



Tourism Destination Development & Management Plan for the Parish of St. Thomas, Jamaica

2019-2030



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ACRONYMS

ADR	Average Daily Rate
BJCMNPRF	Blue and John Crow Mountains National Park/Forest Reserve
CDB	Caribbean Development Bank
CMU	Caribbean Maritime University
DBR	Doing Business Report
DMO	Destination Management and Marketing Organization
EXIM	Export Import Bank
FIT	Foreign Independent Tourist
GDP	Gross Domestic Product
GW	George Washington University
HEART	Human Employment and Resource Training Agency
IPC	Interplan Planning Consultants
JAMPRO	Jamaica Promotions Corporation
JBDC	Jamaica Business Development Corporation
JCDT	Jamaica Conservation and Development Trust
JCF	Jamaica Constabulary Force
JHTA	Jamaica Hotel and Tourist Association
JIS	Jamaica Information Service
JNHT	Jamaica National Heritage Trust
JOAM	Jamaica Organic Agriculture Movement
JPS Co	Jamaica Power Service Company
JSIF	Jamaica Social Investment Fund
JTB	Jamaica Tourist Board
LOS	Length of Stay
MICAF	Ministry of Industry, Commerce, Agriculture and Fisheries
MOAF	Ministry of Agriculture and Fisheries
NGO	Non-Governmental Organization
MICE	Meetings, Incentives, Conferences and Events
MOT	Ministry of Tourism
MSME	Micro Small and Medium Enterprise
MSMTE	Micro Small Medium Tourism Entities
NEPA	National Environment and Planning Agency
NRW	Non-Revenue Water
NSWMA	National Solid Waste Management Authority
NTA	National Training Agency
NWA	National Works Agency
NWC	National Water Commission
OPT	Orange Park Trust
OUR	Office of Utilities Regulation
PASMP	Protected Area System Management Plan – Jamaica 2013-2017
PWD	Public Works Department
RADA	Rural Agricultural Development Agency
SAVE	Scientific, Academic, Volunteer, Educational
SDC	Social Development Commission
SFCA	Special Fishery Conservation Area
SGF	Small Grants Fund
SMTE	Small Medium Tourism Entities
STEPA	St. Thomas Environmental and Protection Association
SWOT	Strengths, Weaknesses, Opportunities and Threats
TEF	Tourism Enhancement Fund
TDDMP	Tourism Destination Development and Management Plan for the parish of St. Thomas
TPDCo	Tourism Product Development Company Ltd.
TLN	Tourism Linkages Network
UDC	Urban Development Corporation
UNESCO	United Nations Educational, Scientific and Cultural Organization
UTECH	University of Technology
UWI	University of the West Indies
UWIDEC	University of the West Indies Distance Education Centre
VFR	Visiting Friends and Relatives
WRA	Water Resources Authority

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EXECUTIVE SUMMARY

St. Thomas—a parish of striking, undeveloped beauty where the Blue Mountains cascade down to cliffside beaches and a rugged coastline—offers untapped possibilities as a tourist destination. Currently, however, tourism is quite nascent in St. Thomas. While the parish is home to 3.5 percent of the nation’s total inhabitants, it receives only 0.24 percent of all tourists, most of whom are Jamaican residents and do not spend the night in hotels. While there is no specific statistical data available, the consulting team estimates that St. Thomas Parish received about 5,775 stopover arrivals in 2018.

The Tourism Destination Development and Management for the Parish of St. Thomas, Jamaica 2019-2030 (TDDMP) was developed in consultation with representatives from industry, government and the community. It is built upon the Ministry of Tourism’s comprehensive destination assessment, visioning exercises and stakeholder focus groups conducted in the summer of 2018. The participatory process brought together more than 300 tourism and local community stakeholders for a series of foresight and visioning exercises and more than 1,200 people were surveyed to develop an inventory of the tangible and intangible tourism assets across the parish of St. Thomas.

The TDDMP sets forth a strategy for the short, medium and long term that aims to increase the competitiveness of St. Thomas by improving the parish’s desirability as a travel destination and as a place to live. *Ultimately, the plan’s purpose is to inspire more people to visit, stay over, and spend more money, thereby improving the economic performance of the tourism sector and contributing to the well-being of parish residents.*

The impetus to develop this tourism plan for St. Thomas arose during government meetings. Cabinet of Jamaica members identified tourism development as an ideal complement to other recently approved initiatives including the Morant Bay Urban Centre and road upgrades connecting Kingston to Port Antonio through St. Thomas. While there is a general lack of community awareness of tourism and its potential—as well as limited readiness and understanding of the market—consensus among community leaders, business owners, and other key stakeholders is that tourism can be a catalyst for economic growth for the parish. At the same time, there is a need for the purposeful and strategic development of a workforce to support entrepreneurial initiatives, resort development, and ensure community inclusion in the burgeoning tourism sector.

VISION AND GOAL

The 2030 vision is:

St. Thomas will be recognized internationally as a premier tourism destination that promotes sustainable growth, supports inclusion, encourages local ownership of tourism businesses, fosters links between tourism and the local economy, and embraces a culture of continuous improvement through workforce development, customer focus and excellence.

The vision will be achieved by:

1. Creating and delivering iconic brand tourism products and experiences.
2. Improving infrastructure and placemaking.
3. Developing tourism infrastructure using sustainability principles.
4. Enabling tourism enterprise success and viability.
5. Preparing community and skilled workforce for tourism.
6. Increasing awareness of the destination among key market segments
7. Managing the destination collaboratively.

TARGETS

By 2030 St. Thomas will increase visitors from:

2018	2030
5,775	230,000 stay-over & 65,000 day visitors

Prioritizing market segments that have the highest viability for short-term growth, and developing untapped markets that are in line with the medium- and long-term vision of St. Thomas as a tourism destination.

1. Short term: incremental growth from existing markets—non-resident Jamaicans visiting friends and/or relatives (VFR); Meetings, Incentives Conferences and Events (MICE); domestic day visitors; Scientific, Academic, Volunteer and Educational (SAVE), and Foreign Independent Tourists (FIT).
2. Medium to long term: significant growth from additional market segments—international leisure tourists and domestic leisure tourists.



The TDDMP is designed to support the long-term economic, environmental and social sustainability of the tourism sector by balancing the needs of the community, industry, environment and visitors. It aims to foster community inclusion through broad-based access to opportunities throughout the parish; and to build a diversified local economy by creating links between tourism and other sectors such as agriculture, health and wellness, and creative industries.

When fully implemented, the TDDMP will provide tangible benefits to St. Thomas, including significant economic, infrastructure and investment benefits. **Expected economic impacts for 2030 are outlined below.**

- **New hotel rooms: 4,170**
- **Visitor expenditures: US\$244 million**
- **Tax contributions: US\$22 million**
- **Total direct and indirect employment: 13,000**
- **Full contribution of tourism to GDP: US\$174 million¹**

The TDDMP outlines a set of main strategies and accompanying priority actions that include a wide range of infrastructural priority initiatives as well as potential attractions and product development investment projects.

The TDDMP presents 51 priority initiatives. Implementation of these initiatives will require public and private investment and partnerships. **Estimates of minimum investment figures are outlined below.**

- **Public Investment: US\$205 million**
- **Private Investment: US\$508 million**
- **Public-Private Partnerships: US\$33 million¹**

Identifying leaders who can adequately inspire and facilitate coordination and collaboration among stakeholders will be critical for implementation of the TDDMP. While the ultimate objective would be to establish a permanent St. Thomas Destination Management and Marketing Organization (DMO), in the short term efforts should be taken to organize stakeholders into a unified Destination Stewardship Committee (DSC) guided by the shared vision and goals detailed throughout the TDDMP.

The DSC will have a two-fold objective:

- Convene public agencies and coordinate intragovernmental efforts for implementation of the TDDMP; and
- Establish a multisectorial forum that will bring together private sector, public sector, community leaders, and NGOs to actively participate in the implementation of the TDDMP.

Initially, the DSC should be situated in the Prime Minister's Office (PMO) to facilitate the intra-governmental coordination and collaboration needed for the successful implementation of the plan. The DSC will need dedicated staff. The DSC's secretariat will track the adoption of these various initiatives and their impacts over time.

The Ministry of Tourism and DSC can use the accompanying TDDMP Synopsis Document as a blueprint for immediate action. While the TDDMP details a total of 51 priority initiatives, the TDDMP Synopsis Document shortlists 23 priority initiatives, which would be critical to implement in the near future. These priority initiatives should be socialized with the Jamaica Promotions Corporation (JAMPRO), develop an investment prospectus for priority initiatives, and develop an action plan with JAMPRO for attracting international and national investors.

The short term aim of the Ministry of Tourism alongside the DSC should be to initiate and deliver on 3-6 quick-win priority initiatives outlined in the TDDMP Synopsis Document by 2022. This effort will help to demonstrate tangible and measurable results within the first three years. The quick-wins can be instrumental in garnering support for the more complex initiatives.

The successful implementation of the plan will require diligent oversight by the Ministry of Tourism and the DSC in the short term as well as the DMO in the medium to long term. Progress and challenges should be carefully tracked, and strategies and priority actions adapted over time to meet ever-changing local realities and needs.

¹ According to the Ministry of Tourism's *Assessment of the Economic Impact of the Tourism Sector in Jamaica* (2014), overall, every dollar of tourism final demand results in an increase of 0.72 dollars in GDP. Thus, the full contribution of tourism to GDP is estimated to be lower than visitor expenditures.

A. What Is the Purpose of the Plan?

The Tourism Destination Development and Management Plan for the Parish of St. Thomas, Jamaica 2019-2030 (TDDMP) presents a long-term strategic blueprint. *The TDDMP provides direction for the region and guidance to public, industry and community leaders for work together over a decade aimed at increasing the competitiveness of St. Thomas by improving the parish's desirability as a travel destination and as a place to live.* Ultimately, the plan's purpose is to inspire more people to visit, stay over, and spend more money, thereby improving the economic performance of the tourism sector and contributing to the well-being of parish residents.

A separate TDDMP Synopsis Document was prepared to serve as an abbreviated, companion guide to the TDDMP. It outlines the key elements of the comprehensive long-term strategic blueprint.

The TDDMP systematically assesses the potential and challenges of tourism in the parish of St. Thomas in order to identify key opportunities. It also outlines a shared vision, realistic goals and practical strategies for tourism destination development and management.

The TDDMP was developed through four phases of work carried out over a ten month period from October 2018 to July 2019:

- Phase 1: Established an inventory of existing conditions
- Phase 2: Conducted an on-site destination diagnostic and consulted with stakeholders
- Phase 3: Developed the destination vision and key elements of the plan using a collaborative approach that involved all key stakeholder groups
- Phase 4: Finalized and presented the TDDMP to stakeholders

The approach for developing the TDDMP included:

1. Understanding the current tourism supply, demand, and environment in the parish, including its hard and soft infrastructure, and natural and cultural assets;
2. Determining key tourism destination planning issues through urban, social, environmental and economic analysis;
3. Establishing requirements and making policy and planning recommendations for physical infrastructure and placemaking, human capacity development, tourism products and experiences, tourism market readiness as well as branding and marketing;
4. Crafting a shared vision and developing key elements of the strategy in consultation with community and tourism stakeholders;
5. Developing an implementation framework that consists of priority initiatives, monitoring guidelines and recommendations for a local destination management organization.



B. What Are the Plan Objectives?

The overall plan objective is to establish a blueprint for tourism development for the parish of St. Thomas. This blueprint will support development of an economically, environmentally and socially sustainable tourism product that leverages the parish's unique assets while delivering inclusive economic development.

The TDDMP answers these questions: ***Where are we now? Where will we be in 2030?*** And, ***How do we get there?***

Specific objectives in answering these questions include:

- Assessing which tourism products and experiences are most representative of sense of place and unique to St. Thomas;
- Identifying the key market segments that align with the St. Thomas product offering;
- Projecting inclusive and sustainable tourism growth in St. Thomas;
- Understanding the implications for the visitor, resident, and business community experience;
- Determining the investments needed for tourism growth, both in terms of infrastructure (hard) and human capital (soft); and
- Developing a basic model for local destination management and partnerships that can support the potential growth of tourism in St. Thomas.

The TDDMP 2030 supports the Ministry of Tourism's Five Pillars of Tourism Growth:

1. Tapping into new markets to continue the process of positioning Jamaica as a leading, internationally competitive destination that is safe, healthy and hassle free.
2. Developing new products that develop and seek to expand Jamaica's authentic and unique product offering and leverage natural and cultural assets, so that the visitors' time in Jamaica will be more experiential and fulfilling.
3. Promoting investments that strengthen the existing product, diversify the product offering into non-traditional or emerging areas, increase its contribution to Gross Domestic Product and ensure that the product is managed in an environmentally and socially sustainable manner.
4. Building new partnerships which integrate tourism with the wider economy and society by strengthening and capturing more of the local tourism value chain with related and supporting sectors through the Five Tourism Networks—Sports and Entertainment, Gastronomy, Health and Wellness, Knowledge, and Shopping.
5. Developing human capital by securing a cadre of skilled and trained personnel for the tourism sector, and by improving the welfare of tourism workers by providing a worker friendly environment and post-retirement benefits.

1. SITUATION ANALYSIS

Where are we now?

This section of the plan provides a snapshot of tourism activities in the parish of St. Thomas, both from a supply and demand perspective. It also presents a comprehensive overview of key infrastructure and enabling environment considerations, which are critical for leveraging tourism as an economic development tool.

Findings are based on desktop research, initial stakeholder consultations and on-site observations, which emerged from the consulting team's field data collection sessions that took place from October - December 2018. The report also builds upon the Ministry of Tourism's comprehensive destination assessment, visioning exercises and stakeholder focus groups conducted in June, 2018.

1.1 Tourism Product

Tourism is nascent in St. Thomas. While there is no specific tourism statistical data available for St. Thomas, the consulting team estimates that the parish received about 5,775 stopover arrivals. This figure represents 25 percent of total stopover arrivals for the Port Antonio Resort under which St. Thomas is classified. The majority of the current demand is generated by non-resident Jamaicans visiting friends and/or relatives (VFR) who stay longer than what is considered the average length of stay, but spend less per day than foreign leisure tourists. The Ministry of Tourism estimates that 80 percent of arrivals in St. Thomas are VFR. The ratio of resident to overnight tourism is very low for St. Thomas. The parish is home to 3.5 percent of the nation's total inhabitants but receives only 0.24 percent of all tourists.

In general, our findings indicate that St. Thomas features a rich mix of natural and cultural heritage resources. The group identified about 33 assets distributed across nine nodes. Fifty-five percent of these assets are classified as nature and adventure sites, and 36 percent as cultural heritage sites. Most of the assets require further development to prepare them for visitors.

The most popular existing attractions, based on our initial assessment, are: Blue Mountain Peak, Reggae Falls, Bath Fountain Hotel & Spa, Morant Point Lighthouse and Lyssons Beach. It is important to note that none of the current tourism attractions are licensed. TripAdvisor quality ratings for attractions are good, while Google Maps conclusions are more mixed.

St. Thomas has about 27 accommodation providers (only three are licensed) and 36 restaurants operating across the 9 nodes. TripAdvisor and Booking.com quality ratings for accommodations are good while those on Google Maps are more mixed. Strategic development of the tourism workforce would be critical to overcoming current low levels of customer service.

Poor road infrastructure and limited options for local transportation greatly impact accessibility to accommodations and attractions—a challenge that stakeholders cited as the number one obstacle to business expansion. Additionally, water distribution, internet, sewage and waste management pose infrastructure challenges.

Availability of online trip planning information for St. Thomas is limited. Thirty-six percent of attractions, 81.5 percent of accommodations, and 33 percent of restaurants identified have online reviews. St. Thomas is also not featured on the official national tourism web portals.

While a few hotels in the parish cater to foreign and domestic groups of travelers, there are very few tours offered in St. Thomas specifically. Tour operators indicate that demand for St. Thomas is limited.

While there is a general lack of community awareness of tourism, as well as limited readiness and understanding of the market, consensus among community leaders, business owners, and other key stakeholder groups is that tourism can be a catalyst for economic growth for the parish. At the same time, there is a need for the purposeful and strategic development of a workforce to support entrepreneurial initiatives, resort development, and ensure community inclusion in the burgeoning tourism sector.

Lastly, visitor safety and security must be addressed proactively to ensure that visitor harassment does not become more widespread since it is already an issue at Bath.

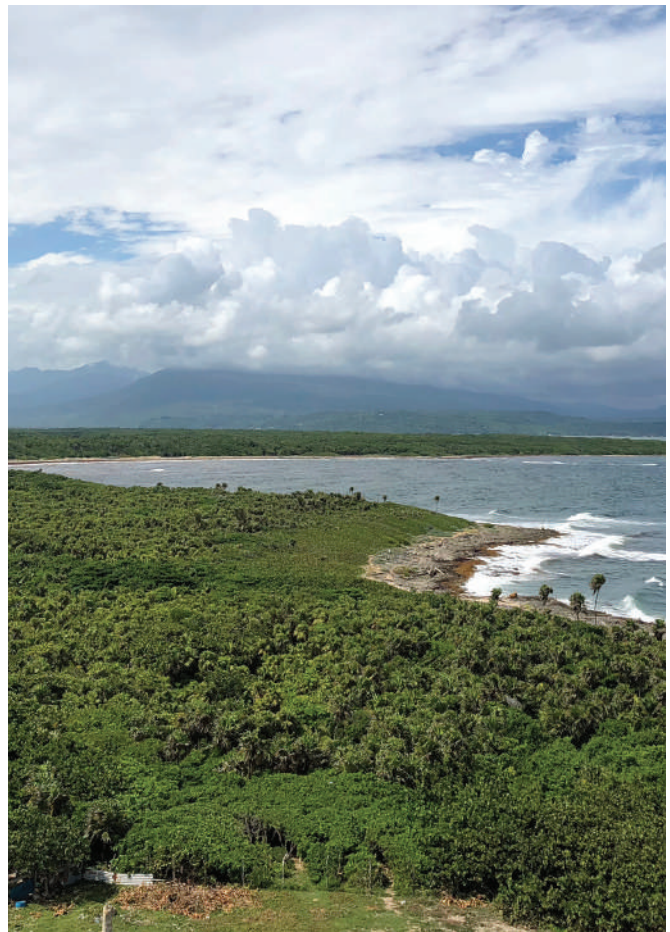


FIGURE 1. Component of the Total Tourism Product



1.1.1 Tourism Assets

The St. Thomas Tourism Destination Assessment 2018 report, prepared by the Ministry of Tourism, provides a fairly detailed inventory of tourism assets that can be utilized to attract tourists. Supported by the consulting team's rapid on-site assessment and additional research, the tourism assets have been classified according to four product development themes:

1. **Cultural Heritage.** Cultural heritage refers to the legacy that the people of St. Thomas inherited from earlier generations. This category includes current and potential attractions that have historical significance and bring to life architecture, structures, monuments, artifacts, arts and crafts inherited from the period of colonial rule and the movement for self-rule which started in St. Thomas.
2. **Culture.** Culture is all that constitutes the way of life of the people of St. Thomas. It includes traditions, habits, customs, beliefs, and capabilities that define the parish's society. While heritage is extrinsic, culture is intrinsic. This category includes attractions associated with cultural elements of key groups such as the fisher folk, Bobo Dread Rastafarians and Eastern Maroons—all of which contribute to the rich culture of the parish of St. Thomas.
3. **Wellness.** This category includes attractions that put health and well-being at the very centre of the visitor

experience. Wellness experiences encompass one or several of the following: healthy foods, exercise, spa treatments and opportunities to experience or expand spirituality and creative expression. The overarching theme is better self-care—physically, psychologically and spiritually.

4. **Nature and Adventure.** This theme is built around the parish of St. Thomas' natural heritage and includes attractions such as the beaches, the sea, hillsides, rivers, mountains, flora and fauna, ecosystems and landscapes that form the region's natural treasures.

Tourism assets were mapped in order to identify their spatial distribution. Figure 1 illustrates a series of nodes centered around key towns in which the main attractions are located. There are nine (9) nodes in total. Accommodations and restaurants tended to be spatially distributed around the nodes as well.

FIGURE 2: Map of Current and Potential Tourism Assets in St. Thomas

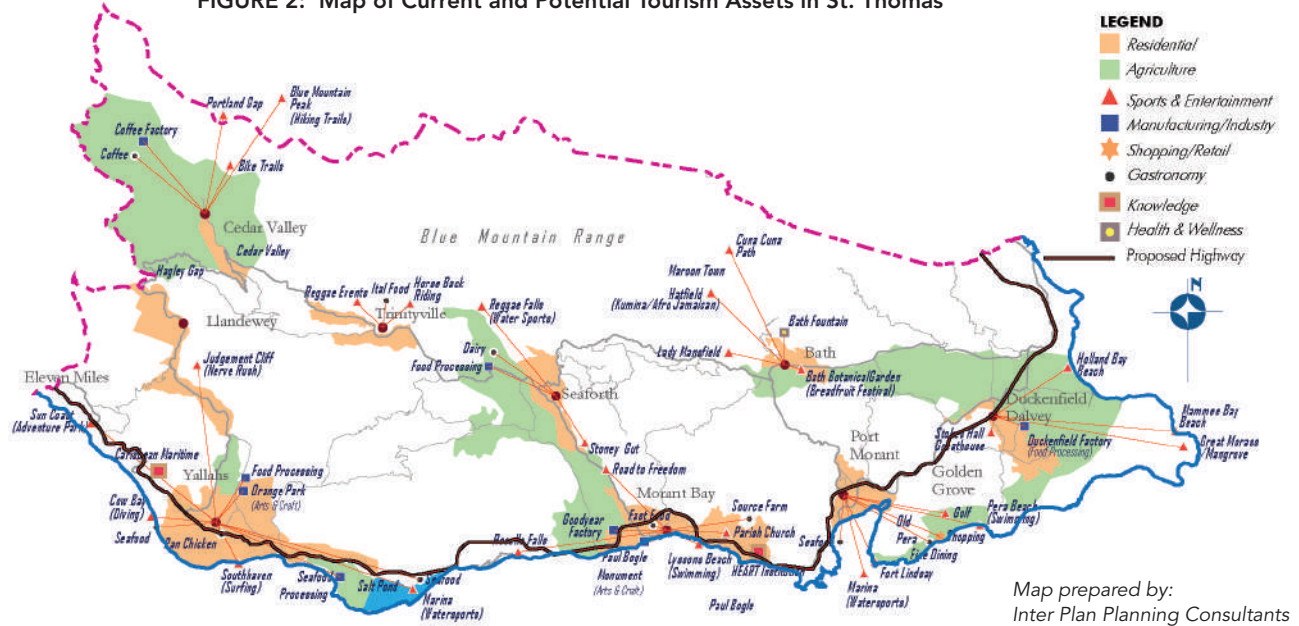


Table 1 builds on the tourism map of tourism assets by describing each of the twenty-five (25) current and potential attractions identified, and classifying these by product development themes and nodes. Average online ratings for the attractions are also presented.

TABLE 1: List of Key Attractions by Product Development Themes and Nodes

Attraction Name	Product Development Theme	Node/ Location	Description	Average Online Rating
Blue Mountain Peak	Nature & Adventure	Hagley Gap	Highest peak in Jamaica surrounded by beautiful scenery, flora, and fauna. A popular hiking attraction.	TripAdvisor: 4.5/5 (56 reviews) Google Maps: 4.4/5 (68 reviews)
Rasta Wall	Culture	Trinityville	Site where Leonard Percival Howell (The First Rasta) held his Rastafarian meetings. High Rasta religious significance.	No online reviews
Reggae Falls	Nature & Adventure	Seaforth	Waterfall where people swim, gather, and appreciate the scenic view.	TripAdvisor: 4.5/5 (12 reviews) Google Maps: 4.3/5 (226 reviews)
Spring Garden	Cultural Heritage	Seaforth	Community that was home to Paul Bogle.	No online reviews
Stoney Gut	Cultural Heritage	Seaforth	Birthplace of Paul Bogle. Declared a heritage site including the Paul Bogle Memorial Garden.	No online reviews
Cuna Cuna Pass	Nature & Adventure	Bath	5-mile trail that represents many sites of battles between the British Colonists and Maroons.	No online reviews
Lady Mansfield Greathouse	Nature & Adventure and Cultural Heritage	Bath	Greathouse of historical significance located along a hiking trail.	No online reviews
Bath Hotel and Spa	Wellness	Bath	World renowned for mineral quality and healing properties of the water. Also a National Heritage Site.	TripAdvisor: 4.0/5 (81 reviews) Google Maps: 4.1/5 (128 reviews)

Attraction Name	Product Development Theme	Node/ Location	Description	Average Online Rating
Bath Botanical Garden	Nature & Adventure	Bath	Established in 1779 the garden showcases domestic and international plants and flowers.	Google Maps: 3.95/5 (68 reviews)
Great Morass	Nature & Adventure	Duckenfield/ Dalvey	Largest area of mangrove forest in Jamaica. Has a very diverse ecosystem including crocodiles.	No online reviews
Morant Point Lighthouse	Cultural Heritage	Duckenfield/ Dalvey	Well-maintained, picturesque attraction built in 1841.	TripAdvisor: 4.0 (2 reviews) Google Maps: 4.4/5 (29 reviews)
Holland Bay Beach	Nature & Adventure	Duckenfield/ Dalvey	Pristine white sand beach located near the Morant Point Lighthouse	No online reviews
Golden Grove Sugar Factory	Nature & Adventure/ Cultural Heritage	Duckenfield/ Dalvey	The sugar factory is one of few remaining factories in Jamaica that processes sugarcane.	Google Maps: 4.2/5 (6 reviews)
Bowden Harbour	Nature & Adventure	Port Morant	Deep harbor that was once an important transshipment point.	Google Maps: 2.8/5 (17 reviews)
Fort Lindsay	Cultural Heritage	Port Morant	Fort Lindsay was built opposite to Fort William, near Old Pera in St. Thomas and designed for eighteen 24 pound guns.	No online reviews
Bowden Bay	Nature & Adventure	Port Morant	Shallow bay and fish sanctuary known as fish nursery and source for oysters	No online reviews
Pera	Cultural Heritage and Culture	Port Morant	Small historic fishing village also known for Kumina	No online reviews
Roselle Falls	Nature & Adventure	Morant Bay	Small waterfall on the side of the main road.	No online reviews (have a TripAdvisor page)
Lyssons/Golden Shore Beach	Nature & Adventure	Morant Bay	Lyssons and Golden Shore beach are among the popular white sand beaches visited in the parish.	Google Maps: 4.0/5 (183 reviews) listed as "Lyssons Beach"
Paul Bogle Monument	Cultural Heritage	Morant Bay	Was recently removed due to controversy surrounding legitimacy of his image.	Google Maps: 3.2/5 (22 reviews) listed as "Paul Bogle statue at the old Morant Bay Courthouse"
Anglican Parish Church	Cultural Heritage	Morant Bay	Church of significance during the Morant Bay Rebellion of 1865.	No online reviews
Fort William	Cultural Heritage	Morant Bay	The fort has a platform with five guns to defend its harbor and was named Fort William in honour of King William	No online reviews
Morant Bay Courthouse Ruins	Cultural Heritage	Morant Bay	Site of historic courthouse and former location of Paul Bogle's statue	Google Maps: 4.0/5 (4 reviews) listed as "St. Thomas Parish Court"

Attraction Name	Product Development Theme	Node/ Location	Description	Average Online Rating
Albion Great House and Aqueduct	Cultural Heritage	Yallahs	Ruins of former Albion Sugar Estate.	No online reviews
Easington Bridge	Cultural Heritage	Yallahs	Historic bridge deemed as the location where Paul Bogle rested on his journey from Stoney Gut to Spanish Town.	No online reviews
Cow Bay	Nature & Adventure	Yallahs	Local spot for fishing and diving, and gathering. Very scenic views.	No online reviews
South Haven	Nature & Adventure	Yallahs	Site known for surfing	No online reviews
Salt Pond	Nature & Adventure	Yallahs	Associated beach considered worthy of further development	Google Maps: 4.2/5 (14 reviews) listed as "Great Pond of Yallahs"
Judgement Cliff	Nature & Adventure	Yallahs	Was formed after a landslide triggered by the earthquake of 1692. Could be used as a hiking attraction.	No online reviews
Orange Park	Culture	Yallahs	Home and studio of Barrington Watson. Well maintained and located in the hills of Yallahs overlooking the Salt Pond.	No online reviews
Mavis Bank Coffee Factory (In St. Andrew but close to border)	Nature & Adventure	Hagley Gap	Well equipped for tours and provides an educational experience that introduces visitors to the various stages of coffee production.	TripAdvisor: 4.0/5 (14 reviews) Google Maps: 4.1/5 (9 reviews)

It is important to note that currently none of the tourism assets are licensed as attractions. Adventure tours currently featured on the Jamaica Tourist Board (JTB) website for the Jamaican South Coast do not feature any of the attractions in St. Thomas. This may be largely because they are not licensed.

Furthermore, most of the attractions listed in Figure 2 require further development in order to attract and host tourists.

To date, many of the investments in attraction development and maintenance have mainly been made by the public sector through the TPDCo. The flagship example is Bath. Another recent example is TPDCo's rehabilitation project in Lyssons beach. See insert above for details.

Moving forward, tourism development will require additional investment in attractions development and maintenance. It will be imperative to attract new private and public-private investments. The Tourism Destination Development and Management Plan for the Parish of St. Thomas, Jamaica 2019-2030 Synopsis Document is the companion guide to the TDDMP and serves as a "prospectus" that details the vision for development and can be used as a tool to help attract investment.

This mapping exercise was the first step towards the ultimate aim of identifying the main attractors—flagship developments—for this region, i.e. the "hubs", for tourist movement and activity combined with the clusters and

Lyssons Beach Rehabilitation Project

The Lyssons Beach is a very popular beach attraction that serves Morant Bay and the wider St. Thomas parish. As part of the TPDCo's Beaches Upgrading Programme, it invested in major improvements including construction of the rest room facilities, gazebos and enhancement of the driveway and parking area. Other enhancements involved construction of life guard stands, public showers and foot wash areas. All amenities necessary to host disabled persons were installed. Works were done by M.A.E. Construction Ltd and monitored by TPDCo, with funding from the Tourism Enhancement Fund (TEF) The project cost thirty million dollars (\$30M)

Source: <http://www.tpdco.org/product-enhancement/>

circuits of attractions and activities, i.e. "the spokes", that can be based around a product development theme or a geographic area.

Enhancing the quality and quantity of information found online about tourism attractions is also required. Many of the attractions have no online presence and are primarily promoted through word of mouth. Table 1 provides a summary of visitor satisfaction ratings for each of the few, current tourism attractions. Sources for visitor satisfaction

ratings are TripAdvisor and Google Maps. The table presents the total number of reviews and the average rating for each attraction that has information available. Reggae Falls, Bath (Hotel/Spa and Fountain), Lyssons Beach, and Blue Mountain Peak are the most popular attractions based on the quantity of online visitor reviews.

1.1.2 Accommodations

There are twenty-seven (27) accommodation providers in the parish of St. Thomas (See Table 2). Of these, only three are licensed hotels—Bath Fountain Hotel & Spa, Morant Bay Villas Hotel, and Whispering Bamboo Cove Resort. Accommodation options range in type from hotels to guesthouses and homes listed on booking portals such as Airbnb and Booking.com. Most of the accommodation options fall into the guesthouse category. Overall accommodation options are limited in variety and generally have a rustic environment with basic amenities.

There is very limited information available about visitor satisfaction with existing accommodations. Table 2 presents the best information available online. It was gleaned from booking sites such as Booking.com, Airbnb as well as Google Maps.

Pricing of hotel/guest house accommodation in the parish averages around US\$60 per night. There is very little range in the type of accommodation offered as most of the rooms can be categorized as moderate. There is considerable opportunity for diversification of accommodation options and improvements in maintenance and amenities, such as consistent water supply, hot water and internet access, commonly expected by domestic and international visitors. Accommodations are also impacted by poor road infrastructure affecting their accessibility. Section 3 of this plan proposes additional accommodation types to be developed for various nodes within the parish.

