\$109) per person per day, while stay longer (12 nights). However, the diving segment is not growing and seems to be even stagnating in terms of arrivals.¹¹ The latter may be due to TCB budget constraints and the lack of marketing dollars from the highly fragmented and small hotel sector affecting marketing opportunities to this segment.

Divers' spending profile



- 56% of divers stay in hotels
- Stay for 8 nights
- \$217.75 spent per day per person



- 37.5% of divers stay in apartments
- Stay for 9 nights
- \$222.00 spent per day per person



- 7% of divers stay in houses
- Stay for 12 nights
- \$109.00 spent per day per person

Source: 2017 Tourist Exit Survey (STMP Bonaire)



Challenges on the Horizon

By international standards, Bonaire is still a low-end destination that lacks a clear WOW factor in its attributes' configuration. That is, product offerings and delivery are perceived as average according to tourists who have visited the island. Experiential variety is mainly limited to water activities with a dearth of well-developed land product attractions and offerings. Tourists who have not consumed the destination offerings perceived its quality and delivery as inferior compared to Bonaire's competitive set. This is because the destination mainly lacks awareness and image in the global tourist market. It is evident that Bonaire is not well-positioned as a tourist destination.

The tourist perception of Bonaire quality experience

	56%	Accessibility to sites of interest
	53%	Multi-lingual skills of the local people
	51%	Social atmosphere
	50%	Friendliness of the local people
	47%	Safety and security
	45%	Drinking water quality
	40%	Cleanliness of the island
	38%	Presence of signage and directions
	37%	Clarity of road signage
	29%	Quality of infrastructure

Note: Figures represent the % that agree
Source: 2017 Tourist Exit Survey (STMP Bonaire)



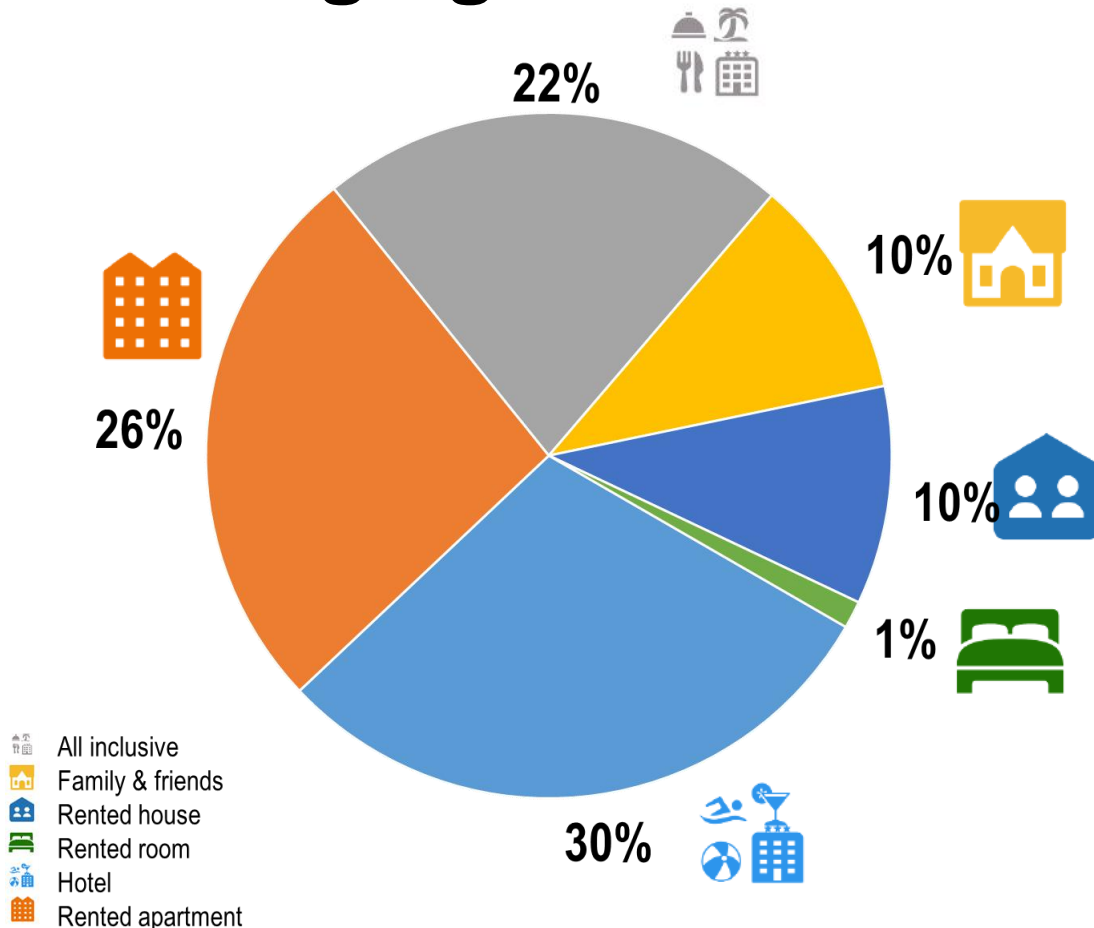
Challenges on the Horizon

The tourists who visit Bonaire primarily prefer to stay in non-hotel accommodations. The most popular of these non-hotel accommodations are staying with family and friends (12%) and in rental units (47%) (e.g. apartments and vacation homes). The higher demand for these types of accommodations has triggered an increase in their real estate development, thereby mitigating larger spillover effects to the economy. While these spillover effects are beneficial to the local economy, the hotel sector generates the largest multiplier effect when compared to all other subsectors. Yet, only 41% of Bonaire tourists stay in hotels.

The hotel sector also reveals the highest budget spending by tourists. For example, tourists staying in hotels spend nearly US\$220.00 per day per person compared to US\$191.00 for those tourists who stay in apartments, and only US\$98.00 for those tourists staying with family and friends. This tourist behavior takes its toll on the accommodation sector's performance.

The accommodation sector is underperforming and its facilities need renovation. Capital investments are needed because only 44% of respondents perceived island accommodations as attractive. Accommodation cleanliness also drew substantial criticism as only 45% of tourists reported the cleanliness as adequate. Consequently, barely half of the respondents did not report satisfaction with their accommodation, nor did they entertain a positive perception of value and quality of their accommodation.

Lodging Preferences



Source: 2017 Tourist Exit Survey (STMP Bonaire)



Challenges on the Horizon

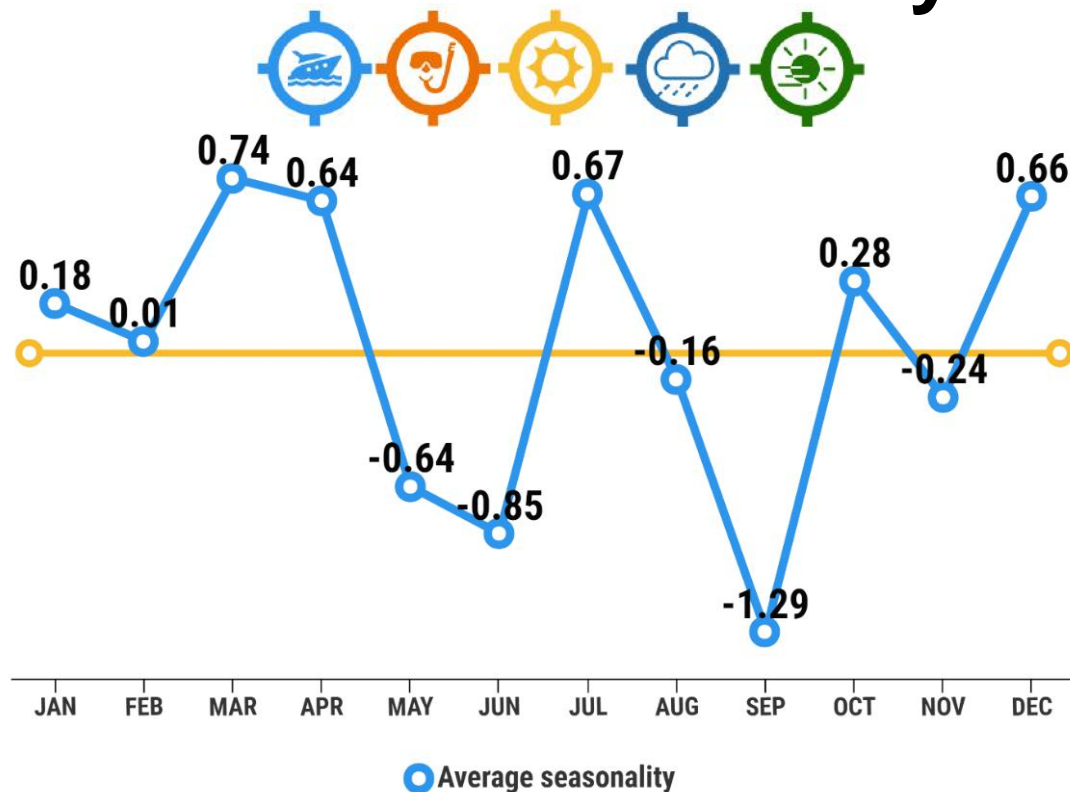
The consequence of this underperformance is that several hotels are financially suffering. That is, in addition to the aforementioned challenges another distinct issue exists. That issue is the pronounced seasonality that the destination experiences. For example, the month of September basically erases all the revenues earned in the previous months with catastrophic financial consequences for small hotels on the island.

The tourism industry is characteristically highly fragmented – requiring a communicative composition of all constituents. That is, many business entities are involved in the formulation of the tourist product and collaboration is required for success. Moreover, the hallmark of the Bonaire destination includes many small businesses. However, these small tourism suppliers are not accustomed to practicing the type of closely-knit collaboration that could contribute to success of the island's tourism industry.

Indeed, there are several organizations from the same subsectors vying for attention and promotion of their own interests without adequate consideration for the overall impact of their actions on the whole of the industry. For example, the small hotel sector's three groups seem to have a different vision about the tourism situation, how to resolve issues, and what the future of the industry should be.

Bonaire's fragmentation hampers the implementation of the two most important tasks of the TCB, namely building common objectives such as beneficial relationships under their capacity to meet the issues of the complex industry ecology, and connecting the industry with external resources and influences. The TCB lacks resources to carry out the organizational responsibilities required of a high-end destination management organization (DMO).

Tourism Seasonality



Source: Tourism Data obtained from Tourism Corporation Bonaire



Challenges on the Horizon

In addition, political instability has hindered a focused approach to tourism as a social and economic spearhead that could enhance quality of life within a sustainable setting. A weak institutional tourism framework has engendered a sector that does not comply with its obligations. For example, the weak room tax enforcement is a case in point where nearly 2/3 of room tax revenues are not collected. The suspicion is that tax dollars are being lost when hotels and home-shares skirt the mandated room tax. It is also possible that the constant change of hands from commissioner to commissioner (political instability) may result in the lack of consistent policy enforcement to collect the room tax.

Further, a culture that is grounded in decision-making based on intuition rather than being grounded in data driven information is also hampering quick and effective decisions. The lack of decision effectiveness is especially inadequate for an opportunity-poor setting such as that of a small island destination. Thus, for Bonaire, data appear as a major challenge in the destination tourism landscape.

There are issues related to the definition of a tourist, the credibility of existing data, and the data required for the private sector. To confuse the situation further is the ambivalence of the supporting role of the Dutch statistical department after the constitutional changes established as of October 10, 2010. Entry-Departure Cards (ED cards) are no longer completed, which makes reliable tourism statistics difficult to obtain.

The destination also lacks a transportation policy that clearly supports the tourism industry. Like all small island destinations, Bonaire is crucially dependent upon accessibility to the island. The increasing poor service of INSELAIR has significantly disrupted tourists' abilities to arrive to Bonaire. The uncertainty surrounding the viability of this carrier is clearly putting the destination's tourism industry at risk. Therefore, a transportation policy that is focused on route development is necessary if Bonaire is to increase its competitive position in the Caribbean. This policy could rest on a subsidy scheme that includes revenue guarantees and marketing support. The subsidy scheme will aim to increase airlift while considering tourists' spending power, brand allegiance, and source market reach in terms of capitalizing on alliances, networks, and interlines.

Chapter 9



Opportunities for Bonaire





Opportunities

Bonaire's tourism currently generates nearly US\$229 million and 1,215,953 room nights. On average, each tourist spends per day US\$184.00 and they stay an average of 8.8 nights. The hotel tourists and the rental apartment's tourists are the most important segment based on their daily spending behavior, each contributes nearly US\$220.00 and US\$191.00 respectively per day per person. This means that the visiting friends and family market segment significantly drags the spending per day down. These are commending numbers compared to other destinations in the Caribbean region.



1,215,953
(hotel room nights)



US\$229 million
(tourism receipts)



2.5 people (average
party size)



US\$184
(spending per day)

COUNTRY	NETHERLANDS			NORTH AMERICA			OTHERS		
PARTY SIZE	2.50			2.56			2.23		
LENGTH OF STAY (LOS)	10.00			8.52			11.35		
	Per Trip	Per Day	Distribution	Per Trip	Per Day	Distribution	Per Trip	Per Day	Distribution
Lodging (only room expenses) US\$	\$ 628.58	\$ 62.84	32.76%	\$ 767.21	\$ 90.02	31.65%	\$ 646.90	\$ 56.99	36.96%
Food/beverage (inside hotel) US\$	\$ 241.00	\$ 24.09	12.56%	\$ 348.03	\$ 40.83	14.36%	\$ 115.97	\$ 10.22	6.63%
Food/beverage (outside hotel) US\$	\$ 178.44	\$ 17.84	9.30%	\$ 159.13	\$ 18.67	6.56%	\$ 169.25	\$ 14.91	9.67%
Car rental US\$	\$ 136.62	\$ 13.66	7.12%	\$ 145.79	\$ 17.11	6.01%	\$ 138.05	\$ 12.16	7.89%
Gasoline US\$	\$ 26.91	\$ 2.69	1.40%	\$ 23.89	\$ 2.80	0.99%	\$ 34.01	\$ 3.00	1.94%
Taxi US\$	\$ 25.36	\$ 2.54	1.32%	\$ 35.05	\$ 4.11	1.45%	\$ 26.00	\$ 2.29	1.49%
Scuba diving US\$	\$ 151.75	\$ 15.17	7.91%	\$ 175.45	\$ 20.59	7.24%	\$ 161.70	\$ 14.25	9.24%
Local arts/cultural events US\$	\$ 53.42	\$ 5.34	2.78%	\$ 80.43	\$ 9.44	3.32%	\$ 39.52	\$ 3.48	2.26%
Shopping US\$	\$ 79.71	\$ 7.97	4.15%	\$ 112.99	\$ 13.26	4.66%	\$ 65.45	\$ 5.77	3.74%
Internet/telephone US\$	\$ 36.16	\$ 3.61	1.88%	\$ 41.70	\$ 4.89	1.72%	\$ 42.96	\$ 3.78	2.45%
Groceries/Sundries US\$	\$ 90.21	\$ 9.02	4.70%	\$ 95.06	\$ 11.15	3.92%	\$ 85.28	\$ 7.51	4.87%
Entertainment/nightlife/casino US\$	\$ 65.56	\$ 6.55	3.42%	\$ 105.56	\$ 12.39	4.35%	\$ 52.83	\$ 4.65	3.02%
Recreation US\$	\$ 88.80	\$ 8.88	4.63%	\$ 135.44	\$ 15.89	5.59%	\$ 101.21	\$ 8.92	5.78%
Other expenses US\$	\$ 116.13	\$ 11.61	6.05%	\$ 198.65	\$ 23.31	8.19%	\$ 71.33	\$ 6.28	4.07%
Total	\$1,918.64	\$ 191.80	100.00%	\$ 2,424.37	\$ 284.46	100.00%	\$ 1,750.46	\$ 154.20	100.00%

Source: 2017 Tourist Exit Survey (STMP Bonaire)



Opportunities

Tourism can empower the people of Bonaire by generating greater numbers of new opportunities. The people of Bonaire yearn for change away from their present life situation. And they believe (more than 50% of residents' respondents) that tourism holds promise for the future. They can see and feel this opportunity from the sector's employees who are overwhelmingly proud of working in the tourism industry. Indeed, 75% of those working in the tourism sector are proud employees. Tourists corroborate this feeling as 78% indicated they enjoyed hotel employees' friendliness and attitude.

Job commitment: Tourism employees

- 75%** • proud to work in tourism
- 64%** • plan to work in tourism for many years
- 53%** • see myself moving up to higher position
- 66%** • job in tourism is important
- 56%** • job in the tourism industry is respected
- 44%** • proud if my children worked in tourism

Source: 2017 Employee Survey (STMP Bonaire)

Our study supports this view that tourism on the island is a pathway towards greater QOL, life satisfaction, and happiness. Tourism activities can generate more development, and more development can lead to higher levels of life satisfaction. Bonaire's people have the affinity and the attitude to engage in higher levels of tourism. People of Bonaire are happy people (76% of respondents) and happiness is a fundamental societal metric. This means that tourism generates the material conditions (e.g. jobs, income, business opportunities, etc.) that are sufficient to propel QOL, life satisfaction, and happiness in Bonaire.

Bonaire's people also believe in their power to change and shape the future. They possess a goal oriented life perspective, and 63% are optimistic about the future. These are crucial attributes for a successful destination. The challenge will be to harness this positive outlook in an inclusive network that can unleash creative and innovative offerings and activities for tourists.



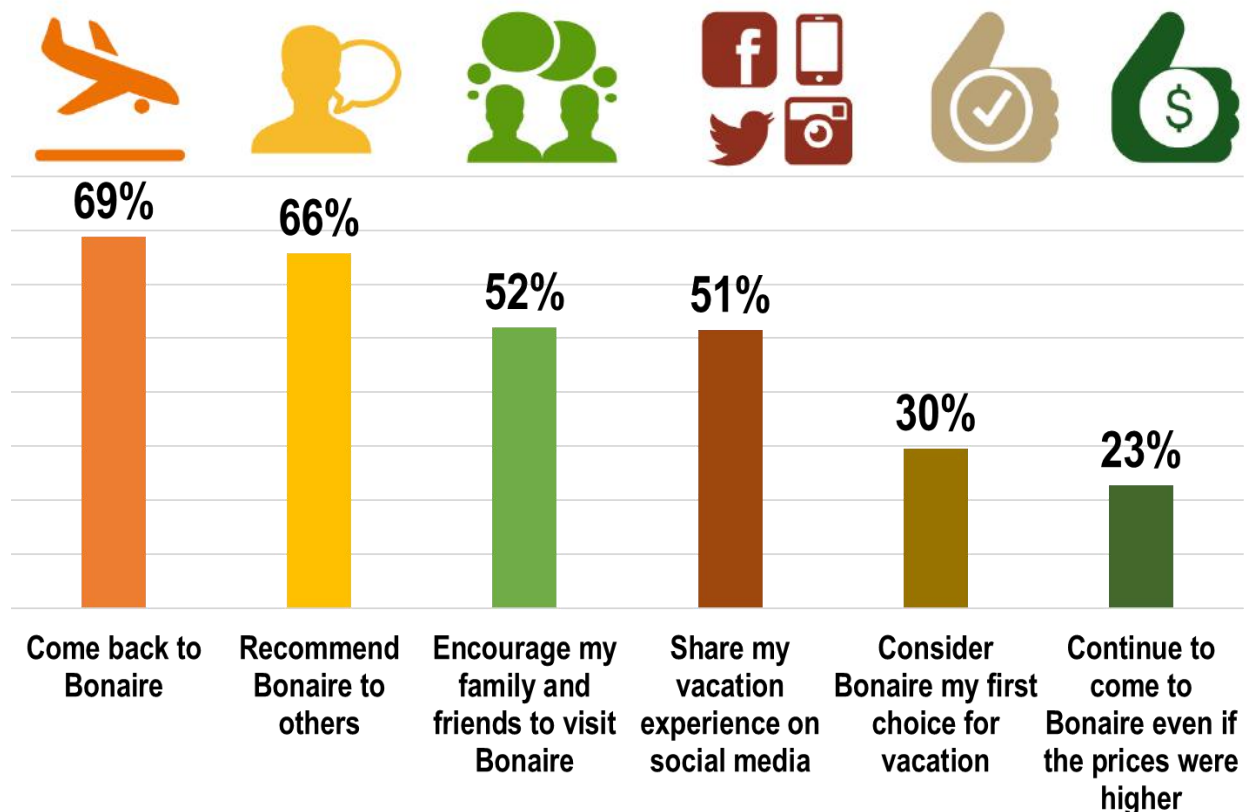
Opportunities

The destination also enjoys a good image by tourists who have not yet visited Bonaire. An image plays an important role in attracting potential tourists and in shaping the imagination of a tourist in a personal way. Image is a crucial signifier to promote a visit to a destination and to manage tourists' expectations. A positive image is key for attracting and retaining tourists, which is crucial for the economy of a small island destination such as Bonaire. A positive image also has an intrinsic value, which is the identity of Bonairians, how they see and feel about themselves, and how others see them. This image is a powerful source of pride, self-growth of a collectivity, and resiliency.

Over 63% of tourists who have visited the Caribbean region in the past five years but who have never visited Bonaire reported that Bonaire has a good image as a destination. While this good image may be a solid marketing platform to stimulate demand, Bonaire's relative image compared to its competitors may be more indicative of the destination's marketing position. This relative image is vital within the highly competitive Caribbean market.

This is a very important finding because recently the Caribbean has become the most desired foreign vacation for U.S.A residents, which surpasses Europe. Thus, if Bonaire can present a good image that is valid after tourists have visited the island, it can capture a legitimate share of Caribbean tourists.

Bonaire's strong image as the oldest marine protected area in the Caribbean and its strong tradition in nature conservation has the opportunity to harness these features in scaling up its size constraints to appeal to higher-end tourists. The destination has an exceptional opportunity to offer a unique value proposition founded on its unspoiled natural beauty. The emergence of the post-materialistic values is propelling increased demand for experiences that provide personal growth and connectedness with the environment.



Source: 2017 Tourist Exit Survey (STMP Bonaire)

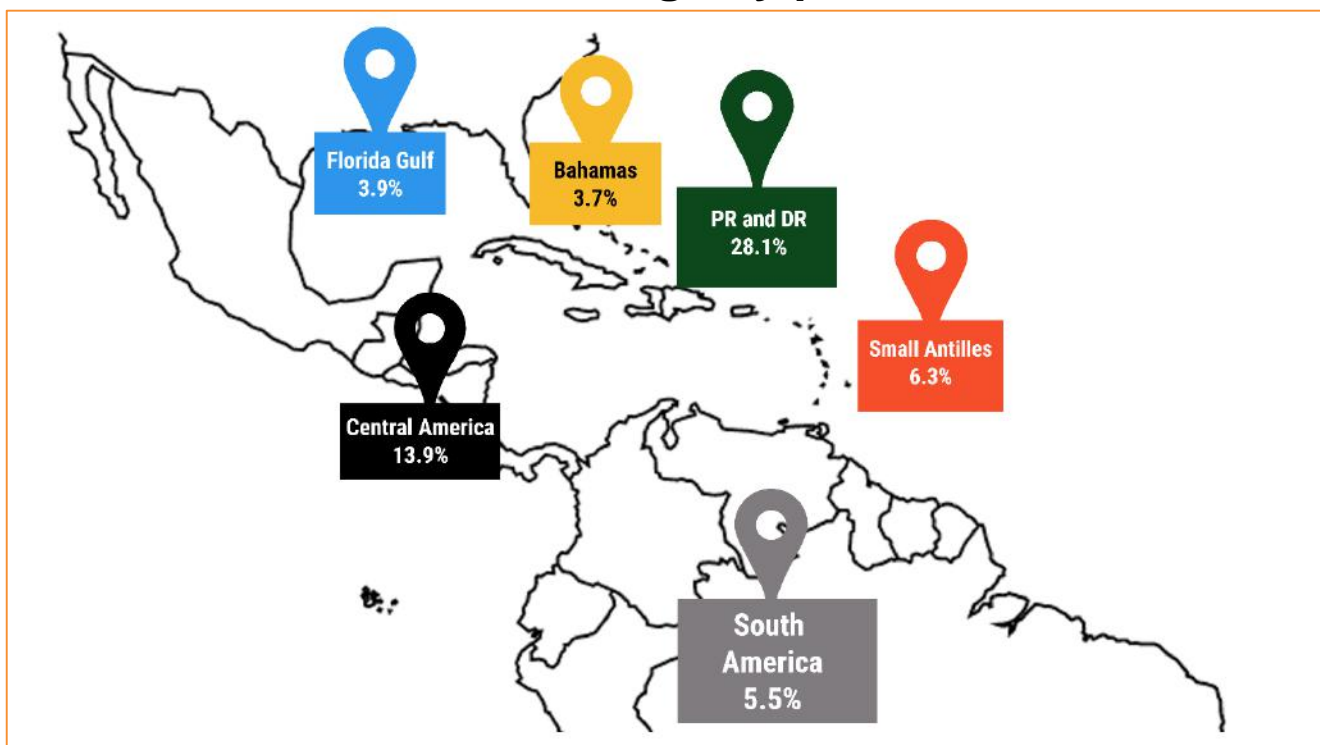


Opportunities

In addition, Bonaire's location outside of the hurricane belt reveals another unique geographic opportunity that can be seized to entice new tourist segments to visit the destination. Hurricanes can potentially scare tourists, hurt the economy, and induce physical destruction and coastal degradation. In a destination like Bonaire that depends upon its coral reefs to attract tourists, a hurricane could destroy this natural asset. Being outside of the hurricane belt offers Bonaire some important advantages. One such advantage could be for Bonaire to attract a new affluent segment that may be looking for a safe, nature oriented, and unspoiled destination.