TABLE 2: List of Accommodations by Nodes

Accommodation	Location by Node	Type of Accommodation	Average Online Rating
Jay's Guest House	Hagley Gap	Guest House	TripAdvisor: 5.0/5 (51 reviews) Booking.com: 8.8/10 (49 reviews) Google Maps: 4.8/5 (18 reviews)
Jah B Guest House	Hagley Gap	Guest House	Booking.com: 8.1/10 (7 reviews) Google Maps: 4.4/5 (27 reviews) listed as "Jah B Restaurant & Lodge"
Whitfield Hall	Hagley Gap	Guest House	TripAdvisor: 4.5/5 (37 reviews) Google Reviews: 3.5/5 (2 reviews) listed as "Whitfield Hall #2"
Farmhouse in the Blue Mountains	Hagley Gap	Airbnb	Airbnb: 4.5/5 (34 reviews)
Real Blue Mountain Spot	Hagley Gap	Airbnb	Airbnb: no rating (2 reviews)
Lot 24 Fairy Hill Gardens Guesthouse	Seaforth	Guest House	No online reviews (have a Booking.com page)
Avis Seaforth Paradise close to Reggae Falls	Seaforth	Airbnb	Airbnb: no rating (2 reviews)
Hidden Treasures Farm, Guest House, and Retreat Centre	Seaforth	Airbnb	Airbnb: no rating (0 reviews) Google Maps: 5.0/5 (1 review)
Bath Fountain Hotel & Spa*	Bath	Hotel	TripAdvisor: 4.0/5 (81 reviews) Google Maps: 4.1/5 (128 reviews)
Riverside Cool Cabin	Bath	Airbnb	Airbnb: 4.5/5 (14 reviews)
Cottage Farm Retreat	Duckenfield	Guest House	No online reviews (have a Booking.com page)
Barking Lodge	Point Morant	Guest House	Google Maps: 4.4/5 (9 reviews)

Accommodation	Location by Node	Type of Accommodation	Average Online Rating
Morant Bay Villas Hotel*	Morant Bay	Hotel	TripAdvisor: 4.0/5 (1 reviews) listed as "Morant Villas Hotel & Conference Center" Google Maps: 3.6/5 (8 reviews) listed as "Morant Villa Hotel"; 3.0/5 (36 reviews) listed as "Morant Villa" Have a Booking.com page with 0 reviews listed as "Morant Villas Hotel"
Whispering Bamboo Cove Resort (Retreat)*	Morant Bay	Hotel	TripAdvisor: 3.5/5 (25 reviews) Booking.com: 7.5/10 (42 reviews) Google Maps: 4.2/5 (30 reviews)
Barefoot Guest House	Morant Bay	Guest House	TripAdvisor: 4.5/5 (5 reviews) Booking.com: 7.6/10 (18 reviews) Google Maps: 3.6/5 (9 reviews)
Hilara's Ville	Morant Bay	Guest House	TripAdvisor: 4.5/5 (3 reviews)
Golden Shore Beach Resort	Morant Bay	Hotel	TripAdvisor: 4.0/5 (33 reviews) Google Maps: 3.8/5 (87 reviews)
Brown's Guest House	Morant Bay	Guest House	Google Maps: 4.1/5 (53 reviews)
Cerulean Bay	Morant Bay	Guest House	Google Maps: 4.8/5 (12 reviews)
Secluded Caribbean beach house	Morant Bay	Airbnb	Airbnb: 4.5/5 (19 reviews); Room #2 = 4.5/5 (17 reviews); Room #3 = 4.5/5 (9 reviews); Room #4 = no rating (2 reviews)
A Place of Tranquility	Morant Bay	Airbnb	Airbnb: no rating (2 reviews)
Villa Southhaven	Yallahs	Guest House	Booking.com: 9.0/10 (5 reviews) Google Maps: 3.4/5 (20 reviews)
Three Finger Jack Hotel	Yallahs	Hotel	TripAdvisor: 4.5/5 (9 reviews) Google Maps: 3.8/5 (18 reviews)
Casa Lagoon Hotel	Yallahs	Hotel	Google Maps: 4.0/5 reviews (68 reviews)
White House on a Farm	Yallahs	Airbnb	Airbnb: 4.5/5 (12 reviews)
Jenny's Retreat	Yallahs	Airbnb	Airbnb: Apartment = 5.0/5 (3 reviews); Farmhouse = no rating (0 reviews)
Secluded villa on your private beach	Yallahs	Airbnb	Airbnb: 5.0/5 (6 reviews)

*Note: Licensed Accommodations

1.1.3 Restaurants

St. Thomas has thirty-six (36) licensed restaurants (See Table 3). These vary in type of restaurant and price range. While most of the restaurants serve mainly Jamaican food, there are a few that have diverse offerings such as Chinese, Italian, Thai, and international cuisine. It is extremely difficult to find information online for the restaurants, and online reviews are often mixed. It is evident that the restaurants are mainly catering to the domestic market.

St. Thomas has tremendous opportunity to enhance the culinary offering. There is also the opportunity to include culinary delights that are unique to St. Thomas, such as Irish Moss.

TABLE 3: List of Licensed Restaurants by Nodes

Restaurants Name	Location by Node	Average Online Rating
Rain Bow Restaurant	Golden Grove	No online reviews
Iteen's Restaurant and Bar	Bath	No online reviews
Fish Cove Restaurant (and Sports Bar)	Port Morant	TripAdvisor: 5.0/5 (2 reviews) Google Maps: 4.2/5 (105 reviews)
Maple Leaf Restaurant	Morant Bay	No online reviews
Benefit Tai Chinese Restaurant	Morant Bay	No online reviews
Cammy's Eatery	Port Morant	No online reviews
Dahliah's Delight	Morant Bay	No online reviews
Daphodil's In the Garden	Morant Bay	Google Maps: 4.2/5 (19 reviews)
Denise Restaurant	Morant Bay	No online reviews
Chicken & More	Morant Bay	No online reviews
V.I.P. Beach Lounge & Rest.	Morant Bay	Google Maps: 3.9/5 (47 reviews)
J & D's Juicy Restaurant	Morant Bay	No online reviews
Robbie's Restaurant	Morant Bay	Google Maps: 3.6/5 (7 reviews)
Flava For All	Morant Bay	No online reviews
KJR Pharmacy	Morant Bay	No online reviews
Hue's Restaurant	Morant Bay	Google Maps: 3.9/5 (30 reviews)
The Long Boarder Bar & Grill	Morant Bay	TripAdvisor: 4.0/5 (10 reviews) Google Maps: 3.9/5 (113 reviews)
Village Green Restaurant	Morant Bay	Google Maps: 5.0/5 (1 review)
Fyah Side Restaurant	Morant Bay	No online reviews for this location (location in Toll Gate, Clarendon parish has 3.8/5 and 335 reviews)
Doyley's Restaurant	Morant Bay	No online reviews
Valin's Touch of Class	Port Morant	No online reviews
Stanley's Restaurant	Morant Bay	No online reviews
Sue True Carib Grill	Morant Bay	TripAdvisor: no rating (0 reviews) Google Maps: 4.0/5 (12 reviews)
Tastee Ltd.	Morant Bay	Google Maps: 2.9/5 (34 reviews)
Perfection on a Plate	Morant Bay	No online reviews
FAH-REE Entertainment Jerk centre	Port Morant	No online reviews
Shelly's Home Style	Yallahs	Google Maps: 3.4/5 (50 reviews)
Juici Patties	Morant Bay	Google Maps: 4.2/5 (17 reviews)
Juici Patties	Yallahs	No online reviews
Advanced Service Station Food Court	Yallahs	Google Maps: 3.8/5 (128 reviews) listed as "Advanced Service Station"
Ian's One Stop	Yallahs	No online reviews
Macky's Caribbean Cuisine	Yallahs	No online reviews
Sharon's Restaurant & Catering	Yallahs	No online reviews
Survival Restaurant	Yallahs	No online reviews
Rovers Pub	Seaforth	No online reviews
Mom's Bar & Restaurant	Seaforth	No online reviews

1.1.4 Overview of the Total St. Thomas Tourism Product

Table 4 provides a summary of tourism assets and the accommodation and dining options by node. The Morant Bay and Yallahs nodes have the highest concentration of tourism assets and existing businesses providing services to

visitors. The most popular existing attractions based on the initial assessment are: Blue Mountain Peak, Reggae Falls, Bath Fountain Hotel & Spa, and Lyssons Beach.

TABLE 4: Summary of Tourism Assets, Accommodations and Restaurants by Nodes

Node Location	#of Attractions	# of Accommodations	# of Restaurants	Total
Hagley Gap	2 (2 Nature & Adventure)	5	0	7
Trinityville	1 (1 Cultural)	0	0	1
Golden Grove	0	0	1	1
Seaforth	3 (1 Nature & Adventure, 2 Heritage)	3	2	8
Bath	4 (3 Nature & Adventure, 1 Wellness)	2	1	7
Duckenfield	5 (4 Nature & Adventure, 1 Heritage)	1	0	6
Port Morant	4 (2 Nature & Adventure, 2 Heritage)	1	4	9
Morant Bay	7 (2 Nature & Adventure, 5 Heritage)	9	21	37
Yallahs	7 (4 Nature & Adventure, 2 heritage, 1 culture)	6	7	20
Total	33	27	36	96

Other key findings about the tourism product:

- 55% of assets are classified as nature and adventure sites, and 36% as cultural heritage sites
- 36% of assets, 81.5% of accommodations, and 33% of restaurants have online reviews
- TripAdvisor quality ratings for attractions are good while Google Maps are more mixed
- TripAdvisor and Booking.com quality ratings for accommodations are good while Google Maps are more mixed

1.1.5 Tour Operators and Tour Guides

Tour operators generally play an important role in the packaging, distribution and sales of tourism products. They function as intermediaries between suppliers and consumers. Tour operators (inbound and outbound) are therefore important strategic partners for tourism development in St. Thomas.

The Tourism Product Development Company (TPDCo) estimates that there are more than 100 registered inbound (or receptive) tour operators in Jamaica. Interviews with tour operators (i.e. outbound and inbound) revealed that there are very few tours currently offered in St. Thomas. Neighboring parishes are much further along in this regard.

A few examples of tours off the beaten track in nearby parishes are Reach Falls and Charles Town Maroons in Portland, Blue Mountain Trail and Coffee Tours in upper St. Andrew, and tours around Kingston. Tours that link to gateway parishes of Kingston and Portland are also available. An example of this includes tours that initiate in Kingston, pass through St. Thomas via Cuna Cuna Pass and culminate in Portland.

Most formal tour companies provide guides that lead their tours. Guides from the parish are often associated with the Blue and John Crow Mountain Trails. There is an opportunity to develop a cadre of tour guides from St. Thomas. The expertise from the Jamaica Historical Society, Jamaica National Heritage Trust and other known local historians may be leveraged to help develop interpretation for key attractions and sites as well as train residents of St. Thomas on interpretation and tour guiding techniques.

1.1.6 Transportation

While there are many current and potential attractions in St. Thomas, they are often difficult to access. Investments in improving roads will improve the readiness of the parish of St. Thomas to attract domestic and international visitors. Accommodations are also impacted by poor road infrastructure.

Difficult accessibility attributed to poor road infrastructure is further complicated by limited options for local transportation. Visitors need to rely on taxis and buses. The buses do not maintain consistent schedules, and information about the routes and pricing is not readily available.

Most visitors, the majority of whom are Jamaican returning home to visit friends and relatives, usually rent vehicles to fill their transportation needs. Strengthening of the transportation network (see urban analysis for more details) is critical for the improved movement of residents within the parish as well as the development of tourism overall.

1.1.7 Creative Industry

The destination assessment report prepared by the Ministry of Tourism indicated the presence of a few craft vendors in certain locations within the parish of St. Thomas. Furthermore, while other resort areas and parishes have representatives in the National Jamaica Craft Traders and Producers Association, there is no known representative for St. Thomas.

Development of entertainment and sporting facilities in the parish can attract domestic and international visitors. Treasure Beach, a destination located in the Southern Coast of Jamaica, has leveraged its sporting facilities to attract celebrity athletes, such as Serena and Venus Williams. Currently, there are well designed sporting facilities, including multipurpose courts, in Pera. The Ministry of Tourism’s destination assessment report highlighted the entertainment area as one potential attractor for domestic visitation.

1.2 Tourism Demand

1.2.1 Tourism Demand in Jamaica

ARRIVALS

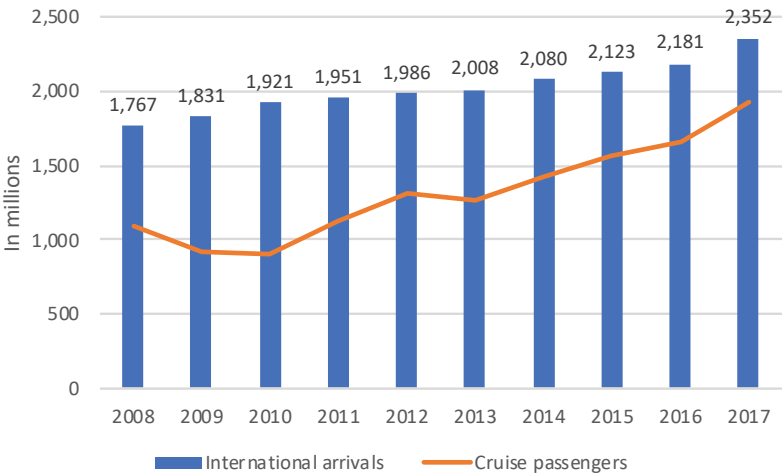
The tourism sector in Jamaica is considered a mature market and sun-sea and sand is the main tourism product. The destination has experienced strong year-on-year growth for the last ten years. In 2018, stopover arrivals increased by 5.1% compared to 2017 and grew to almost 2.5 million. Tourist arrivals in the Caribbean decreased by 1.8% during the same time and global arrivals increased by 5.6%. Cruise passengers in Jamaica have experienced steeper growth; the number of cruise passengers increased by 40.5% between 2012 and 2018.

The JTB divides stopover arrivals into two groups: foreign nationals and non-resident Jamaicans. The second group is defined as “Any Jamaican National whose usual residence is outside of Jamaica.” In 2018, 7.1 % or 174,565 of the total number of stopover arrivals was categorized as Non-resident Jamaicans. Most of the non-resident Jamaican visitors can be categorized as Visiting Friends and Family (VFR).

Jamaica’s top three markets are the US, Canada and the UK. Arrivals from the US and Canada combined make up over 82% of all stopover arrivals in the country. The US market is still growing and overnight arrivals from the US increased by 6.7% in 2018. The total market share however has become smaller as the country represented 72% of all arrivals in 2003 and 65.9% in 2018. Canada is the second most important source market, though arrivals decreased by 1.3% in 2018. The UK represented 8.7% of all overnight arrivals in 2018 though saw a decrease of 1%. The rest of Europe represented 4.6% of the market and increased by 4.3%. Arrivals from the Caribbean increased by 5.6% between 2017 and 2018 and represented 2.7% of all stopover arrivals in 2018.

There are no reported statistics available on domestic tourism.

FIGURE 3: Stopover arrivals and cruise passengers, 2008-18



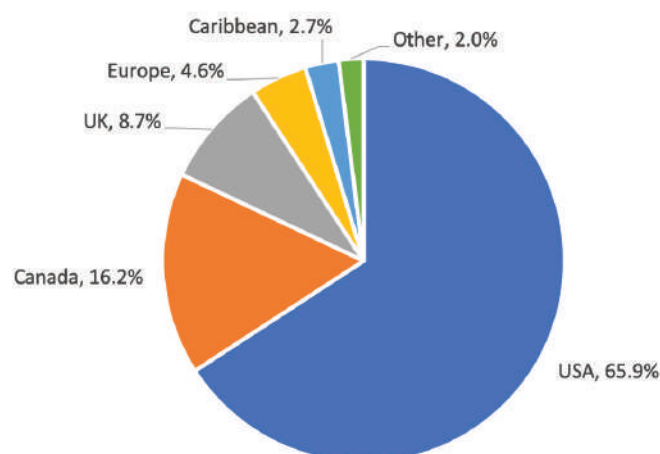
Source: Jamaica Tourist Board

TABLE 5: Top five source markets for stopover arrivals, 2014 and 2018

	2014	2018	% change
US	1,296,457	1,509,963	16.5
Canada	419,898	399,969	-4.7
UK	177,218	215,584	21.6
Germany	21,346	34,255	60.3
Italy	8,692	13,721	57.9

Source: Jamaica Tourist Board

FIGURE 4: Stopover arrivals by major markets, 2018



MARKET CHARACTERISTICS

Age

While the 18-24 visitor age group is stagnating and the 25-34 age group is in decline, the number of children and people in the 35-49 age bracket is increasing. This may indicate that Jamaica is becoming more popular among families and less so among singles and younger couples. Growth can also be seen in the market of people between 50 and 64 years old and even stronger growth in the over 64 age bracket. This market segment is considered desirable as they tend to have relatively high disposable income and stay longer than younger travelers.

TABLE 6: Age distribution of stopover arrivals (% of total), 2015-18

Age	2015	2016	2017	2018	% change 2015-18
Under 18	11.1	11.1	11.1	11.1	0.0
18-24	6.7	6.8	6.7	6.7	0.3
25-34	19.7	18.9	18.5	18.3	-7.2
35-49	29.0	28.9	28.8	29.0	0.0
50-64	25.3	25.7	25.9	25.8	1.9
Over 64	8.3	9.0	8.7	9.1	9.7

Source: Jamaica Tourist Board

Length of Stay

The average length of stay for foreign nationals was 8.4 nights in 2018, the same as in 2017. Foreign nationals staying in hotels averaged 6.2 nights in 2018 in non-hotels (8.7) and private homes (14.9) stayed much longer. Non-resident Jamaicans stay an average of 17.5 nights in 2018, the same as in 2017.

TABLE 7: Average length of stay, by type of stopover arrival, 2016 and 2018

	Foreign nationals		Non-resident Jamaicans	
	2017	2018	2017	2018
All types of accommodation	8.4	8.4	17.5	17.5
Hotels	6.6	6.2	8.3	8.2
Non-hotels	9.0	8.7	12.3	13.1
Private homes	15.2	14.9	18.2	18.2

Source: Jamaica Tourist Board

Purpose of Visit

For 70.7% of all foreign nationals, leisure and holiday was the main reason to visit Jamaica in 2018. For most non-resident Jamaicans, the main reason to come to the country was to visit friends and family (VFR).

TABLE 8: Purpose of visit, by type of visitor (% of total), 2018

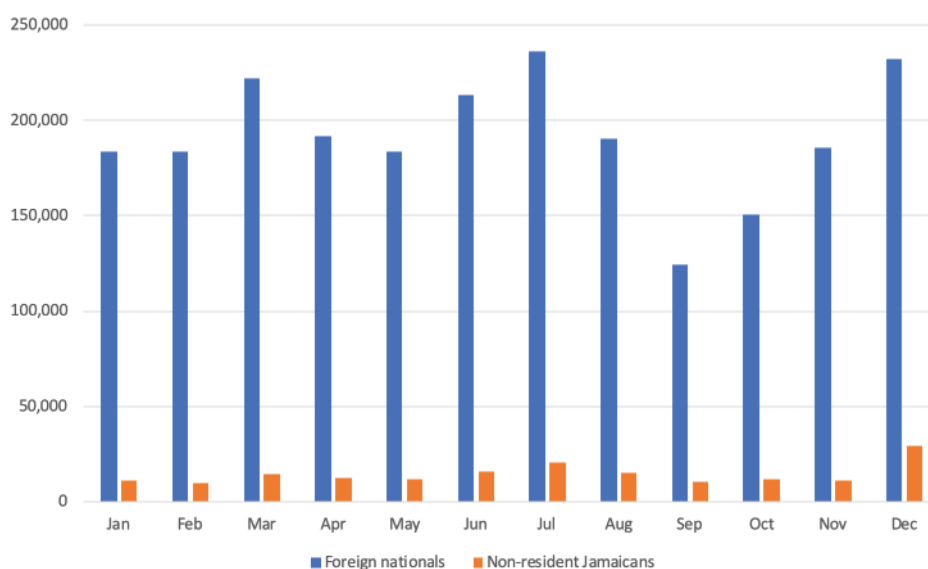
	Foreign nationals	Non-resident Jamaicans
Vacation	70.3	25.8
VFR	12.8	52.5
Business	3.7	3.4
Convention/meetings	0.1	0.0
Honeymoon/wedding	8.5	2.3
Other	4.4	16.0

Source: Jamaica Tourist Board

Seasonality

Over the last ten years, seasonality has decreased and Jamaica has become a more year-round destination. Ten years ago, tourists from the US would mostly visit during the winter months and Europeans during the summer months. But now arrivals are more balanced. The lower arrival numbers in September and October are mostly caused by the hurricane season. July and December are still the most popular months for all geographic source markets.

FIGURE 5: Stopover arrivals by month, 2018

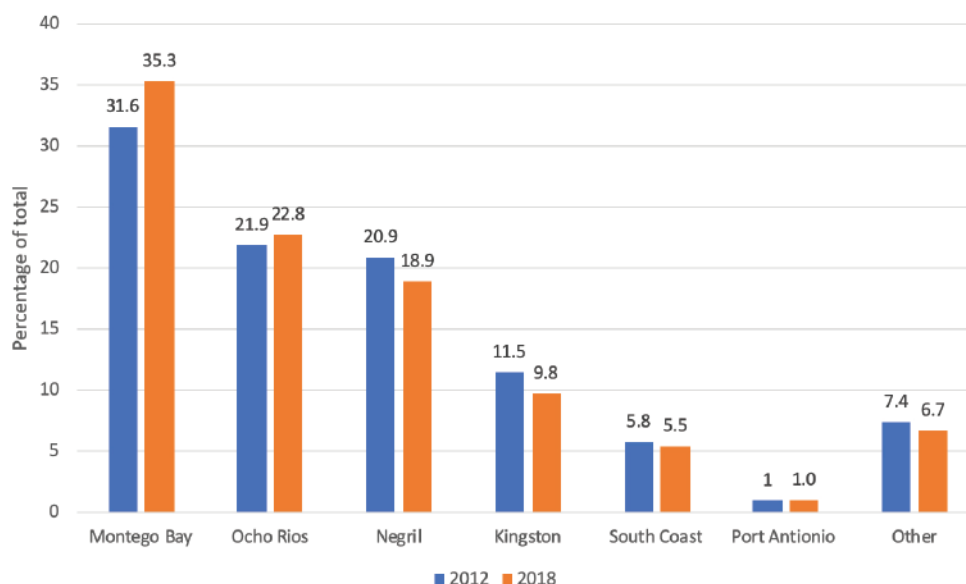


Source: Jamaica Tourist Board

MAIN DESTINATIONS IN JAMAICA

Montego Bay is the main tourist destination followed by the other resort areas Ocho Rios and Negril. The three areas combined received 77% of the total number of stopover arrivals in 2017 and 2018. Arrivals in Montego Bay grew fastest between 2012 and 2018; 39% compared to 25% average for the overall country. The resort area of Ocho Rios also experienced a small increase in stopover arrivals while other areas experienced a drop in their market share. Arrivals for St. Thomas are included under the Port Antonio resort area.

FIGURE 6: Stopover arrivals by intended area of stay, 2012 and 2018



Source: Jamaica Tourist Board

TYPES OF ACCOMMODATION

Hotel rooms, including all-inclusive hotels and non-all-inclusive hotels, make up 77% of the total room inventory. In 2003, hotel room represented 69% of the total rooms available. Montego Bay has the largest number of rooms with 37% of the country's room inventory. The area with the second largest inventory is Ocho Rios with 24% of all rooms. St. Thomas' statistics are included as part of Port Antonio. There are no hotels in St. Thomas with more than 50 rooms and a relative high share of rooms are in guesthouses or private homes.

TABLE 9: Number of available rooms per resort area, 2018

	Kingston	Montego Bay	Ocho Rios	Negril	Port Antonio	South Coast	Total
Less than 50 rooms	366	463	428	1,029	287	284	2,857
Between 51-100 rooms	273	576	580	522	0	267	2,218
Between 101-200 rooms	678	901	324	244	0	0	2,147
Over 200 rooms	320	8,235	4,912	4,042	0	360	17,869
Total hotel rooms	1,637	10,175	6,244	5,837	287	911	25,091
Guest houses	868	577	530	782	316	653	3,726
Resort villas	8	1,159	765	712	311	207	3,162
Apartments	76	207	460	49	10	16	818
TOTAL ROOMS	2,589	12,118	7,999	7,380	924	1,787	32,797

Source: Jamaica Tourist Board

Between 2012 and 2018, the overall number of rooms available increased by 14.9%. Hotels noticed a 16.4% increase in growth, mostly fueled by the larger hotels. Hotels over 200 rooms added 3,378 rooms to the inventory, and hotels between 101 and 200 rooms added 576 new rooms. The number of available rooms in resort villas slightly increased while the number of apartments decreased during the same time period.

TABLE 10: Number of available rooms by category, 2012 and 2018

	2012	2018	change 2012-18
Less than 50 rooms	2,386	2,857	19.7
Between 51-100 rooms	2,526	2,218	-12.2
Between 101-200 rooms	1,571	2,147	36.7
Over 200 rooms	14,491	17,869	23.3
Total hotels	20,974	25,091	19.6
Guest houses	3,061	3,726	21.7
Resort villas	3,801	3,162	-16.8
Apartments	700	818	16.9
TOTAL	28,536	32,797	14.9

Source: Jamaica Tourist Board

In 2016, 74% of all foreign nationals indicated they would stay in a hotel during their time in the country. The share of hotels has increased slightly since 2012 while the share of foreign nationals staying in non-hotels or 'Other' increased. The latter two categories include guesthouses, resort villas and apartments. The number of foreign nationals staying in non-hotels increased by 37% between 2012 and 2018, which could indicate a shift to staying in self-catering accommodation offered via the accommodation sharing economy platforms. The category 'Others' increased by just 18%.

TABLE 11: Foreign nationals intended type of accommodation, 2012 and 2018

	2012	% total 2012	2018	% total 2018	% change 2012-18
Hotels	1,343,085	73.3	1,710,784	74.4	27.4
Non-hotels	86,275	4.7	118,521	5.2	37.4
Private homes	380,119	20.7	441,919	19.2	16.3
Other	22,850	1.2	26,938	1.2	17.9
TOTAL	1,832,329	100.0	2,298,162	100.0	25.4

Source: Jamaica Tourist Board

Non-resident Jamaicans, Jamaican citizens who are permanently living outside the country, represent 7.1% of the total number of stopover arrivals. Almost 92% of this segment stays in private homes during their stay. This could be a home of a family member or friend or in a vacation home they own. Interesting to note that this share decreased slightly while the share of non-resident Jamaicans staying at non-hotels increased.

TABLE 12: Non-resident Jamaicans intended type of accommodation, 2012 and 2018

	2012	% total 2012	2018	% total 2018	% change 2012-18
Hotels	9,425	6.1	10,898	6.2	15.6
Non-hotels	1,666	1.1	2,522	1.4	51.4
Private homes	141,773	92.2	160,308	91.8	13.1
Other	892	0.6	837	0.5	-6.2
TOTAL	153,756	100	174,565	100.0	13.5

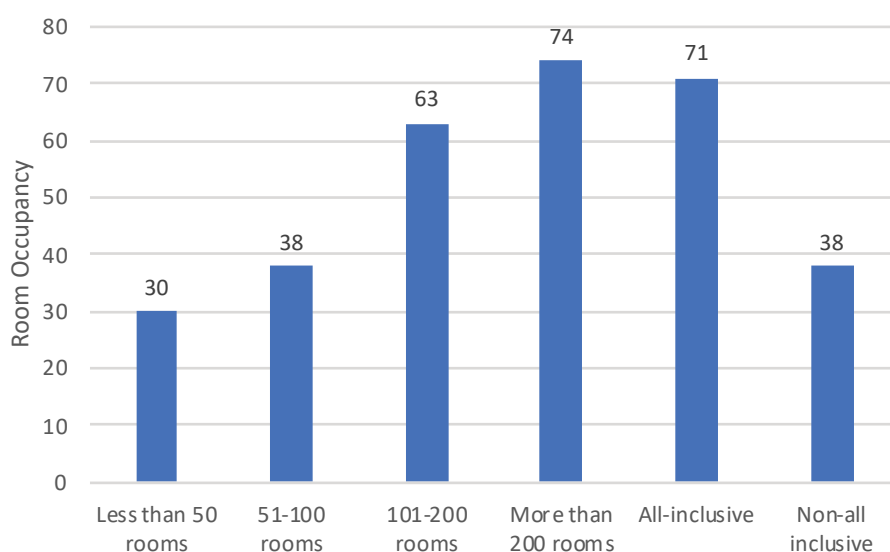
Source: Jamaica Tourist Board

The overall room occupancy rate was 64.9% in 2017, between January and April 2017, the average room occupancy rate was 69.1 and between May and December it was 62.8%. In 2017, the occupancy rates in the resort areas in Montego Bay (68.3%), Ocho Rios (67.3%), Negril (62.2%) than in Kingston (56.9%), Mandeville/South coast (51.5) and Port Antonio (13.6%).

Between 2016 and 2017 the total number of hotel rooms in Jamaica increased by 9.5% from 20,543 in 2016 to 22,493 in 2017. All resort areas in Jamaica experienced growth in the number of hotel rooms between 2016 and 2017, the overall growth in rooms was 9.5%. In most resort areas, the room occupancy rates increased with the growth in supply except for in Negril, Kingston and the South Coast.

Hotel room occupancy in Jamaica varies significantly by the size and type of hotel. The larger hotels achieve more than double the occupancy rate of small hotels and all-inclusive outperform non all-inclusive properties. All of the hotels in St. Thomas have less than 50 rooms so it can be assumed that the average occupancy levels is below 30%. This is consistent with the information collected during interviews with a representative sample of hotels in the parish.

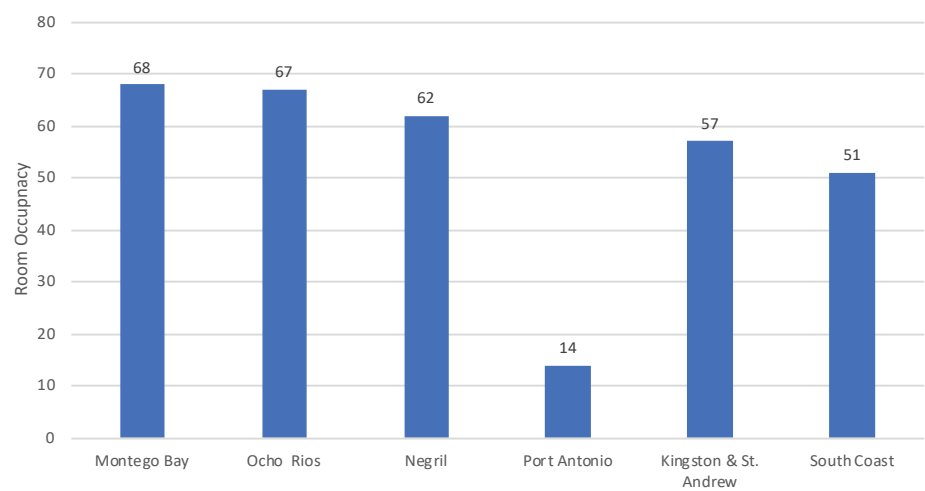
FIGURE 7: Hotel room occupancy by category, 2017



Source: Jamaica Tourist Board
Note: 2018 data not yet available

Hotel room occupancy also varies by resort area. The larger resort areas of Montego Bay where most of the inventory is in all-inclusive achieve occupancy rates above 60% while the resort area of Port Antonio which includes the parish of St. Thomas achieved an average hotel room occupancy rate of 13.5% in 2017.

FIGURE 8: Hotel room occupancy by resort area, 2017



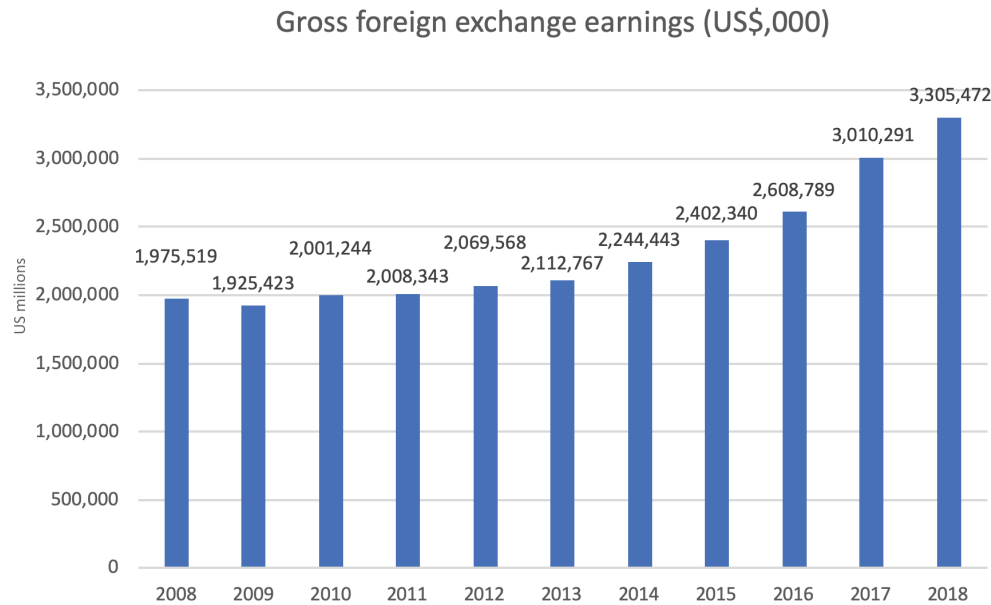
Source: Jamaica Tourist Board
Note: 2018 data not yet available

CONTRIBUTION TO THE ECONOMY

In 2018, Jamaica’s earnings from tourism totaled US\$3,305 million, a 9.8% increase over the previous year. Tourism receipts have increased steadily since 2008, except for the negative growth in 2009.

In 2012, the average expenditure per person per night for overnight visitors was US\$117.23, by 2017 this had increased to US\$148.61 but dropped to US\$1,337 in 2018. The distribution of expenditures has not changed much between 2012 and 2018 except that the share of accommodation has increased.