For example, Bonaire could become a natural destination for the segment that is embedded in the general aviation industry. The general aviation industry is related to non-scheduled flight activities and is looking for destinations that are unspoiled and that enables the owners, relatives, and guests to enjoy everyday life in an inimitable culture and environment. Bonaire can leverage this activity due to its appeal as an unspoiled and novel destination. This industry has the potential to make Bonaire more accessible to higher-end tourists. The general aviation fees that these tourists will pay to land in Bonaire will also assist the airport in achieving financial stability.

Bonaire's location image by potential tourists



Source: 2017 Latent Demand Survey (STMP Bonaire)

The other high-end tourist segment consists of those tourists who are engaged with the marina and yachting industry. The latter could take advantage of Bonaire's unique geographic location, outside of the hurricane belt, that can offer a safe haven for yachting combined with yacht repair and marina services, and affordable insurance thanks to its geographic location. Location is an important predictor on how well a marina will fare in a hurricane.

Chapter 10



The Five Strategies





The Five Strategies

Tourism is an integral part of the island economic landscape representing nearly 20% of the economy and generating nearly 25% of the jobs available on the island. Tourism will continue to shape the island's blueprint for the future. The master plan is designed and structured around five strategies to achieve the previously stated four objectives. These five strategies are:



A strong and professional TCB



A strong accommodation sector performance and skilled human capital



An increased tourism demand



An increased airlift



Governing the cruise tourism flows



Strategy 1:

A strong and professional TCB

The plan suggests a new privatized TCB. The governance structure of the new privatized TCB is compelled by an inclusive philosophy that shields tourism activities from the endemic political instability on the island. Moreover, the tourism master plan recognizes that the sector's management approach that is used is no longer feasible to face the challenges ahead. It behooves the destination to engage in a more integrated approach that considers competing interest for ocean and coastal resources and space, such as tourism and the environment. The development of a governance framework based on concepts of integrated tourism and ecosystems based on integrated stakeholders' management approach is required.

The TCB should consist of a board of seven members, of which three are appointed from the public sector and three from the private sector. The six members will elect a chair. One of the three members appointed by the public sector should come from the nature groups (Stinapa or the Commission Nature Bonaire), while one member appointed by the private sector should be affiliated from a non-traditional tourism stakeholder, including telecommunication, banks, or utilities. The two other private sector members should be from the hotel sector.

The telecommunication sector earns 14 cents with each additional tourist dollar, while banks and utilities earn 3 cents each for each additional dollar. This means that these non-traditional tourist sectors are important beneficiaries of the tourism industry and it behooves them therefore to become an active member of this sector. Likewise, it behooves the existing Bonaire tourism stakeholders to introduce such non-traditional stakeholders in that these private firms are stable and may have alternative business model views that could trim the impact of high seasonality in the tourism sector.

The new TCB should also embrace a new organizational culture based on the cost-effectiveness of marketing among tourist segments and diverse types of promotion, such as media advertising, festivals, events, airline subsidies, as well as through quality assurance programs. Such marketing effectiveness is embedded in measuring tourism's ROI and marginal net contribution. ROI should not only be considered in terms of money in a program and money in return.

For example, the TCB spent on average about \$22.00 to bring a tourist to Bonaire, while the spending per day is \$184.00, which is equivalent to an impressive 1 to 83 ratio. However, the marginal net contribution is not clear when each dollar to acquire a tourist cohort is assessed.

Efficiency should be revealed in all TCB's activities and expectations. Moreover, the TCB should also embrace as a matter of organizational principle that decisions are based on business intelligence and not on intuition.

Summary of Direct Economic Impact Bonaire	
HORECA	\$159,603,323
Transport & Communication	\$30,790,206
Retail & Trade	\$38,402,695
Total	\$228,796,225

Summary of Direct and Indirect Impact Bonaire	
HORECA	\$161,588,152
Trade	\$38,402,695
Transport and communication	\$37,775,661
Manufacturing	\$8,630,693
Financial Intermediation	\$7,914,634
Electricity, gas, and water supply	\$6,555,171
Other real estate activities	\$5,122,811
Health	\$3,952,073
Construction	\$830,046
Other services	\$385,436
Agriculture, fishing, mining	\$177,768
Education	\$114,431
Public administration and defense	\$25
Total	\$271,449,596

Tourism Multipliers for Bonaire	
Output Multiplier	1.19
Demand Multiplier	1.24

NOTE: The output multiplier reflects all the linkage effects for the increase in output for each sector, while the demand multipliers measure the production and consumption linkage effects derived from exogenous changes. In other words, demand multipliers refer to the amount of purchases realized by productive activities from land, capital, and labor inputs (factor inputs) as well as the intermediate inputs (tourism consumption of businesses) from the commodity markets. The gross demand from other industries used for production of the original event-related products represents the intragroup effect, and it leads to a greater use of the factors of production, increasing the income of the institutions that own the factors concerned. These movements are the extra-group effect, since the initial change alters the accounts of the groups, except for the one that initially underwent the change.



Strategy 1:

A strong and professional TCB

Another important principle that should direct the new TCB organizational culture is that it should constantly rationalize the tourists' accessibility to Bonaire's natural assets - the core asset of the destination - with a clear focus of preventing their willful exploitation to the detriment of the people's QOL. Therefore, it should view accommodation taxation as a pricing mechanism through which it is possible to capture the economic value of these normally unpriced environmental goods. This means that the TCB should engage with marketing and visitor information that directs tourists to offerings that will entice them to spend money at the destination.

Being engaged with the tourist during their stay implies that the TCB should have an active role in shaping the quality and delivery of offerings. For example, Bonaire allocates a large portion of its area to a national park (Washington-Slagbaai). The park generates about US\$1.8 million per year from tourists' revenue. This is a low value accrued from tourism. Either tourists are not interested in the national park, or they are not aware of its existence, or the park does not provide an appealing servicescape. It is important for the TCB to identify why the earnings from this attraction are low and then find a means by which to engage the tourist with this attraction.

Tourists do not seem impressed by the attractions on the island. Only 43% of tourists perceived Bonaire's attractions as having value. This perception hinders Bonaire's ability to further expand the tourism industry and deepen the destination's value chain. While eco-tourism activities have a strong bearing on tourists' perception these activities must be deemed valuable to tourists in order to help shape their assessment of Bonaire, which in turn shapes the destination's image.



12.5% Room Tax



9.5% Room Tax



9% Room Tax



8.5% Room Tax



8% Room Tax



7.5% Room Tax

NOTE: Tourists visiting Bonaire pay \$70 in taxes (all taxes) while in Bonaire for 8.7 days. The finance department in Bonaire collected \$3 million (all tourist tax), while they should have collected \$9.1 million. This estimate is in accordance to the information shared by the Finance Department as well as our team's estimate. This represents a deficit of more than \$6 million for the island.

In this respect, the TCB should view the accommodation tax as an important vehicle to plan and manage the destination's natural resources. The accommodation tax is roughly proportional to the use of natural resources since it is related to the length of stay; and it has a discriminatory nature because the tax falls on the tourists and not on the residents. Also, a room tax grounded on a percentage system enables the TCB to closely monitor hotel productivity on the island. Room tax percentage provides insights into the RevPAR magnitude and level, and usually RevPAR is directly linked to the economic output.



Strategy 1:

A strong and professional TCB

Viewed from this perspective, the master plan suggests a change from the current flat rate system to a percentage rate system of 7% that should be collected for every room rented. This room rate is competitive when compared with hotel room taxation in the region. A room tax percentage rate system is fair to the tourists and may provide an incentive to tourists to favorably assess the accommodation's performance. In addition, the master plan strongly recommends a strict control of room tax collection of the private homes short-term rentals through the Dutch Tax Office. The room tax policy should be adjusted over time based on the industry performance.

The expected room tax collection based on the current tourism room consumption is estimated at \$9 million according to the Finance Department and our team. Arguably, this amount is premised on the fact that all short term rentals pay their dues. This amount is sufficient to market the destination more aggressively, to facilitate innovative product development, to attract more carriers to the destination, and to enhance the competitive position of the island. It is possible for the TCB to increase its funding through two channels: 1) by leveraging funds from non-traditional partners such as the utility company, telecommunications and the local banking sector; and 2) by leveraging resources from the EU by leading the blue destination movement in the Caribbean region.

In addition, the master plan also recommends to change the TCB structure from a destination marketing to a destination management organization (DMO). The shift towards a DMO changes the TCB task configuration. The TCB will engage in three distinct tasks:



The financial resources that must become available to the new TCB emerge from the room tax. The room tax should be earmarked solely to the new TCB. We understand that the Bonaire government has fewer tax sources due to the new 10/10 regime, and that it may be a challenging proposition for political Bonaire to earmark the room tax solely to support tourism. However, a stronger TCB is required to expand the tourism industry, which will result in higher economic growth rates and government revenues. The Bonairian government should secure the funds required from The Hague in order to ensure that Bonaire can improve its much needed infrastructure (hard and soft). The plan also recommends that the Dutch Tax Office, which is already collecting taxes in Bonaire, administer the room tax collection. The current tax collection situation administered by the island government cannot be sustained because it is unfair to those who pay their taxes and the situation is a drain to the island financial coffers. Policies should be adapted and adopted to facilitate and support this fiscal endeavor.



Strategy 1:

A strong and professional TCB

The new TCB should also embrace smart tourism as a business principle. The policy focuses on small volume and high yield and implies that the island of Bonaire will not promote immigration as a vehicle to propel development. Hence, Bonaire should engage in tourism activities and offerings with almost the same amount of human resource supply.

One way to accomplish the recommended tourist increase is to entice tourist arrivals with a high quality product that embraces technology. To illustrate, the new TCB could launch an APP that is user-friendly and includes a tour guide that delivers a scenic sightseeing tour across the island. Thus, the tourist has the preference and technological ability to access and experience the island on his own time and at his own pace. The use of an APP is an illustration of how technology can assist Bonaire to reduce the need to import labor with increased demand.

The TCB could also assist STINAPA or the Commission Nature Bonaire in their efforts to make the coral reefs more resilient. That is, the TCB could enforce more stringent enforcement management strategies regarding divers' behavior. As Bonaire's available diving staff seems already stretched, the use of Saildrones to facilitate enforcement is appealing. In addition Saildrones are far cheaper than manned boats. To pay for the Saildrones, STINAPA could increase its fees from \$25.00 to \$35.00. This fee is still below the consumer surplus that has been estimated by previous studies. It should be pointed out that tourists do not only consume the marine park and the natural parks. Tourists also visit Klein Bonaire and use other natural areas such as beaches. It is recommended to consider one nature fee to be paid upon arrival at the airport. The nature fee should be based on an in-depth study of tourists' willingness to pay, which was not part of this plan due to time and budgetary constraints.

SMART





Strategy 2:

Strong hotel performance & human capital

The accommodation sector is the backbone of the tourist sector. It generates the largest multiplier impact on multiple economic sectors on the island. This is because the accommodation sector possesses the highest value added component compared to the other tourism sub sectors. Unfortunately, Bonaire's accommodations, especially hotels, are under financial duress due to the volatility induced by high seasonality demand patterns and poor accessibility to the island as well as low quality hotel rooms. High seasonality prompts an oversupply of room inventory and the lack of heads on beds is detrimental to the industry and thus the people of the island.

Additionally, statistical analyses of Bonaire's primary market segments reveal that some of these segments are not consuming hotel rooms but rather apartments and rental homes. In the case of Bonaire, multiple statistical analyses were used to segment existing and potential tourists. The first set of analyses depicts the types of tourists that are currently frequenting the island (Exit Survey and ED Cards cluster analysis). The second set of statistical analyses provides insight as to the type of potential tourists that Bonaire could acquire (Latent Demand Survey, Google Analytics, Google Trends, and Text Mining Trip Advisor). The types of statistical analyses included cluster analyses complemented with big data analysis, text mining, and decision trees.

The statistical assessments that were performed reveal that there are three primary clusters (market segments) that Bonaire should target. All three of these segments would find the proposed slogan and tagline appealing. All three of the segments may participate in scuba diving as an activity while in Bonaire but they do have other distinguishing traits. The segments are referred to as: the Dutch Tourist, the American SSSSS Tourist, and the Business and Pleasure Tourist. The distinguishing market characteristics are listed below. The suggested market segments are intended to shape tourist profiles. The data that was used to compile the information is aggregated. This means that individual profiles for individual businesses can not be determined.

It is important to assess and closely monitor these three segments in relation to the rapidly changing market environment. This environment is characterized by the emergence of the millennial segment as the most prominent segment with its own tastes and preferences.

Dutch Lifestyle Tourist



- Geographic region Randstad
- Middle aged and married
- Income is USD\$75,000 and up
- Participate in a balance between water and land activities
- Prefer small scale destinations
- Like unique and simple experiences
- Like cultural experiences
- Appreciate environment
- 50% stay in hotels
- 50% stay in apartments/houses
- Combination of 1st time and repeat tourists

American SSSSS Tourist



- Geographic regions: Tri-state area, Great Lakes area, and Florida
- Middle aged and married
- Income is USD\$75,000 and up
- Water enthusiasts
- Advanced sun, sand, and sea tourists to include scuba diving and snorkeling (SSSSS)
- Appreciate environment
- High tourism product consumption
- Like convenient access to the sea
- Prefer convenience
- Nearly 100% stay in hotels
- Combination of 1st time and repeat tourists

Business & Pleasure Tourist



- Geographic region: Caribbean
- Middle aged and married
- Income is USD\$50,000 and up
- Prefer land activities
- Like adventure and fun activities
- Family travels with them
- 90% stay in hotels
- Combination of 1st time and repeat tourists

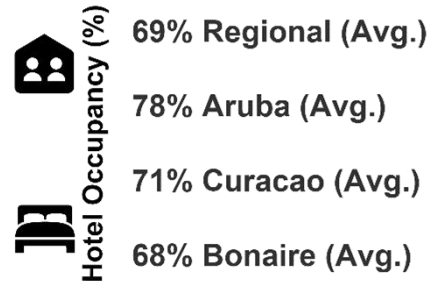
Source: 2017 Tourist Exit Survey (STMP Bonaire)

These tastes and preferences resonate with experience, seamless technology, well-being, and the local culture and traditions including: cuisine, social interactions, and even arts and crafts. Also social media word of mouth is a powerful weapon that needs close attention.



Strategy 2: *Strong hotel performance & human capital*

Tourist accessibility to the island impacts accommodation prices and inventory. It does not make sense to build hotels if the primary demand for those hotel rooms only exists during peak seasons. However, it is recognized in the Caribbean that price pressures induced by inaccessibility can be mitigated when a hotel has a well-established reputation of positive user ratings on popular travel web sites or is affiliated with a chain.



Currently, the Bonaire hotel sector enjoys an occupancy rate of 68%. Unlike manufacturing industries, which offset labor with large capital investments, hotels are both capital- and labor-intensive. The result is high fixed costs of operation that must be paid whether or not the hotel has business.

Thus, a high percentage of occupancy is needed just to break even. The breakeven benchmark in the Caribbean is 65%, which leaves the island hotel sector barely surviving in the high seasonality circumstance that is so pervasive in Bonaire. An occupancy rate objective based on 80% would require an additional 40,000 arrivals at the demand level. Only 41% of tourists visiting the destination stay in hotels, while 12% stay with friends or family. Those tourists staying with friends and family spend much less (US\$98.00) per day when compared to those staying in hotels (US\$220.00).

The required demand growth for Bonaire is 60,000 additional tourists over 10 years. In order to accommodate this demand the destination will need about 600 additional new rooms. The plan assumes that the current inventory, provided that it is updated and upgraded, can accommodate about 40,000 of those new arrivals based on an 80% occupancy rate. The plan advocates to allow for these new rooms to be only four star rooms according to international standards. The plan favors the construction of small boutique type hotels appropriate to the destination's needs and the population's desire of measured growth. These hotels should comprise between 60 to 100 rooms. The justification for this approach is that such new inventory would require less capital and would also facilitate labor supply management.

The construction of these 600 new rooms would require some \$150 million. The total capital requirements are based on Aruba's cost figures of \$350K cost per room and a cost per m2 GFA of \$3.4K for a four star turnkey room. The assumption is that the small hotel size would include fewer amenities compared to Aruba such as a casino, and would cost about 30% less (2.4K per m2 GFA).

The addition of 600 four star rooms, if accomplished, would bring the destination to its 30% benchmark. This benchmark defines the island as a high end destination. This inventory mix will also give the destination a solid foundation to attract a diversified marketing mix of arrivals. Finally, the expected direct and indirect jobs created by the 600 new hotel rooms would amount to 2400 new jobs: one per room, one in another tourist activity, and two in the private and public sectors.

The Dutch European market is the largest market consuming Bonaire as a tourist destination. The proportion of the Dutch European market segment covers 33% of the total tourist population. Fewer than five out of ten Dutch visitors stay in hotels, while 37% and 18% stay in apartments or with friends and family respectively. This behavior is very different than the American tourists who visit Bonaire. Nearly 66% of American tourists stay in hotels, while only 28% and 6% respectively stay in apartments or with friends and family. Both markets indicate that they are currently not satisfied with the hotel value, cleanliness, and quality.

Hotels are the economic engines for most small island destinations. Due to Americans tendency to stay in hotels this makes this segment a profitable tourist market to attain. However, in order to increase the American tourist market share it is necessary for Bonaire to increase the aesthetic appearance and service quality within the hotel sector. This is because most Americans expect an international hotel room quality level that many Bonaire hotel rooms do not meet.



Strategy 2: *Strong hotel performance & human capital*

Therefore, it is imperative that the government provides an incentive framework that promotes facility and service improvements in the hotel sector. There are examples in the region that the local government can emulate and contextualize (e.g. Aruba, Barbados, St. Lucia). In addition, the room tax ordinance should be adjusted to include the 7% room tax and should clarify the present ambiguity in the ordinance of what exactly is considered an accommodation unit (hotels, apartments, houses, room rentals, etc.). The ordinance should specify that all short-term rentals must have a license.



Human capital represents the present value of your future wages. It is the knowledge, collective skills, and intangible assets of the individuals that work in a specific sector that can be utilized to create economic value for the individuals, their community, and their employees. It is important to analyze the human capital in Bonaire and determine the skills, competencies, and abilities shortages. Although this study provided a preliminary understanding of the human capital of hotel employees a deeper investigation is required and is strongly recommended. Unfortunately, due to budgetary and time constraints such an investigation could not be executed with this study.

Extensive qualitative interviews with tourism stakeholders reveal that there is a lack of certain skills, competencies and abilities on the island that would be necessary to propel the industry forward. Qualified human capital is scarce in the destination making it difficult to increase labor productivity affecting economic growth. This is because the current training institutions are not meeting the needs of the industry. Industry managers indicated that the skill training that is taking place is not producing employees that are focused on quality service and managerial standards.

It is imperative that the destination enhances its human capital. The service delivery for all tourism products should be laced with creativity and prowess in order to make the destination product offerings more competitive. The focus on human capital should also undergird the image of Bonaire as a blue destination. The destination should, for example, create a new generation of local professional divers interfacing between business and research as well as business diversification in diving.

Therefore, certain employment positions cannot be filled. This leaves tourism firms with managerial gaps in the service delivery of tourism related products. A human capital strategy can be developed that aligns with the vision, mission, and goals and objectives of Bonaire. The accommodation establishment owners have indicated that a hospitality school can be sustainable in Bonaire.

Providing a curriculum and training that aligns with market needs is crucial if Bonaire is to be capable of designing new quality products. Quality tourism products are necessary if Bonaire is to increase its competitive position in the Caribbean. Additionally, if Bonaire is to increase its tourist arrivals the destination will require quality level tourism products that would increase the positive electronic word of mouth (eWOM) recommendations that are necessary to expand market reach. Currently, the accommodations sector is below the international standards of a quality product. It will be necessary for this sector to improve both the tangible parts of the product as well as the service delivery.

The inclusion of the local population is a must in order to ensure that the local flare is embedded in the product. An inclusive system requires the sharing of individual ideas in a systematic and organized way that results in the most innovative ideas that could support, update, and uplift the tourism industry. For ideas to be generated in this way incentives will be required. The way to organize these incentives is through an awards system.



Strategy 3: ***An increased tourism demand***

This plan aims to increase tourist arrivals by 60,000 arrivals from its baseline of 140,000 arrivals to 200,000 arrivals within the next nine years. This growth entails a 5% increase per year on average. This suggested growth figure is feasible based on the growth experience of the past five years. This increased demand is based on a smart segmentation strategy that will primarily generated from the Dutch, the North American market, including USA and Canada, and regional markets. Secondary markets in Europe, including Germany and Belgium, and Latin America, including Colombia and Brazil, could be eventually pursued strictly based on ROI considerations. Any collaboration with tour operators and/or carriers should be directed by these ROI considerations and by a marketing mix that supports the high end destination concept that is undergirded by at least 30% four star hotels.

This increased demand responds to the needs of the industry, the capitalization of the infrastructure (airport and harbor), and the need to improve the QOL of Bonairians. It is based on the stated preference of the local residents for measured growth. The report considers QOL as an important departure point in determining the necessary amount of additional arrivals that Bonaire will need to attract in order to improve the QOL of its residents.

Quality of life is underpinned in its material dimension as revealed in the quality of life survey. The measurement used is the subsistence level as estimated by the Dutch NIBUD¹². Based on the subsistence level of US\$1462.00 (adjusted with an annual inflation of 2%), the destination would need to attract nearly 30,000 in the first four years. For a female with a subsistence level of US\$1475.00, the destination would need to attract nearly 34,000 tourists already in the first year. However, from year five to nine there is no further need to consider these two groups since the projected 5% growth would compensate for the subsistence level. In the case of a couple with a child (based on an adjusted US\$2,295.00), the amount of tourists required is much larger, exceeding the 700,000 arrivals.

The 5% growth figure does not consider the amount of dives that may jeopardize the ecosystem. It is very difficult to come up with a final number that would have a negative impact on the coral reefs. For example, the DPITS team was informed that in spite of the growing amount of yearly dives, Bonaire's coral reefs have shown incredible resilience. Yet, biologists have informed the DPITS team that all coral reefs possess a carrying capacity. That is, coral reefs cannot sustain unlimited dives. The carrying capacity indicates the number of dives that the reef can support before damage occurs.

Unfortunately, measuring a coral reef's carrying capacity becomes a difficult task as many variables come into play (e.g. amounts of anchor damage, pollutants entering the water, sea surface temperatures, disease outbreaks, etc.) However, one thing that is known is that the stressors that cause detriment harm have multiplicative effects, and corals express stress responses on an order of magnitude scale. For example, in the case of coral, instead of a stressor causing damage with $2+3 = 5$, a stressor will cause damage with $10^5 = 100,000$. Thus, even a seemingly little thing like a lot of divers in the water will eventually have negative impacts. This might explain why coral reefs have experienced a major decline on a worldwide scale.



Strategy 3:

An increased tourism demand

The effort to protect Bonaire's coral reefs will require the destination managers to become clever in their efforts so as not to detour diver tourists to competing islands. For example, the DPITS suggests banning the use of sunscreens that contain oxybenzone and octinoxate. These chemicals are severely toxic to baby corals. Just one teaspoon of oxybenzone will make six Olympic size swimming pools toxic for corals. If Bonaire is to experience the economic benefits of the suggested growth rates in tourist arrivals it is important for Bonaire to develop sanctions to protect its number one tourism attraction – the coral reefs.