FIGURE 9: Gross foreign exchange earnings, 2008-18



Source: Jamaica Tourist Board

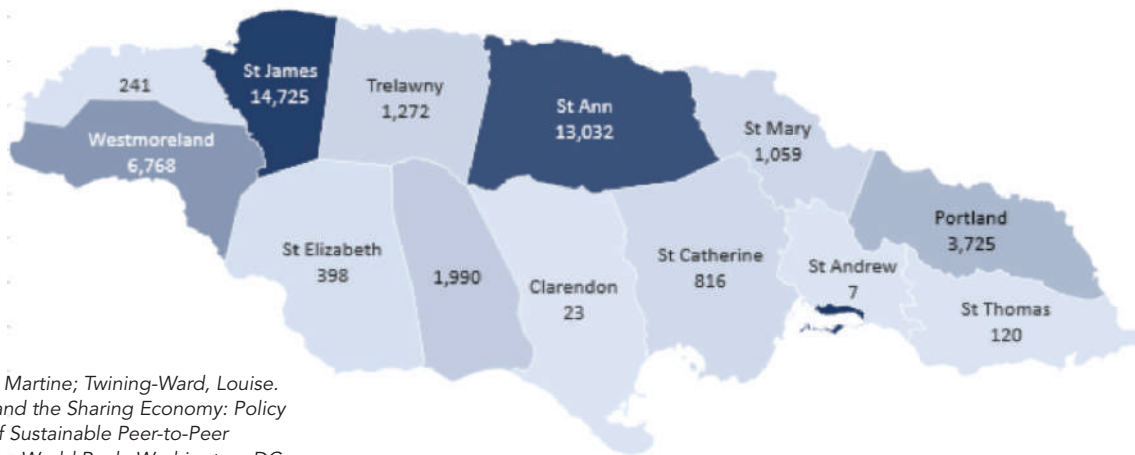
1.2.2 Tourism Demand in St. Thomas

ARRIVALS

Unfortunately, there is no specific tourism statistical data available on St. Thomas. The parish is included in the Portland resort area and therefore assumptions have to be made to estimate the tourism demand in St. Thomas. Tourism arrivals in St. Thomas are currently relatively low. In 2017, St. Thomas was estimated to have received 7,300 stopover arrivals (an estimated 30% of the stopover arrivals in the Port Antonio resort). Much of the current demand is generated by non-resident Jamaicans visiting friends and/or relatives (VFR). The Ministry of Tourism estimates that 80% of arrivals in St. Thomas are non-resident Jamaicans. The ratio resident to overnight tourist is very low; the parish is home to 3.5%² of the total population in Jamaica but receives just 0.31% of all tourists.

Due to lack of JTB tourism statistics that are specifically for the parish, Airbnb trends can be used to understand the demand in St. Thomas in comparison to the rest of Jamaica. While in the other regions of Jamaica, platforms such as TripAdvisor Rentals and Booking.com also offer peer-to-peer accommodation, these platforms have no offerings in St. Thomas. HomeAway has one listing in Morant Bay but that listing is also offered on Airbnb. In 2017, Jamaica received 59,522 Airbnb guests and thereby representing 2.4% of all foreign arrivals (including non-resident Jamaicans). In 2017, St. Thomas received 120 guests who booked using the Airbnb platform, generating approximately US\$10,000 for all hosts in the parish. These numbers were up from 27 guests and US\$2,000 in revenues generated during 2016.

FIGURE 10: Airbnb Guests in St. Thomas, 2017



Source: Bakker, Martine; Twining-Ward, Louise. 2018. *Tourism and the Sharing Economy: Policy and Potential of Sustainable Peer-to-Peer Accommodation*. World Bank, Washington, DC.

FIGURE 11: Number of Airbnb Guests and Total Earnings, St. Thomas, 2014-17



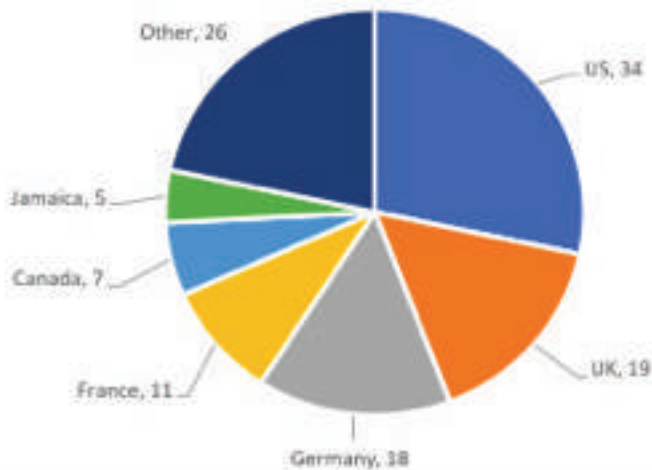
Source: Bakker, Martine; Twining-Ward, Louise. 2018. *Tourism and the Sharing Economy: Policy and Potential of Sustainable Peer-to-Peer Accommodation*. World Bank, Washington, DC

² Migration in Jamaica: A Country Profile 2018

AIRBNB SOURCE MARKETS

The US is the main market for Airbnb rentals in St. Thomas followed by UK, Germany and France. Airbnb data does not reveal if guests can be considered as overseas Jamaicans.

FIGURE 12: Source Markets Airbnb Guests, 2017



Source: Bakker, Martine; Twining-Ward, Louise. 2018. *Tourism and the Sharing Economy: Policy and Potential of Sustainable Peer-to-Peer Accommodation*. World Bank, Washington, DC

HOSTS AND LISTINGS

The number of Airbnb guests in St. Thomas is relatively low compared to the other parishes in Jamaica, 120 guests versus the average of 4, 253 guests for all parishes. The average daily Airbnb expenditures per guest in St. Thomas is US\$20.96 which is lower than the average per parish.

TABLE 13: Key Airbnb indicators for St. Thomas and average per parish in Jamaica, 2017

	Parish of St. Thomas	Average per parish in Jamaica
Number of guests	120	4,253
Total earnings	US\$9,937	US\$637,106
Average expenditures per guest	US\$82.80	US\$156.91
Average daily expenditures per guest	US\$20.96	US\$32.86
Typical host earnings	US\$723	US\$1,482
Average length of stay	4	4.9
Average group size	2	2.3
Number of listings per host	1.2	1.7

Source: Jamaica Tourist Board

In 2017, the parish of St. Thomas had 21 active hosts of which only 10 had ever received a booking since listing their property. The 21 active hosts offered 26 listings combined of which 14 listings had received at least one booking.

Private rooms are the most popular type of booking in St. Thomas. This is most likely caused by the fact that several small hotels are listed on the platform.

TABLE 14: Active listings and listings booked, type of listing, 2017

Type of listing	Number of active listings	Number of listings ever booked
Entire home	9	6
Private room	16	8
Shared room	1	0
Total	26	14

Source: Bakker, Martine; Twining-Ward, Louise. 2018. *Tourism and the Sharing Economy: Policy and Potential of Sustainable Peer-to-Peer Accommodation*. World Bank, Washington, DC.

PROFILE OF VISITORS

In preparation of this study, the Ministry of Tourism conducted a visitor survey in the parish.³ The interviewing of visitors involved visiting attractions, such as Bath, Blue Mountain Peak, and Reggae Falls; visiting hotel accommodation; and attending events such as the Independence Day parties. There were a total of 97 persons surveyed which gave some indication of the type, age groups and destinations visited. The sample included 51 males and 46 females with the majority being between the ages of 25-35 years (44%), followed by those between 18-25 years (25%). No person over 55 was surveyed. The majority of the respondents were locals (75%) and the rest were foreigners (25%).

Most respondents reported visiting St. Thomas for leisure (77%) or for family and friends (9%), and a larger share of visitors came for swimming (31%) and hiking (15%). Only between 5% and 20% of visitors reported being attracted to St. Thomas for specific attractions and activities, for the quality of its accommodation, for its heritage and culture, or its cuisine.

Occasional visitors made up the largest share of visitors (41%) while frequent visitors represented 26 percent. The summer period recorded the highest level of visitation of the four seasons (81%). Most people surveyed (62%) reported no plans to visit other destinations in other parishes, they traveled in groups with four or more individuals (77%) for a period of 1–3 days (75%), and they used personal transportation (87%), public transport (9%) and tour buses (7%).

Most people (50–65%) reported an average daily spend of about US\$40 on transportation, meals, accommodation and shopping, with the least expenditure going to entertainment and shopping. Food and transportation took the lion's share with 32 percent and 34 percent of the travel budget respectively.

TOURIST MARKET SEGMENTS

Current visitors to St. Thomas broadly fall under one of the following main categories:

1. **Free Independent Traveler (FIT):** These visitors make their own arrangements and are not traveling as part of an organized group tour. These are stay-over visitors who spend an average of one to two nights in the parish. These stay-over visitors are mostly Europeans and interested in hiking to the peak of the Blue Mountain or interested in exploring the less visited areas of Jamaica.
2. **Visiting Friends and Relatives (VFR):** Non-resident Jamaicans visiting friends and/or relatives. It is estimated that most of these visitors stay with friends and family. However, there is a growing trend of VFR visitors to rent private accommodation through platforms such as Airbnb or stay in a hotel. The VFR market has a high interest in visiting sites of cultural heritage importance.
3. **Domestic Tourists:** Jamaicans who spend one or more nights in St. Thomas for leisure or as part of a local meeting, conference, or event. The market for overnight leisure tourists is currently low but the parish receives a significant number of church and other community groups.

³ Ministry of Tourism (2018) Tourism Destination Assessment St. Thomas, Jamaica

4. **Scientific, Academic, Volunteer, Educational (SAVE):** International groups that travel to St. Thomas for voluntourism experiences usually in the medical sector or with school or edutourism programs.
5. **Day Visitors:** On the weekends and during holidays people living in the wider Kingston area visit the parish to visit friends or family. Others visit the parish to visit one the beaches, eat at a restaurant or visit a specific site. International visitors who may be staying in Kingston and are looking for a nature and/or adventure experience are currently representing a small group. The majority of this group visits the parish of St. Thomas for hiking in and around the Blue Mountains. The lack of organized day tours make it difficult for foreign visitors to travel to other regions of the parish.

AVAILABILITY OF TRIP PLANNING INFORMATION

Websites and online platforms that provide some trip planning information for St. Thomas are:

- TripAdvisor- accommodations, restaurants, “things to do” (attractions)
- Booking.com- accommodations
- Google Maps- accommodations, restaurants, attractions
- Trivago- accommodations
- My Island Jamaica- attractions
- Jamaica National Heritage Trust- cultural heritage attractions
- USA Today Travel Tips- attractions
- Lonely Planet- “Kingston, Blue Mountains, and Southeast Coast” activities, experiences, accommodations, restaurants, etc., but information is limited and mainly is for Kingston
- Trip-Suggest- attractions
- Rough Guides- history, attractions

Websites that do not feature any trip planning information for St. Thomas are:

- Jamaica Tourist Board
- Visit Jamaica
- TPDCo
- Things-to-do-in-Jamaica.com
- Fodor’s Travel
- Trippy.com

Overall there is a steady demand of visitors but very little year-to-year growth. The St. Thomas tourism growth rate is below the country’s average. The far majority of tourists can be described as VFR who have a higher average length of stay but tend to spend less per day than foreign



leisure tourists. Some of the hotels also cater to foreign and domestic groups of travelers. Some of these groups are volunteer tourists while others are domestic community groups. One of the hotels indicated a drop in the number of group reservations. An international group that had stayed at the property for more than a decade indicated last year they preferred to overnight in Kingston instead citing the poor road infrastructure between Kingston and the parish as the main reason. There is low availability of trip information to the parish and the region is not highlighted on the official national tourism web portals.

COMPETITIVE ANALYSIS

The Ministry of Tourism and its agencies recognize six main resort areas in the country: Montego Bay, Ocho Rios, Negril, Kingston, Portland and the South Coast⁴. The first three resort areas combined received 77.4% of all international arrivals in 2017. These resorts are identified by the 2002 Jamaica Tourism Master Plan as the high-density tourism zones focusing mostly on the all-inclusive tourism model. Portland and the South Coast have developed as secondary resort areas offering smaller hotels and Kingston is positioned as the business and cultural capital.

Within the overall tourism offerings in Jamaica, St. Thomas will need to differentiate itself from the other areas in the country. Its relatively close proximity to Norman Manley Airport in Kingston and the capital makes it easier to access than some of the other parishes. The lack of current tourism development can be used as an advantage and can be used to position the parish as the “real Jamaica” or “undiscovered Jamaica.” To retain this competitive advantage, future tourism development in the region should range from low to high density guided by a zoning plan and based on sustainable development principles that will protect and maintain existing natural and cultural heritage. While the current economic impact is limited, St. Thomas is expected to benefit from the recent strategy of the Ministry of Tourism to focus more on community-based tourism (see Section 3). Much of the competitiveness of the parish as a tourism destination will depend on the national efforts to diversify the current tourism product and brand the country beyond its image of an all-inclusive resort destination.

⁴ In 2019, the Ministry of Tourism reorganized the six main resort areas into Destination Areas. The geographic boundaries of the Destination Areas are as follows: 1. Montego Bay, 2. Ocho Rios, 3. Negril, 4. Kingston & The South Coast, 5. Portland & St. Thomas, and 6. Falmouth

1.3 Enabling Environment

The development of tourism enterprises which are the bedrock of a vibrant tourism industry depends on what is referred to as the “enabling environment.” In other words, how easy is it for businesses to comply with local government requirements? What is the availability of trained employees? Can businesses readily access financing and other incentives? It is also important to ensure that the destination plan is aligned to national policies and related plans.

1.3.1 Aligning the Destination Plan to National Tourism Plans & Policies

The Master Plan for Sustainable Tourism Development and the National Development Plan—Vision 2030 are the main guides for determining Jamaica’s tourism strategy. The government has set a target of 5% growth per year for the years 2017-2022. The target is 5 million visitors per year with a total earning of US\$3.5 billion from visitor consumption expenditure. To achieve this, the goal is to add 20,000 additional rooms in the higher end of the market over the next five to ten years.

The government’s goal is also to significantly reduce the amount of leakage; currently Jamaica retains only about 30% of every dollar spent by tourists.⁵ So, while the government will pursue foreign direct investment to develop larger hotels, it has also instituted increased incentives for Jamaicans to invest in the tourism sector.

“Increased local investments can be achieved through increased provision of services, developing attractions, and transforming small hotels and private homes to meet the needs of special-needs travelers and other groups.”⁶
—Hon. Edmund Bartlett – Minister of Tourism

The prioritization of investment for tourism growth and development at the local level is also in line with the 2015 National Community Tourism Policy and Strategy⁷, which includes the following vision:

“Community Tourism Vision: an invigorated tourism sector in communities that enriches community quality of life through social, cultural, economic and environmental benefits, exemplifies sustainable livelihoods, and strengthens Jamaica’s national policy values and interests.”

Jamaica’s national tourism strategy recognizes the opportunity for community tourism and a more inclusive approach to tourism overall. It also provides specific recommendations for developing tourism products that cater to markets interested in experiential tourism.



A number of recurring themes emerged from the first round of on-site consultations that align with national tourism plans and policies. These include the need for:

- Community inclusion through organic growth;
- Local ownership of tourism products and businesses;
- A blended scale of hotel development, i.e. small to medium scale accommodation offerings;
- Diversification of local economies that go beyond tourism to other value-adding activities and cooperatives, such as permaculture farming;
- Linkages to other key sectors, such as agriculture and creative industries

St. Thomas presents a unique opportunity for tourism growth: although there is currently little tourism development in the area, the potential of its natural and cultural heritage is promising. Planning for this growth is essential for St. Thomas to become a competitive destination, which will require investment in the sustainable development of roads, solid waste and water management systems; tourism attractions, experiences and events, tourism market readiness; workforce development, and branding and marketing.

1.3.2 Human Resource Development

To develop as a tourism destination, residents of St. Thomas need to be prepared to:

1. Pursue entrepreneurial opportunities.
2. Develop the skills and knowledge needed for key, front-line and supervisory positions for employment in hotels, restaurants and other service providers.
3. Consistently deliver good customer service.
4. Foster a positive attitude towards visitors and understand that harassing guests and seeing them only as a means of income is detrimental to development.
5. Learn from the experiences of other parishes in order to ensure sustainable and inclusive growth.

⁵ <https://www.hotelmanagement.net/development/foreign-support-jamaica-ramps-up-hotel-development>

⁶ <http://www.mot.gov.jm/speeches/ministry-tourism's-five-year-strategic-vision-tourism-development-jamaica>

⁷ <http://jis.gov.jm/media/FINAL-COMMUNITY-TOURISM-POLICY-AND-STRATEGY-White-Paper-April-2015.pdf>

On-site interviews with owners and managers of accommodations, restaurants and attractions revealed that while certain institutions in the parish provide training, availability of suitably prepared staff was a challenge.

Employee attitude and quality of service was also found lacking. Staff attrition and difficulties associated with finding suitably trained employees is a persistent problem. Building the capacities of individuals to not only serve in tourism facilities but to become entrepreneurs and owners of their own establishments will be among strategic priorities. Human Employment and Resource Training Agency (HEART) facilities, high and technical schools in the parish can provide a strong knowledge base for meeting the needs of an expanding industry in the parish. These include the Paul Bogle Vocational Training Institute (HEART), University of the West Indies Distance Education Centre (UWIDEC), Robert Lightbourne High School, Paul Bogle High School, Yallahs High School and St. Thomas Technical School.

The development of critical skills for tourism will include not only the suite of customer service, culinary, restaurant, housekeeping, entrepreneurship and other competencies but also those aligned to the creative industries. Building a pool of talent to meet the entertainment needs of the expanding hotel footprint should be strategic and intentional, and to this end, institutions should ensure that course offerings are available and relevant.

The enabling environment is impacted by the extent to which there is adequate human resources to meet the labor requirements for tourism. The Travel and Tourism Competitiveness Index 2017 measures the human resource and labor market and Jamaica ranked 55th out of 136 countries. The rank and scores of sub-indices are outlined below.

- Primary education enrollment rate: (30)/98.0 net percentage
- Secondary education enrollment rate: (92) /82.1 gross percentage
- Extent of staff training: (60) /4.0
- Degree of customer orientation: (118) /3.9
- Hiring and firing practices (63)/3.8
- Ease of finding skilled employees (61)/ 4.3
- Ease of hiring foreign labor (32)/ 4.4
- Pay and productivity (90)/ 3.7
- Female participation in the labor force (59) 0.83 ratio to men

These metrics can serve as a guide to entrepreneurs interested in establishing tourism businesses and those responsible for human resource development and planning

at national and local levels. The national and local training mechanisms and institutions in Jamaica, including the Jamaica Centre for Tourism Innovation, should seek to proactively work to improve Jamaica's ranking and performance.

The low ranking for the degree of customer orientation is indicative of what to expect in St. Thomas and signals a need at the national level to address this issue. The strategic development of tourism workforce development in St. Thomas can help to position the parish as a place where customer service is first-rate and is a defining characteristic of the parish.

1.3.3 Ease of Doing Business

Two globally recognized indices that provide insights about Jamaica's enabling environment for doing business can be used to prepare and guide tourism stakeholders in St. Thomas. The World Economic Forum Travel and Tourism Competitiveness Index ranks Jamaica's performance as 69th out of 136 economies. Sub-indices are ranked out of seven, and Jamaica's enabling environment sub-indices were as follows: Business Environment (4.8)/42nd out of 136, Safety and Security (4.0)/119 of 136, Health and Hygiene (4.7)/94 of 136, Human Resources and Labour Market (4.7)/55 of 136 and ICT Readiness (4.2)/78 of 136. Property rights, efficiency of legal processes, time and costs required to deal with construction permits, and time and cost to start a business, the effect of taxation on incentives to work and to invest and the overall tax rate are among the key business environment measures. Jamaica ranked 70th out of 190 countries in the 2018 World Bank Doing Business Report (DBR 2018). The Jamaica Promotions Corporation (JAMPRO) is working towards moving Jamaica's ranking to the top ten (10) in the next few years. The rank for areas measured for the DBR were as follows: Starting a business - 5, Getting credit - 20, Trading across borders - 130, Dealing with construction permits - 98, Protecting minority investors - 81, Getting electricity - 91, Enforcing contracts - 127, Paying taxes - 122, Registering property - 128, Resolving insolvency - 35.

While Jamaica has an opportunity to improve on both global rankings, the DBR rank of five for starting a business could be viewed as encouraging for anyone wanting to set up tourism enterprises in St. Thomas. This score, in addition to the country's ongoing efforts to improve performance on all indices, is indicative of commitment at the highest level to improve the business environment. The provision of technical support and logistical ease of accessing services can help to drive further improvements. Agencies should consider coming into communities to provide services so that entrepreneurs in more rural parishes can minimize the travel and other costs associated to accessing business development services in Kingston and other key hubs.

1.3.4 Tourism Licensing Requirements

After setting up a business, owners and managers require access to various licenses or approvals depending on the nature of the enterprise. For example, specific criteria and requirements (e.g. insurance) are associated with certain licenses, and these can be costly and onerous. Individuals and groups interested in establishing tourism businesses must be prepared to meet requirements relevant to their business. The Tourism Product Development Company (TPDCo) can support potential business owners and other stakeholders in St. Thomas in this regard.

TPDCo is responsible for the development and monitoring of tourism standards, planning and implementation of tourism products and human resource development policies and training. One of the agency's main goals is tourism product identification. While TPDCo has supported several community-based tourism projects in the region, none of the following are located in the parish. They include:

- Blue and John Crow Mountains National Park tours
- Holywell Recreational Area mountain retreat
- Ambassabeth Eco-Lodge cabins operated by the Bowden Pen Farmers Association

1.3.5 Linkages

A strong linkages framework is integral to the sustenance of the tourism industry. The Ministry of Tourism, through the Tourism Linkages Council, provides a policy framework within which linkages in the tourism sector is facilitated and monitored. The Linkages Council provides oversight to five Networks (Gastronomy, Sports and Entertainment, Health and Wellness, Knowledge and Shopping) and two Technical Working Groups (Agriculture and Manufacturing). Its mission is to increase consumption of goods and services that can be competitively sourced locally, with the aim of creating employment and increasing earning potential while generating and retaining foreign exchange earnings.

The Ministry is also in the process of finalizing a Tourism Networks Policy which will further guide how networks will support economic growth. This policy framework can provide support and guidance to how St. Thomas can create specific linkages along the tourism value chain. Guided by the networks and technical working groups and with the support of the Destination Assurance Council, stakeholders interested in tourism in St. Thomas can determine where linkage opportunities reside in the parish within the areas of focus of the Tourism Linkages Network and other areas.

The ability of the parish's farming community to meet most of the agricultural needs of a local tourism destination is key. Currently, there are eighteen local Jamaica Agricultural Society farming cooperatives. The Cedar Valley and Port Morant groups have expressed interest in ensuring they are positioned to meet the produce needs of a growing tourism sector. Farmers in the Hagley Gap community, known for its

coffee farms, currently supply produce to accommodation providers such as guest houses. The distribution of farms across the central tourism nodes (Blue Mountain area and southern coastal area) will also be important in supplying accommodations and restaurants.

1.3.6 Community Safety and Security

Community and visitor safety and security are essential to expanding the parish's tourism offerings. The parish must ensure that they have enough police officers and stations and that these stations are adequately spread out across the parish. They must also ensure that officers are trained to function well in a tourism destination and that there is an assigned liaison to assess the safety and security of tourism properties seeking registration. Not only will the police need to be equipped but the citizens also need to understand their role in being vigilant and alert and contributing to the overall security monitoring and management system.

It will be critical to proactively engage communities in St. Thomas to understand how best to address and stem the persistent issue of visitor harassment at key attractions such as Bath. It is critical to ensure that visitor harassment does not expand to other areas of the parish as tourism grows over time.

1.3.7 Readiness for Community Tourism

The National Community Tourism Policy and Strategy was tabled as a white paper in 2015 after island wide consultations. The policy seeks to ensure that tourism is more inclusive extending the tourism spend to communities and articulates a framework for increasing the awareness of communities to tourism benefits.

The vision articulated in the policy is: *'an invigorated tourism sector in communities that enriches community quality of life through social, cultural, economic and environmental benefits, exemplifies sustainable livelihoods, and strengthens Jamaica's national policy values and interests.'*

The policy will therefore provide a framework for addressing key aspects of readiness at the community level in St. Thomas. This will include but not be limited to:

- Strengthening tourism awareness and understanding tourism best practices
- Appreciating that guests enjoy non-traditional experiences including experiencing life in communities
- Understanding the range of community tourism niche areas to be pursued
- Meeting requirements for compliance including Regulatory, Infrastructural and Human and Social
- Enabling communities to appreciate the unique role to be played in collectively safeguarding the experience of the guests

- Establishing, where necessary, associations to strengthen the ability to roll out experiences across the community and parish e.g. Homestay Associations can support group training etc.

The policy articulates tiers of readiness for community tourism enterprises and indicates requirements to move from tier 3 (Visitor ready) to tier 1 (Export Market ready). Understanding what the current and future tourism market demands and ensuring readiness to meet these needs will be important for tourism business interests in St. Thomas.

The community tourism policy will be used as the guiding framework for further assessment of the readiness in current tourism businesses in St. Thomas. The readiness of the enterprises and the communities on a whole for tourism are important components of the enabling environment.

1.3.8 Financing

Creating and strengthening financing mechanisms, including loans and incentives, and increasing the awareness of parish stakeholders of these options is critical to expanding tourism development. The Tourism Enhancement Fund (TEF) has provided loans at competitive rates for the tourism sector, working through vehicles including the Export Import Bank, Jamaica National Bank and other partners. The Hotels Incentives Act also offers incentives that can be accessed by local stakeholders and businesses.

1.4 Urban Development & the Environment

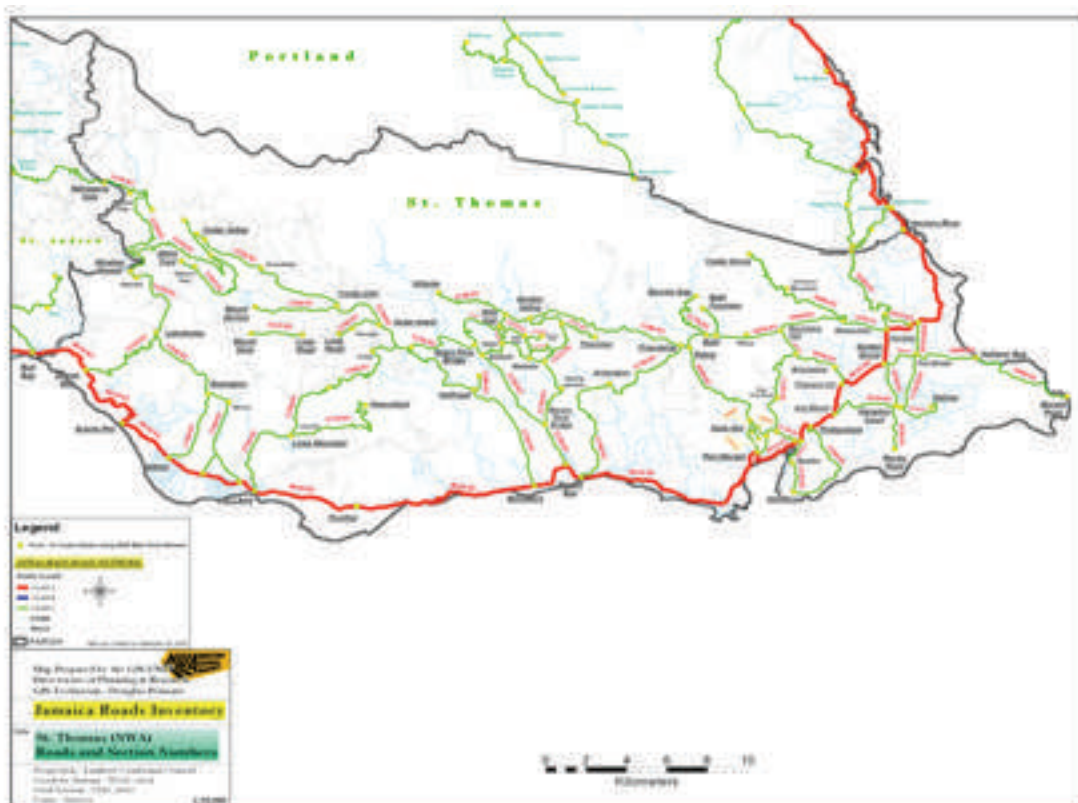
1.4.1 Road Network

Roads make a crucial contribution to economic development and growth and bring important social benefits. They are of vital importance for the economic development of the parish of St. Thomas. A good road network provides access to employment, social, health and educational services in support of inclusion and poverty alleviation for the population of this parish. The tourism industry needs good roads to facilitate the transportation of tourists from one place to another because quite simply, the aim of the tourist is to be able to safely access key attractions, sites and hotels.

The parish of St. Thomas has an extensive road network, i.e. six (6) class A, forty (40) class C roads connected via seventy (70) bridges. The majority of the network is of poor quality with limited directional signage.

The National Works Agency (NWA) is directly responsible for Jamaica's main road network, consisting of approximately 5000 km of class A, B and C roads. Parochial roads however, are the responsibility of the local planning authority and in the case of St. Thomas the responsibility entity is the St. Thomas Municipal Corporation.

FIGURE 13: National Works Agency (NWA) Jamaica Roads Inventory - St. Thomas



Source: <http://www.nwa.gov.jm/nwa-bridges-and-roads>

NWA has outlined the following general road repairs and maintenance projects in relation to their current status within the parish of St. Thomas.

TABLE 15: Overview of NWA General Road Repairs and Maintenance Projects for St. Thomas

Project	Description	Responsible Entity	Progress
1. Albion - Llandewey	Road Rehabilitation	NWA	60%
2. Church Corner to Morant River	Periodic Maintenance	NWA	100%
3. Eleven Miles	Bridge Construction	NWA	Pending
4. Friendship, Wilmington	Road Rehabilitation	NWA	Pending
5. Llandewey	Retaining Wall	Municipal Corporation	Awarded
6. Lloyds - Lowe Mountain	Road Rehabilitation	NWA	30%
7. Middleton (Morant Crossing - Whitehall)	Road Rehabilitation	NWA	10%
8. Morant Bay to Port Morant	Periodic Maintenance	NWA	100%
9. Port Morant to Pleasant Hill	Periodic Maintenance	NWA	100%
10. Springfield	Road Rehabilitation	NWA	75%
11. Stewart Mountain	Road Rehabilitation	Municipal Corporation	Awarded

1.4.2 Water Supply System

The National Water Commission (NWC) draft parish plan for St. Thomas describes the investments needed to improve water service in the parish of St. Thomas. This report identifies the key water supply system (distribution) problems, suggests improvement projects, and estimates the costs of the improvement projects.

St. Thomas needs significant investment in the water sector for the following reasons:

- The water supply network infrastructure is deteriorating and requires immediate rehabilitation or replacement.
- St. Thomas has high levels of non-revenue water (NRW), at approximately 70 percent. High levels of non-revenue water reflect large volumes of water lost through leaks, stolen through illegal connections, or for which the NWC does not issue invoices.
- Water supply does not satisfy water demand in any of the zones within St. Thomas.

The main challenge that the parish faces is the high level of NRW which is caused by an old and undersized water supply network infrastructure and poor water supply pressure management. The majority of water supplied to the parish is from well sources, which accounts for 56 percent of the water supply.

WATER RESOURCE

Water Sources

Approximately 44 percent of the total water production for the parish is derived from surface water sources. The following are the main surface sources in the parish:

- Nutts River
- Windsor Castle River
- Duckenfield
- Bath
- Easington/Yallahs

Approximately 56 percent of production in St. Thomas is supplied by groundwater from eight wells across the parish. The major ones are as follows:

- South Haven
- Albion Estate
- East Albion
- Montpellier
- Springfield
- Prospect
- New Pera

Water Supply Systems

The parish is supplied by eleven wells that account for approximately 56 per cent of supply as stated above. The combined reliable yield from these sources is 4.727mgd. Most of the water supply networks throughout the parish consist of aged and undersized pipelines, which are contributing factors to the high levels of NRW. Information on the water supply network is summarized in Table 16.

The National Water Commission (NWC) provides some 7.0 million gallons of water per day to the St. Thomas water supply system during the wet season, however, production reduces to 5.5mgd during the dry season. Approximately 56 % of the parish’s population has access to piped water. Numerous springs and river water sources cover a large portion of St. Thomas. The major rivers are the Yallahs River, Morant River, and the Plantain Garden River. Yallahs River is notable for supplying Kingston and St. Andrew Area with potable water. The majority of the springs and tributaries terminate at these rivers and together they form the largest water supply sources in the interior regions of the parish.

Aquifers are also present in the parish where most are utilized as potable water production wells. These wells serve as major water production sources for all the coastal regions of St. Thomas including Eleven Mile, Yallahs, White Horses, Morant Bay and Prospect. The major wells are located in Albion, Yallahs, Whitehorses and Springfield.

Despite the abundance of potable water sources in St. Thomas, the parish is faced with the challenge of water shortages and improper water distribution. This is due to the continuous deterioration of the Commission’s pipe/network infrastructure, intake facilities, treatment plants and pumping equipment. Improper water storage as well as water theft is also a major contributor to the water supply problems in the parish and signifies the need for major upgrade works in most sections of the parish.

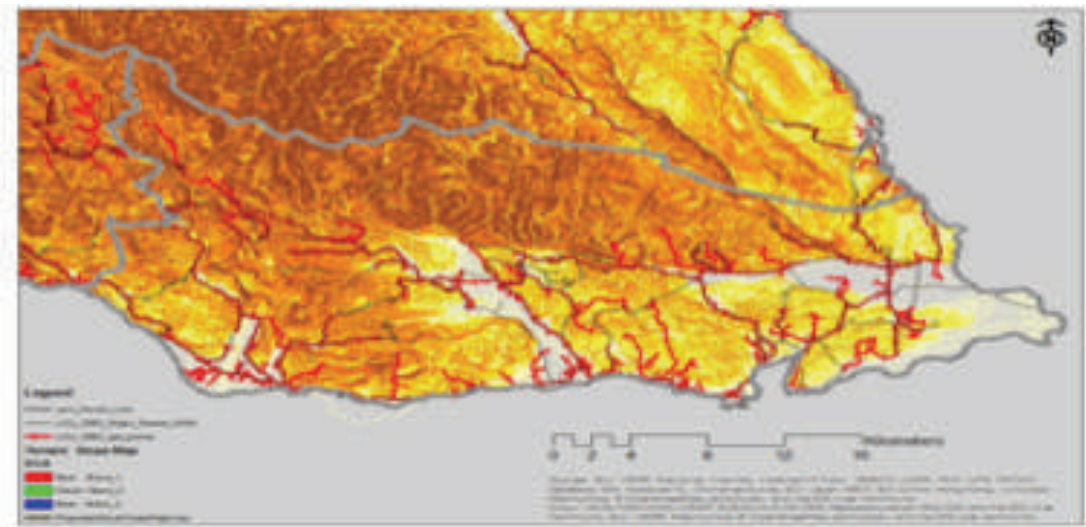
TABLE 16: Summary Information on St. Thomas Water Supply Network

Pipe Diameter (inches)	Approximate Length (Metres)	Portion of the Network (%)
3/4	415	0.1
1	34,087	7.9
1.5	7,735	1.8
2	123,661	28.5
3	46,325	10.7
4	149,452	34.4
6	21,715	5.0
8	45,020	10.4
10	2,555	0.6
12	2,116	0.5
36	866	0.2
Total	433,947	100.0

1.4.3 Power Supply

Jamaica Power Service Company (JPS Co) is the primary provider of electricity to the parish of St. Thomas. The poor conditions of the existing road network contributed to the difficulty the company faces in extending the power supply to the more rural hinterlands (to the north) within the parish. Renewable energy sources are utilized by very few persons currently and should be encouraged throughout the parish in order to foster sustainable development in communities.

FIGURE 14: St. Thomas Power Supply and Slope Analysis



Map prepared by: Inter Plan Planning Consultants (Data source depicted on Map)

1.4.4 Sewage Treatment Facilities

The NWC operates nearly 100 sewerage (wastewater) treatment plants island wide. The types of sewerage treatment facilities used in Jamaica include oxidation ditch, activated sludge, waste stabilization pond and primary treatment. The table below highlights the existing sewerage treatment facilities in St. Thomas.

TABLE 17: Estimated Costs for Improvement Projects by Demand Zone		
Treatment Plant	Type of Facility	Capacity (mgd)
Red Hills Pen	Extended Aeration	0.07
Yallahs Housing Estate	Waste Stabilization Ponds	0.16

1.4.5 Solid Waste Management

The National Solid Waste Management Authority (NSWMA) operates the sole solid waste disposal site in St. Thomas located at Church Corner on land owned by the St. Thomas Municipal Corporation. The property is only three (3) acres in size and is grossly inadequate to serve the current population of St. Thomas, therefore a new larger location must be recommended in order to boost the physical infrastructure required for tourism development and future generations.

TABLE 18: NSWMA Solid Waste Management Data for St. Thomas

Disposal Site	Acreage	Type of Solid Waste	Volume of Solid Waste Annually Tonnes (2014)	Commencement of Operations	Owned by	Operated by	Current Operational Status
Church Corner	3	Municipal	17,760	1980's	St. Thomas Municipal Corporation	NSWMA	Active

1.4.6 Natural Environment

TERRAIN

The parish of St. Thomas contains 742.2 km² (286.5 sq. miles) of land at the south-eastern end of the island. The terrain is mountainous and contains the Blue Mountain Peak which is the highest point on the island at an elevation of 7,402 feet above sea level as well as Mossman's Peak at 6,700 feet. Other mountain features include the Kenmore Ridge, Queensbury Ridge and Yallahs Hills.⁸

CLIMATE AND CLIMATE CHANGE

Jamaica experiences a bimodal pattern of rainfall with an early peak between April and June and a higher peak between September and November.⁹ Peak rainfall typically occurs in October. The months of December to March is typically the driest period of the year with an additional

midsummer drought in July/early August.¹⁰ The mean yearly rainfall of St. Thomas is the second highest on the island after Portland.

Temperatures in the parish are relatively constant throughout the year averaging between 25-30°C in the coastal lowlands and 15-22°C in the higher elevations of the north-east regions of the parish. Temperatures are also influenced by the onshore daytime breezes and offshore nighttime breezes.¹¹

Temperatures across the island have been observed to show a steady increase from the mid-twentieth century to the present and the nighttime temperatures are increasing faster than the daytime temperatures resulting in less difference between the two. There is also evidence of year-to-year and decade-to-decade variability in rainfall patterns with a general drying trend.¹²

⁸ STLSDP 2016

⁹ State of the Jamaican Climate 2015: Information for Resilience Building (Summary for Policy Makers). Produced for the Planning Institute of Jamaica (PIOJ). Climate Studies Group, Mona (CSGM) 2017.

¹⁰ Ibid.

¹¹ STLSDP 2016.

¹² State of the Jamaican Climate 2015: Information for Resilience Building (Summary for Policy Makers). Produced for the Planning Institute of Jamaica (PIOJ). Climate Studies Group, Mona (CSGM) 2017.

TABLE 19: Thirty year mean rainfall by station (1971-2000) in mm.

RAINFALL STATION	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
Amity Hall	99	74	72	87	176	144	86	125	203	240	222	111
East Albion	72	72	49	63	114	146	92	153	237	244	197	99
Duckenfield	119	93	84	98	168	116	96	165	221	273	254	165
Morant Bay PWD	84	61	63	90	145	174	126	165	248	293	216	106
Whitehorses	66	78	51	82	127	156	118	166	242	248	186	100
Ramble	89	73	64	84	126	168	107	171	273	319	189	103
Cedar Valley PWD	106	120	81	102	168	173	111	203	289	365	229	121
Sunning Hill L/A	123	96	76	128	179	189	141	208	313	337	233	139
Serge Island	88	74	74	89	226	203	164	222	260	266	220	103
Coley Farm	98	67	69	94	193	224	129	226	268	286	228	116

Source: *The State of the Jamaican Climate 2015: Information for Resilience Building*

The North Atlantic Hurricane season coincides with Jamaica's rainfall season and runs from June 1 to November 30 annually with a peak period occurring between mid-August to late October. Jamaica has experienced more hurricanes and storm events since 2000 than in the preceding 20-year period.

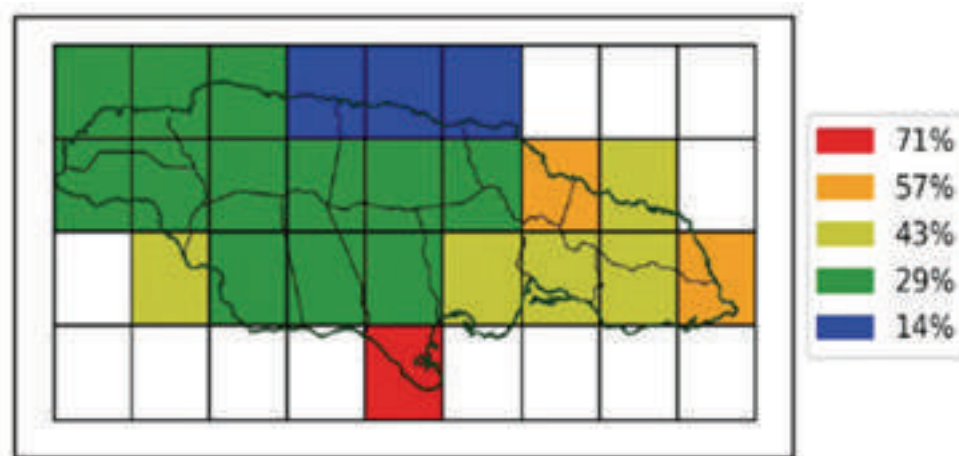
Hurricanes generally approach the island from the south-west direction and therefore the parish of St. Thomas is highly susceptible to the possibility of hurricane impacts. The State of the Jamaican Climate 2015 report indicates that the eastern section of the parish has a 57% chance of a hurricane passing within 50km of that area and the western section of the parish has a 43% chance of a hurricane passing within 50km. The current projections suggest that although

the genesis, frequency and tracks of hurricanes and storms should remain the same, the intensity of rainfall and wind speed are expected to increase.

Sea levels in the Caribbean have been rising at a rate of 2.5 +/- 0.4 mm/year. Sea surface height data for the coastal regions of Jamaica are limited and inconsistent but mapping of impacts across the island indicates that sea level rise has possibly contributed to coastal erosion and storm surges.¹³

Climate change is expected to impact physical development and infrastructure especially along coastal regions as well as agriculture, marine and terrestrial biodiversity, tourism and freshwater resources among others.

FIGURE 15: Map Illustrating Probability of a Hurricane Passing within 50km of a Grid Box Ba



Source: *The State of the Jamaican Climate 2015: Information for Resilience Building*

¹³ Ibid.

PROTECTED AND SENSITIVE AREAS

Jamaica established a protected areas system master plan (PASMP) 2013-2017 through the collaboration of the Ministry of Water, Land, Environment and Climate Change, the Ministry of Agriculture and Fisheries and the Ministry of Youth and Culture with support from the Forest Conservation Fund and the Jamaica Institute of Environmental Professionals. Within the parish, the Blue and John Crow Mountains National Park / Forest Reserve (BJCMNPFR) is an established terrestrial protected area.

The PASMP lists tourism as one of the threats to the protection of the BJCMNP. The Bowden Inner Harbour is a declared Special Fishery Conservation Area (SFCA) which is reserved for the reproduction of fish populations and is a no fishing zone (MICAF 2018). Rocky Point is proposed as a SFCA and the Yallahs Salt Pond is proposed as a protected area.

The Bowden and Great Morass areas were the focus of research activities by the University of the West Indies with funds from the Ramsar Small Grants Fund (SGF) in 2006.

The Blue and John Crow Mountains National Park was inscribed to UNESCO's World Heritage List on July 3, 2015 as Jamaica's first World Heritage Site for its cultural and natural significance.

1.4.7 Summary

The Ministry of Tourism destination assessment report for St. Thomas provides a fairly comprehensive overview of the primary environmental concerns in the parish. St. Thomas is rich in natural resources and provides critical ecosystem services such as coastal protection, fish nurseries, watershed functions. Forests, aquatic (marine and riverine) and agro ecosystems are present throughout the parish and experience varying levels of impact. Not only do these resources provide critical ecosystem services but they can also form the basis of many of the tours and attractions.

St. Thomas has numerous protected areas which include fish sanctuaries, watershed areas, the Blue and John Crow Mountains UNESCO World Heritage Site and other natural,

cultural and built heritage locations. The Protected Areas System Master Plan - Jamaica 2013-2017 (PASMP) maps Jamaica's protected areas and outlines goals and targets for achievement. The delicate balance between sustainable and inclusive tourism development that does not threaten the natural resources, the ecosystem services they provide and the experience of the tourism product will be an imperative for St. Thomas. The scale of proposed tourism development planning will have to take these environmental factors into consideration.

St. Thomas has been impacted by sea level rise, storms and hurricanes, which have eroded coastlines (e.g. Roselle), damaged natural and built environments and impacted livelihoods. In a context of climate change, the TDDMP will not only have to account for the risks associated with the increased frequency and intensity of hurricanes, but also ensure that alternative sources of energy—such as use of renewable energy supply systems—are among the priority sources for energy recommended for powering accommodations and attractions. Not only is this approach more cost effective in the long run, but it reduces Jamaica's carbon footprint and contribution to greenhouse gases through reduction in use of fossil fuels.

The parish is experiencing environmental degradation through deforestation, aquatic pollution and poor solid waste management. The Yallahs watershed area is the subject of various studies and strategies to minimize degradation and erosion. The impact of poor solid waste management was evident at Bath where garbage, generated largely by people using the route facilitated by community folk, can be observed in the river. Holland Bay beach was replete with garbage that appears to originate from Haiti given the French labelling. Piles of Sargassum was also evident, a phenomenon that has been affecting the Caribbean in recent years. These and other impacts will have to be taken into account in tourism development planning.

From an urban planning standpoint, poor road infrastructure and limited options for local transportation greatly impact accessibility—a challenge that stakeholders cited as the number one obstacle to business expansion. Additionally, water distribution, internet, sewage and waste management pose infrastructure challenges.

FIGURE 16: Images of Garbage at Bath and Holland Bay Beach



Garbage pile up in river at Bath



Garbage and Sargassum on Holland Bay Beach



Garbage on Holland Bay beach with French labelling

1.5 Key Strengths, Challenges and Opportunities

There are key strengths, challenges and opportunities for tourism development in St. Thomas drawn from the comprehensive situation analysis.

KEY STRENGTHS

- Non-resident Jamaicans repeatedly visiting friends and relatives provide a strong foundation for tourism.
- A rich mix of product assets, including natural and cultural heritage sites, offers potential to expand.
- Resilient tourism businesses have remained open despite low levels of visitation.
- A growing number of tourism entrepreneurs are hosting guests in their homes, indicating strong local interest in the tourism industry.
- There is consensus among community leaders, business owners and other key stakeholders that tourism is a catalyst for economic growth.

KEY CHALLENGES	KEY OPPORTUNITIES
Online trip planning information is limited. Tourism businesses are not organized to promote St. Thomas.	Increase awareness of the destination among key market segments.
Most product assets require further development. Visitor harassment is occurring at some attractions. There are no existing tours offered by tour operators.	Create and deliver iconic brand product experiences and events.
The region has poor road infrastructure and transportation barriers to, from, and within the area. Water distribution and sewage and solid waste management systems are inadequate. Signs and directions are inadequate, and there is little sense of arrival in main towns.	Improve infrastructure and placemaking.
Many sensitive and/or threatened ecosystems and wildlife habitats could be negatively impacted by development. The location is at high risk for hurricane impacts.	Develop tourism using sustainability principles.
Tourism businesses are not market ready. Service and quality online ratings for accommodations range from good to mixed. Entrepreneurs do not have access to financing and technical support.	Enable tourism business success and viability.
Community readiness and understanding of the market is low.	Prepare the community and provide a skilled workforce for tourism.
The community does not speak with a unified voice—there is no cooperation or collaboration among tourism stakeholders.	Manage the destination collaboratively.



2. 2030 VISION

Where will we be in 2030?

This section of the plan presents the strategic framework for developing sustainable tourism in St. Thomas. It outlines the vision, goals, strategies, expected outcomes and potential impact of the plan.

GOALS AND TARGET



POTENTIAL ECONOMIC IMPACT

When fully implemented, the TDDMP will provide tangible benefits to St. Thomas, including significant economic, Infrastructure and investment benefits. Expected economic impacts for 2030 are outlined below.

New hotel rooms:
4,170

Tax contributions:
US\$22 million

Number of overnight visitors:
230,000

Total direct and indirect employment:
13,000

Visitor expenditures:
US\$244 million

Full contribution of tourism to GDP:
US\$174 million*

**According to the Ministry of Tourism's Assessment of the Economic Impact of the Tourism Sector in Jamaica (2014), overall, every dollar of tourism final demand results in an increase of 0.72 dollars in GDP. Thus, the full contribution of tourism to GDP is estimated to be lower than visitor expenditures.*

PUBLIC-PRIVATE INVESTMENT

Implementation of the TDDMP will require public and private investment and partnerships. Estimates of minimum investment figures are outlined below.

PUBLIC INVESTMENT:
US\$205 million

PRIVATE INVESTMENT:
US\$508 million

**PUBLIC-PRIVATE
PARTNERSHIPS:**
US\$33 million

2.1 Vision & Guiding Principles

St. Thomas will be recognized internationally as a premier sustainable tourism destination that exemplifies sustainable growth, promotes inclusion, encourages local ownership of tourism businesses, enhances links between tourism and the local economy, and embraces a culture of continuous improvement through workforce development, customer focus and excellence.

Sustainable tourism is defined by St. Thomas as a tourism that sustains the distinctive character of the place—its environment, heritage, and culture, and the well-being of its residents.

Following are the guiding principles for sustainable tourism development:

1. **Community Involvement:** fostering inclusion through ongoing workforce development and organic growth that prepares communities to seize opportunities.
2. **Community Benefits:** supporting local ownership in tourism and creating good jobs that provide living wages and safe work conditions.
3. **Protection of Destination Appeal:** ensuring blended development, e.g., small- and medium-scale resorts, and tourism facilities that sustain the natural environment, prevent degradation by keeping the volume of tourists within maximum acceptable limits, and attract business investments that can operate profitably within these limits.
4. **Diversification in the Local Economy:** striving to diversify the local economy and create links between tourism and other sectors, such as agriculture and creative industries.

2.2 Expected Outcomes

The desirable long-term outcomes from tourism development in St. Thomas are the following:

1. Increase the competitiveness of St. Thomas by improving the parish's desirability as a travel destination and place to live, ultimately inspiring more people to visit, stay longer, and spend more and thereby improve the economic performance of the tourism sector.
2. Support the long-term economic, environmental and social sustainability of the tourism sector by balancing the needs of the community, industry, environment and visitors.
3. Guarantee community inclusion through broad-based access to opportunities—as well as the outcomes of these opportunities—throughout the parish.
4. Build a diversified local economy by creating linkages between tourism and other sectors such as agriculture, health and wellness, and the creative industry.

This section of the plan describes seven main goals and strategies that provide the direction required to achieve the three long-term outcomes. When fully implemented, this plan will provide tangible benefits to St. Thomas, including significant economic, infrastructure and investment benefits. Table 20 outlines the potential economic impacts of the plan.

TABLE 20: Potential economic impacts of the St. Thomas Destination Development and Management Plan

Figures in US\$	Short Term (Year 3)	Medium Term (Year 6)	Long Term (Year 11)
Tourists	14,600	46,720	232,422
Expenditures	\$7,227,000	\$29,200,000	\$244,042,650
Direct and indirect employment	1,192	2,384	13,023
Tax contributions	\$1,416,200	\$4,531,840	\$22,544,934
Full contribution of tourism to GDP (direct, indirect and induced)	\$5,152,851	\$20,819,600	\$174,002,409
Total hotel rooms	400	800	4,370

Figure 17 identifies the three main components used to measure the full contribution of the tourism sector to the economy of St. Thomas. The *direct* economic benefits of tourism consist of expenditures by visitors during their stay in the destination—for example, spending on hotels, restaurants, tours and other services. The *indirect* benefits of tourism are the value of the services and products that tourism businesses purchase from their suppliers. The *induced* impact measures the salaries and wages of employees in the tourism sector, which they use to purchase goods and services.

2.2.1 Expenditure

The limitations of available data make it difficult to accurately assess the current value of tourism in St. Thomas. In 2017, the parish received an estimated 7,300 overnight visitors and tourists.¹⁴ Of these, 80 percent are estimated to be people Visiting Friends and Relatives (VFR)¹⁵—a higher rate than most other areas in the country.

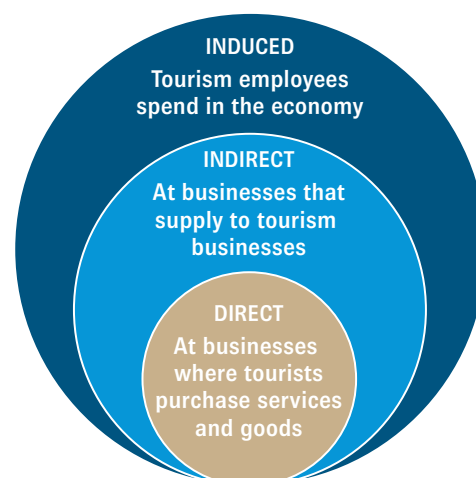
Daily expenditures of the VFR market in Jamaica tend to be lower than those of foreign nationals. The average length of stay by visiting Jamaican nationals in 2017 was 17.5 nights, with an average daily expenditure of US\$30.63 per person, resulting in non-resident Jamaicans spending US\$536 per stay while in Jamaica.¹⁶ In 2017, foreign nationals in Jamaica spent on average US\$148.61 per person per night, with an average length of stay of 8.4 nights—resulting in US\$1,248 per stay.¹⁷

The Average Daily Rate (ADR) for hotels in St. Thomas is currently estimated at US\$60, based on a survey conducted by the Ministry of Tourism and published in “Tourism Destination Assessment 2018: St. Thomas, Jamaica.” The overall ADR for hotels across Jamaica is expected to be higher given the relatively low quality of accommodation in St. Thomas. The same survey indicated that the average length of stay for all visitors was just below two nights.

In the absence of reliable data, three methods can be used to calculate 2017 tourism expenditures in St. Thomas:

1. Assuming that foreign nationals stay an average of 2 nights and non-resident Jamaicans stay an average of 17.5 nights, the total expenditures in St. Thomas can be estimated at US\$2,819,609 using the Jamaica average daily expenditures for both markets.

FIGURE 17: Direct, Indirect and Induced Impacts of Tourism



2. Total tourism expenditures in Jamaica for 2017 were estimated at US\$2.7 billion, and St. Thomas received 0.31 percent of all overnight arrivals. Extrapolating from these numbers, tourism expenditures in the parish would equal US\$8,380,000 assuming they spent as much in St. Thomas as they did in other areas.
3. Using an estimated number of rooms, average occupancy rate of 30 percent,¹⁸ average length of stay, an average number of guests per room of 1.2, and assumed average expenditures of US\$100 per day, total tourism expenditures for St. Thomas in 2017 can be estimated at US\$2,190,000.

Given that tourism supply and demand in St. Thomas is significantly lower than average in the country, the third and lowest estimate is most likely to resemble actual economic impacts.

Using the estimated number of new rooms, estimated occupancy rates, average number of people per room, average length of stay (LOS), and average expenditures per day based on historic tourism data (see section 1.2), table 21 shows the estimated total tourism expenditures for 2022, 2025, and 2030 assuming full implementation of the plan.

¹⁴ JTB estimates that about 30 percent of the 23,098 overnight visitors to the Port Antonio Resort in 2017 stayed in St. Thomas.

¹⁵ Ministry of Tourism estimate

¹⁶ In 2017, 156,614 non-resident Jamaicans spent a total of US\$0.084 billion in Jamaica.

¹⁷ Jamaica Tourist Board (2018) Annual Travel Statistics 2017

¹⁸ In 2017, the average occupancy rate for hotels with less than 50 rooms in Jamaica was 30%, this is expected to be slightly lower in St. Thomas.

TABLE 21: Estimated total tourism expenditures for 2022, 2025, and 2030

Year	Number of rooms*	Occupancy rate (%)	Number of sold nights*	Average LOS	Average number of guests per room	Number of tourists*	Average expenditures per day, per tourist (US\$)*	Average Total expenditures (US\$)*
2017	200	25	18,250	3	1.2	7,300	100	2,190,000
2022	400**	30	43,800	4.5	1.5	14,600	110	7,227,000
2025	800**	50	146,000	5	1.6	46,720	125	29,200,000
2030	4,370**	60	957,030	7	1.7	232,422	150	244,042,650

*The numbers are cumulative. **Figures include existing room inventory.

Every dollar of tourism final demand results in an increase of 0.72 dollars in GDP.¹⁹ Using multiplier figures from the 2014 Economic Impact Study, the direct GDP impact of tourism expenditures can be expected to have a ratio of 0.423, indirect a ratio of 0.192 and induced a ratio of 0.098.²⁰ The actual 2017 estimated total expenditures for St. Thomas are very likely to be slightly lower than the US\$2.2 million estimated above because tourism accommodations in the parish are below the average in Jamaica in terms of quality, services, and type of markets generally available in Jamaica, resulting in lower ADR and lower additional expenditures.

Due to lack of historic economic data in Jamaica, the impact of day visitors on GDP is not included.

TABLE 22: Estimated direct, indirect and induced impact of tourism on GDP in St. Thomas (in US\$)

	Direct (0.423)	Indirect (0.192)	Induced (0.098)	Total
2017	926,370	420,480	214,620	1,561,470
Phase 1 (2022)	3,057,021	1,387,584	708,246	5,152,851
Phase 2 (2025)	12,351,600	5,606,400	2,861,600	20,819,600
Phase 3 (2030)	103,230,041	46,856,189	23,916,180	174,002,409

2.2.2 Day Visitors

There is limited data available on the current volume and impact of day visitors to St. Thomas. According to a survey conducted by the Ministry of Tourism and published in "Tourism Destination Assessment 2018: St. Thomas, Jamaica," as well as anecdotal evidence, the main attractions for day trippers are currently Reggae Falls, musical and social events, and local restaurants. The majority of day visitors come during the weekend or during a holiday period.

Evaluation data collected by the JTB during different events in Jamaica in 2018 provides insights into the economic impact of events and festivals. For example, the average expenditure of domestic day visitors attending the Boston

Jerk Festival in Portland was US\$107.²¹ The one-day Little Ochi Seafood music and food festival in Manchester attracted predominantly domestic visitors (88%). Most of the visitors did not stay overnight (85%); a small percentage were staying in the area (8%) or were members of the community (7%). The average expenditure per visitor was US\$57.²²

Current daily expenditures of visitors in St. Thomas are likely to be lower than for the festivals described above because events in the parish are less well known and smaller in scale. Also, the main attractions Reggae Falls and the lighthouse do not charge an entrance fee. An estimated 25,000 day visitors came to St. Thomas in 2017, spending an estimated US\$25 per person. This resulted in an estimated total expenditure of US\$625,000.

¹⁹ Assessment of the Economic Impact of the Tourism Sector in Jamaica, August 2014

²⁰ Assessment of the Economic Impact of the Tourism Sector in Jamaica, August 2014

²¹ JTB (2018) An Evaluation of Boston Jerk Festival 2018

²² Assessment of the Economic Impact of the Tourism Sector in Jamaica, August 2014

Table 23 shows the estimated total expenditures of day visitors for 2022, 2025, and 2030 assuming full implementation of the plan.

TABLE 23: Estimated total expenditures for day visitors for 2022, 2025, and 2030

	Number of day visitors	Daily expenditures (US\$)	Total expenditures (US\$)
2017	25,000	25	625,000
Phase 1 – 2022	30,000	28	840,000
Phase 2 – 2025	45,000	30	1,350,000
Phase 3 – 2030	65,000	35	2,275,000

2.2.3 Employment

As with overall economic impact, the tourism sector has three types of employment impact: direct, indirect and induced employment. Direct employment is generated at the businesses that serve tourists directly, such as hotels and attractions. Indirect employment is generated via the services and products supplied to tourism businesses, including farming and construction. Induced employment refers to the employment effect of direct tourism employees spending their wages in the economy.

In 2017, the accommodation sector in Jamaica directly employed 48,439 people. Based on the estimate that one job in the accommodation sector generates 1.46 jobs in other tourism sectors,²³ the tourism sector in Jamaica would have employed an estimated 72,181 people in 2017. If the 2.4 million overnight tourists in 2017 supported 72,181 tourism jobs, then the estimated 5,775 overnight tourists in St. Thomas would have generated roughly 177 direct tourism jobs in the parish.

To predict future job growth (see table 24), the following assumptions are made:

- In 2019, the parish had an inventory of 200 rooms.
- By 2022, 200 new rooms will be added.
- By 2025, 600 new rooms will have been added (cumulative).
- By 2030, 4,170 new rooms will have been added (cumulative).
- In Jamaica, on average, one hotel room creates 1.52 jobs in the hotel sector.
- The ratio of jobs in the hotel industry to jobs in other tourism industries is 1:1.46.

The employment impact of day visitors is not included, due to lack of historic economic data of the segment in Jamaica.

TABLE 24: Projected direct and indirect tourism jobs in St. Thomas through 2030

	Accommodation sector	Other tourism sectors	Total
Phase 1 (ends in 2022)	608	584	1,192
Phase 2 (ends in 2025)	1,216	1,168	2,384
Phase 3 (ends in 2030)	6,642	6,380	13,023

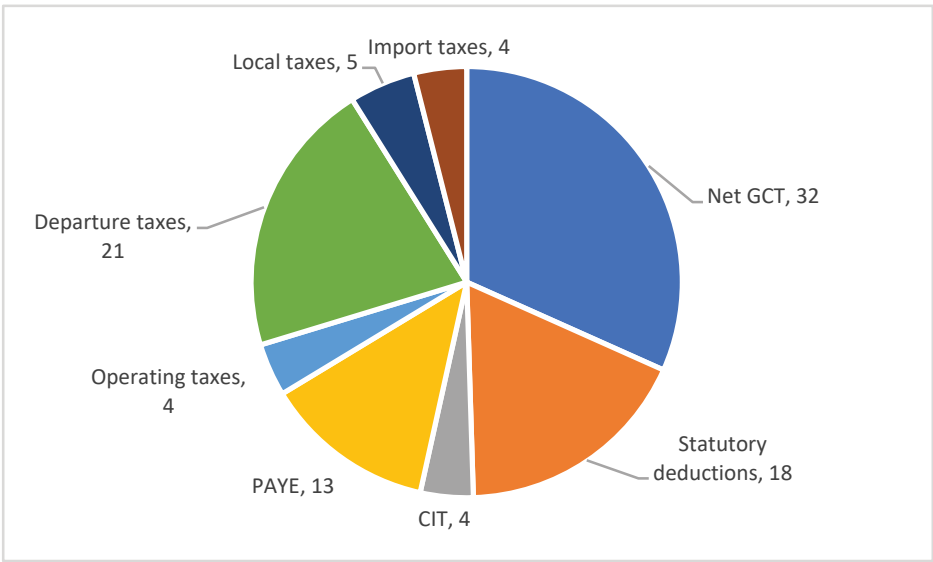
²³ Assessment of the Economic Impact of the Tourism Sector in Jamaica, August 2014

2.2.4 Tax Contribution

Based on a study of the impact of tourism on the economy, each overnight visitor in 2010 generated US\$97 in overall tax revenue.²⁴ This includes departure tax, corporate income tax, personal income taxes, local taxes and import taxes (see Figure 18). Based on this average, the 5,775 overnight visitors to St. Thomas in 2017 would have generated

US\$560,175 in taxes. The actual amount is likely to be much lower given the high share of VFR visitors, shorter length of stay, and lower ADR in the parish. Table 25 shows projected tax contributions based on tourism growth during the plan period. A basic cost benefit analysis of the required estimated public investment and the expected tax contributions shows a payback period of almost ten years²⁵.

FIGURE 18: Taxation of the tourism sector, by type of tax (% of total taxes)



Source: Assessment of the Economic Impact of the Tourism Sector in Jamaica, August 2014.

TABLE 25: Estimation of tax contributions

	Number of overnight visitors	Total tax contribution (US\$)
2017	7,300	708,100
2022	14,600	1,416,200
2025	46,720	4,531,840
2030	232,422	22,544,934

²⁴ In 2010, 1,921,678 overnight visitors generated JA\$16.3 billion in taxes

²⁵ The estimated public expenditures for the full TDDMP are US\$205 million. An estimated 50% of the total of US\$27 million in public-private investments is also included in this Cost Benefit Analysis.

2.2.5 Strategic Growth Markets

Current tourism demand in St. Thomas is very low. In the Blue Mountain area, travelers are a mix of Foreign Independent Tourists (FIT) and domestic adventure seekers, while in the rest of the parish overnight stays are mainly generated by VFRs; domestic Meetings, Incentives, Conferences and Events (MICE); and the Scientific, Academic Volunteer and Educational (SAVE) and FIT markets.

While the focus on tourism development in St. Thomas will be on quality over quantity, the flow of overnight tourists and day visitors must increase for the current and new private enterprises within the industry to be financially viable.

The visitation growth strategy will involve prioritizing market segments that have the highest viability for short-term growth, and developing untapped markets that are in line with the medium- and long-term vision of St. Thomas as a tourism destination. A successful plan will achieve these objectives:

1. Incremental growth from existing markets—MICE, SAVE, domestic day visitors, VFR, FIT.
2. Significant growth from additional market segments—international leisure tourists and domestic leisure tourists.

In the short term, the existing markets show the highest potential for growth. Improved infrastructure and attractions will make the parish a more attractive and thus competitive destination. Feedback from SAVE and MICE market providers, which were recently important segments for the area between Eleven Mile and Yallahs, have indicated that the poor condition of the main road into the parish is making St. Thomas less competitive compared to similar destinations in the country. For example, anecdotal evidence indicates that international educational programs that previously would spend one to two weeks in and around Yallahs have recently decided to overnight in Kingston instead. The size of the domestic MICE market has also decreased over the last few years. Stakeholders that served this market have indicated that the condition of the roads was the main reason to withdraw. For example, Sun Coast Adventures and the Three Finger Jack Hotel near the border with Kingston offered corporate retreats and team building exercises, but have temporarily closed the hotel property due to reduced business. The condition of the parish roads in general and the limited number of attractive activities or points of interest is also limiting the growth potential of the domestic day visitor segment. Improved road conditions could reduce the driving time and tap into the greater Kingston market. Improvement of existing attractions, as well as adding new attractions and events such as festivals, will grow the volume and daily expenditures of day visitors. The VFR market is currently the largest generator of overnight stays. While growth of the size of this market is largely dependent on



external factors, improvement of the overall tourism product in the parish could increase VFR expenditures. In the medium and long term, the international and domestic leisure markets are most important to achieving the targets. These markets are different than the existing FIT market, which is primarily interested in adventure around The Peak and has a relatively short length of stay. In contrast, the leisure markets are interested in a more typical vacation involving the beach and seas, and are characterized by a longer length of stay and higher expenditures per day than the existing markets. In 2017, foreign tourists in Jamaica who used hotel accommodation had an average length of stay of 6.6 nights; those who stayed in non-hotel accommodation stayed 9.0 nights. Foreign tourists spent an average of US\$148.61 per person per night.²⁶ Non-resident Jamaican arrivals (VFR) stayed an average of 17.5 nights but are much less likely to stay in paid accommodation. There is no expenditures data available on the domestic market, but based on anecdotal evidence this market has a lower length of stay and lower expenditures per day. Nevertheless, this segment is considered a priority market, as the domestic market is more familiar with the parish and their visits tend to be less seasonal than foreign markets.