If Bonaire were to ban such toxic sunscreens it would be the first destination to accomplish such a feat in its effort to preserve the coral reefs. This effort would receive worldwide recognition that would assist in promoting the island to potential tourists. Another strategy that Bonaire may adopt to preserve its environment is the banning of plastic bags, which have a negative impact on the environment in terms of production energy costs, limited lifespan, improper disposal, etc. Finally, the destination should take a blue carbon initiative as the first destination in the region to support its harmony vision. Similar to the banning of sunscreens this effort would reap positive PR and promotions for Bonaire on an international market platform.

In order for Bonaire destination managers to launch clever tactics to promote sustainable development it will be necessary to have a combination of consumer and public policy to initiate the appropriate legislative activity to support such efforts. If the appropriate legislative actions and policy development can be put in place it is likely that Bonaire will draw more environmentally friendly tourists.

Finally, currently the airport is not self-sufficient. In order to break-even the airport is in need of 60,000 additional arrivals. Based on the measured growth objective as the main development preference of Bonairians, the master plan suggests taking the 60,000 additional arrivals as a necessary goal for Bonaire to achieve. This arrival goal covers the individual quality of life requirement (30,000 arrivals) as well as the strong hotel performance objective based on 40,000 arrivals. The attraction of these additional 60,000 new arrivals should support the objective of converting Bonaire in a high-end destination, which means that at least 20,000 arrivals should stay at four star hotels on the island. These four star hotels should include at least 600 new hotel rooms.



Strategy 3: *An increased tourism demand*

In 2018, the 5% growth could spur an income of US\$240 million based on the spending per day of US\$188 and 147,000 arrivals. This amount would increase to US\$393 million based on a spending per day of US\$208 by 2027 with 218,000 arrivals. Based on the projections and working assumptions, tourism five years from now (by 2021) could reveal 45% of the island's GDP.

The marketing strategy should be centered on attracting segments with the highest probability to visit the island combined with the highest yield. Primary markets include the Netherlands. In case of this country, this strategy means a focused approach on a specific geographical areas that have demonstrated a high interest in Bonaire, which includes the Randstad and adjacent regions and those affluent segments in this geographical area. Similarly, the master plan suggests focusing on specific states in the USA including Florida, the Tri-State area, and the Great Lakes area. The market segments that would be acquired would include: the Dutch Lifestyle Tourist, the American SSSSS Tourist, and the Business and Pleasure Tourist. Please see the below diagram for market characteristics of each segment. Secondary markets in Europe (Germany and Belgium) and Latin America (Colombia and Brazil), could eventually be pursued strictly based on ROI considerations. Any collaboration with tour operators and/or carriers should be directed by these ROI considerations and by a marketing mix that supports the high end destination concept that is undergirded by at least 30% four star hotels.

When designing advertisements and promotions to attract the suggested markets it is important for Bonaire to acknowledge the booking behaviors of both the Dutch and American tourists that frequent Bonaire. One third of the American market demonstrates a booking window trend of three to six months. This means that Bonaire will need to plan and design marketing efforts that reach the American market at least 6 months in advance. The Dutch market exhibits a much quicker booking window. Forty one percent of the Dutch market demonstrate a booking window of one to three months. This means that Bonaire will have the opportunity to promote and convert this market to actual arrivals during forecasted low periods. The complimentary nature of the long range booking window (USA) and the short range booking window (Dutch) markets will assist in alleviating seasonality. (Booking behaviors were determined from the exit survey data that was collected.)

In addition, the master plan also suggests focusing on the cruise segment as a low hanging fruit and complementary segment. The segment is not to be considered a competing market to that of stayover tourists. The cruise segment reveals that nearly 55% of cruise visitors would like to visit the destination as a stayover tourist.

Dutch Lifestyle Tourist



American SSSSS Tourist



Business & Pleasure Tourist



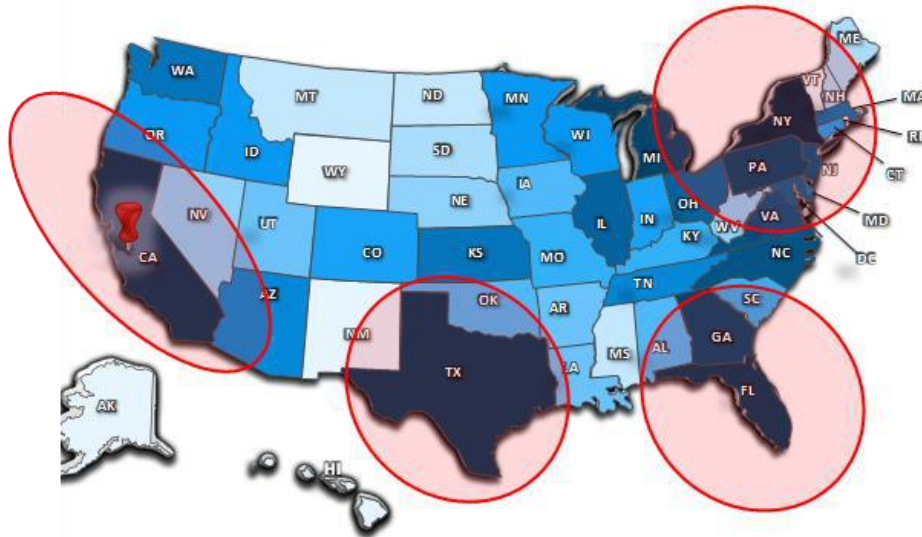


Strategy 4: *An increased airlift*

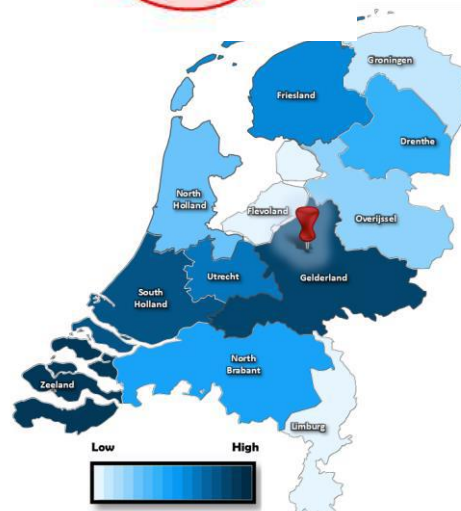
The island has suffered from limited airlift. Limited airlift means steep costs in money and time to get to the island. For example, a trip from Chicago to Bonaire in August 2017 costs nearly US\$2,000.00, and it takes almost 16 hours to get to the island; a trip from Boston during the same time costs nearly US\$1,900.00 and it takes more than 19 hours to get to the island, while a trip from Los Angeles costs over \$2,000.00 and it takes over 20 hours to get to Bonaire. Tickets from neighboring islands are also steep and flights are unreliable.

The master plan suggests increased airlift from three regions, which are the most important arrival sources for the destination. These three regions are the Netherlands, the islands from the Dutch Caribbean (Aruba, Curacao, and St. Maarten), and the United States and Canada. The Dutch tourist spends US\$1,387.00 when staying at a hotel for nearly eight nights, while spending US\$1,597.00 when staying in apartments for nearly 10 days, or US\$1,811.00 in vacation homes during 13.5 nights, and US\$910.00 when staying in with family or friends during 10.6 nights.

The American tourist spends respectively US\$1,769.00 when staying in a hotel for 7.6 nights, US\$2,448 in apartments for nine nights, US\$2,013 for vacation homes for 9 nights, and US\$963 when staying with family or friends for 8.5 nights. While the Caribbean tourist spends US\$1,737.00 when staying in a hotel for six nights, US\$507 in apartments for 3.8 nights, and US\$728 when staying with family or friends for 5.5 nights.



In the case of the Netherlands, the master plan suggests for Bonaire to focus on the following priority regions: Randstad and adjacent regions and those affluent segments in this geographical area. Three points in the USA are of special interest: Florida (Miami, or Fort Lauderdale, or Orlando with American Airlines from Miami, or JetBlue from Fort Lauderdale, or Southwest from Orlando); Charlotte or Raleigh with American Airlines; and the Great Lakes from Chicago with United or Delta. With the increased financial resources, the master plan suggests to begin with Florida as a first hub to Bonaire.





Increased airlift from Europe can also stem from a dual destination program with Aruba and Curacao. Seat capacity from Europe can be increased by working with Aruba on a dual destination program to further penetrate the Dutch market and tap new markets from Germany and Belgium. Ideally, the estimated amount of seats needed to comply with the projected demand would have been provided. However, due to the lack of data available in Bonaire these estimates could not be provided. Further study on this important matter is recommended.





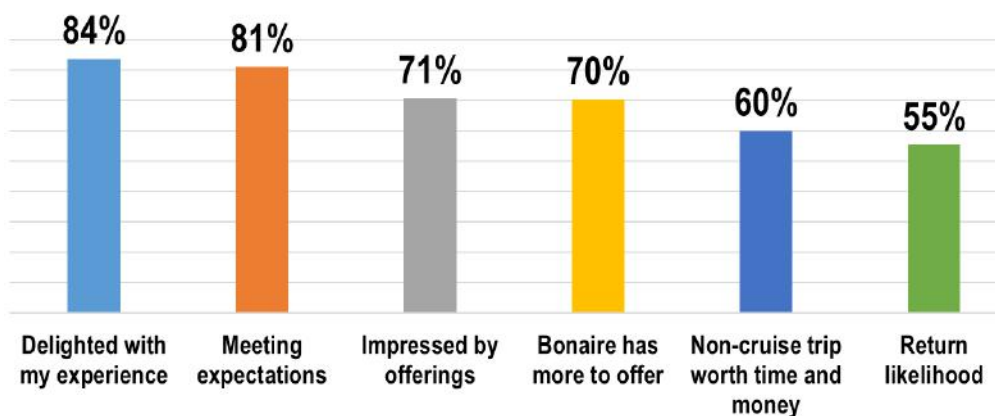
Strategy 5: *Governing the cruise tourism flows*

Cruise tourism has become an important economic vehicle for the island. Bonaire has witnessed a steady increase in cruise passengers and cruise ships in recent years. According to official data, Bonaire received 217,000 cruise visitors in 2016, which was a 6% decrease compared to 2015. The decline is attributed to cancellation of some cruise visits and hurricane Matthew. Recent data indicate that cruise passengers will hover around 200,000 per year, harboring between 160 and 180 ships per year. This increase is a remarkable accomplishment because Bonaire lies much further to the south and away from the cruise itineraries to have an appeal on its own. Bonaire's appeal for cruise business is mainly due to the popularity of Aruba and Curacao as cruise destinations, and the ongoing political upheaval in Venezuela.

The cruise industry is interlocked with many players and stakeholders on the island effectually driving many local businesses. According to the 2015 Business Research and Economic Advisors (BREA) report, the cruise business generates \$3.2 million. Each cruise passenger spent on average \$54.22. Our study confirms these numbers, even though the spending per person inferred from our survey indicates a slightly lower number of \$42.00. The reason for this discrepancy may be the result of the time of the year that our survey was administered (April-May). Nevertheless, the spending per day in Bonaire is one of the lowest in the Caribbean region. For example, in Aruba cruise passengers spent \$112.10, in Curacao, they spent per person \$77.55 and in St. Maarten, \$191.26.

The cruise spending per person when in Bonaire does not mesh with their stated experience. Over 70% of respondents to our survey were impressed by Bonaire's environment and water activities. For example, 88% had a very positive impression of Bonaire's pristine natural environment, and 84% were delighted with their experience while on the island. More than eight out of ten respondents reported that the destination met their expectation and 82% were wowed by the friendliness of residents. More than half, 55%, expressed their intention to return to the island. It does not appear that the stay-over and cruise visitors are mutually exclusive in terms of their experiences at the island destination.