Improved road conditions will increase the number of day visitors and thereby increase the demand for restaurants and leisure activities. The opening of the Port Royal cruise port is also expected to increase the demand for organized excursions in the region. To compete with existing offerings in Kingston, tour offerings for cruise passengers will need to highlight the authentic characteristics of the parish.

²⁶ Jamaica Tourist Board. Annual Travel Statistics 2017

Table 26 projects the arrivals for the different market segments for the short, medium, and long term.

TABLE 26: Estimated visitor arrivals by market segment

Market segments	2017	2022	2025	2030
SAVE/MICE	445	800	1,500	3,000
VFR	5,840 ²⁷	6,500	7,500	8,500
Leisure	1,015	7,300	37,720	220,942
TOTAL TOURISTS*	7,300 ²⁸	14,600	46,720	232,422
DAY VISITORS**	25,000	30,000	45,000	65,000

Notes: *Figures are for non-resident visitors who spend at least one night in paid accommodation.
**Day visitors are defined as people from outside the parish who do not spend the night.

2.3 Goals and Strategies

2.3.1 Create and Deliver Iconic Brand Experiences

To stand out in a crowded national, regional and international marketplace, St. Thomas will need differentiated tourism products and experiences. St. Thomas has a diverse mix of a few existing and many potential attractions and activities for domestic and international visitors to enjoy. The existing attractions are neither licensed nor visitor and market ready. Furthermore, the existing activities offered to the low volume of domestic day visitors, VFRs and FITs—the latter being very few in number—are mostly focused on nature tourism. Current activities include surfing at a few key sites along the coastline, hiking to the Blue Mountain Peak, and recreation at popular attractions such as Reggae Falls, Lyssons Beach and Bath. International visitors mainly visit the Blue Mountain Peak, though some do make it to

Morant Point Lighthouse. These activities do not represent the full spectrum of potential activities in St. Thomas, such as heritage tourism, agritourism and wellness tourism.

While the towns in St. Thomas do host a few local festivals and events from time to time, the Makka Pro surfing tournament is the only event that is organized more frequently and that attracts some regional and international visitors. Professionalizing festivals and events could attract more visitors over time.

The overarching goal and corresponding strategy for tourism product development in St. Thomas are outlined in table 27.

TABLE 27: Strategy for creating and delivering iconic brand experiences

1. GOAL	STRATEGY
Create and deliver iconic brand experiences.	<div>1.1 Develop authentic and differentiated products, experiences and events.</div> <div>1.2 Develop new attractions and enhance existing attractions needed for iconic experiences.</div> <div>1.3 Develop full range of lodging and facilities that appeal to different market segments.</div> <div>1.4 Improve the quality of product and service delivery.</div>

²⁷ MOT estimate
²⁸ JTB estimate



2.3.2 Improve Infrastructure and Placemaking

Destination development in St. Thomas will involve government and industry working together to create a compelling visitor experience that attracts new visitors and entices repeat visitation. The aim of destination development in St. Thomas will be to enhance multiple elements associated with the visitor experience:

- The setting in which tourism experiences take place;
- Accessibility of the destination and experiences in the destination; and
- Infrastructure and amenities, which are often publicly owned and used by residents as well as visitors.

Since tourism is nascent in St. Thomas, development should be guided by a land use plan that reflects the community's vision to become a preferred sustainable tourism destination and eco-parish with attractive permanent communities and strong community support for tourism.

In this context, the goals for destination development in St. Thomas are outlined in table 28.

TABLE 28: Strategy for improving infrastructure and placemaking

<div>2. GOAL</div> <div>Improve infrastructure and placemaking.</div>	<div>STRATEGY</div> <div> <div>2.1 Develop a zoning plan to guide appropriate development that maintains integrity of place.</div> <div>2.2 Prioritize infrastructure projects that enhance accessibility and aesthetics of attractions and new areas of development.</div> <div>2.3. Enhance the welcoming feel and urban character of main towns and attractions.</div> </div>
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2.3.3 Develop Tourism using Sustainability Principles

Sustainable tourism development in St. Thomas is highly dependent on the region’s natural assets. St. Thomas has a wide diversity of natural ecosystems, many of which still remain in relatively good condition in spite of human intervention. Compelling local ecosystems include mangrove swamps, forests, coral reef, seagrass beds and beaches. Local wildlife of interest includes crocodiles, sea turtles, butterflies, Jamaican coney, and local and migratory birds. While tourism can threaten natural assets without adequate planning, it can be also be used as a tool for protecting these assets.

Climate change is a potential threat to key economic sectors

such as agriculture and tourism. These industries rely on natural resources and on infrastructure such as roads and power lines, which are vulnerable to impacts from storms and hurricanes. The parish of St. Thomas is one of the most vulnerable on the island to storms and hurricanes; therefore, it is important to plan for resilience to these systems as well as other projected impacts of climate change such as sea level rise and changes in precipitation patterns resulting in droughts and floods.

Infrastructural development will be underpinned by sustainability principles.

TABLE 29: Strategy for developing the destination using sustainability principles

3. GOAL	STRATEGY
Develop destination using sustainability principles.	3.1 Protect sensitive and/or threatened ecosystems and wildlife.

2.3.4 Enable Tourism Business Success & Viability

Existing tourism attractions and businesses in St. Thomas largely operate informally. Of the 27 accommodations listed in the parish, only three are licensed hotels. There are no documented licensed attractions in the parish. Since most enterprises do not meet national standards for operation, they are not currently equipped to cater to international visitors.

This situation is probably a result of a combination of factors. Some individuals and entities may not think licensing is necessary, especially if they have been able to operate without obvious penalties. Some may find it too costly to meet the requirements, and some find the requirements onerous for other reasons. Some may be out of compliance due to factors outside their control, such as land title and lease concerns.

This will have to change if St. Thomas intends to position itself as a premier sustainable tourism destination. Enhancing support to increase the number of market ready and export ready businesses is a top priority.

The current ecosystem of tourism enterprises in St. Thomas is quite limited. Delivering on the goals for tourism development will require supporting the establishment of new Micro, Small and Medium Tourism Enterprises (MSMTEs) and the improvement of existing MSMTEs to fill gaps in amenities, tourism products and experiences, and services. Supporting entrepreneurship and local ownership in the sector is also one certain way of facilitating inclusion and distributing economic benefits to destination residents.

Jamaica’s Micro Small Medium Enterprises and Entrepreneurship Policy (2013) identifies the need for financing and ongoing business development support as key considerations for enabling entrepreneurship. It will be important to establish well-defined and ongoing programs to provide financing and technical assistance in order to encourage entrepreneurship.

Table 31: Strategy for enabling tourism business success and viability



TABLE 30: Strategy for enabling tourism enterprise success and viability

<div>4. GOAL</div> <div>Enable tourism business success and viability.</div>	<div>STRATEGY</div> <div> <p>4.1 Enhance market readiness of MSMTEs.</p> <p>4.2 Provide affordable financing to help start-up and grow MSMTEs.</p> </div>
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2.3.5 Prepare Community and Skilled Workforce for Tourism

Ensuring that citizens understand tourism best practices, potential impacts (positive and negative) on their lives, communities and livelihoods, and the role citizens may play is important to preparing the community to support and participate in tourism. Building general public awareness of tourism has become increasingly common in countries most reliant on tourism. Research indicates that as entrepreneurial endeavours and public awareness increase, residents will be in a better position to participate in tourism development.

The population of St. Thomas has been steadily declining, which is mainly attributed to the lack of jobs and marginal public services such as education and a good network of roads. Today, St. Thomas is considered a “dormitory parish” since most residents work in neighboring parishes, such as Kingston. Tourism development in St. Thomas offers the opportunity to reverse this trend by creating local employment opportunities.

A cursory review of 2011 data from the Statistical Institute of Jamaica indicates that St. Thomas could have a strong tourism workforce with a local population of approximately 50,000 between the ages of 20 and 65.

Tourism is extremely labor intensive and a significant source of employment. It is among the world’s top creators of jobs requiring varying degrees of skills, and allows youth and women quick entry into the workforce. Accommodations, transportation providers, attractions, and sites all create employment opportunities. Therefore, the availability of skilled and trained workers is a crucial element for the success of tourism development in St. Thomas.

The 2011 population and housing census data reveals that residents of St. Thomas have fewer university and other tertiary degrees than residents in most other parishes (surpassing only Portland residents and women residing in Westmoreland).

The HEART Trust NTA facility in Yallahs currently offers Commercial Food Preparation Training at levels 2 and 3, and has previously offered Community Tourism training. Between 2016 and 2019, 25 people received certification in Commercial Food Preparation level 3, and 34 were certified at level 2. Thirty-five people were certified in Community Tourism level 1, out of 80 enrollees. The current HEART Trust model operates through a franchise-based system, where independent institutions choose to offer programs.

TABLE 31: Strategy for preparing community and skilled workforce for tourism

5. GOAL	STRATEGY
Prepare community and skilled workforce for tourism	<p>5.1 Build community awareness of tourism.</p> <p>5.2 Develop skilled workforce in tourism and hospitality.</p>

2.3.6 Increase Awareness of Destination Among Key Market Segments

As described throughout this plan, St. Thomas needs to further develop its infrastructure—as well as its tourism offerings, services and accommodations—to better attract and meet the expectations of both domestic and international visitors and to compete with other Jamaican and Caribbean destinations. At the same time, St. Thomas would benefit from well-organized, methodically planned and intentional branding and promotional efforts—even at a relatively modest scale.

Why Branding and Promotion?

A clear and compelling brand helps destinations position themselves so that their characters, personalities and promise are clear in the imaginations of prospective visitors. Today, if people think of St. Thomas at all, their image of the parish is vague. They may know of a few sites or a bit of its history, but they don't have a sense of St. Thomas as a place—its soul and essence. This needs to be intentionally cultivated and articulated if the parish is to successfully compete with comparable destinations—whether off the beaten track or in more developed areas such as Treasure Beach.

Simultaneously, individual parish businesses would be well served by taking immediate steps to distinguish themselves and purposefully attract visitors. An Internet search of parish accommodations and attractions turns up little in St. Thomas. Even if accommodations and hospitality services were upgraded, it wouldn't matter much if the public didn't know they existed. Recommendations for individual businesses are outlined in the second part of this section.

The branding initiative for St. Thomas and the promotional efforts of individual businesses can and should happen concurrently, with professional guidance and support for both.

Developing the Parish as a Destination

How can St. Thomas strategically build a brand that's clearly articulated, emotionally resonant and effective in attracting visitors? It's important to remember that destinations—even those that are clear and compelling in the minds of visitors—did not usually occur by happenstance. They were intentionally designed and built.

A brand needs to say more than “beach” or “mountain” or “historical site.” It should create and convey a sense of place. The St. Thomas brand should tie in with the overall Jamaica brand, which has been intentionally designed, revised and refined over time by the Jamaica Tourist Board.

Helping Businesses Promote Themselves

While the development of the St. Thomas brand and website would take several months to a year to complete, depending on the availability of funds and local buy-in and participation, local businesses could move ahead with specific promotional activities in the meantime. These activities would benefit from support and guidance by experienced marketing professionals who could help with low-cost outreach and promotional activities.

TABLE 32: Strategy for increasing awareness of destination

6. GOAL	STRATEGY
Increase awareness of destination among key market segments.	<p>6.1 Develop the parish as a destination.</p> <p>6.2 Reach diversified market segments.</p> <p>6.3 Assist tourism enterprises to promote themselves.</p>

2.3.7 Manage the Destination Collaboratively

Tourism development in St. Thomas will touch many aspects of the community and involve many organizations, including national and local government agencies, private sector businesses, civil society, and academia. Establishing

leadership that can facilitate coordination and collaboration among stakeholders will be critical for developing St. Thomas as a desirable travel destination and place to live.

TABLE 33: Strategy for managing the destination collaboratively

7. GOAL	STRATEGY
Manage the destination collaboratively.	<div>7.1 Establish destination management mechanism.</div> <div>7.2 Attract investors and plan implementation partners.</div> <div>7.3 Monitor plan implementation and adapt strategies and priority actions as needed over time.</div>





3. STRATEGY & ACTION PLAN

How will we get there?

This section of the plan outlines the recommended strategic priorities including 51 priority initiatives. Partnerships will be critical for successful plan implementation. Steps for attracting local and foreign investment are presented. Furthermore, a proposed local destination management framework and key performance indicators for monitoring plan implementation are detailed.



TDDMP STRATEGIC FRAMEWORK

GOAL	STRATEGIES	PRIORITY INITIATIVES	IMPLEMENTATION TIME HORIZON	IMPLEMENTATION PARTNERS	BUDGET (US\$)*
1. Create and deliver iconic brand experiences.	1.1 Develop iconic experiences and events.	1. Southeast coast surfing trail	Short Term: Years 1-3	NEPA, Jamaica Surfing Association	\$200,000
		2. Paul Bogle and Morant Bay rebellion movement heritage trail	Short Term: Years 1-3	Jamaica National Heritage Trust (JNHT), Ministry of Culture, Gender, Entertainment and Sport, Jamaican Historical Society, TEF, TPDCo	\$405,000
		3. Art and wellness at Orange Park	Short Term: Years 1-3	Orange Park Trust, JNHT, Georgian Society of Jamaica, MoT, Ministry of Culture	\$4,050,000
		4. Coffee trail	Short Term: Years 1-3	JAMPRO, local investors, TPDCo, TEF, National Environment and Planning Agency (NEPA)	\$550,000
		5. Fat bike epic adventure trail	Short to Medium Term: Years 1-6	NEPA, JCDDT, investors, TPDCo	\$200,000
		6. Historic St. Thomas trail: great houses and churches	Short to Medium Term: Years 1-6	Institute of Jamaica, JNHT, churches, property owners	
		7. St. Thomas birding and wildlife trail	Short to Medium Term: Years 4-6	Wildlife and conservation groups, local and international NGOs, NEPA, Institute of Jamaica	\$450,000
	1.2 Develop new attractions and enhance existing attractions needed for iconic experiences.	8. Morant Bay historic district	Short to Medium Term: Years 1-5	Jamaica National Heritage Trust (JNHT), Ministry of Culture, Gender, Entertainment and Sport, Jamaican Historical Society, Georgian Society of Jamaica, Tourism Enhancement Fund (TEF), Tourism Product Development Company (TPDCo), St. Thomas Municipal Corporation, management of St. Thomas Parish Church	\$870,000

* All figures are estimates

GOAL	STRATEGIES	PRIORITY INITIATIVES	IMPLEMENTATION TIME HORIZON	IMPLEMENTATION PARTNERS	BUDGET (US\$)*
1. Create and deliver iconic brand experiences.		9. Reggae Falls freshwater river park	Short to Medium Term: Years 1-5	Serge Island Dairy Farms	\$4,000,000
		10. Saltwater park and nature reserve at Cow Bay	Short to Medium Term: Years 1-5	JAMPRO, local investors, TPDCo, TEF, NEPA	\$7,000,000
		11. Hayfield ecotourism training centre and Cuna Cuna Pass trail	Short Term: Years 2-4	TPDCo, JCDDT, JNHT, Jamaica Organic Agriculture Movement (JOAM), Hayfield Community Development Committee	\$270,000
		12. Bath Butterfly Farm and nature interpretation centre	Short to Medium Term: Years 2-5	Natural History Society of Jamaica, NEPA, local and international research institutions, local and international wildlife and conservation organizations (e.g. World Wildlife Fund, The Nature Conservancy, International Union for Conservation of Nature, etc.), JCDDT, Institute of Jamaica, Forestry Department, Ministry of Agriculture, UWI	\$2,180,000
		13. Rocky Point public beach park - Morant Point Lighthouse and visitor centre - Great Morass water trail and boardwalk	Short to Medium Term: Years 2-5	NEPA, Rocky Point Fishers Association, TEF, Port Authority of Jamaica, JNHT, local and international research institutions, local and international wildlife and conservation organizations	\$1,190,000
		14. Salt Pond development	Medium to Long Term: Years 6-9	Scientific Research Council (SRC), NEPA, local and international research institutions, local and international wildlife and conservation organizations (eg. Audubon Society, World Wildlife Fund, Birdlife International, The Nature Conservancy, STEPA, etc.)	\$465,000
	1.3 Develop full range of lodging and facilities that appeal to different market segments.	15. St. Thomas homestay and community experiences network	Short Term: Years 1-3	TPDCo, Jamaica Business Development Corporation (JBDC), Social Development Commission, Human Employment and Resources Training Agency (HEART)	\$50,000
		16. Bath resort and spa (redevelopment)	Short to Medium Term: Years 2-6	JAMPRO, investors	\$3,000,000
		17. Pera eco-resort village and golf course	Medium to Long Term: Years 7-11	Private landowners, NEPA, local development planning team, investors, Jamaica Hotel and Tourist Association (JHTA), SDC, HEART	\$500,000,000

* All figures are estimates

GOAL	STRATEGIES	PRIORITY INITIATIVES	IMPLEMENTATION TIME HORIZON	IMPLEMENTATION PARTNERS	BUDGET (US\$)*
1. Create and deliver iconic brand experiences.	1.4 Support development of people- and program-based businesses.	18. Tourism experiences studios	Short Term: Years 1-3	TPDCo, JBDC, Product Area Interest Groups, Social Development Commission (SDC)	\$462,000
		19. Develop a cadre of professional tour guides and site guides	Short Term: Years 1-3	SDC, TPDCo, HEART, JCDT, JNHT	Cost included under workforce development initiative
	1.5 Improve the quality of product and service delivery.	20. Launch destination-level customer service training	Short to Medium Term: Years 1-6	SDC, TPDCo, HEART, tertiary institutions	Cost included under workforce development initiative
		21. Include the marginalized and 'at risk' youth, actively involved in or with the potential to harass visitors, in formal tourism activities	Short to Long Term: Years 1-11	SDC, TPDCo, HEART, tertiary institutions	\$77,000
		22. Organize informal service providers operating at main attractions and sites	Short to Medium Term: Years 1-6	SDC, TPDCo, HEART, tertiary institutions, Jamaica Constabulary Force (JCF)	\$77,000
		23. Launch tourism ambassadors program to help manage visitor harassment tourism activities	Short to Medium Term: Years 1-6	SDC, TPDCo, HEART, tertiary institutions, JCF	\$100,000
		24. Develop safety and security plan for main attractions and sites	Short to Medium Term: Years 1-6	SDC, TPDCo, HEART, tertiary institutions, JCF	\$745,400
2. Improve infrastructure and placemaking.	2.1 Develop a zoning plan to guide appropriate infrastructure development that maintains integrity of place.	25. Implement visitor safety awareness campaign	Short Term: Years 1-3	SDC, TPDCo, HEART, tertiary institutions, JCF	\$40,000
		26. Approval of Zoning Plan for St. Thomas	Short Term: Year 1	NEPA, St. Thomas Municipal Corporation, MoT	\$107,300
	2.2 Prioritize infrastructure projects that enhance accessibility and aesthetics of attractions and new areas of development.	27. Upgrade road network and improve drainage	Short to Medium Term: Years 1-6	St. Thomas Municipal Corporation, NWA, Ministry of Finance, CDB, international partners	\$67,021,000

* All figures are estimates

GOAL	STRATEGIES	PRIORITY INITIATIVES	IMPLEMENTATION TIME HORIZON	IMPLEMENTATION PARTNERS	BUDGET (US\$)*
2. Improve infrastructure and placemaking.		28. Expand water and sewage system	Short to Medium Term: Years 1-6	NWC, CDB, Ministry of Finance	\$14,000,000
		29. Introduce alternative energy sources	Short to Long Term: Years 1-11	UAE-Caribbean Renewable Energy Fund, Ministry of Science, Energy & Technology, JPS, NWC, International Donor Agencies (eg. CIDA, USAID, DFID, EU, IDB)	\$10,000,000
		30. Upgrade telecommunications network	Short to Long Term: Years 1-11	Telecommunications providers, OUR, Ministry of Science, Energy & Technology	\$25,000,000
		31. Upgrade airports and helipads	Medium to Long Term: Years 7-11	Airports Authority of Jamaica, Jamaica Civil Aviation Authority, Ministry of Transport & Mining	\$10,000,000
		32. Develop seaport/marina	Medium to Long Term: Years 7-11	Port Authority of Jamaica	\$80,000,000
		33. Improve bridges	Medium to Long Term: Years 7-11	NWA, St. Thomas Municipal Corporation	\$800,000
		34. Establish parish-wide system for storing and collecting garbage	Short to Medium Term: Years 1-6	National Solid Waste Management Authority, St. Thomas Municipal Corporation, NEPA, TEF	\$366,000
	2.3 Enhance the welcoming feel and urban character of main towns and attractions.	35. Build iconic entry point and town square in main towns	Short Term: Years 1-3	TEF, JNHT, National Works Agency, Urban Development Corporation (UDC), St. Thomas Municipal Corporation, National Solid Waste Management Authority	\$1,485,000
		36. Establish wayfinding system	Short to Medium Term: Years 1-4	NWA, JNHT, TEF, TPDCo, St. Thomas Municipal Corporation	\$3,250,000
		37. Create network of scenic viewpoints	Short Term: Years 1-3	TEF, JCDT, TPDCo, NWA, St. Thomas Municipal Corporation	\$330,000
3. Develop tourism using sustainability principles.	3.1 Protect sensitive and/or threatened ecosystems and wildlife.	38. Support research, monitoring and management of sensitive areas and habitats	Short to Medium Term: Years 1-6	NEPA, local and international conservation organizations, TPDCo	\$810,000
		39. Support monitoring and management of aggregate mining	Short to Medium Term: Years 1-6	Ministry of Transport and Mining - Mines and Geology Division, Mining and Quarrying Association of Jamaica	\$100,000

* All figures are estimates

GOAL	STRATEGIES	PRIORITY INITIATIVES	IMPLEMENTATION TIME HORIZON	IMPLEMENTATION PARTNERS	BUDGET (US\$)*
4. Enable tourism business success and viability.	4.1 Enhance market readiness of MSMTEs.	40. Formalize tourism enterprises and support compliance	Short Term: Years 1-3	TPDCo, Jamaica Business Development Centre (JBDC), TEF, EXIM Bank, Jamaica National Bank, Ministry of Finance, JSIF, SDC	\$462,000
		41. Ensure licensing of attractions that have national, cultural and environmental significance	Short Term: Years 1-3	TPDCo, JNHT, TEF, Ministry of Tourism	\$385,000
	4.2 Provide affordable financing to help start-up and grow MSMTEs.	42. Promote entrepreneurship	Short Term: Years 1-3	JBDC, JAMPRO, MICAF, TPDCo, SDC, SMTEs	\$462,000
		43. Offer affordable financing for micro, small and medium tourism enterprise	Short to Long Term: Years 1-11	TPDCo, Jamaica Business Development Centre (JBDC), TEF, EXIM Bank, Jamaica National Bank, Ministry of Finance, JSIF, SDC	\$193,000
5. Prepare community and skilled workforce for tourism.	5.1 Build community awareness of tourism.	44. Launch a tourism awareness campaign and program	Short Term: Years 1-3	TPDCo, Jamaica Information Service (JIS)	\$576,000
	5.2 Develop skilled workforce in tourism and hospitality.	45. Launch a tourism workforce development program	Short to Long Term: Years 1-11	TPDCo, HEART, tertiary institutions, SMTEs	\$1,694,000
6. Increase awareness of destination among key market segments.	6.1 Develop the parish as a destination.	46. Develop the St. Thomas brand architecture and strategy	Short Term: Years 1-3	Caribbean School of Architecture, Jamaican Institute of Architects, St. James Municipal Corporation, TPDCo	\$100,000
		47. Establish a functional DMO	Short to Medium Term: Years 2-4	Ministry of Tourism (MoT)	\$70,000
	6.2 Reach diversified market segments.	48. Develop and implement a marketing strategy	Short to Medium Term: Years 3-6	Jamaica Promotions Corporation (JAMPRO), MoT	\$70,000
	6.3 Assist tourism enterprises to promote themselves.	49. Train tourism businesses to promote themselves online	Short to Medium Term: Years 1-6	JTB, Jamaica Social Investment Fund, TPDCo, MICAF	\$300,000
7. Manage destination collaboratively.	7.1 Establish destination management and plan implementation mechanisms.	50. Establish destination stewardship council to work alongside MOT on plan implementation, monitoring implementation and impacts of TDDMP	Short to Medium Term: Years 1-6	MOT, TPDCo, SDC, Parish Development Committee	\$300,000
	7.2 Attract investors and plan implementation partners.	51. Promote opportunities to investors, and secure buy-in of partners	Short to Medium Term: Years 1-3	MOT, JAMPRO, MICAF, NEPA	\$19,230

* All figures are estimates



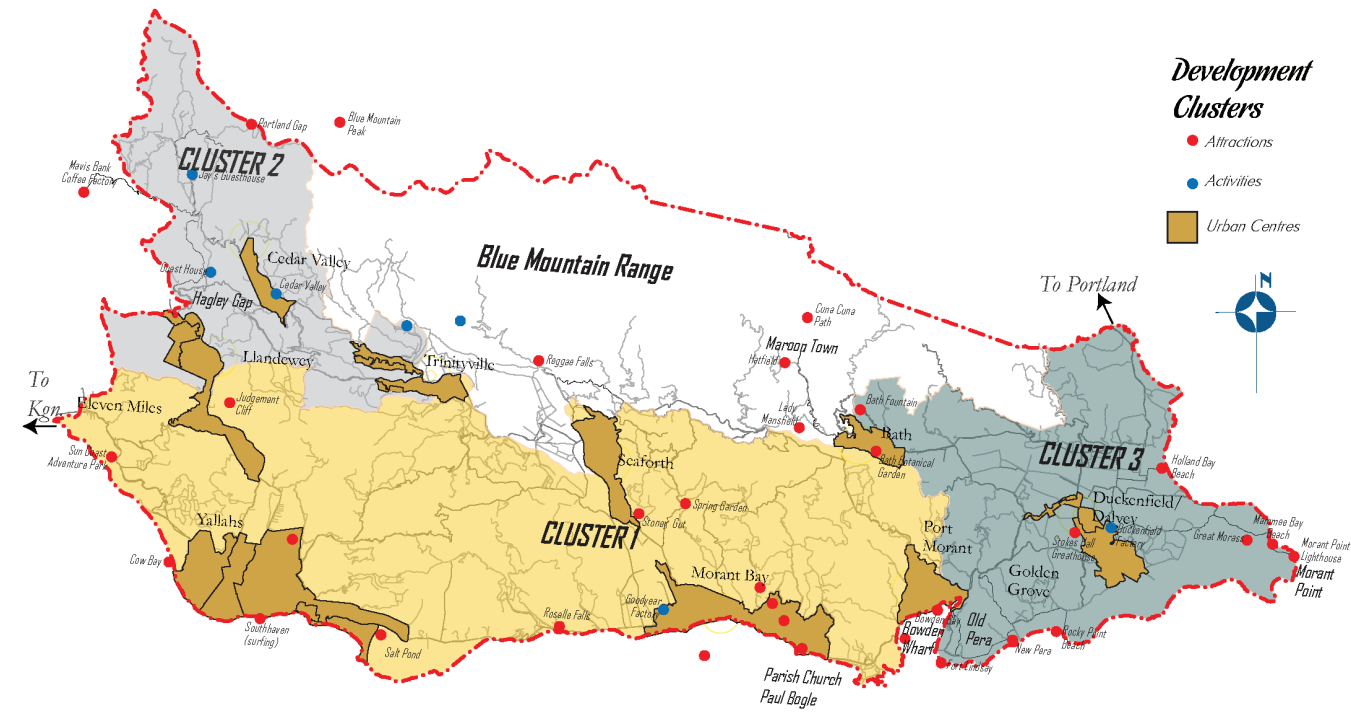
3.1 Develop Authentic and Differentiated Experiences

TABLE 34: Priority actions for developing authentic and differentiated experiences

1.1 STRATEGY	PRIORITY ACTIONS
Develop iconic experiences and events	1.1.1 Develop differentiated, core experiences that foster local pride and are reflective of what is most distinctive to St. Thomas.

Three tourism clusters, i.e. groups of tourism attractions, businesses and institutions directly or indirectly involved in tourism, concentrated in a particular geographic area within the parish of St. Thomas, have been defined to help achieve product differentiation. Figure 19 presents the 3 clusters. It is envisioned that each cluster will offer distinct, yet complementary, tourism experiences that will cater to specific priority markets identified in Section 2.2.5. Creating a wide range of tourism experiences that appeal to different market segments will reduce dependency on just a few market segments. This approach also ensures that tourism benefits are distributed equitably throughout the parish.

FIGURE 19: Product Development Clusters



Differentiated core experiences will need to be developed in each cluster. The core experiences will combine attractions with well-structured activities in creative ways in order to attract specific market segments. Over time, the aim should be to create additional, complementary offerings around the core experiences. This approach will help to extend the geographical impact of tourism. The new experiences should be experiential in nature and focus on the active participation, involvement and event immersion (where appropriate) of visitors.

Identifying the unique selling proposition (USP) of each cluster is a critical first step for creating differentiated core experiences. Table 35 captures the unique elements of each cluster.

TABLE 35: Clusters and their unique selling proposition

CLUSTER 1: Coastal Reaches

Cluster 1 is the nearest to Kingston and most developed, with the largest urban centres and highest concentration of existing hotels and restaurants. This makes it an ideal destination for day visitors, corporate or religious retreats, weddings, meetings, conferences, and events. This cluster features the most popular tourism attraction in St. Thomas—Reggae Falls. Cluster 1 features the home of national hero Paul Bogle. And, the movement for self-rule that Paul Bogle initiated emanated from key sites in Cluster 1. There are several compelling historic sites associated with this period. The Orange Park Great House is an iconic attraction; one of the best preserved great houses in St. Thomas, associated with the late painter and patriot Professor Basil Barrington Washington. The Source Farm Foundation and Ecovillage serves as a unique demonstration site that embodies the basic elements of wellness—organic farming, a model community, and a yoga centre—and serves as an ideal field lab. The coastline, which is largely undeveloped, features Lyssons Beach, a fishing village at Cow Bay, and various good areas for surfing and other adventurous water sports.

CLUSTER 2: Highlands

Cluster 2 encompasses rural communities that buffer the iconic Blue and John Crow Mountains National Park and World Heritage Site. This cluster offers the real Jamaican “country living.” Small coffee farms dot the landscape and breathtaking landscapes and vistas can be found everywhere. The national park is the ideal backdrop for nature and adventure activities as well as scientific, academic and educational experiences.

CLUSTER 3: Southeast Coast

Cluster 3 features some of the last undeveloped beaches in Jamaica. The beach at Pera features a few miles of wide, white sandy beaches; Bowden Bay offers an idyllic setting and peaceful views. The Great Morass is a sensitive and unique ecosystem that serves as a central focal point for this cluster. The majestic Morant Point Lighthouse offers fantastic views of the coastline and captures the essence of Jamaica’s rugged Southeast coast. The Golden Grove Sugar Factory, canefield, and ruins of great houses, such as the Duckenfield Hall Great House, offer glimpses into the rich history of the region and the country. Furthermore, there are remnants of extensive canal systems in Holland and Belgium Districts.



Table 36 presents the main themes for the development of differentiated experiences that are based on the USP of each cluster.

TABLE 36: Main themes for development of differentiated tourism experiences

NATURE & ADVENTURE	
 	<p>CLUSTER 1: Coastal Reaches</p> <p>Surfing: St. Thomas is considered a gem for surfers with consistent year-round waves. It boasts the first surf tourist destination. Top surfing spots include Makka Beach, Copa, Zoo, Canon Cave and Guanna Reef.</p> <p>Coastal wildlife viewing: the coastline, which is largely undeveloped, features Lyssons Beach, a fishing village at Cow Bay, and the unique ecosystem at Salt Pond. These areas create unique opportunities for coastal wildlife viewing of resident and migratory birds, turtles and crocodiles.</p>
	<p>CLUSTER 2: Highlands</p> <p>Hiking, biking, camping: the iconic Blue and John Crow Mountains National Park and World Heritage Site is the ideal backdrop for nature and adventure activities as well as scientific, academic and educational experiences.</p>
 	<p>CLUSTER 3: Southeast Coast</p> <p>Beaches: Cluster 3 features some of the last undeveloped beaches in Jamaica. The beach at Pera features a few miles of wide, white sandy beaches; Bowden Bay offers an idyllic setting and peaceful views</p> <p>Coastal wildlife viewing: ecosystems such as the Great Morass offer wonderful opportunities for wildlife viewing of turtles and crocodiles. The Great Morass is a sensitive and unique ecosystem that serves as a central focal point for this cluster.</p> <p>Water sports such as fishing and rafting, and sailing</p> <p>Sports such as golfing</p>
CULTURAL HERITAGE	
	<p>CLUSTER 1: Coastal Reaches</p> <p>National hero and self-rule movement: Cluster 1 features the home of national hero Paul Bogle, and the movement for self-rule that Paul Bogle initiated emanated from key sites in St. Thomas.</p> <p>Plantations and great houses: there are several compelling historic sites associated with this period. The Orange Park Great House is an iconic attraction; one of the best preserved great houses in St. Thomas, associated with the late painter and patriot Professor Basil Barrington Washington.</p>
	<p>CLUSTER 2: Highlands</p> <p>Great houses: Cluster 2 is replete with ruins of plantations and great houses such as the Ladyfield Great House which was once part of a coffee plantation, and the Grampian Ruins that features a waterwheel and structures.</p>
 	<p>CLUSTER 3: Southeast Coast</p> <p>The majestic Morant Point Lighthouse offers fantastic views of the coastline and captures the essence of Jamaica's rugged Southeast coast.</p> <p>Great houses and historic churches: Ruins of great houses, such as the Duckenfield Hall Great House and Stokes Hall Great House, offer glimpses into the rich history of the region and the country. The Stokes Hall Great House is one of the oldest English ruins in Jamaica.</p>

CULTURE



CLUSTER 1: Coastal Reaches

Afro-Jamaican traditions such as kumina and obeah.