Cruise Overall Experience: Bonaire



Note: Figures represent the % that agree
Source: 2017 Cruise Survey (STMP Bonaire)

However, it is clear that the destination does not have the harbor facilities or the infrastructure to host a substantial amount of cruise visitors at the same time. For example, when on shore, a large amount of visitors frequent Klein Bonaire, which lacks the necessary facilities and infrastructure to host these visitors. These visitors could have a negative impact on the fragile ecosystem of the islet and therefore could become a hazard to the pristine environmental landscape. Several studies have alluded to the threat that cruise visitors can pose to Bonaire's ecosystem.¹³



Strategy 5:

Governing the cruise tourism flows

The tourism master plan assumes that managing cruise growth while maintaining the viability of natural ecosystems is possible. The plan recommends to enhance the enforcement authority of the harbor master and to structure the information flow through the harbor master. Currently, the harbor master lacks the governance rules in order to streamline information which would allow the harbor master to more effectively manage the cruise movements towards the destination. Currently, all the information goes first to the shipping agencies, which do not always provide timely information to the harbor. Arguably, this system does not facilitate a governance structure that could manage the visitors' flow in a more pro-active way. The plan recommends to improve the capability and information position of the harbor master regarding the cruise industry.

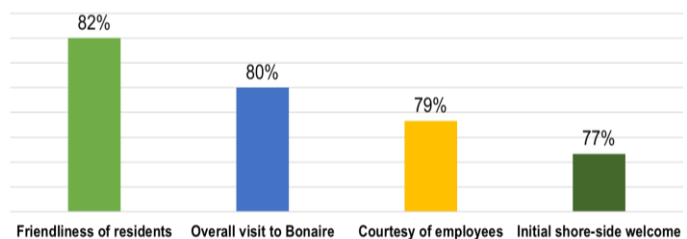
Applying price strategies and controlling the amount of visitors allowed to visit Klein Bonaire makes it possible to mitigate potential eco stressors. Head tax can be increased as well as applied to Klein Bonaire and diving opportunities. The master plan recommends to increase the head tax to US\$5.00 and to introduce a progressive head tax, a reverse system as applied in Aruba. In other words, when the amount of cruise passenger exceeds 250,000 to levy a higher head tax in the order of US\$10.00; when exceeding 300,000 to levy a head tax of US\$20.00, etc.

In addition, cruise visitors can be incentivized to engage with more land activities than what is currently accessed. For example, only 30% of cruise visitors engage in land activities. The destination needs to invest in generating more land offerings, such as tours to Salt Pans (Cargil) and the natural areas managed by STINAPA. The destination should also create more beach sites for cruise visitors.

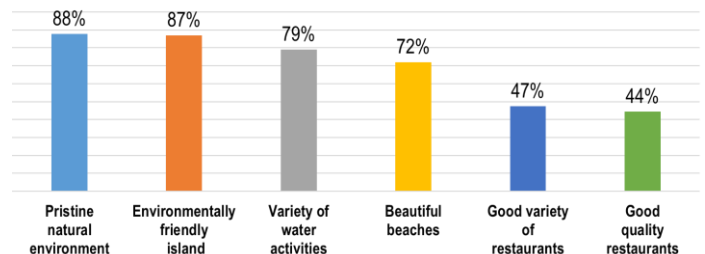
Similarly, the amount of dives spawned by cruise visitors can be controlled to a maximum allowable number during a visit. Governing the cruise tourism flows is crucial to alleviate potential eco damage. This is possible as witnessed in other destinations.

The cruise segment is a potential significant source market for the destination. Nearly 55% of cruise visitors indicated that they would like to return to the island based on their positive experience during their short stay. This likelihood percentage to return is consistent to what was found in Aruba and Curacao. Cruise passengers to the Caribbean is expected to increase to 24 million by 2019, and industry research (FCCA) suggests that 80% of cruisers say that cruising allow them to sample destinations they would like to visit again. The plan recommends Bonaire to develop programs that actively try to convert cruise visitors to become stay-over tourists at the destination.

The cruise experience



Note: Figures represent the % that agree
Source: 2017 Cruise Survey (STMP Bonaire)



Note: Figures represent the % that agree
Source: 2017 Cruise Survey (STMP Bonaire)

Chapter 11















Actions





Action Plan (2017-2027)

LEGEND:

-  **Conceive a new Integrated Tourism Management Approach**
-  **Elevate Competitiveness Position in the Caribbean**
-  **Destination Product**
-  **Residents QOL**
-  **Enhanced Tourist Experience**
-  **Strategic Image**
-  **Governance Structure**
-  **Hotel Performance**
-  **Product Development**
-  **Increase Airlift**
-  **Governing Cruise Flow**
-  **Increased Arrivals**

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
Lack of direction	Approve Tourism Master Plan	Approval from: TCB Board, The Commissioner of Tourism & Parliament	Increase organizational credibility	TCB	TCB: initiate approval process	TCB, Board, Commissioner of Tourism, & Parliament	2017-2018:Q4, Q1
Lack of TCB effectiveness in directing quality & spending	Convert TCB to a destination management organization	Go to Parliament with revised TCB bylaws	More revenues	TCB	TCB: revise bylaws with Board & Parliament	TCB & Parliament	2018:Q1,Q2
Lack of indicators to track & measure progress	The use of data & technology to underpin reform & shape management decisions	New policy directives & strong leadership to support evidence-based decisions	Increase organizational credibility	TCB	TCB & stakeholders	TCB & Commissioner of Tourism	2018:Q2,Q3
Lack of cost-effectiveness culture	Develop cost-effective marketing assessment	New indicators that reveal ROI & marginal net contribution	Increase organizational credibility	TCB	TCB & TCB Board	TCB & Commissioner of Tourism	2018:Q3
Fragmented sector	Update bylaws to include private sector	Go to Parliament with revised TCB bylaws	Ensure capacity building	TCB	TCB: revise bylaws together with stakeholders	TCB, stakeholders & Parliament	2018:Q1,Q2



Legend:

STMP Goals








Strategic Objectives



Development Strategies



TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
 Lack of coordination between sectors	Allocate (1) board member seat to non-traditional tourism partner (e.g.: banks, utilities, or telecommunications)	Go to Parliament with revised TCB bylaws	New perspectives and resources to support tourism development and communication between sectors	TCB	TCB: revise the bylaws, establish committee, and assemble qualified applicants	Commissioner of Tourism, Hotels, Utilities, Chamber of Commerce, Airport, Harbor Master	2018:Q3
 Limited representation from the conservation organizations within the TCB	Allocate a board member seat to a science based expert on natural conservation & protection	Go to Parliament with revised TCB bylaws	Shared vision on development & conservation/protection	TCB	TCB: revise the bylaws, establish committee, and assemble qualified applicants	Industry stakeholders & environmental organization	2018:Q3
 Lack of financial resources to support TCB tasks	Change room tax system to a percentage system & charge 7% room tax	Go to Parliament with revised TCB bylaws	Increase TCB revenues	TCB	TCB: revise current law	TCB & Commissioner of Tourism	2019:Q1,Q2
 Lack of financial resources to make natural attractions more attractive	Increase Stinapa fees to US\$35	Approach STINAPA	Shared vision on development & conservation/protection	TCB & STINAPA	TCB: increase coral reefs & Klein Bonaire resiliency (conservation & facilities)	TCB, STINAPA, & Commissie Natuur Bonaire	2019:Q2,Q3,Q4
 Lack of data	Reintroduce ED cards	Approach Dutch Economic Affairs	Improve decision-making	TCB	TCB: agreement with Dutch Immigration to collect ED cards	TCB & all stakeholders	2018:Q3

Legend:

STMP Goals

-  Conceive a new Integrated Tourism Management Approach
-  Elevate Competitiveness
-  Position in the Caribbean
















Strategic Objectives

-  Destination Product
-  Residents QOL
-  Enhanced Tourist Experience
-  Strategic Image

Development Strategies
















-  Governance Structure
-  Hotel Performance
-  Product Development
-  Increase Airlift
-  Governing Cruise Flow
-  Increased Arrivals

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
  	Create a BLUE program that supports research coastal area	Approach Dutch Economic Affairs & EU to set up a regional BLUE with sufficient funds	Shared vision on development & conservation protection & Bonaire as a regional leader for coastal conservation	TCB, Commissioner of Tourism	TCB: contact the Dutch Ministry and prepare a plan to talk to Brussels	TCB & Dutch Ministry	2018:Q2,Q3,Q4
  	Promote backward linkages to other economic sectors	Approach other sectors such as agriculture & banking	Increase economic added value	TCB	TCB: contact the sectors to discuss the needs & linkage indicators	TCB, Commissioner of Tourism & other economic sectors	2018:Q2,Q3,Q4
  	Promote more independent travelers who do not use packages	Strong marketing efforts to attract these tourists	More spending	TCB	TCB: partner with hotel sector to establish measurable indicator	TCB & hotel sector	2018:Q2,Q3,Q4
  	Provide opportunities for tourists to purchase food & beverages as well as other items	Set up high-end concession stands	Increase revenue from natural attractions	TCB	TCB: develop high-end standards for service & products	TCB, STINAPA, & Commissie Natuur Bonaire	2019: Q1
  	Publicize all available tourism job opportunities on TCB website	Create a web page on TCB's website where all tourism businesses can post job opportunities	Increase employment awareness & provide access to employment opportunities	TCB	TCB: create, inform, and monitor employment website	TCB & Labor Department	2019:Q3






Legend:	STMP Goals	Strategic Objectives	Development Strategies
	  	   	     

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
   Migration of natural born Bonaireans that seek opportunities	Coordinate with the public school system to bring awareness of civic responsibility to build Bonaire	Tap into curriculum requirements & standards to create or increase civic content & lessons	Build citizen commitment to the welfare of Bonaire & increase desire to remain in Bonaire	Parliament (Educational Secretary)	TCB: provide advice for developing content & lessons	TCB, Education Department & private sector	2018:Q4
   Lack of employment opportunities	Coordinate with public school system to identify student interest areas & skill levels	Administer credible tests/assignments to students	Increase the ability to harness a future workforce that is highly committed to the welfare of the industry & Bonaire	Parliament (Educational Secretary)	TCB: provide feedback for developing content & lessons	TCB, Education Department & private sector	2018:Q3,Q4
   Residents' low life perception & satisfaction	Sustain optimism regarding tourism's potential to positively impact community & residential life	Use public media & social media to engage residents of ongoing events	Ongoing sustainability & growth of tourism's potential to benefit residents	TCB	TCB coordination with partners	Media partners	2018:Q2,Q3,Q4
   Distribution of tourism's economic benefits	Practice a collaborative economy	Change the TCB bylaws to include tourism private sector, environment, & non traditional stakeholders	Increase trust among stakeholders & acquisition of more resources	Parliament	TCB should coordinate with partners	TCB & Commissioner of Tourism	2018-2017:Q1
   Under price valuation for existing natural resource use	Assign increased costs to accessing Bonaire's most valuable natural assets	Revise the existing license for scuba diving by increasing cost & limiting the amount of dives	Increase revenue generated from natural asset, as well as provide locals with a sense of ownership & pride of those assets	TCB	TCB should partner with STINAPA & diving companies	TCB, STINAPA, Commissie Natuur Bonaire, & diving organization	2019: Q3-Q4

Legend:	STMP Goals	Strategic Objectives	Development Strategies
	 Conceive a new Integrated Tourism Management Approach  Elevate Competitiveness  Position in the Caribbean	 Destination Product  Residents QOL  Enhanced Tourist Experience  Strategic Image	 Governance Structure  Hotel Performance  Product Development  Increase Airlift  Governing Cruise Flow  Increased Arrivals

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
 Residents' concerns for compatibility between tourism growth with environmental sustainability	Keep the public informed	Publicize via social media the value of tourism growth & its impacts	Supportive, committed, enthusiastic, & hopeful public	TCB	TCB should have a PR campaign	TCB	2018-2017:Q1
 Fragmented vision of tourism in Bonaire	Common vision of Bonaire's tourism & resident welfare that includes all stakeholders	Hold ongoing town hall meetings & press conferences & survey residents about projects & activities	Concerted inclusive vision that is goal orientated & accounts for the welfare of all residents	TCB	TCB: prepare materials to share with population at large (website, social media, press release)	TCB	2018-2017:Q1
 How to synergize tourism & nature	Transform nature into a profitable tourism product	Establish a market value/price for each individual natural resource	Increase tourism receipts	TCB	TCB: initiate conversation with nature partners	Environmental organizations & their representatives	2018:Q2,Q3,Q4
 Identification of tourism management's pitfalls, challenges, & successes	Determine the pitfalls, challenges, & successes by way of a sustainable lens	Collaborate with relevant stakeholders & survey tourists on a quarterly basis	Increase positive tourist perception	TCB	TCB: administer surveys and share results	Relevant stakeholders	2019-2027:Q1
 A need to make the tourism industry sustainable	Adopt an expanded view of what constitutes sustainability	Develop & implement legal policies that secure a BLUE growth initiative	Redefine sustainability (people, profit, & planet) in all tourism components for a BLUE Economy	Parliament & TCB	Increase sustainability & resiliency	TCB, Commissioner of Tourism & Parliament	2018-2027: Q2