CLUSTER 2: Highlands

Rural lifestyle and homestays: Hagley Gap offers the real Jamaican “country living.”

Rasta community: Trinityville represents an important location in the founding of a local religion and music genre that has international appeal.



CLUSTER 3: Southeast Coast

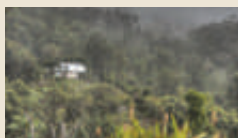
Vibrant Maroon communities maintain Afro-Jamaican traditions.

AGRITOURISM



CLUSTER 1: Coastal Reaches

Permaculture farm: the Source Farm Foundation and Ecovillage serves as a unique demonstration site that embodies the basic elements of wellness—organic farming, a model community, and a yoga centre—and serves as an ideal field lab.



CLUSTER 2: Highlands

Coffee farms: small coffee farms dot the landscape and breathtaking landscapes and vistas can be found everywhere.



CLUSTER 3: Southeast Coast

Sugar factory/plantations: the Golden Grove Sugar Factory and canefields offer glimpses into the rich history of the region and the country.

The Bath Botanical Garden is one of two historic gardens founded in the Caribbean by the British in the 18th century.

WELLNESS



CLUSTER 1: Coastal Reaches

Retreat centres, yoga and spas



CLUSTER 2: Highlands

Retreat centres, yoga and spas



CLUSTER 3: Southeast Coast

Retreat centres, yoga and spas with a special focus on the Bath mineral springs.

Table 37 presents the recommended core tourism experiences to be developed in St. Thomas by clusters. In addition to the core tourism experiences, the destination should use festivals and events to showcase and present natural and cultural experiences. Specific recommendations for events are summarized in Table 37 and include enhancing the Makka Pro surfing tournament, as well as introducing new events such as the Coffee Festival, Art at the Great House and an Iron Man Triathlon that starts in Coastal Reaches (Cluster 1) and culminates in the Highlands (Cluster 2). These events will promote the culture and nature of St. Thomas and encourage repeat visitors and domestic visitors.

TABLE 37: Action plan for developing authentic and differentiated experiences

<div>1. PRIORITY INITIATIVE</div> <div> <div>Southeast Coast Surfing Trail</div> <div> <div>Cluster 1: Coastal Reaches</div> <div>Product category: nature and adventure</div> <div>Partners: NEPA, Jamaica Surfing Association</div> </div> <div> <div>Short term: Years 1-3</div> <div>Budget: US\$200,000 (to develop 5 surfing beaches)</div> <div>(these figures are estimates)</div> </div> </div>	
<div>DESCRIPTION</div> <div> <div> Attractions: Develop five surfing spots to create a unified and compelling coastal surfing product—Makka Beach, Copa, Zoo, Canon Cave and Guanna Reef.</div> <div>Develop basic infrastructure at each surfing spot—restrooms; shelters for beachgoers; activity, directional and safety signage; parking areas; and possibly a small area for vendors.</div> <div> Activities: Surfing and surfing lessons, including wind and kite surfing at ideal spots, combined with regularly scheduled reggae jam sessions (similar to what Jamnesia offers on weekends) and local food.</div> <div> Event: Emphasize professional management and more effective promotion of the Makka Pro, the island’s biggest surf tournament, to attract more local, regional and international surfers and spectators.</div> <div> Community Involvement: Support new businesses and improve existing facilities, such as Jamnesia Surf Club and Longboarders, that cater to the surfing scene.</div> <div> Ambassador: Elim Beckford, a Jamaican active on the international surfing scene.</div> <div> Market Segments: Day visitors (international and domestic), FITs, foreign leisure tourists.</div> </div>	

TABLE 37: Action plan for developing authentic and differentiated experiences

2. PRIORITY INITIATIVE

Paul Bogle and Morant Bay Rebellion Movement Heritage Trail

Cluster 1: Coastal Reaches

Short term: Years 1-3

Product category: cultural heritage

Budget: US\$405,000 *(these figures are estimates)*

Partners: Jamaica National Heritage Trust (JNHT), Ministry of Culture, Gender, Entertainment and Sport, Jamaican Historical Society, TEF, TPDCo

DESCRIPTION

Attractions: Restoration of the Paul Bogle Monument, Morant Bay Courthouse, Morant Bay Fort, and key sites at Stoney Gut Village such as the birthplace of national hero Paul Bogle.

Develop an educational trail that incorporates guidebooks and interpretive signs. This full-service trail will offer wayfinding signage along the route; visitor centres in Morant Bay and Stoney Gut with that will have public restrooms and possibly a small area for vendors; parking areas at key sites; and guided tours offered by site guides and special events. The trail will feature comprehensive interpretation including compelling stories about national hero Paul Bogle and other key leaders of the Morant Bay Rebellion movement, as well as the milestone events that shaped the history of St. Thomas and the country. It will be designed to serve as both a guided and self-guided and guided trail.

Activities: Guided trail combined with Kumina cultural performance and street food such as pan chicken in Morant Bay.

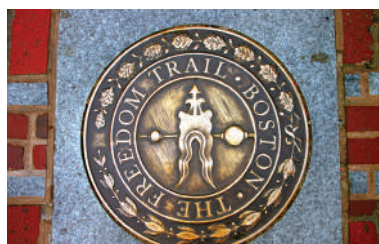
Event: Annual events can be organized around special dates to attract more domestic and international day visitors.

Community Involvement: Tour guides and vendors at visitor centres, artisans, Kumina musicians and performers, street food, cafes and restaurants.

Ambassador: Members of Paul Bogle's extended family.

Market Segments: Day visitors (international and domestic), Jamaicans visiting friends and relatives (VFRs), foreign independent tourists (FITs).

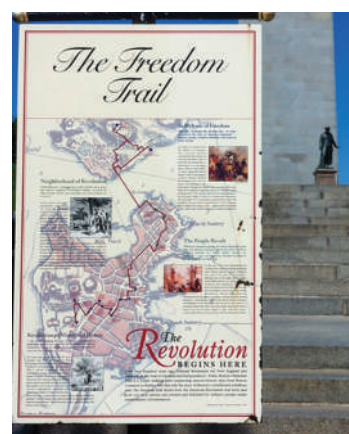
Pillars of Growth and Linkages Programmes: Health and Wellness, Gastronomy, Knowledge, Entertainment



Examples of plaques along sidewalk



Statue of Miss Lou



Example of interpretive sign

TABLE 37: Action plan for developing authentic and differentiated experiences

<div>3. PRIORITY INITIATIVE</div> <div><div>Art and Wellness at Orange Park</div><div>Cluster 1: Coastal ReachesShort term: Years 1-3</div><div>Product category: CultureBudget: US\$4,050,000 (these figures are estimates)</div><div>Partners: Orange Park Trust, JNHT, Georgian Society of Jamaica, MOT, Ministry of Culture</div></div>	
<div>DESCRIPTION</div> <div><p>Attractions: The Orange Park Great House is an iconic great house in St. Thomas. It was declared a national monument in 1994 by the Jamaica National Heritage Trust. The Orange Park Trust (OPT) has developed a plan for establishing an art museum, building accommodations for short-term visitors and facilities for corporate conferences. Every effort should be made to support the OPT’s plan. Addition of health and wellness options such as a yoga center and spa should be considered.</p><p>Activities: Live workshops featuring local artists (different mediums), yoga and wellness day and multi-day retreats, day itineraries such as art and dinner/lunch that combines a visit to the greathouse with farm to table meals in the nearest communities, and specialized international art retreats focused on Jamaican art forms.</p><p>Event: Annual “Art at the Great House” event that features current, popular artists.</p><p>Community Involvement: Site guides, featured local artists for live workshops and gallery, storytellers.</p><p>Ambassador: Artist who may have been close to or inspired by Prof. Basil Barrington Watson.</p><p>Market Segments: Day visitors (international and domestic), VFRs, FITs, MICE, SAVE.</p></div>	

4. PRIORITY INITIATIVE

Coffee Trail

Cluster 2: Highlands

Short term: Years 1-3

Product categories: nature and culture

Budget: \$650,000 *(these figures are estimates)*

Partners: Jamaica Promotions Corporation (JAMPRO), local investors, TPDCo, TEF, National Environment and Planning Agency (NEPA), international partners such as IICA

DESCRIPTION

Develop a coffee trail that will have stops at small-scale coffee farms and will include education on coffee production and culminate with tastings.

Nature interpretation and bird watching will add important dimensions to the trail. The trail can be combined with a farm volunteer experience and study tour themes around agritourism and community development.

This project will serve as a national demonstration project for agritourism. It will establish a replicable model for working with small scale coffee producers and the community in order to offer a holistic agriculture, nature and cultural experience. This demonstration project offers a unique opportunity to attract academic and international partners, such as the Inter-American Institute for Cooperation on Agriculture (IICA).

Attractions: Terraces will be built at various farms featured on the trail to ensure safe access to farms year-round. The terracing component of this initiative will include development of a large terraced environment that will create picturesque vistas; development of trails to the river to establish leisurely activities for visitors to enjoy.

The terracing will also improve productivity of the farms as well as protect the hillside from erosion and landslides; and connect to hiking trails leading to the peak.

Interpretative signage will be added along the coffee trail.

A central educational pavilion will be built to serve as a hub for the agritourism and community development study tours as well as a national level training center on agritourism.

Activities: Guided tour of coffee farms and tastings, farm volunteer experiences, nature viewing, study tours, home restaurants.

Event: Annual coffee (agritourism) festival.

Community Involvement: Site/nature guides, coffee farmers, home restaurants, vendors, transportation providers, study tour leaders.

Market Segments: Day visitors (international and domestic), VFRs, FITs, SAVE.

Pillars of Growth and Linkages Programmes: Gastronomy, Knowledge, Agriculture, Health and Wellness

What change
can look like



Examples of coffee trails in Colombia

TABLE 37: Action plan for developing authentic and differentiated experiences

5. PRIORITY INITIATIVE

The Fat Bike Epic Adventure Trails

Cluster 2: Highlands

Short to Medium term: Years 1–6

Product category: nature and adventure

Budget: US\$200,000 (for 3 segments) (*these figures are estimates*)

Partners: NEPA, JCDT, investors, TPDCo

DESCRIPTION

Develop a network of fat bike trails and outfitters. Fat bikes are “all terrain bikes” that allow you to ride anywhere—including muddy, sandy, or rocky ridelines—in epic adventures.

Attractions: The Fat Bike Epic Adventure Trail will have three main segments. The first segment will connect Hagley Gap to communities buffering the BJCMNP. The second segment will connect buffer zone communities to the BJCMNP. The third segment will take bikers through the national park on one or two trails and could culminate with a hike to the Blue Mountain Peak.

The segments will offer different levels of difficulty that will ensure suitability to a wide range of visitors with different fitness levels. The various segments of the trail can be developed using a phased approach.

Activities: Bike tours and wilderness site exploration.

Event: Annual Iron Man Triathlon that starts in Coastal Reaches (Cluster 1) and culminates in the Rural Highlands (Cluster 2).

Community Involvement: Site/nature guides who bike, outfitters of biking equipment, home restaurants, vendors, transportation providers.

Market Segments: Day visitors (international and domestic), VFRs, FITs, SAVE.

6. PRIORITY INITIATIVE

Historic St. Thomas Trail: Great Houses and Churches

Cluster 1 - Coastal Reaches and Cluster 3 - Southeast Coast

Product category: cultural heritage

Medium term: Years 4–6

Budget: US\$450,000 (for 4 great houses and 3 churches) (*these figures are estimates*)

Partners: Institute of Jamaica, JNHT, churches, property owners

DESCRIPTION

Develop a multi-themed trail that focuses on plantations, great houses, and churches. Key interpretation themes are history, architecture, traditional lifestyles, the role of religion in daily life.

Attractions: Key great houses, such as Lady Mansfield Great House, Orange Park and Stokes Hall Great House, as well as historic churches such as the St. Thomas Parish Church located in Clusters 1 and 3. Create an educational trail that includes guidebooks and interpretive signs. This full-service trail will offer wayfinding signage along the route; visitor centres with public restrooms and possibly a small area for vendors; parking areas at key sites; and guided tours offered by site guides and special events. The trail will feature comprehensive interpretation including compelling stories.

Activities: Site visits, culinary options, and shopping.

Community Involvement: guides, restaurants, vendors, transportation providers.

Market Segments: Day visitors (international and domestic), VFRs, FITs, foreign leisure tourists, SAVE.

TABLE 37: Action plan for developing authentic and differentiated experiences

<div>7. PRIORITY INITIATIVE</div> <div>St. Thomas Birding and Wildlife Trail Cluster 1 - Coastal Reaches and Cluster 3 - Southeast Coast Product category: nature and adventure Medium term: Years 3-6 Budget: US\$450,000 (assuming 5 locations) <i>(these figures are estimates)</i> Partners: Wildlife and conservation groups, local and international NGOs, NEPA, Institute of Jamaica</div>
<div>DESCRIPTION</div> <div><p>Develop a wildlife viewing loop that encompasses important sites for turtles, birds, crocodiles and manatees. This full-service loop will offer wayfinding signage along the route. The trail will feature comprehensive interpretation including compelling stories.</p><p>Attractions: Key coastal sites such as Cow Bay, Salt Pond, and Bowden Bay.</p><p>Activities: Site visits with a focus on wildlife, culinary options, and shopping.</p><p>Community Involvement: Nature guides, vendors, transportation providers.</p><p>Market Segments: Day visitors (international and domestic), VFRs, FITs, foreign leisure tourists, SAVE.</p></div>

3.2 Develop Attractions Needed for Iconic Experiences

TABLE 38: Priority Actions for developing attractions needed for iconic experiences

<div>1.2 STRATEGY</div> <div>Develop new attractions and enhance existing attractions needed for iconic experiences</div>	<div>PRIORITY ACTIONS</div> <div>1.2.1 Develop new attractions and support the enhancement of existing attractions in order to develop iconic experiences. Attractions development should enhance the place-based character of St. Thomas.</div>
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The identification and development of anchor attractions and sites—such as museums, historic sites, trails—within each cluster is a critical first step for development of the differentiated iconic experiences prioritized in Section 3.1. Figure 20 maps existing and potential attractions.

FIGURE 20: Overview of existing and potential attractions



A comprehensive assessment of the readiness of 15 attractions and sites in St. Thomas found that the average rating of readiness is 53.5% (out of 100%). The assessment criteria are Access (for bicycles, walking, SUV/4x4, and small car), Uses (analysis of uniqueness, scenic value, passive activities, recreation, and education), Issues (level of community participation, safety/security and socio-cultural concerns, and product development), and Readiness (assessing both community interest and capacity). Each indicator was ranked on a scale of 1–5, with a score of 1 indicating the lowest/worst score and 5 the highest/best score an indicator can receive. Each of the four criteria were then scored based on the average ranking across their associated indicators. Finally, the overall readiness score was tabulated by computing the average score across all the criteria indicators for each attraction.

Based on this analysis, the top four attractions most ready for tourism are all located in Cluster 1: Lyssons/Golden Shore Beach (63%), Cow Bay (61%), Paul Bogle Monument and Morant Bay Courthouse (each 60%). Blue Mountain Peak (Cluster 2), Bath Botanical Garden (Cluster 3), and Bowden Harbour (Cluster 3) are the next top attractions ready for tourism— each rated at 59%.

TABLE 39: Visitor readiness scores for key attractions

Attraction Name	Classification	Cluster	Description	Overall Readiness Score (out of 100%)
1. Lyssons/Golden Shore Beach	Nature & Adventure	Cluster 1	Lyssons and Golden Shore beach are among the popular white sand beaches visited in the parish.	63%
2. Cow Bay	Nature & Adventure	Cluster 1	This local spot for fishing, and diving, and gathering. features very scenic views.	61%
3. Morant Bay Courthouse	Cultural Heritage	Cluster 1	This is the site of a historic courthouse and the former location of the Paul Bogle statue.	60%
4. Paul Bogle Monument	Cultural Heritage	Cluster 1	This monument was recently removed due to controversy surrounding the legitimacy of his image.	60%
5. Bath Botanical Garden	Nature & Adventure	Cluster 3	Established in 1779, the garden showcases domestic and international plants and flowers.	59%
6. Blue Mountain Peak	Nature & Adventure	Cluster 2	The highest peak in Jamaica is surrounded by beautiful scenery, flora, and fauna, and is a popular hiking attraction.	59%
7. Bowden Harbour	Nature & Adventure	Cluster 3	This deep harbor was once an important transshipment point.	59%
8. Anglican Parish Church	Cultural Heritage	Cluster 1	This historic church was significant during the disturbances of 1865.	56%
9. Morant Point Lighthouse	Cultural Heritage	Cluster 3	A well-maintained, picturesque attraction built in 1841.	54%
10. Golden Grove Sugar Factory	Nature & Adventure/ Cultural Heritage	Cluster 3	This is one of few remaining factories in Jamaica that processes sugarcane.	53%
11. Salt Pond	Nature & Adventure	Cluster 1	The associated beach is considered worthy of further development.	53%
12. Bowden Bay	Nature & Adventure	Cluster 3	This shallow bay and fish sanctuary is known as fish nursery and a source for oysters.	49%
13. Reggae Falls	Nature & Adventure	Cluster 1	A waterfall where people swim, gather, and appreciate the scenic view.	43%
14. Bath Hotel and Spa	Wellness	Cluster 3	World renowned for the mineral quality and healing properties of the water, this is also a National Heritage Site.	37%
15. Roselle Falls	Nature & Adventure	Cluster 1	A small waterfall on the side of the main road.	37%

Table 40 outlines recommendations for attractions and site development by time frame. These recommendations are based on the iconic experiences prioritized in Section 3.1 and the results of the attractions readiness assessment.

TABLE 40: Attractions development priorities

SHORT TERM: Years 1-3

<p>Cluster 1 - Coastal Reaches</p> <ol style="list-style-type: none"> 1. Morant Bay Courthouse and Paul Bogle Monument – restoration and development of trail with interpretation 2. Surfing spots – develop surfing trail consisting of 5 sites 3. Reggae Falls – redevelop site 4. Orange Park – support Orange Park Trust’s plan 5. Source Farm & Ecovillage – develop experiences and itineraries 	<p>Cluster 2 - Highlands</p> <ol style="list-style-type: none"> 1. BJCNP – develop fat bike trails 2. Coffee farms – construct terracing and develop interpretation 	<p>Cluster 3 - Southeast Coast</p> <ol style="list-style-type: none"> 1. Morant Point Lighthouse – improve interpretation and build visitor center
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MEDIUM TERM: Years 4-6

<p>Cluster 1 - Coastal Reaches</p> <ol style="list-style-type: none"> 1. Cow Bay – develop fishing village and water park 2. Salt Pond – develop recreational area 3. Trinityville – develop rasta community, trails, horseback riding 	<p>Cluster 2 - Highlands</p> <ol style="list-style-type: none"> 1. BJCNP – build research centre to observe and study endemic species 	<p>Cluster 3 - Southeast Coast</p> <ol style="list-style-type: none"> 1. Bath Fountain and Hotel – redevelop site 2. Bath Botanical Gardens – enhance infrastructure and improve interpretation 3. Great Houses – restore Lady Mansfield and other sites and develop interpretation 4. Great Morass – develop kayak trail with interpretation
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LONG TERM: Years 7-11

<p>Cluster 1 - Coastal Reaches</p> <ol style="list-style-type: none"> 1. Judgement Cliff – develop ziplining, hiking, camping, parasailing 	<p>Cluster 2 - Highlands</p> <ol style="list-style-type: none"> 1. BJCNP – build cable car 	<p>Cluster 3 - Southeast Coast</p> <ol style="list-style-type: none"> 1. Bath Botanical Garden - add a butterfly farm
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Development plans should be created for attractions and sites, integrating visitor flow and visitor experience considerations and better access to attractions. Key elements of the development plans will include structured pathways and signage, maps, and other site interpretation materials for visitors. Attractions should have also have public restrooms. The attractions and sites will need to have consistent management over time.

Table 41 presents several catalyst initiatives for attractions development.

TABLE 41: Action plan for developing attractions needed for iconic experiences

8. PRIORITY INITIATIVE	
<p>Morant Bay Historic District</p> <p>Cluster 1- Coastal Reaches Product category: cultural heritage Short to Medium term: Years 1-5 Budget: Square upgrade - US\$250,000 Courthouse renovation - US\$620,000 <i>(these figures are estimates)</i></p> <p>Partners: Jamaica National Heritage Trust (JNHT), Ministry of Culture, Gender, Entertainment and Sport, Jamaican Historical Society, Georgian Society of Jamaica, Tourism Enhancement Fund (TEF), Tourism Product Development Company (TPDCo), St. Thomas Municipal Corporation</p>	
<p>DESCRIPTION</p> <p>Restore historic buildings and monuments in the Morant Bay square in order to commemorate the town’s rich history, as well as the life of National Heroes Paul Bogle and George William Gordon.</p> <p>This project will focus on restoration of the Paul Bogle Monument, Morant Bay Courthouse, St. Thomas Parish Church, Memorial Garden and Morant Bay Fort.</p> <ul style="list-style-type: none"> • Paul Bogle Monument sculpted by Jamaica’s Edna Manley. • Morant Bay Courthouse - the Morant Bay Rebellion began as a protest outside the courthouse. • St. Thomas Church is located to the West of the Court House. It was constructed in 1865. • Memorial Garden - a memorial garden dedicated to the Jamaican soldiers who lost their lives during World War 1. A monument is erected in their honour at the centre of the garden. • Morant Bay Fort is located behind the courthouse in a small park containing the ruins of the Morant Bay Fort. The fort dates from 1758 and was designed to hold nine guns. Three cannons remain there today. <p>Eco-friendly Interpretive signage will be installed throughout the square to bring to life the important facts and stories of this area.</p> <p>This project forms part of the Paul Bogle and Morant Bay Rebellion Movement Heritage Trail which is one of several recommended iconic experiences to develop.</p> <p>Amenities: kiosks and structures for obtaining food and sanitation facilities; the square will serve as a staging area for tours and meeting points.</p> <p>Exploration: attraction that provides food, entertainment, souvenirs and other services to encourage tourists to travel the entire parish and experience all the themes and monuments.</p> <p>Pillars of Growth and Linkages Programmes: Gastronomy, Knowledge, Entertainment</p>	

What change
can look like



Morant Bay Courthouse



Example of pavilion



Example of gardens around Cenotaph



Morant Bay Square - current view of courthouse



Morant Bay Square - what it can look like after restoration and enhancements



Morant Bay Square - current view of courthouse



Morant Bay Square - what it can look like after restoration and enhancements

TABLE 41: Action plan for developing attractions needed for iconic experiences

9. PRIORITY INITIATIVE

Reggae Falls Freshwater River Park

Cluster 1- Coastal Reaches

Product category: nature and adventure

Short to Medium term: Years 1-5

Budget: US\$4,000,000 *(these figures are estimates)*

Partner: Serge Island Dairy Farms

DESCRIPTION

Develop a freshwater river park at Reggae Falls. Although the location is off the beaten path, it will attract visitors interested in exploration and can provide interesting photo opportunities, as well as ample entertainment and recreational opportunities worthy of a trip. See Figure 21 for drawing of the proposed freshwater river park.

Attraction: the park can be designed as a medium sized recreational facility that will provide activities for hosting events, parties and concerts; water sports– kayaking and swimming; a water park with slides, pools and a zip-line; a food court.

The park will also be equipped with restroom and changing rooms; bus and car park; food and vending facilities; cabanas for relaxation; lights, landscaping and garbage silos.

Employment opportunities: jobs will be created in facility maintenance, entertainment, sanitation, vending, gastronomy and security.

Amenities: attraction which provides food, entertainment and recreation for tourists and local day visitors.

This initiative can be developed as a PPP joint venture, and possibly public ownership through share offerings in the long term.

FIGURE 21: Drawing for proposed redevelopment of Reggae Falls



TABLE 41: Action plan for developing attractions needed for iconic experiences

10. PRIORITY INITIATIVE

Saltwater Park and Nature Reserve at Cow Bay

Cluster 1- Coastal Reaches

Product category: man-made attraction; nature and adventure

Short to Medium term: Years 1-5

Budget: US\$7,000,000 *(these figures are estimates)*

Partners: JAMPRO, local investors, TPDCo, TEF, NEPA

DESCRIPTION

Develop a saltwater park and nature reserve at Cow Bay. See Figure 22 for drawing of the proposed saltwater park and nature reserve.

Attraction: the saltwater park will be a major recreational facility that will provide activities for hosting events, parties and concerts at the lagoon and beach; beach sports– volleyball and football; a water park with slides and pools; seafood court; staging point for scuba diving and wildlife tours.

The park will also be equipped with restroom and changing rooms; bus and car park; food and vending facilities; cabanas for relaxation; tour guides; lights, landscaping and garbage silos.

The water for the beach park will be extracted from the sea, but will be treated and purified with a low cost electrolysis system to remove the salinity from the water.

Protection: A key component of this initiative involves designation of a new nature reserve designed to protect threatened coastal habitats and wildlife. This area will serve as an educational area for the saltwater park.

Amenities: tourist trap which provides food, entertainment and recreation for tourists and local day visitors.

Employment opportunities: jobs will be created in facility maintenance, entertainment, sanitation, vending, gastronomy, tour guides and security. It's estimated that the park could employ between 60- 80 persons.

The main target market will be day visitors from Kingston and surrounding parishes.

This initiative can be developed as a PPP joint venture, and possibly public ownership through share offerings in the long term



Example of waterpark in the Mexican Caribbean

FIGURE 22: Drawing for proposed development at Cow Bay

What change
can look like



TABLE 41: Action plan for developing attractions needed for iconic experiences

11. PRIORITY INITIATIVE

Hayfield Ecotourism Training Centre and Cuna Cuna Pass Trail

Cluster 2- Highlands

Product category: nature and adventure

Short term: Years 2-4

Budget: US\$270,000 *(these figures are estimates)*

Partners: TPDCo, JCDT, JNHT, Jamaica Organic Agriculture Movement (JOAM),
Hayfield Community Development Committee

DESCRIPTION

The upper reaches of the Rio Grande Valley are replete with natural and cultural heritage. The valley is home to the Giant Swallowtail Butterfly (*Papilio homerus*), and features heritage trails (8.9 Km Cuna Cuna Pass and 8 km Corn Puss Gap Trails), great houses and ruins at Hayfield (Ladyfield Great House and Grampian Ruins), streams and diverse flora and fauna. The hiking trails in this unique area link the parish of St. Thomas to Portland.

These assets make this an ideal area for training tour guides and service staff in nature and adventure guiding, interpretation, climate smart and sustainable tourism practices and hospitality. The development of an ecotourism training centre can help to transform this area into a new destination within Cluster 2 - Highlands. The ecotourism will help bring attention to this region and at the same time draw domestic and international visitors.

While the Hayfield Community Development Committee has been working diligently to improve trails from Hayfield to the Great Houses, there is more work needed to enhance accessibility of the area. Enhancing accessibility is critical for appealing to visitors. This is especially important for access to the trails and great houses.

Priority Actions associated with this initiative will include:

1. Improving road access via Hayfield to Hayfield great houses and to Cuna Cuna Pass Trail.
2. Supporting community based initiatives to create and enhance trails to current great house ruins.
3. Establishing eco-tourism training centre.

Pillars of Growth and Linkages Programmes: Health and Wellness, Knowledge

What change
can look like



Example of ecotourism training centre



Training of nature and adventure tour guides

TABLE 41: Action plan for developing attractions needed for iconic experiences

12. PRIORITY INITIATIVE/ACTION

Bath Butterfly Farm and Nature Interpretation Centre

Cluster 3- Southeast Coast

Product category: category: nature and adventure

Short to medium term: Years 2-5

Budget: Phase 1 - Butterfly farm and research facility - US\$ 680,000

Interpretation Centre / Museum - US\$ 1,500,000

Phase 2 - Presented as a separate initiative in the TDDMP

(these figures are estimates)

Partners: Natural History Society of Jamaica, (NEPA), local and international research institutions, local and international wildlife and conservation organizations (e.g. World Wildlife Fund, The Nature Conservancy, International Union for Conservation of Nature, etc.), JCDT, Institute of Jamaica, Forestry Department, Ministry of Agriculture, UWI

DESCRIPTION

The project seeks to build on the history of the area to develop a multi-purpose facility for education and research of forest ecology as well as butterfly viewing. This project aims to rejuvenate some of the country's oldest tourism facilities by adding new attractions.

Attractions will include:

Phase 1

Construction of a Butterfly Farm and conservation/research facility.

- Rebuilding of the courthouse for use as an Interpretation Centre and Museum where the history of the region with information on the Bath mineral springs, history of Bath Botanical Gardens, and the fruits that were introduced to the island and the Giant Swallowtail Butterfly will be displayed. The facility will include a restaurant and gift shop.

Phase 2

Redevelopment of the Botanical Gardens as well as the Hotel & Spa

- Riverside park along the river between the hotel and botanical gardens

Amenities: the interpretation centre will include a display area with educational materials on the Bath Mineral Springs, Bath Hotel & Spa, Giant Swallowtail Butterfly and Bath Botanical Gardens and the fruits that were introduced to the island through that facility. The butterfly farm will specialize in local butterfly species especially the endemic Giant Swallowtail butterfly. The facility will include an enclosed facility for displays and intimate contact with butterflies as well as external gardens. The interpretation centre will offer clean bathrooms and a small cafeteria.

The hotel and spa can be redeveloped to include new river pools and outdoor hot tubs using the mineral water. The hotel structure also requires extensive renovation. The botanical gardens will be upgraded with shelters, signage and walkways for safety as well as upgraded planter beds. A riverside park will tie the botanical gardens to the hotel and mineral spring using a trail with enhanced garden areas and shelters. One suggestion to control the local entrepreneurs is to remove the bridge from the gate of the hotel facility and relocate it further downstream.

Employment opportunities: naturalists, trained butterfly farm assistants, guides, general workers.

Sustainability: the project is an example of a tourist attraction that can be used to support conservation efforts of endemic species. The development of the butterfly farm can be used to protect the Giant Swallowtail Butterfly and its habitat while creating a new attraction. The effort is closely linked to the conservation efforts of the Blue and John Crow Mountains National Park.

Market Segments: Day visitors (domestic and international) interested in health & wellness, culture, history and environment.

Pillars of Growth and Linkages Programmes: Gastronomy, Knowledge, Health and Wellness

What change
can look like



Examples of butterfly farms in Belize



Key butterfly species and other fruits to be featured in Bath Butterfly Farm



Examples of interpretation centres: Belize and Galapagos



Examples of signs in botanical gardens

13. PRIORITY INITIATIVE

Rocky Point Public Beach Park - Morant Point Lighthouse and Visitor Centre - Great Morass Water Trail & Boardwalk

Cluster 3- Southeast Coast

Product category: category: nature and adventure

Short to medium term: Years 2-5

Budget: Rocky Point Beach - US\$450,000

Morant Point Lighthouse and Visitor Centre - US\$360,000

Great Morass Water Trail and Boardwalk - US\$420,00

(these figures are estimates)

Partners: Rocky Point Beach Park - NEPA, Rocky Point Fisherfolk Association, TEF

Morant Point Lighthouse - NEPA, Port Authority of Jamaica, JNHT, TEF

Great Morass Trail and Boardwalk - NEPA, local and international research institutions, local and international wildlife and conservation organizations

DESCRIPTION

The aim of the project is to create a trio of connected nature-based attractions in the extreme eastern region of the parish. Together these attractions are sufficiently compelling to attract day visitors in the short to medium term. As medium to large scale development of hotels occurs in Cluster 3, this trio of nature-based attractions will serve as an anchor attraction. This development features one of the most beautiful beaches in the parish and also allows access to the Great Morass for education, research and recreation.

The Rocky Point Beach will be developed into a public beach park to complement the other public beaches, such as Lyssons Beach and Rudolph Elder Park.

The Morant Point Lighthouse will be upgraded as an official attraction with amenities to support visitors.

The Great Morass will be developed to accommodate low impact activities that allow viewing and exploration of the ecosystem.

Attraction: the components of the Rocky Point Public Beach Park will include toilets, showers and changing facilities and associated sewer systems; connection of electricity and water services; picnic shelters and picnic tables; lifeguard stations; restaurant and/or other food preparation establishments; parking area; general landscaping.