Legend:

STMP Goals

-  Conceive a new Integrated Tourism Management Approach
-  Elevate Competitiveness
-  Position in the Caribbean
















Strategic Objectives

-  Destination Product
-  Residents QOL
-  Enhanced Tourist Experience
-  Strategic Image

Development Strategies

-  Governance Structure
-  Hotel Performance
-  Product Development
-  Increase Airlift
-  Governing Cruise Flow
-  Increased Arrivals

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
   Attract high quality hotels	30% of hotel room inventory should be 4 star	Make a list of potential hotels to attract	High-end destination	TCB	TCB: work with Dutch Economic Affairs & local finance department	TCB & Dutch Economic Affairs	2020-2025: Q1
   Attract high quality small boutique hotels	30% of hotel room inventory should be 4 star	Design & approve investment plan	High-end destination	Parliament & TCB	TCB: work with Dutch Economic Affairs & local finance department	TCB & Dutch Economic Affairs	2020: Q1
   Upgrade current hotel inventory/facilities	Improve quality	Design an incentive plan	Provide more value	Parliament, TCB, & tax office	TCB: work with Dutch Economic Affairs & local finance department	TCB & Dutch Economic Affairs	2018-2019: Q3, Q4, Q1
   Upgrade small hotel operations	Delivery of training & capability building	Design & execute a certification program	Provide more value	TCB & hotel sector	TCB: coordinate with hotel sector, education department, and labor department	TCB, Education Department, Labor Department & hotel sector	2019-2027: Q1
   Increase the use of social media for marketing	Delivery of training to small hotels	Design & execute a certification program	Provide more value	TCB & hotel sector	TCB: coordinate with hotel sector, education department, and labor department	TCB, Education Department, Labor Department & hotel sector	2019-2027: Q1

Legend:

STMP Goals

-  Conceive a new Integrated Tourism Management Approach
-  Elevate Competitiveness
-  Position in the Caribbean
















Strategic Objectives

-  Destination Product
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-  Strategic Image

Development Strategies

-  Governance Structure
-  Hotel Performance
-  Product Development
-  Increase Airlift
-  Governing Cruise Flow
-  Increased Arrivals
















TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
   Non enforcement of room tax collection in accommodation units non traditional accommodation	Ensure that all accommodation units comply with existing laws & regulations	MOU with AirBnB; local tax authority can request taxpayers list from AirBnB	Improve fair competition & TCB revenues	TCB & hotel sector, AirBnB	TCB: approach AirBnB	TCB, Commissioner of Tourism, & hotel sector	2018:Q2-Q4
   Improve product delivery & service	Delivery training to restaurants, transportation, tour guides, & shopping	Design & execute a certification program	Provide more value	TCB & educational department	TCB: coordinate with hotel sector, education department, and labor department	TCB, Education Department, Labor Department & hotel sector	2019-2027: Q1
   Promote more land attractions & activities	Delivery of business intelligence	Create a unit for gathering & dissemination of business intelligence	Increase product variety	TCB & Chamber of Commerce	TCB: coordinate partnership efforts	TCB & Chamber of Commerce	2019-2027: Q1
   Promote more land attractions & activities	Improve financial access & feasibility for small businesses	Create an award system that supports the creation of innovative tourism products	Increase product variety	TCB, Chamber of Commerce	TCB: coordinate partnership efforts	TCB, Chamber of Commerce & Bankers Association	2019-2027: Q1
   Market more land attractions & activities	Improve communication with tourists about these activities when they are on land	Use of social media to increase awareness	Increase destination sustainability	TCB	TCB: organize workshops with stakeholders	TCB, tour guides, taxis, & hotel sector	2019-2027: Q1

Legend:

STMP Goals	Strategic Objectives	Development Strategies
 Conceive a new Integrated Tourism Management Approach  Elevate Competitiveness  Position in the Caribbean	 Destination Product  Residents QOL  Enhanced Tourist Experience  Strategic Image	 Governance Structure  Hotel Performance  Product Development  Increase Airlift  Governing Cruise Flow  Increased Arrivals
















TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
   Non enforcement of room tax collection in accommodation units non traditional accommodation	Ensure that all comply with existing laws & regulations	MOU with AirBnB; local tax authority can request taxpayers list from AirBnB	Improve fair competition & TCB revenues	TCB & hotel sector, AirBnB	TCB: approach AirBnB	TCB, Commissioner of Tourism, & hotel sector	2018:Q2-Q4
   Improve product delivery & service	Delivery training to restaurants, tour guides, & shopping	Design & execute a certification program	Provide more value	TCB & educational department	TCB: coordinate with hotel sector, education department, and labor department	TCB, Education Department, Labor Department & hotel sector	2019-2027: Q1
   Promote more land attractions & activities	Delivery of business intelligence	Create a unit for gathering & dissemination of business intelligence	Increase product variety	TCB & Chamber of Commerce	TCB: coordinate partnership efforts	TCB & Chamber of Commerce	2019-2027: Q1
   Promote more land attractions & activities	Improve financial access & feasibility for small businesses	Create an award system that supports the creation of innovative tourism products	Increase product variety	TCB, Chamber of Commerce	TCB: coordinate partnership efforts	TCB, Chamber of Commerce & Bankers Association	2019-2027: Q1
   Market more land attractions & activities	Improve communication with tourists about these activities when they are on land	Use of social media to increase awareness	Increase destination sustainability	TCB	TCB: organize workshops with stakeholders	TCB, tour guides, taxis, & hotel sector	2019-2027: Q1

Legend:

STMP Goals	Strategic Objectives	Development Strategies
 Conceive a new Integrated Tourism Management Approach  Elevate Competitiveness  Position in the Caribbean	 Destination Product  Residents QOL  Enhanced Tourist Experience  Strategic Image	 Governance Structure  Hotel Performance  Product Development  Increase Airlift  Governing Cruise Flow  Increased Arrivals

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
   Improve attractiveness of restaurants	Improve communication regarding restaurants' quality	Use of social media to increase awareness	Provide more value	TCB	TCB: organize workshops with stakeholders	TCB & restaurants association	2019-2027: Q1
   The existence of steep seasonality	Organize (cultural) events to attract regional markets during shoulder months (September)	Generate a year long calendar of events	Improve destination productivity	TCB	TCB: design and coordinate events implementation	TCB, AirBnB, & hotel sector	2018-2027: Q2
   Lack of clear brand identity	Align tourists' needs & wants with destination experience	Adapt & revise website according to new vision	Cohesive brand	TCB	TCB: work with partners to ensure a cohesive brand	TCB & partners	2018-2027: Q2
   Lack of a clear destination image	Announce Bonaire as a BLUE Destination	Organize events with stakeholders	Amplify & resonate Bonaire's BLUE image	TCB	TCB with partners	All tourism stakeholders	2018: Q2
   Lack of a clear destination image	Sign Declaration of Underwater Heritage in Marine Protected Areas	Organize events with stakeholders	Amplify & resonate Bonaire's BLUE image	TCB	TCB with partners	All tourism stakeholders	2018: Q2

Legend:

STMP Goals

-  Conceive a new Integrated Tourism Management Approach
-  Elevate Competitiveness
-  Position in the Caribbean

Strategic Objectives

-  Destination Product
-  Residents QOL
-  Enhanced Tourist Experience
-  Strategic Image














Development Strategies

-  Governance Structure
-  Hotel Performance
-  Product Development
-  Increase Airlift
-  Governing Cruise Flow
-  Increased Arrivals






TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
Lack of a clear destination image	Image should be supported with experiential content	Improve quality of product delivery & service	More value & higher satisfaction level	TCB & stakeholders	TCB: work with partners to ensure product quality through product certification	TCB & partners	2019-2027: Q1
Lack of a clear destination image	New slogan & logo should support the tourism vision	New destination vision should be supported by stakeholders	More branding cohesiveness	TCB & stakeholders	TCB: work with partners to ensure a cohesive brand	TCB & partners	2018-2027: Q2
Lack of a clear destination image	Destination image & vision should be communicated to the market segments	Marketing office should discuss with overseas representatives to improve efficiency & effectiveness	Increase market awareness	TCB, overseas offices & stakeholders	TCB: work with partners to ensure a cohesive brand	TCB & partners	2018-2027: Q2
Lack of a clear destination image	Use website to provide more information regarding image & branding to enforce sustainability efforts	Every three years prepare RFP for marketing PR firms in the Netherlands & USA	Project & enhance positive perceptions of tourists who have a strong nature orientation	TCB & stakeholders	TCB: create a search committee to establish search criteria and rules	TCB & partners	2018: Q3, Q4
Lack of a clear destination image	Convert Bonaire to the regional leader of a BLUE economy	Work with the Dutch Ministry & Brussels to create a BLUE program for the Caribbean	Enhance image & global market awareness	TCB, STINAPA, Dutch Ministry & Brussels	TCB: prepare a document to initiate conversation with the Dutch Ministry	TCB, STINAPA, Dutch Ministry & Brussels	2019: Q1, Q2, Q3, Q4

Legend:

STMP Goals	Strategic Objectives	Development Strategies
 Conceive a new Integrated Tourism Management Approach  Elevate Competitiveness  Position in the Caribbean	 Destination Product  Residents QOL  Enhanced Tourist Experience  Strategic Image	 Increase Airlift  Governing Cruise Flow  Increased Arrivals  Governance Structure  Hotel Performance  Product Development

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
 Lack a of clear image as a nature loving destination	Convert Bonaire to the regional leader of a BLUE economy	Ban the use of sunscreen with oxybenzone & octinoxate	Increase sustainability & resiliency of coral reefs	TCB, STINAPA, & Parliament	TCB & STINAPA: prepare document	TCB & STINAPA	2019: Q1, Q2, Q3, Q4
 Lack a of clear image as a nature loving destination	Convert Bonaire to the regional leader of a BLUE economy	Promote use of rash guards	Increase sustainability & resiliency of coral reefs	TCB, STINAPA, & Parliament	TCB & STINAPA: prepare document	TCB & STINAPA	2019: Q1, Q2, Q3, Q4
 Need to preserve the coral reefs ecosystems	Develop and implement policy law to ban sunscreens that contain oxybenzone & octinoxate	Review the research of Dr. John Fauth and Dr. Craig Downs; as well as the US Draft Legislation for Hawaii	Improved coral reef life	TCB & STINAPA	TCB: lead policy development process	TCB & STINAPA	2018: Q1, Q2, Q3, Q4
 Marketing efforts should focus on identified segments in the identified regions	Collateral materials should be prepared & distribution channels approached	Revise existing communication overseas marketing offices	Increase acquisition of tourists by 5% per year	TCB, TCB overseas, & marketing offices	TCB: organize workshops & FAM trips to boost plan awareness	TCB & partners	2018: Q2, Q3, Q4
 Marketing efforts should be focused on identified potential markets	Prepare collateral materials & list of potential companies	Collaborate with the Airport Authority to engage in these tasks	Increase tourism yield to US\$198 per day per person over 5 years	TCB & Airport Authority	TCB, Airport Authority: should prepare collateral materials & visit potential clients	TCB & Airport Authority	2019: Q1, Q4

Legend:

STMP Goals

-  Conceive a new Integrated Tourism Management Approach
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Strategic Objectives

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Development Strategies

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-  Increased Arrivals

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
Marketing efforts should be focused on identified potential markets	Prepare collateral materials & list of potential companies	Make a list of potential companies in this business & approach them	Increase tourism yield to US\$198 per day per person over 5 years	TCB, harbor & Chamber of Commerce	TCB, harbor, Chamber of Commerce: prepare collateral materials & visit potential clients	TCB, harbor & Chamber of Commerce	2019: Q1, Q2, Q3, Q4
Lack of efficient accessibility to the destination	Approach carriers in the USA that serve the identified regions	Priority should be Florida region	More seats & convenience to the island	TCB & Airport Authority	TCB: prepare collateral material & visit potential clients	TCB & Airlift Committee	2018: Q3, Q4
Lack of efficient accessibility to the destination	Create an airlift fund to support new routes	Formalize current ad-hoc airlift committee	More seats & convenience to the island	TCB & Airport Authority	TCB: prepare collateral materials & visit potential clients	TCB & Airlift Committee	2018: Q3, Q4
Lack of efficient accessibility to the destination	Approach Aruba, Curacao, & local private companies to secure uninterrupted airlift to Bonaire	Create a committee which includes the Dutch Ministry of Economic Affairs	More seats & convenience to the island	TCB & Airport Authority	TCB: contact Aruba & Curacao government to craft a plan	TCB, Dutch Ministry & Airlift Committee	2018: Q3, Q4
Lack of a clear air transportation policy supporting tourism	Focus on route development that considers visitors' spending power	Design a transportation policy	More seats & more spending power	TCB & Airport Authority	TCB together with the Airlift Committee should prepare transportation policy	TCB & Airlift Committee	2018: Q3, Q4

Legend:

STMP Goals

-  Conceive a new Integrated Tourism Management Approach
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Strategic Objectives

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Development Strategies

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TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
 Lack of subsidy schemes to support airlift	Provide access to markets, market diversification, maintaining capacity, & support demand during depressed periods	Design subsidy schemes that may include revenue guarantees & marketing support	More seats & more spending power	TCB & Airport Authority	TCB: prepare transportation policy	TCB & Airlift Committee	2018: Q3, Q4
 Lack of electronic word of mouth (eWOM) from cruise visitors that are delighted with experience	Create instant access wi-fi terminals in the areas most frequented by cruise visitors	Develop a corporate sponsorship with a communication technology company to build wi-fi access	Instant positive social media promotion	TCB, tele-communication company	TCB: contact the telecommunication company & the downtown merchants	TCB & harbor	2018: Q3, Q4
 Lack of efficient tourist arrivals to support benefit to Bonaire	Create instant access wi-fi terminals at the airline gates	Develop a corporate sponsorship with a communication technology company	Instant positive social media promotion by tourists departing Bonaire	TCB, Airport Authority	TCB: coordinate these efforts	TCB, Airport Authority & telecommunication company	2018: Q3, Q4
 Lack of converting cruise visitors to stayover tourists	Create a data logging system for cruise visitor information	Use the compiled data to contact cruise visitors with a promotional opportunity to come to Bonaire	Generate a 30% conversion rate	TCB, harbor, & hotel sector	TCB: coordinate these efforts	TCB, harbor, & hotel sector	2018: Q3, Q4
 Cruise receipts are among the lowest in the Caribbean	Create &/or improve opportunities for cruise visitors to consume Bonaire tourism products	Perform a price audit of similar activities & attractions in the region; price in accordance with the competitive set	Increase spending per person similar to Curacao in 5 years	TCB, harbor, STINAPA	TCB: coordinate these efforts	Tour guides, & downtown merchants	2019: Q1, Q2, Q3

Legend:

STMP Goals	Strategic Objectives	Development Strategies
 Conceive a new Integrated Tourism Management Approach  Elevate Competitiveness  Position in the Caribbean	 Destination Product  Residents QOL  Enhanced Tourist Experience  Strategic Image	 Governance Structure  Hotel Performance  Product Development  Increase Airlift  Governing Cruise Flow  Increased Arrivals

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
   Lack of infrastructure to support cruise visitors	Develop appropriate infrastructural needs	Build toilets, drinking fountains, wash basins, food & beverage kiosks, trash receptacles, cash withdrawal machines	Increase cruise receipts	TCB & STINAPA	TCB: coordinate these efforts	TCB & STINAPA	2019: Q1, Q2, Q3
   Cruise visitors cause eco stress	Apply price strategies to control the amount of visitors that visit eco sensitive areas (e.g. Klein Bonaire)	Increase head tax & increase fee to Klein Bonaire & diving opportunities	Increase cruise receipts & increase conservation efforts	TCB, harbor & STINAPA	TCB: coordinate these efforts	TCB, harbor & STINAPA	2019: Q1, Q2, Q3
   Only 30% of cruise visitors engage in land activities (excessive diving)	Develop attractive promotions of land activities & market to cruise visitors	Aggressive information campaign about what Bonaire has to offer	Increase cruise receipts	TCB	TCB: coordinate these efforts with tour guides	TCB, Tour Guides	2018-2027: Q2
   Cruise visitors are diving in abundance	Limit the amount of dives permitted per cruise ship	TCB should inform cruise ships about this conservation policy	Improved coral reef life	TCB, harbor & STINAPA	TCB: coordinate these efforts	TCB, harbor & STINAPA	2019: Q1, Q2, Q3
   Lack of WOW factor the tourist experience	Increase the authenticity content of the tourist experience	Focus on the creation of offerings that include everyday life cultural experiences	Increase satisfaction & spending	TCB	TCB: coordinate these efforts	TCB & small businesses	2019-2027: Q1

Legend:

STMP Goals

-  Conceive a new Integrated Tourism Management Approach
-  Elevate Competitiveness
-  Position in the Caribbean
















Strategic Objectives

-  Destination Product
-  Residents QOL
-  Enhanced Tourist Experience
-  Strategic Image

Development Strategies

-  Governance Structure
-  Hotel Performance
-  Product Development
-  Increase Airlift
-  Governing Cruise Flow
-  Increased Arrivals

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
   <p>Lack of WOW factor when visiting parks</p>	Develop facilities & opportunities for tourists to consume while visiting natural parks	Focus on the creation of these spending opportunities through carefully crafted business licensing	Increase satisfaction & spending	STINAPA & TCB	TCB: coordinate these efforts	STINAPA & TCB	2019: Q1, Q2, Q3
   <p>Average service delivery</p>	Improve service quality	Provide service quality standards to hospitality managers	Improved service quality across the island	TCB	TCB: coordinate training and awareness efforts	TCB & Chamber of Commerce	Q1, 2019-2027
   <p>Lack of skilled human capital</p>	Hospitality school or courses	Revise hospitality curriculum &/or partner with an international institution that can provide online training for students	Improved managerial skills & tourism product development	TCB & Education Department	TCB: take the initiative & coordination	TCB & Education Department	Q1, 2019-2027
   <p>Poorly performing market segments</p>	Product development	Develop tourism products that will meet the demands of the newly suggested markets	Increased arrivals from suggested markets	TCB	TCB: focus on segments & keep an eye on competitive set	TCB & partners	2018-2027: Q2
   <p>Poorly performing market segments</p>	Market acquisition	Develop & launch advertisements & promotions to attract new markets	Increased arrivals from suggested markets	TCB	TCB: focus on segments & keep an eye on competitive set	TCB & partners	2018-2027: Q2

Legend:

STMP Goals

-  Conceive a new Integrated Tourism Management Approach
-  Elevate Competitiveness
-  Position in the Caribbean






Strategic Objectives

-  Destination Product
-  Residents QOL
-  Enhanced Tourist Experience
-  Strategic Image






Development Strategies

-  Governance Structure
-  Hotel Performance
-  Product Development
-  Increase Airlift
-  Governing Cruise Flow
-  Increased Arrivals

TMP Action Plan (2017-2027)

Key Issues	Actions	Action Game Plan	Impact	Lead Organization	TCB Role	Partner	Time
 Lack of information available for attractions	Create multiple forms of information outlets for attractions	Create an award system that supports creative communication methods	Increased access & revenues from tourism attractions (e.g., Washington-Slagbaai)	TCB	TCB: coordinate efforts	TCB, STINAPA & partners	2018-2027: Q2
 Conversion of 1st time tourists to repeat tourists	Increase repeat tourists	Maintain creative electronic contact with tourists that provide information	Increased repeat tourists	TCB & stakeholders	TCB: coordinate efforts	TCB, hotel sector, tour guides, & STINAPA	2019-2027: Q1
 Lack of tourist awareness regarding the importance of conserving nature for Bonairians	Educate tourists on Bonairians' efforts to protect the environment	Create a video that can be played on the aircraft to educate tourists on efforts to protect the environment	Increased positive word of mouth & PR	TCB	TCB: coordinate efforts	TCB, STINAPA & social media companies	2019-2027: Q1
 Need for more "smart tourism" strategies & practices	Adopt "smart tourism" business practices	Adopt business principles that focus on small volume & high yield (e.g. Sail drones)	Increased tourist satisfaction	TCB	TCFB: determine best practices for technological application	TCB & partners	2018: Q2, Q3, Q4
 Need for memorable experience	Create a quality assurance program (QAP)	Work with stakeholders from the tourism industry & education	Increased tourist satisfaction	TCB	TCB: facilitate the design & implementation	TCB, tourism & education partners	2018: Q4

Legend:

STMP Goals	Strategic Objectives	Development Strategies
 Conceive a new Integrated Tourism Management Approach  Elevate Competitiveness  Position in the Caribbean	 Destination Product  Residents QOL  Enhanced Tourist Experience  Strategic Image	 Increase Airlift  Governing Cruise Flow  Increased Arrivals

Chapter 12



List of Participants





List of Participants

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List of Participants

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Chapter 13



Endnotes





Endnotes

1. A study by TEEB-NL estimated the annual monetary value of the ecosystems in Bonaire at US\$105 million. The study was based on a willingness to pay approach (WTP).

2. See, TEEB-NL(2001). The Economics of Ecosystems and Biodiversity on Bonaire.

http://www.ivm.vu.nl/en/Images/2001_TEEB_Bonaire_total_tcm234-310328.pdf, retrieved on September 24, 2016.

3. Statistics Netherlands (2015). Trends in the Caribbean Netherlands 2015. The Hague.

4. The Professional Association of Diving Instructors (PADI) estimated that the total divers segment in 2012 was between three to six million divers globally, which indicates that this segment is relatively small. The literature also recognizes that there is no agreed international definition for dive tourism which makes comparison challenging. In addition, the dropout rate of divers seems high with 50% of divers certified in any given year ceasing to dive in their fifth year. See, for example, Daniels and Roberts (2006). Profile of the most active divers in the US: Lifestyle and Demographics Study.

5. The bottom-up research approach requires that the research that is conducted in the formation of the plan begin at a community level with local residents and then graduates to business owners and government officials. For example, at the community level all socio-economic levels of people are surveyed and/or interviewed, we then proceeded to interview or survey line employees (entry level) in the industry, then managers, then business owners. Other sectors were also included in the process in order to facilitate actions that could stimulate economic linkages. Finally, government officials were included within the process. The bottom-up research approach guarantees that the final plan is representative of a collaborative vision for how tourism will serve Bonaire.

6. Data triangulation is a technique that is used to validate data through cross verification from two or more sources. It also requires the application and combination of several research methods that examine the same research question. See footnote 8 for how the DPITS incorporated data triangulation.

7. A variety of qualitative and quantitative techniques were used to analyze the data from the stakeholder meetings, focus groups, and surveys. Qualitative techniques included content analysis, domain analysis, quasi-statistics, analytic induction, typology and taxonomy, and organizational scanning. Quantitative techniques covered regression analyses, co-integration analyses, unit root analyses, Granger causality analyses, factor analyses, cluster analyses, input-output analyses, ANOVA and MANOVA, discriminant analyses, contingent valuation method, and big data mining.

8. Two other surveys were conducted, one administered to restaurants and the other to tour operators. However, both subsectors did not show interest in these surveys, and consequently, these surveys were dropped due to lack of enough responses.

9. Big data analytics applies advanced analytic techniques against large and diverse datasets in order to capture hidden patterns, variable correlations, and other statistical insights.

10. See <http://documents.worldbank.org/curated/en/278611473448567594/overview> for access to the full report.

11. Google Trends allows users to compare the volume of searches between two or more terms. The analysis allows for the tracking of various words and phrases that are typed into Google's search box. The data is available in real time.

12. NIBUD (2014). Minimum voorbeeldbegrotingen voor Bonaire.

13. See, for example, Wolfs, E., Schep, S., Lujan-Gallegos, V. & Van Beukering, P. (2015). What is Bonaire's cruise tourism worth? <http://www.wolfscompany.com/wp-content/uploads/2016/02/Whats-Bonaire-Cruise-Tourism-Worth-Wolfs-Company-Revised-report-Aug-2015.pdf>, retrieved June 3, 2017.



BONAIRE

Once a Visitor Always a Friend

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