The Morant Point Lighthouse upgrade will include toilets, gift shop and snack counter; connection of electricity and water systems; picnic shelters and picnic tables; designated parking area and walkways; landscaping and interpretive signs.

The Great Morass Water Trail & Boardwalk will be accessed by boat where possible and with a limited boardwalk in other areas. The development will require an access point with a shelter or kiosk with bathroom facilities, lockers, displays and signage.

Amenities: the beach park will include all the facilities required for a safe and enjoyable beach experience- toilets, changing rooms and showers as well as food. The lighthouse and great morass will appeal to the adventurous and the attractions will be made accessible without losing too much of the rustic appeal.

Employment opportunities: naturalists, tour guides, facility managers and workers.

Sustainability: the Rocky Point public beach is connected to the proposed large-scale Pera Eco-resort Village and Golf Course initiative (see TDDMP for details), and also links to the Morant Point lighthouse via the Great Morass. This proposed beach park functions to protect the future resort development from the impacts of hurricanes/storms as well as sea level rise.

Market segments: the developments will cater to individuals and groups, families and nature lovers.

Pillars of Growth and Linkages Programmes: Health and Wellness, Gastronomy, Knowledge, Sports and Entertainment



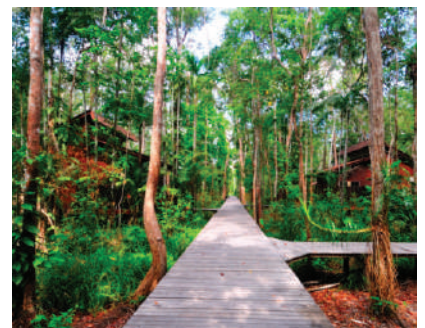
Examples of lighthouses and visitor centres: U.S. and Ireland



Examples of low impact beach park development in the U.S. and the Mexican Caribbean



Example of viewing tower



Examples of gravel trail and boardwalks through wetlands



Example boat tour through mangroves

TABLE 41: Action plan for developing attractions needed for iconic experiences

14. PRIORITY INITIATIVE/ACTION

Salt Pond Development

Cluster 1 - Coastal Reaches

Product category: man-made attraction; nature and adventure

Medium to Long term: Years 6-9

Budget: US\$465,000 *(these figures are estimates)*

Partners: Scientific Research Council (SRC), NEPA, local and international research institutions, local and international wildlife and conservation organizations (eg. Audubon Society, World Wildlife Fund, Birdlife International, The Nature Conservancy, STEPA, etc.)

DESCRIPTION

The project seeks to build on the unique features and folklore around the pond to develop a multipurpose facility for education, research, wildlife viewing and recreation. Components include:

- Rest stop / Interpretation Centre explaining the history, function and folklore of the pond with information on the wildlife including restaurant, yoga centre & spa and gift shop
- Boardwalk /trail around the pond with viewing tower
- Gazebos and picnic tables
- Research station and training centre for bird guides
- Non-motorized water sports- canoeing, paddle boating, etc.

Market diversity: To provide an ecotourism attraction close to Kingston that can be marketed to cruise ship visitors, Kingstonians, schools, wildlife enthusiasts, international and local bird groups (eg. Audubon Society, Birdlife International), history groups, etc.

Amenities: the rest stop offers clean bathrooms and a small restaurant specializing in shrimp and seafood. The interpretation centre will include a display area with educational materials on the salt pond and associated wildlife. The shallow and enclosed nature of the ponds makes it ideal for non-motorized water sports. A boardwalk and promenade along the shoreline of the pond will connect the different components together. The lots surrounding the pond can provide housing for locals and accommodation for visitors.

Employment opportunities: the facility will require guides, watersport operators, beauticians and general workers and will provide an opportunity for the surrounding residents to develop bed and breakfast or villas.

Exploration: the development showcases one of the most unique features of Jamaica's shoreline- there is no other pond like it on the island!

Sustainability: the development retains all the natural features of the pond and is low impact. It is relatively easy to develop (it does not require major long-term studies or engineering) and funding can be sourced from local and international sources as well as the TEF. The attraction of the pond can be linked with other sites for wildlife viewing in the parish such as the Blue and John Crow Mountains National Park, Bath and the Great Morass.

FIGURE 23: Drawing for proposed development at Salt Pond



3.3 Develop full range of accommodations and facilities

TABLE 42: Priority Actions for developing full range of accommodations and facilities

1.3 STRATEGY	PRIORITY ACTIONS
Develop full range of accommodations and facilities	1.3.1 Facilitate development of a full range of appropriate lodging and facilities that appeal to the domestic and international markets

The identification and development of anchor attractions and sites—such as museums, historic sites, trails—within each cluster is a critical first step for development of the differentiated iconic experiences prioritized in Section 3.1. Figure 20 maps existing and potential attractions.

Table 43 outlines the 2030 aspirations for accommodations types and scale, special infrastructure projects such as marinas, services and amenities, and priority market segments envisioned for each cluster. There is significant differentiation proposed in the overall tourism products and services to be offered in each cluster. This strategy will facilitate a wide range of appropriate lodging and food facilities that appeal to the domestic and international markets and help to maximize resiliency over both the short and long term.

TABLE 43: Overview of Product Development Vision for Clusters

	Cluster 1: Coastal Reaches	Cluster 2: Highlands	Cluster 3: Southeast Coast
Accommodations	<p>Hotel Types: Small (1-99 rooms), independent hotels and resorts, all-suite or villas, serviced apartment, and bed and breakfast/homestays.</p> <p>Levels of service: budget/limited to mid-range service that is aligned to service levels of hotels located in Kingston</p>	<p>Hotel Types: Bed and Breakfast/Homestays, small hotels (1-30 rooms) that can accommodate independent travelers as well as groups (SAVE), independent boutique hotels and villas that offer authentic cultural experiences and interesting guest service.</p> <p>Levels of service: budget/limited to mid-range service to world-class service</p>	<p>Hotel Types: Medium (100-399 rooms) and Large (400+ rooms) independent and chain resort hotels as well as mixed developments that include all-suite or villas.</p> <p>Levels of service: mid-range to world-class service</p>
Other facilities	<p>Theme park, such as water park and recreational areas, for day visitors from Kingston</p> <p>Yoga and wellness centres</p>	<p>Wellness centres and spas</p>	<p>Marina, golf course, wellness centres and spas</p>
Food & Drink	<p>Restaurant Type: Fast food, bistros/cafe, casual dining, family style</p> <p>Menus and Level of Service: Jamaican cuisine, some food options that may be international</p> <p>Restaurants have a relaxing and friendly atmosphere, moderate food pricing and table services</p>	<p>Restaurant Type: Home restaurants, casual dining, and fine dining at boutique hotels and villas.</p> <p>Menus and Level of Service: Homestyle Jamaican cuisine with a farm-to-table focus, farm and food experiences, some international food options</p> <p>Restaurants have a relaxing and friendly atmosphere, moderate food pricing and table services</p> <p>The fine dining establishments should have a special design, unique decoration, high-quality furniture, and have full services with special food are offered.</p>	<p>Restaurant Type: Bistro/cafe, casual dining, family style and fine dining</p> <p>Menus and Level of Service: Wide variety of international and Jamaican cuisine, farm and food experiences</p> <p>Restaurants have a relaxing and friendly atmosphere, moderate food pricing and table services</p> <p>The fine dining establishments should have a special design, unique decoration, high-quality furniture, and have full services with special food are offered.</p>

	Cluster 1: Coastal Reaches	Cluster 2: Highlands	Cluster 3: Southeast Coast
Priority Market Segments (listed in order of potential and importance)	<p>Domestic and international leisure visitors from Kingston</p> <p>Day visitors from cruise ships docking at the planned Port Royal cruise port</p> <p>Meetings, incentives conventions and exhibits (MICE) groups associated to the business community as well as social and religious groups in Kingston and surrounding parishes</p> <p>Volunteer and educational travel groups (domestic and international)</p> <p>Diaspora visiting friends and relatives (VFR) is seen as a market segment that will remain steady</p> <p>This cluster is not seen as the most dominant for attracting considerable numbers of foreign and independent travelers (FIT)</p>	<p>Foreign, independent travelers seeking to hike to the Blue Mountain Peak. The aim should be to extend their currently short (1-2 nights) stay-over</p> <p>Domestic hikers interested in exploring the Blue and John Crow Mountains National Park, including hiking to the Blue Mountain Peak</p> <p>The Blue and John Crow Mountains National Park can attract more international scientific, academic, volunteer and educational (SAVE) groups</p>	<p>International and domestic leisure tourists looking to get-away to experience Pera's beaches</p> <p>Diaspora visiting friends and relatives (VFR) is seen as a market segment that will remain steady</p> <p>Foreign, independent travelers (FITs)</p> <p>The Great Morass and other unique coastal ecosystems can attract scientific, academic, volunteer and educational (SAVE) groups</p> <p>Domestic day visitors from Kingston and other neighboring parishes.</p>

The proposed TDDMP zoning plan identifies areas that are ideal for development of new accommodations. These areas exhibit good characteristics, such as views, location outside of town centres and close to main tourist attractions and sites. Buildable land does not include agricultural land or land in very steep, flood prone or other areas exposed to natural hazards. Figure 24 illustrates the recommended accommodation zones, and Table 44 identifies the proposed surface area and densities for proposed hotel development zones.

FIGURE 24: Accommodation development zones



TABLE 44: Surface area and density of proposed hotel development zones

	Area - sq.m	Acres	Density: units per acre	Density: rooms per unit
Pera	13,737,946	3,393	0.5	3
Amity Hall	3,897,298	963	0.5	3
Bath	68,159	17	2	3
Roselle	3,393,470	838	0.5	2
Salt Pond	2,362,127	583	1	1
11 Miles	2,572,917	636	1	3
Llandewey	1,147,386	283	0.5	3
Hagley Gap	1,966,756	486	0.5	3
Trinityville	1,861,410	460	0.5	3
Holland Bay	3,897,298	963	0.5	3
TOTAL	34,904,767	8,621		

To make opportunities for new tourism development inclusive, development should range from small scale accommodation options that can provide investment opportunities for SMEs to large scale properties that can generate volume and help establish anchor sites. However, it is important to note that the 2016 Economic Assessment of the Jamaican Tourism Industry report indicated that medium-sized hotels generate the highest revenue per room and are therefore most interesting to developers. It has to be noted that the average medium-sized hotel in Jamaica is positioned in a higher luxury segment than the larger properties. In 2010, large hotels generated a room revenue of US\$136 per night, while medium-sized hotels generated US\$240. The average revenue per room for small hotels in 2010 was US\$125. This is partly due to the fact that smaller hotels (28-36%) achieve much lower occupancy rates than medium and large hotels (66–69%).

TABLE 45: Total revenue and net profit by hotel size

	Large hotels (400+ rooms)	Medium hotels (100-399 rooms)	Small hotels (1-99 rooms)	Total hotel industry
Total revenue per room (J\$ million)	4.25	5.15	1.70	3.31
Net profit after tax (% of total revenue)	14.7%	14.7%	9.1%	14.2%

Source: Assessment of the Economic Impact of the Tourism Sector in Jamaica, August 2014

In terms of profitability, large and medium-sized hotels also outperform the smaller hotels. Many of the medium-sized hotels have changed their product over the years to strive for higher profitability. According to the report “The medium-sized hotels have turned from offering European Plan²⁷ only or mixed packages to becoming all-inclusive hotels with higher occupancy rates and have gone up market earning higher average daily rates than the Caribbean average.” The low occupancy rates of the smaller hotels impacts their profitability.




The main takeaway is that while we recommend small accommodation options, such as homestays and small boutique hotels, it is important to note that medium-sized (100-399) rooms are the most profitable.

Table 46 details the vision for the different types of accommodations options by clusters and Figure 25 illustrates examples of ideal design concepts for accommodation options for each by cluster.

TABLE 46: Accommodation development type and scale by clusters

	Cluster 1: Coastal Reaches	Cluster 2: Highlands	Cluster 3: Southeast Coast
Type of accommodation (in order of importance)	Small (1–99 rooms), independent hotels and resorts All-suite or villas Serviced apartments Bed and breakfast/homestays	Bed and Breakfast/Homestays Small hotels (1–30 rooms) that can accommodate independent travelers as well as groups (SAVE), Independent boutique hotels and villas that offer authentic cultural experiences and interesting guest service.	Medium (100–399 rooms) Large (400+ rooms) independent and chain resort hotels as well as mixed developments that include all-suite or villas
Total hotel rooms by 2030	1,500	650	2,220

FIGURE 25: Recommended design concepts for accommodation options by cluster

Cluster 1: Coastal Reaches	Cluster 2: Highlands	Cluster 3: Southeast Coast
Low-density (1–99 rooms) Coastal villas, small and medium hotels	Low-density (1–30 rooms) mountain cabins/villas and boutique hotels	Medium- and high-density (100–400+ rooms) independent and chain resorts and hotels, mixed developments that include marina and golf course
 	 	 

²⁷ European Plan hotels only include lodging in their rate and not include meals

There are three initiatives recommended for accommodations development. These initiatives are described below.

TABLE 47: Action plan for developing full range of accommodations and facilities

<div>15. PRIORITY INITIATIVE</div> <div><div>St. Thomas Homestay and Community Experiences Network</div><div>Cluster 1- Coastal Reaches and Cluster 2- Highlands</div><div>Short term: Years 1-3 Budget: US\$50,000 <i>(these figures are estimates)</i></div><div>Partners: TPDCo, Jamaica Business Development Corporation (JBDC), Social Development Commission, Human Employment and Resources Training Agency (HEART)</div></div>
<div>DESCRIPTION</div> <div><p>The homestay network will aim to provide authentic experiences for independent leisure tourists who want to experience the local community and culture. It is envisioned that the network will span from Coastal Reaches (Cluster 1) to Highlands (Cluster 2) and offer tourists an authentic experience that can form part of a multi-day Sea to Ridge experience.</p><p>The network can be developed as a membership based association. Members of homestay network will commit to complying with basic quality and sustainability standards.</p><p>The network will also offer unique, curated experiences to be provided by locals in the communities. The St. Thomas Homestay and Community Experiences association will develop its own brand, promote the network and monitor compliance with basic standards and visitor satisfaction. The product itself can be developed as part of the Tourism Experiences Studios proposed in Section 3.4.1.</p><p>Pillars of Growth and Linkages Programmes: Gastronomy, Sports and Entertainment (Arts and Culture), Health and Wellness, Shopping</p></div>

What change
can look like



16. PRIORITY INITIATIVE

Bath Resort and Spa (redevelopment)

Cluster 3- Southeast Coast

Short to Medium term: Years 2-6

Budget: US\$3,000,000

Partners: Investors, JAMPRO

DESCRIPTION

Re-develop and expand the existing Bath Resort and Spa into a modern hot spring resort and spa facility. See Figure 26 for drawing of the Bath Resort and Spa.

The hotel will provide luxurious family-friendly accommodations. The hotel will offer private outdoor thermal mineral-water pools, spa treatments under cabanas overlooking the rainforest garden, recreational river pools, hiking trails, and a first class restaurant serving fine cuisine.

Amenities: provide a place for staging small events, recreation facilities.

Employment opportunities: jobs will be created in facility maintenance, sanitation, gastronomy, tour guides and security.

Attraction: tourist trap which provides food, entertainment and recreation for tourists and local day visitors

FIGURE 26: Drawing of proposed development of Bath Resort and Spa



17. PRIORITY INITIATIVE

Pera Eco-Resort Village and Golf Course

Cluster 3- Southeast Coast

Medium to Long-term: Years 7-11

Budget: US\$500,000,000 *(these figures are estimates)*

Partners: Private landowners, NEPA, local development planning team, investors,
Jamaica Hotel and Tourist Association (JHTA), SDC, HEART

DESCRIPTION

Create an exclusive high-end eco-resort village in a secluded setting. See Figure 27 for drawing of the eco-resort village and golf course.

The main features of this development include a marina and super yacht facilities; a hip strip for entertainment and high end boutique shopping, casino gaming, restaurants & bars; access to a private airstrip; a 5-mile public beach park, an extensive golf course; horseback riding facilities and trail; a secluded beach surrounded by a mangrove forest.

Nature environments for exploration include: the Emerald Island; Bowden Bay; the Great Morass Mangrove Forest; and the Coral Reefs from Pera Bay to Folly Bay. Historical ruins are also available for tour enhancement, which includes: fort ruins; ruins of a windmill; and great houses along the overlooking hillside. The Golf Course will be Audubon certified in order to align with the overall sustainability principles outlined in the TDDMP. It is also suggested that the area be reforested with native plants in order to enhance and restore this disturbed area.

The village will comprise of various styles of high quality accommodations, from private villas to medium size hotels. A wide diversity of services is planned to cater for all types of visitor needs.

The location will serve as a major staging area for attracting large numbers of tourists, from which excursions will be arranged throughout the parish.

The Pera Resort and Golf Course development will serve as an anchor destination in Cluster 3. It will feature approximately 1,600-2,500 rooms at full buildout.

Amenities: a wide range of amenities will be provided to cater to visitors of all levels including facilities for shopping, restaurants, recreation, sports, services.

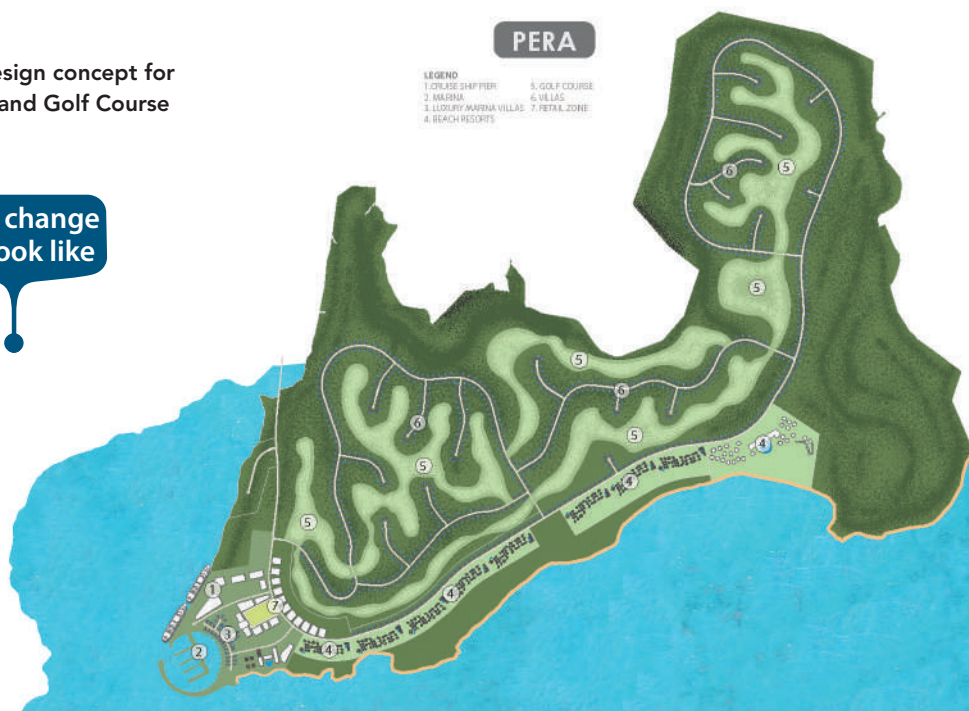
Employment opportunities: jobs will be created in all areas of the tourism industry – from hotel services to hotel ownership.

Sustainability: all aspects of the development will utilize sustainable practices. The main goal of sustainable tourism is to ensure that development benefits the local host communities, tourism operators and minimizing impacts on the environment. Certification schemes have been developed for many aspects of the tourism industry. Leadership for Environmental Efficiency in Design (LEED) for construction, Green Globe for hotel operations and GEO certification for golf course development are examples of international voluntary programs that can be encouraged. Examples of eco-friendly hotel chains include Fairmont Hotels, Hilton Hotels and Resorts, Hyatt Hotels, Marriott Hotels and Sandos Hotels & Resorts. The local Marriott Hotel in New Kingston is certified LEED silver and The Tryall Club is the only local golf course that is pursuing the GEO OnCourse programme to become certified.

Pillars of Growth and Linkages Programmes: Heath and Wellness, Agriculture, Manufacturing, Shopping, Sports and Entertainment, Gastronomy

FIGURE 27: Proposed design concept for Pera Resort and Golf Course

What change
can look like





3.4 Develop People- and Program-based Businesses

TABLE 48: Priority actions for developing people- and program-based businesses

1.4 STRATEGY	PRIORITY ACTIONS
Develop people- and program-based businesses.	<p>1.4.1 Provide tourism experience development and market readiness support to communities and entrepreneurs.</p> <p>1.4.2 Develop a cadre of professional tour guides and site guides.</p>

3.4.1 Provide Tourism Experience Development Support

A fundamental principle of ecotourism is the meaningful involvement of local communities in tourism. Communities should be encouraged to tell their stories and create interactive community-based experiences that allow community members to engage and educate visitors about their place.

In addition, individuals with exceptional local knowledge and local stories should be encouraged to serve as tourism ambassadors, tour guides and even trainers of tour guides. The same is recommended for artisans, musicians, singers and performers. These individuals can create independent tourism activities and experiences to offer to visitors.

Tourism Experience Studios can be employed to assist interested communities and entrepreneurs (such as tour guides, artisans, and musicians) to design and promote unique tourism experiences, and promote their tourism experiences that introduce visitors to the real St. Thomas.

The studios should help to build diverse and differentiated people- and program-based experiences that represent the most unique qualities of the people, place and culture of St. Thomas.

The Market Readiness initiatives outlined in Section 4.0 will provide training and technical assistance to the communities and entrepreneurs that have completed the Tourism Experience Studios. This additional training will help participants learn how to start and operate a small business.

Efforts should be taken to ensure that new community experiences are integrated under, and promoted as part of, Jamaica Tourism Board's Jamaica Community Experiences brand and online portal.

Airbnb Experiences can also serve as an important channel for entrepreneurs to more easily promote their activities and experiences that immerse visitors in their unique world.

TABLE 49: Action plan for providing tourism experience development support

18. PRIORITY INITIATIVE

Tourism Experience Studios

Short Term: Years 1-3

Budget: US\$462,000 (US\$154,000 per annum) *(these figures are estimates)*

Partners: TPDCo, JBDC, Product Area Interest Groups, Social Development Commission (SDC)

DESCRIPTION

Organize a series of Tourism Experience Studios that will assist communities to develop sustainable, immersive tourism experiences.

The studios will support detailed product development with local groups of stakeholders, e.g., the surfing community and homestay providers.

The studios will be designed as an intensive two-day workshop covering key topics: market trends relevant to the specific types of tourism products being encouraged, e.g. cultural tourism; broadening understanding of the variety of visitor experiences and the types of visitors who seek such experiences; examples of successful small tourism businesses and creative partnerships; an overview of practical financial planning tools; understanding how to craft a compelling story and online presence; and exploring opportunities for collaboration that can help to build a critical mass of visitors. The workshop will include practical exercises which guide the community members and prospective entrepreneurs through developing an actual concept for a new product or experience.

TPDCo and other business development and support organizations will be enlisted to provide business "readiness" training and technical assistance subsequent to product development studios. These sessions may be provided at concessionary rates if not fully funded.

Pillars of Growth and Linkages Programmes: Knowledge, Sports and Entertainment



3.4.2 Develop a Cadre of Professional Tour Guides and Site Guides

Another key element of ecotourism is interpretation—the process of providing opportunities for visitors (domestic and international) to personally and meaningfully connect with a place. Interpretation forges emotional and intellectual connections between the visitors and the culture of St. Thomas.

Tour guides, through the quality of their interpretation during interactions with visitors, can make the difference between

an average trip and a great one. The job entails, among other things, knowing the subject in great detail, including facts, figures and anything else someone may ask. Premier ecotourism destinations such as Costa Rica and Belize invest considerably in developing professional tour guides and site guides who to deliver memorable interpretative experiences to visitors. Similar efforts will need to be taken for St. Thomas.

TABLE 50: Action plan for developing a cadre of professional tour guides and site guides

<h2>19. PRIORITY INITIATIVE</h2>	<p>Develop a cadre of professional tour guides and site guides.</p>
<p>Short Term: Years 1-3</p>	<p>Budget: Costs included under Workforce Development initiative</p>
<p>Partners: SDC, TPDCo, HEART, JCDDT, JNHT</p>	
<h3>DESCRIPTION</h3>	
<p>The workforce development initiative outlined in Section 4.7 of the TDDMP will incorporate capacity-building for tour guides and site guides.</p>	
<p>A few important considerations are proposed to ensure that the capacity-building efforts are tailored to the needs of St. Thomas:</p>	
<ul style="list-style-type: none"> • ITPDCo’s official training program for tour guides should be used as the foundational program for tour guides. • The foundational program should be supplemented with an additional module that provides trainee tour guides with parish-specific knowledge. Individuals with exceptional local knowledge and local stories should be contracted to develop and deliver this additional training module. • The training program should integrate practical exercises and culminate with trainees designing and delivering a mock tour. • The training program should include a field apprenticeship component in which trainee tour guides shadow more experienced tour guides for a defined period of time. • The program’s content and delivery will need to be accessible to all, including individuals with lower levels of education. Teaching and test-taking accommodations for reading and written exercises should be considered. 	

3.5 Improve the Quality of Product and Service Delivery

TABLE 51: Priority actions for improving the quality of product and service delivery

<h3>1.5 STRATEGY</h3>	<h3>PRIORITY ACTIONS</h3>
<p>Improve the quality of product and service delivery.</p>	<p>1.5.1 Build the capacity of tourism service staff to deliver a high quality of service consistently.</p> <p>1.5.2 Ensure that visitors are safe at attractions and sites, on tours, and as they travel traverse throughout the parish.</p>

Quality in tourism staff and services and safe environments will make St. Thomas more competitive and attract international tourism investments.

3.5.1 Build the Capacity of Tourism Service Staff

The success or failure of St. Thomas as a tourism destination will depend in large part on how employers and their staff provide quality customer service, focusing on the importance of the “human element” in the visitor experience. Customer service training provides employees with a foundation for effective service delivery. Potential benefits of this training may include improved attitudes; better communication skills; better understanding of workplace practices; increased morale, confidence, and self-satisfaction, and work satisfaction; increased participation; greater job/career advancement potential; greater interest in and willingness to participate in further training; and more independence.

Current online ratings for accommodations and restaurants in St. Thomas range from good to mixed, which indicates a need for a destination-wide focus on quality and service delivery. The Team Jamaica Programme, TPDCo’s mandatory training and certification program for service staff in the tourism industry, would be an ideal starting point. The program’s main components include customer service, product knowledge, and cultural and environmental awareness.

Priority actions that can be implemented to build capacity for high-quality service and product delivery are outlined below.

TABLE 52: Action plan for building the capacity of tourism service staff

<div>20. PRIORITY INITIATIVE</div> <div>Launch destination-level customer service training.</div> <div>Short to Medium term: Years 1-6 Budget: Costs included under Workforce Development initiative</div> <div>Partners: TPDCo, HEART Trust-NTA, SDC</div>
<div>DESCRIPTION</div> <div>Introduce a destination-wide focus on quality and service delivery by:</div> <div><ul style="list-style-type: none">Assessing current gaps in service delivery related to workforce competencies, customer service and visitor experience. This activity will be integrated as part of the broader workforce development gap assessment.Assisting the HEART Trust NTA facility in Yallahs become a TPDCo-approved training partner for the Team Jamaica Programme.Rolling out the Team Jamaica customer service training program throughout the parish. Training sessions that cover all levels of the Team Jamaica program should be offered multiple times a year as part of the workforce development initiative.</div> <div>Pillars of Growth and Linkages Programmes: Knowledge, Gastronomy</div>



3.5.2 Assure Visitor Safety

Visitor harassment is occurring in St. Thomas at Reggae Falls and Bath Fountain Hotel and Spa. Vendor persistence is the main problem. Visitor harassment stems from locals wanting to provide services or goods while competing for the attention of few tourists. At Bath, the situation is quite dire. Visitors are lured away from the Hotel and Spa to have informal experiences, such as massages, at the river. Conflicts associated with the pricing of these services are frequent, and many visitors report feeling quite threatened and even injuries from improper massage techniques.

Reversing this trend is crucial and will require great attention. It will be important to involve all tourism stakeholders in addressing this issue. Local authorities and the tourism community will need to develop a collaborative approach to maintaining a safe, secure environment for residents and visitors alike.

Several priority actions are recommended, which are described in the following table.

TABLE 53: Action plan for assuring safety and security

<div><div>21.</div><div>PRIORITY INITIATIVE</div><div><div>Include the marginalized and ‘at risk’ youth actively involved in or with the potential to harass visitors in formal tourism activities</div><div>Short to Long term: Years 1-11 Budget: US\$77,000 <i>(these figures are estimates)</i></div><div>Partners: SDC, TPDCo, HEART, tertiary institutions</div></div></div>
<div><div>DESCRIPTION</div><div>Promote programs that integrate marginalized persons who comprise most of the harassers into the tourism mainstream. These individuals, along with “at risk” youth, should be targeted for participation in the Team Jamaica Programme and Tourism Experience Studios.</div><div>Finding creative ways to ensure that these programs are accessible to these individuals is critical.</div></div>
<div><div>22.</div><div>PRIORITY INITIATIVE</div><div><div>Organize informal service providers operating at main attractions and sites.</div><div>Short to Medium term: Years 1-6 Budget: US\$77,000 <i>(these figures are estimates)</i></div><div>Partners: SDC, TPDCo, HEART, tertiary institutions, Jamaica Constabulary Force (JCF)</div></div></div>
<div><div>DESCRIPTION</div><div>Assist informal service providers at main attractions and sites to organize as an association.</div><div>The associations should establish a queuing system that ensures all members have equal access to visitors, as well as set basic rules for members, and create a process for self-policing that ensures members abide by basic rules.</div><div>Priority should be given to Bath Fountain and Reggae Falls as part of the redevelopment projects proposed in this destination development plan for these attractions and sites.</div></div>

TABLE 53: Action plan for assuring safety and security

23. PRIORITY INITIATIVE

Launch tourism ambassadors program to help manage visitor harassment.

Short to Medium term: Years 1-6

Budget: US\$23,000 for training, and US\$77,000 for Tourism Liaison Officers *(these figures are estimates)*

Partners: SDC, TPDCo, HEART, tertiary institutions, JCF

DESCRIPTION

Develop a program that stations trained tourism ambassadors and tourism police at key attractions and sites to help provide management and monitoring. Residents will be recruited, hired and trained to serve as tourism ambassadors. This program will help to improve reporting and systematic tracking of the problem.

This program should be developed in partnership with TPDCo's Visitor Safety and Experience Unit.

24. PRIORITY INITIATIVE

Develop safety and security plans for main attractions and sites.

Short to Medium term: Years 1-6

Budget: Cost for plans - US\$35,000 per year per plan; US\$115,400 for safety equipment *(these figures are estimates)*

Partners: SDC, TPDCo, HEART, tertiary institutions, JCF

DESCRIPTION

Support development and implementation of a safety and security action plan for main attractions and sites. This program should be developed in partnership with TPDCo's Visitor Safety and Experience Unit.

25. PRIORITY INITIATIVE

Implement visitor safety awareness campaigns.

Short term: Years 1-3

Budget: US\$40,000 *(these figures are estimates)*

Partners: SDC, TPDCo, HEART, tertiary institutions, JCF

DESCRIPTION

Enhance mutual understanding between residents and visitors through tourism safety awareness and educational campaigns using tools and content available from TPDCo's Visitor Safety and Experience Unit.

A common trend associated with tourism growth in other parishes in Jamaica involves the establishment of unplanned settlements of “squatters” who are drawn to these areas in search of employment. There are numerous security concerns associated with these settlements.

The zoning plan outlined in Section 3.6 includes a Special District designation. There are six Special Districts proposed in different areas of the parish (see Figure 28). Specials Districts are envisioned as areas designated for establishing

temporary housing solutions that cater to migrant workers directly related to the tourism industry. It is envisioned that the Special Districts will prevent the formation of informal settlements from occurring. Local authorities will need to plan for and secure funding to build temporary housing developments in these areas. These areas will require management, and local authorities will need to ensure that people transition out of the temporary housing over time. This approach hopes to preclude security issues that have resulted from informal settlements.

3.6 Develop a Zoning Plan that Guides Appropriate Development

The development zoning plan (see Figure 28) is intended to encourage the most appropriate distribution of land within the parish, to separate incompatible uses of land, and to ensure the health, safety and welfare of residents. Zoning for tourism ensures that tourism activities are placed

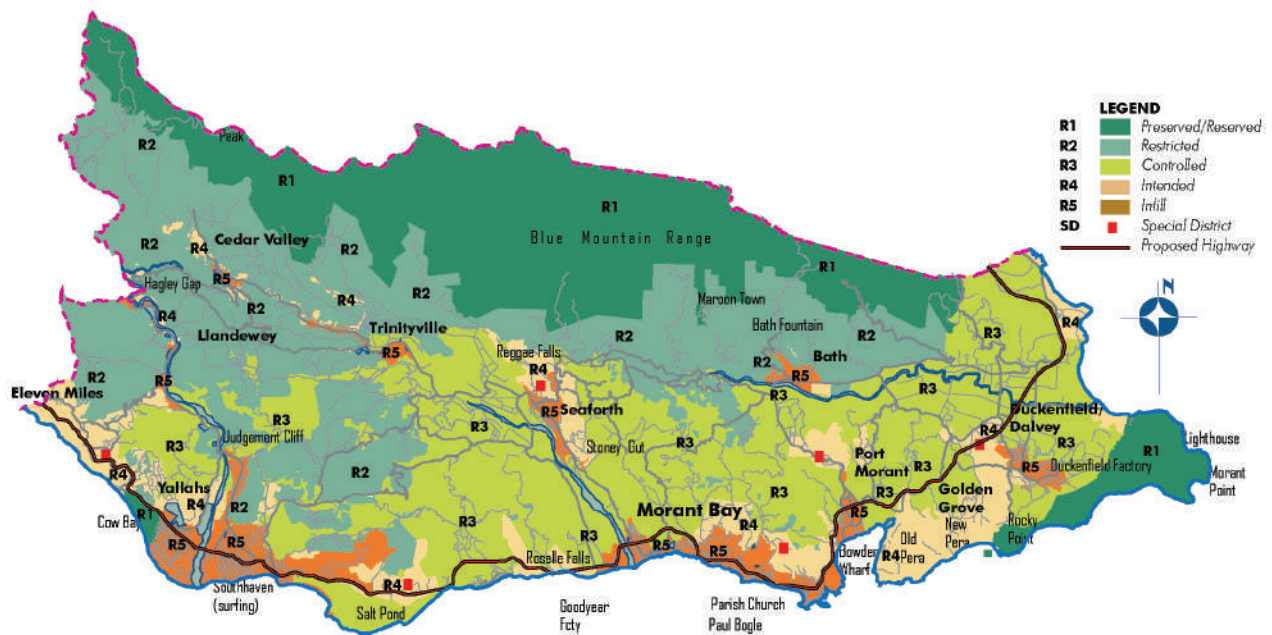
in areas to prevent user conflicts and ensures the activities are sustainable with limited negative impacts on the natural environment. Zoning for tourism is also intended to preserve appealing locations with ideal tourism characteristics to give the destination marketable advantages.

TABLE 54: Priority actions for developing a zoning plan that guides appropriate development

2.1 STRATEGY	PRIORITY ACTIONS
Develop a zoning plan to guide appropriate development that maintains integrity of place.	<div>2.1.1 Establish zones to guide appropriate development that retains the diversity of natural and scenic environments, ensures continued seafront access for residents, and encourages developers to site self-contained attractions that are not related to the character of the place, such as theme parks and convention centres, in locations with no significant ecological and cultural value.</div> <div>2.1.2 Develop and implement control standards and guidelines that protect the natural environment, manage development in sensitive areas, and control the visual integrity of the parish.</div> <div>2.1.3 Align tourism development zoning with existing national and local policies and plans, such as the National Spatial Plan, St. Thomas Local Sustainable Development Plan, relevant Development Orders and Agricultural Land Policy.</div>

3.6.1 Establish Zones to Guide Appropriate Development

FIGURE 28: Development zoning plan for St. Thomas



The zones shall integrate the largest practical geographic area and also overlap property lines as necessary. A description of the zoning categories follows and Table 55 details the surface area of each category.

- **Preserved/Reserved (R1).** These lands and their natural resources should not be utilized for development but rather should be maintained in their pristine form. These lands will remain accessible but only to be enjoyed for their natural beauty and inspiration. The zone includes areas under environmental protection by law or regulation as well as land acquired for conservation through purchase or easement. Examples are the BJCMNPFR and the Great Morass.
- **Restricted (R2).** Areas falling within this category will be confined to only certain types of permissible development due to the steep terrain (Hillside Development Manual for Jamaica) and general vulnerability to natural disasters.
- **Controlled (R3).** Development is permissible in these areas with the caveat that all proposals are thoroughly vetted in relation to the surrounding agricultural land use in a bid to ensure that good agricultural lands are not lost or compromised for other land uses.
- **Intended (R4).** Development is encouraged in these areas in a bid to boost efforts to establish the parish as a tourism destination. They are in close proximity to existing built-up areas and allow for town expansion. Within this zone, some land has been designated for tourism accommodations and anticipated permanent housing for tourism workers.
- **Infill (R5).** These areas are already built or developed; however, vacant or underused parcels within existing urban areas can be rededicated to satisfy growing tourism demands. This will also facilitate the build out of placemaking features such as monuments, town squares and vistas—enabling growth centres in the various clusters to establish their own identity while improving the various linkages that each of them contribute to the destination.
- **Special Districts (SD).** These areas establish temporary housing solutions throughout the parish for migrant workers directly linked to the tourism industry in a bid to prevent informal settlements.

TABLE 55: Surface area of zones

	Area (sq.m)	Area (Acres)	Hectares	Percentage
Preserved/Reserved (R1)	160,387,347	39,632.58	16,038.73	22%
Restricted (R2)	211,301,885	52,213.84	21,130.19	29%
Controlled (R3)	237,072,166	58,581.81	23,707.22	32%
Intended (R4)	72,267,814	17,857.77	7,226.78	10%
Infill (R5)	50,390,264	12,451.71	5,039.03	7%
Road Reserves	6,352,828	1,569.82	635.28	1%
Total	737,772,303	182,307.53	73,777.23	100%

3.6.2 Develop and Implement Control Standards and Guidelines

Providing control standards and guidelines for the zoning plan will ensure that development meets international standards, maintains integrity of place, and provides additional recommendations to potential developers in order to achieve general compliance with the guidelines.

The zoning guidelines will cover the following topics:

- Aesthetic quality: building character, landscaping and streetscapes.
- Accommodation standards: health and safety, including as well as consideration of quality ratings.

- Environmental standards: waste management, energy and promotion of alternative energy technologies, promotion of rainwater harvesting, stormwater management, and guidance for developing in sensitive areas such as steep hillsides. The guidelines will also apply to the mainstreaming of climate resilience in national development projects and plans.

The zoning guidelines and standards will be supplemental to those currently enforced by the regulating agencies.

3.6.3 Align Zoning Plan to Planning Policies and Ordinances

The proposed zoning plan is aligned to the following national and local policies and planning ordinances:

- National Agricultural Land Policy. Every effort was made to avoid including agricultural lands in the zones slated for intended tourism development. However, the conversion of some agricultural land is required in areas that are most ideal for tourism development. The rezoned acreage will be recaptured in other areas not currently in agricultural use but suitable for agricultural activity. The plan proposes an agritourism project on new lands not currently in agricultural production. Figure 29 reveals how the zoning plan impacts agricultural lands and areas proposed for agritourism development.
- St. Thomas Local Sustainable Development Plan and Parish Development Order. The TDDMP is being developed in coordination with the St. Thomas Municipal Corporation and National Environment & Planning Agency to ensure the tourism guidelines are included in all development control instruments.
- National Spatial Plan. The tourism development plan will inform the policies to be outlined in the National Spatial Plan.

FIGURE 29: Implications of zoning plan on agricultural lands

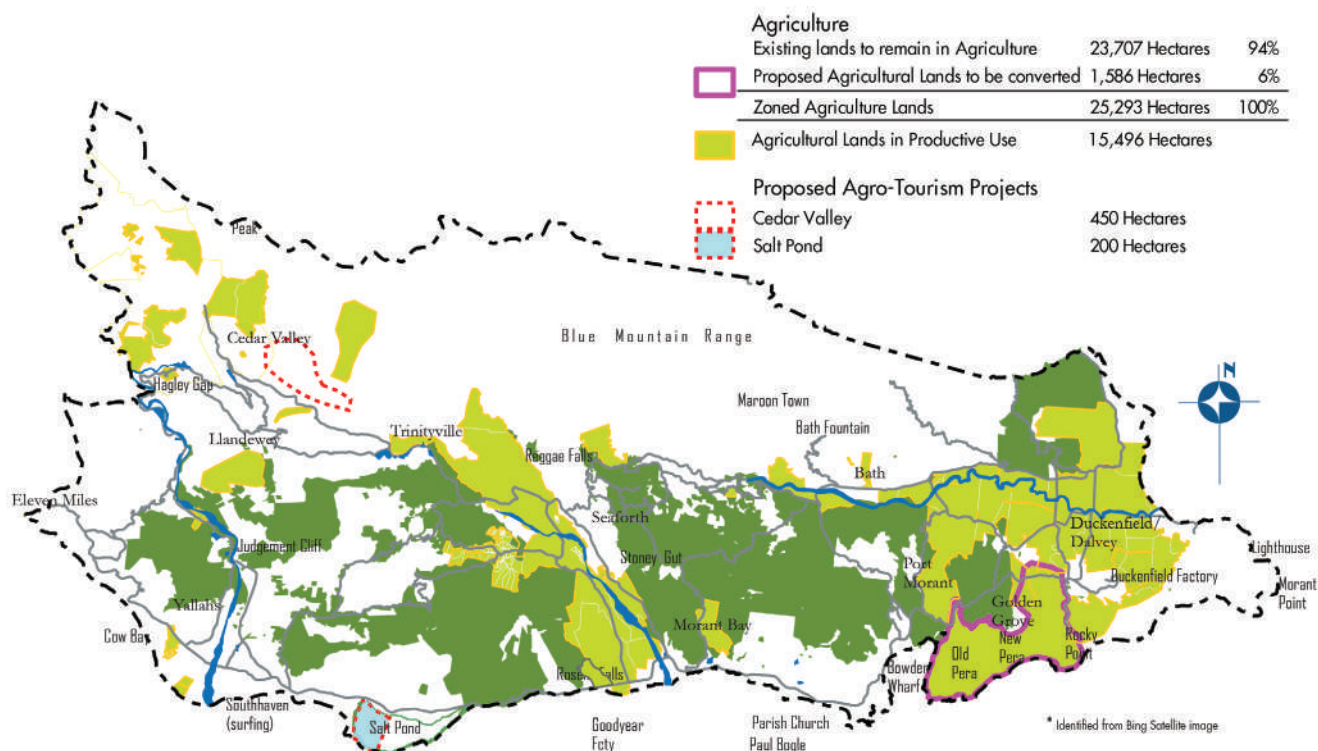


TABLE 56: Action plan for approval of zoning plan

26. PRIORITY INITIATIVE

Approval of Zoning Plan

Short term: Years 1

Budget: US\$107,300 (*these figures are estimates*)

Partners: NEPA, St. Thomas Municipal Authority, MOT, Town & Country Planning Authority

DESCRIPTION

The zoning plan will be used to guide the location and development standards to be used for hotel development, facilities and other types of tourism projects to be implemented.

The zoning plan involves the review and adoption of proposed zoning standards. It will also be integrated into the St. Thomas Sustainable Development Plan (ST LSDP), and will provide assistance to aid the plan preparation process.

This will result in the submission of the ST LSDP to NEPA for its inclusion into the Confirmed St. Thomas Development Order (the 2018 draft is still in its provisional stage) in order to have full legislative support.

3.7 Prioritize Infrastructure that Enhances Accessibility and Aesthetics

TABLE 57: Priority actions for prioritizing infrastructure that enhances accessibility & aesthetics

2.2 STRATEGY

Prioritize infrastructure that enhances accessibility and aesthetics of attractions and new areas of development.

2.2.1 Guarantee adequate public infrastructure and services—in particular, roads, water, sewage, energy and telecommunications—for sustainable tourism development.

2.2.2 Establish an adequate solid waste storage and collection system to improve aesthetics and protect public health.

3.7.1 Guarantee Adequate Public Infrastructure

The condition of the existing infrastructure is a major deterrent to attracting investors and visitors and must therefore be a top priority. Improvement to the existing infrastructure is required to stimulate and support the projected growth in tourism investment and development.

The vision for hard infrastructure in St. Thomas is to have an integrated plan that guides growth areas in developing good infrastructure—including water, sewage, energy, and telecommunications—in order to attract and retain tourism investment and development.

Improving access and roads will be the top priority. The goal is for St. Thomas to have a safe and reliable transportation network that provides access to all main towns, main

attractions and sites, and new areas of development. Town centres will have free-flowing traffic, adequate parking and comfortable provision for pedestrians and cyclists.

New developments will create great spaces that promote human interaction and stimulate the imagination. New buildings will use the principles of sustainability and site designs that respect and are guided by the natural environment.

Figure 30 illustrates the recommended infrastructure improvements needed to support the tourism development goals outlined in this plan.

FIGURE 30: Overview of needed infrastructural improvements

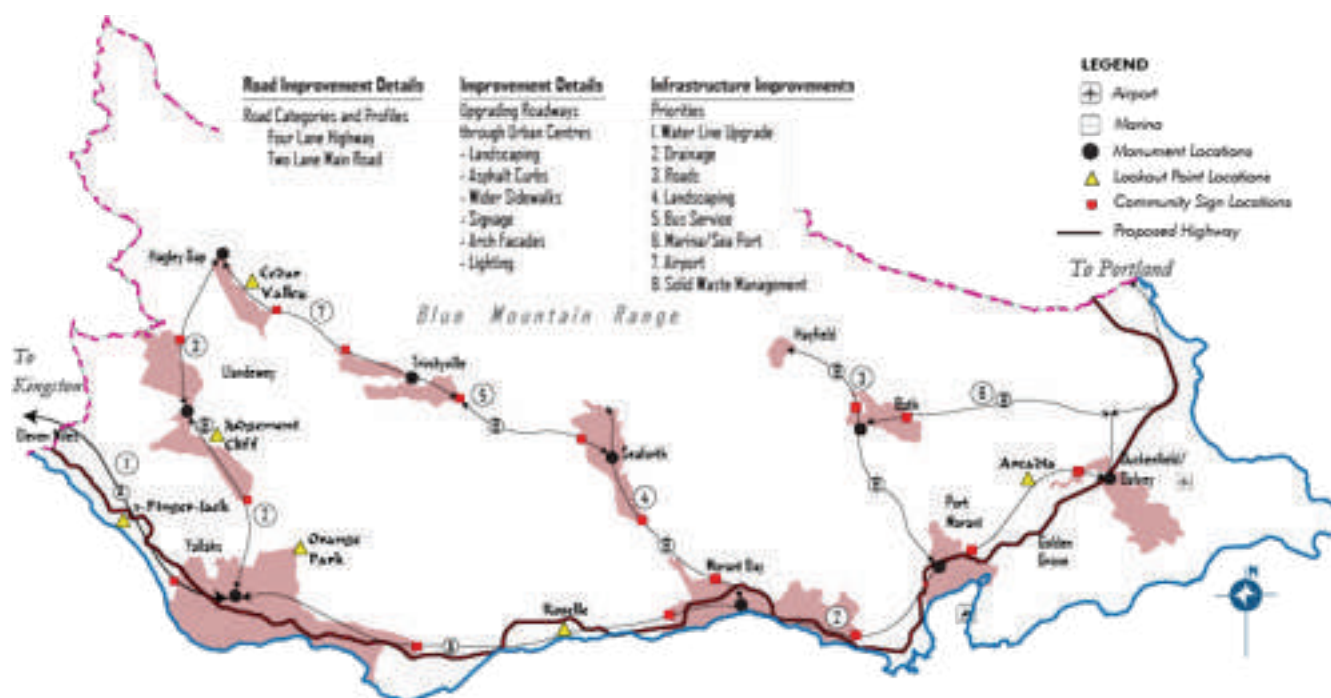


Table 58 provides an overview of the priority projects.

TABLE 58: Action plan for guaranteeing adequate public infrastructure

27. PRIORITY INITIATIVE

Upgrade road network and improve drainage

Cluster 1:
Short term: Years 1-3
Budget: US\$67,021,000 *(these figures are estimates)*
Partners: NWA, Government of Jamaica, Ministry of Finance, Ministry of Tourism, TEF, St. Thomas Municipal Corporation, CBD, international partners

Cluster 2:
Medium term: Years 4-6

Cluster 3:
Medium term: Years 4-6

DESCRIPTION

Cluster 1 - Coastal Reaches
New highway to be constructed from Harbour View in St. Andrew to Yallahs

Cluster 2 - Highlands
The main road between Yallahs and Cedar Valley is scheduled for widening within the reservation. The main road between Llandewey and Hagley Gap should be upgraded to allow access to the Blue Mountain Peak from St. Thomas.

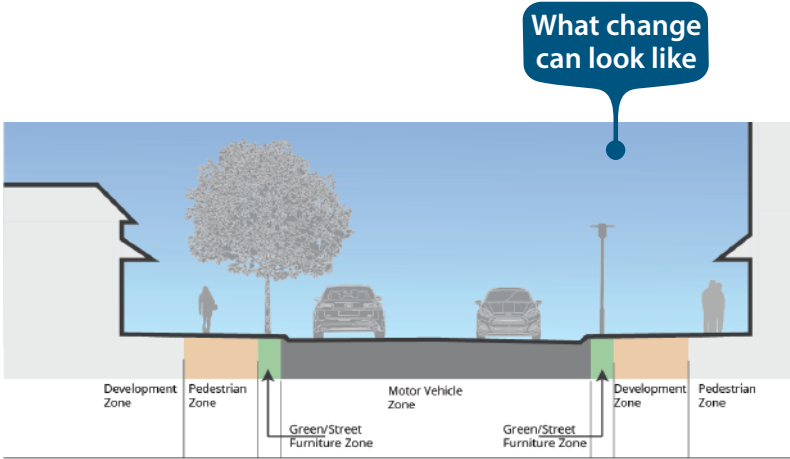
Cluster 3 - Southeast Coast
The main road from Yallahs to the border with Portland is scheduled to be widened within the reservation. The original parochial road to Morant Point needs to be repaired to allow access to the lighthouse without traveling through the canefields.



Unattractive streetscape - BEFORE



Unattractive streetscape - AFTER



TYPICAL MAIN STREET DIMENSIONAL GUIDELINES

	Pedestrian Zone (m)	Green/Street Furniture Zone (m)	Motor Vehicle Zone (m)
Town Centre	1.8 - 2.4 depending on pedestrian volume	0.9 - 1.2	6.2 - 6.8 depending on traffic volume
Rural Community	1.2 - 1.8 depending on pedestrian volume	-	6.0 - 6.2 depending on traffic volume

TABLE 58: Action plan for guaranteeing adequate public infrastructure

28. PRIORITY INITIATIVE

Expand water and sewage system

Cluster 1:

Short term: Years 1-3

Budget: US\$14,000,000 *(these figures are estimates)*

Partners: NWC, NEPA, CDB, Ministry of Finance, St. Thomas Municipal Corporation

Cluster 2:

Medium term: Years 4-6

Cluster 3:

Medium term: Years 4-6

DESCRIPTION

Cluster 1 - Coastal Reaches

Another well is proposed in Springfield, which will add an additional 0.50 mgd of water to lessen water shortages in Morant Bay. Existing pipelines are to be upgraded and replaced along the Morant Bay main road.

The main water supply for Trinityville originates from springs where the water is treated and then fed by gravity to the area. There is a current supply deficit of 0.219 mgd (expected to increase to 0.442 mgd by 2030 if current conditions remain unchanged). The water deficit is expected to be addressed by upgrading the Trinityville Water Treatment Plant, and by interconnecting surrounding areas by laying new pipelines.

Cluster 2 - Highlands

The current water deficit is expected to increase to 0.246 mgd by 2030. The water deficit is expected to be addressed by Yallahs laying new pipelines to upgrade existing ones.

Cluster 3 - Southeast Coast

Sufficient water (approximately 9.8 million gallons) is available to support new developments but distribution might be a challenge. The water deficit is expected to be addressed by re-commissioning the New Pera storage tank, upgrading the pumping facility, and upgrading existing and installing new pipelines in the New Pera area.



29. PRIORITY INITIATIVE

Introduce alternative energy sources

Short to Long Term: Years 1-11

Cluster 1:

Short term: Years 1-3

Budget: \$10,000,000 *(these figures are estimates)*

Partners: UAE-Caribbean Renewable Energy Fund, Ministry of Science, Energy & Technology, JPS, NWC, International Donor Agencies (eg. CIDA, USAID, DFID, EU, IDB)

Cluster 2:

Long term: Years 7-11

Cluster 3:

Medium term: Years 4-6

DESCRIPTION

Alternative energy solutions are recommended—solar power, solar water heaters and wind power where possible.

TABLE 58: Action plan for guaranteeing adequate public infrastructure

30. PRIORITY INITIATIVE

Upgrade telecommunications network

Cluster 1:

Short term: Years 1-3

Cluster 2:

Long term: Years 7-11

Cluster 3:

Medium term: Years 4-6

Budget: US\$25,000,000 *(these figures are estimates)*

Partners: Telecommunications providers, OUR, Ministry of Science, Energy & Technology

DESCRIPTION

Telecommunications across the parish requires upgrading (proposed free Wi-Fi access in Morant Bay, Hagley Gap, Pera and Bath).

31. PRIORITY INITIATIVE

Upgrade airports and helipads

Medium to Long term: Years 7-11 Budget: US\$10,000,000 *(these figures are estimates)*

Partners: Airports Authority of Jamaica, Jamaica Civil Aviation Authority, Ministry of Transport & Mining

DESCRIPTION

The Dalvey/Duckenfield airport will be upgraded and a helipad provided to facilitate tourism development.

32. PRIORITY INITIATIVE

Develop Seaports/Marinas

Medium to Long term: Years 7-11 Budget: US\$80,000,000 *(these figures are estimates)*

Partners: Port Authority of Jamaica

DESCRIPTION

A marina will be constructed at Bowden Harbour to accommodate yachts and facilitate re-establishment of the Bowden Regatta.

33. PRIORITY INITIATIVE

Improve bridges

Medium to Long term: Years 7-11 Budget: US\$800,000 *(these figures are estimates)*

Partners: NWA, St. Thomas Municipal Corporation

DESCRIPTION

Damaged bridges along the original parochial road should be reconstructed to re-establish access to Morant Point without traversing through the canefields.

3.7.2 Establish Adequate Garbage Storage and Collection System

In addition to the infrastructure projects outlined above, a basic system for collecting and managing solid waste is needed. A brief description of this priority initiative is provided below.

TABLE 59: Action plan for establishing adequate garbage storage and collection system

34. PRIORITY INITIATIVE

Establish a parishwide system for storing and collecting garbage.

Short to Medium term: Years 1-6 Budget: US\$366,000 (these figures are estimates)
Partners: National Solid Waste Management Authority, St. Thomas Municipal Corporation, NEPA, TEF

DESCRIPTION

The parishwide solution for storing and collecting garbage will utilize semi-submerged garbage silos and specialized trucks for garbage collection. The system consists of a concrete well 1.5 metres (5 feet) in diameter which extends 1.5 metres (5 feet) below the ground and 1 metre (39 inches) above ground. A reusable PVC bag is suspended within the well. The bag has a hook on the top which allows it to be lifted out by a boom fitted to a standard compacting garbage truck. Once the bag is suspended over the truck, the bottom of the bag is opened and the garbage is emptied into the back of the truck. Once empty, the bag is repositioned over the well, the cinching mechanism on the bottom of the bag is reset, and the bag is lowered into the well. The entire process takes approximately three minutes to complete and only requires one person for operation. Specific benefits of the alternative system include:

- Lower underground temperatures retard bacterial growth in the garbage, resulting in less odour.
- Increased capacity of the receptacle lessens the possibility of excess garbage spilling out of the receptacle and reduces the required time between collection.
- Reduced space is required for the receptacle.
- The system is water tight and prevents leaching of toxic chemicals into the surrounding soil and groundwater. Any leachate produced is contained within the concrete receptacle and can be pumped out as required.
- The system does not encourage breeding of rats and mosquitoes which are vectors for diseases.
- The bins can be constructed utilizing precast concrete culverts that are readily available locally.

This solution has been used in Europe, Canada and more recently the United States.

Pillars of Growth and Linkages Programmes: Heath and Wellness

FIGURE 31: Garbage Storage and Collection System



Underground silo bins
(<https://www.waste360.com/commercial/south-carolina-company-putting-new-spin-bin>)

3.8 Enhance the Urban Character of Main Towns & Attractions

TABLE 60: Priority actions for enhancing the urban character of main towns and attractions

2.3 STRATEGY	PRIORITY ACTIONS
Enhance the welcoming feel and urban character of main towns and attractions.	<p>2.3.1 Build iconic entry points that convey a sense of arrival, and town centres in main towns.</p> <p>2.3.2 Implement a wayfinding system throughout the parish.</p> <p>2.3.3 Establish a network of scenic viewpoints along the coast and up to the mountain.</p>

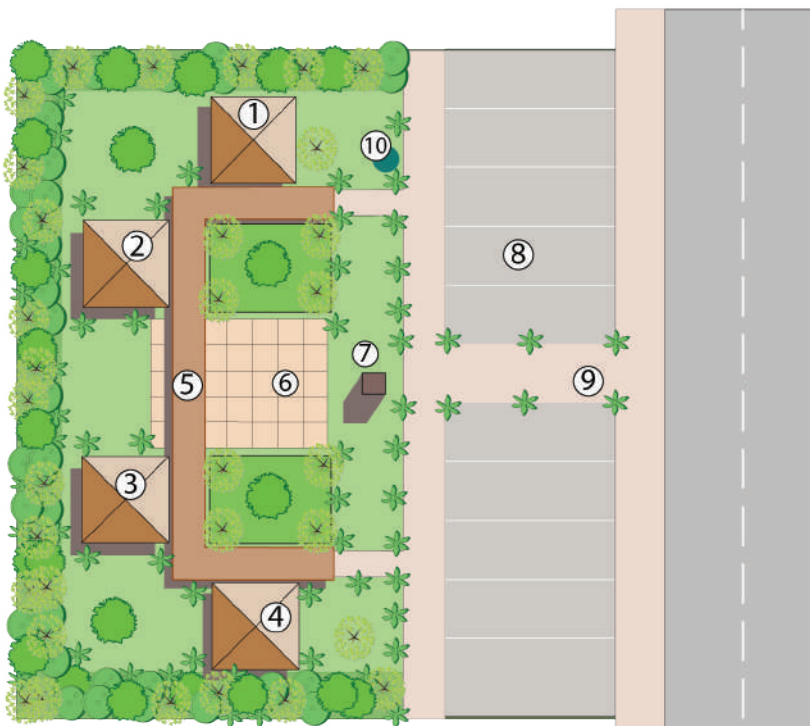
The urban character of a place includes streetscapes, building shape, form and materials, views and landmarks, and trees and landscaping. All these elements combine to give a place its unique identity. There are several recommended priority actions for upgrading the urban character of the towns, tourist attractions, and other sites in St. Thomas.

TABLE 61: Action plan for enhancing the urban character of main towns and attractions

35. PRIORITY INITIATIVE
<p>Build iconic entry points and town squares in main towns.</p> <p>Short term: Years 1-3 Budget: Phase 1- US\$850,000 Phase 2- US\$635,000 (these figures are estimates)</p> <p>Partners: TEF, JNHT, National Works Agency, Urban Development Corporation (UDC), St. James Municipal Corporation, National Solid Waste Management Authority</p>
DESCRIPTION
<p>Build iconic entry points to main towns and major attractions in each cluster to signal to visitors that they have arrived. The entry feature should be themed and symbolically represent the town (e.g., a monument at Morant Bay, a mural or art-based feature at Trinityville). These should include a “welcome to...” message and should intrinsically attract attention and stimulates discussion about an element that is truly unique about the place. The project is intended to improve the aesthetics and amenities, and to create a sense of place in the major towns within the parish. The residents of each town will be given an opportunity to provide ideas for the monuments to be built.</p> <p>All town centres will be upgraded by adding a town square that will contain the following features:</p> <ul style="list-style-type: none"> • Monument highlighting a significant event, person or history of the town • Landscaping • Public restroom • Street furniture • Organized vending area and seating • Lighting • Improved sidewalks • Garbage silo • Improved architectural facades <p>Development will ensure free visitor facilities such as public restrooms, street furniture, sidewalks and shelters are adequate for increased visitor numbers and responsive to their needs. Figure 32 illustrates a rendering of the typical town square recommended.</p> <p>Entry points would be built in two phases:</p> <p>Phase 1- Yallahs, Morant Bay, Bath and Port Morant Phase 2- Seaforth, Trinityville and Hagley Gap</p> <p>Pillars of Growth and Linkages Programmes: Gastronomy, Knowledge, Entertainment, Shopping</p>

What change
can look like

TOWN SQUARE



1. Bathrooms
2. Arts & Craft Kiosk
3. Drink Kiosk
4. Food Kiosk
5. Covered Walkway
6. Courtyard/seating
7. Monument
8. Parking
9. Walkway
10. Garbage Silo



36. PRIORITY INITIATIVE

Establish wayfinding system

Short to Medium term: Years 1-4 Budget: US\$3,250,000 *(these figures are estimates)*

Partners: NWA, JNHT, TEF, TPDCo, St. Thomas Municipal Corporation

DESCRIPTION

A system of wayfinding should be established throughout the parish, including the following:

- **Signage:** place names, directional signs, advertising and interpretive signs to guide travelers through the parish and direct them to attractions. It includes signage along the trails in the national park and other nature areas. Adequate signage gives travelers a sense of safety and confidence when moving through the destination and can contribute to them staying longer and spending more. Signage should be compatible with the TPDCo parish marker being constructed on the Portland-St. Thomas border as well as the requirements of the NWA for road signs.
- **Landmarks:** landmarks can be used as anchors, reference points or communication tools to easily guide travellers through the parish.

Pillars of Growth and Linkages Programmes: Knowledge, Entertainment

What change
can look like



Examples of directional signs and signage for landmarks in U.S. and U.K.



Examples of local directional sign and landmarks

37. PRIORITY INITIATIVE

Create a network of scenic viewpoints

Short term: Years 1-3 Budget: US\$330,000 for each look-out (US\$55,000 per viewpoint)
(these figures are estimates)

Partners: TEF, JCDDT, TPDCo, NWA, St. Thomas Municipal Corporation

DESCRIPTION

Develop a network of scenic viewpoints along the coast and up to the mountains (i.e. Ridge to Reef concept) that will showcase St. Thomas' diverse natural environment in a way that enables safe, leisurely and relaxed visitation.

The lookout points should feature interpretive signs that increase awareness of the region's nationally significant heritage by developing a cohesive story that resonates with visitors.

Pillars of Growth and Linkages Programmes: Gastronomy, Knowledge

What change
can look like

Examples of lookout points in the U.S.



Figure 32 provides a rendering of the typical recommended town square.

FIGURE 32: Plan and rendering of sample town square



Each Town Square will include a monument which will present a unique aspect of the place. In this example, the monument features the endemic Giant Swallowtail Butterfly.

Table 63 presents a summary of potential tourism development activities in key environmentally sensitive areas, and actions that can mitigate negative impacts from tourism in these areas.

TABLE 63: Potential tourism development activities in environmentally sensitive areas

Environmentally Sensitive Areas	Potential Tourism Development Activities	Proposed Impact Mitigation Actions
Wetlands/Great Morass	Research centre, eco-resorts, wildlife viewing location, eco-tours	Wildlife protection, conservation education and awareness programs, mangrove rehabilitation, wetland mitigation fee
Coral Reef and Seagrass Beds	Scuba diving and snorkeling, marine ecosystem tours	Coral reef restoration, conservation education and awareness programs, seagrass bed protection
Beaches	Recreation (sunbathing, picnicking), beach sports (beach cricket, volleyball), water sports (swimming, surfing, diving, boating, parasailing, etc.)	Shoreline protection, conservation and education programs
Blue & John Crow Mountains National Park/Forest Reserve	Camp sites, research centre, wildlife viewing, hiking and bike trails	Trail improvements, conservation education and awareness programs, habitat protection, reforestation
Rivers	Riverside parks, controlled aggregate sources	Monitoring of aggregate mining, guidelines for mining and restoration of mined-out areas, cess on aggregate towards parish development
Wildlife locations: turtle nesting beaches, manatee and crocodile habitats, swallowtail butterfly and bird habitats	Wildlife viewing stations and sites, butterfly house and/or aviary	Guidelines for development in wildlife habitats, monitoring programs, conservation awareness and education programs
Salt Pond	Non-motorized water activities, wildlife viewing location, interpretative centre	Wildlife protection, conservation education and awareness programs, research
Invasive Species	Development of new tourism products (lionfish and deer hunting)	Education and awareness programs, control/removal of coral vine along roadways

Several priority initiatives are outlined in Table 64.

TABLE 64: Action plan for protecting sensitive and/or threatened ecosystems and wildlife.

38. PRIORITY INITIATIVE

Support research, monitoring and management of sensitive areas and habitats.

Short to Medium term: Years 1-6 Budget: US\$810,000 (these figures are estimates)

Partners: NEPA, local and international conservation organizations, TPDCo

DESCRIPTION

Encourage partnerships focused on research, monitoring and management of wildlife habitats and sensitive areas with research institutions, such as the University of the West Indies, University of Technology, Caribbean Maritime University, as well as with environmental NGOs, such as the St. Thomas Environmental Protection Association and the Jamaica Conservation and Development Trust.

These institutions can also be engaged to:

- Develop events around intervention activities (e.g., coral or mangrove replanting, hillside terracing) as well as education and awareness programs.
- Define guidelines and the carrying capacity/limits of acceptable change for sensitive areas that have planned tourism use.

39. PRIORITY INITIATIVE

Support monitoring and management of aggregate mining.

Short to Medium term: Years 1-6 Budget: US\$100,000 (these figures are estimates)

Partners: Ministry of Transport and Mining - Mines and Geology Division, Mining and Quarrying Association of Jamaica

DESCRIPTION

Develop partnerships with the relevant government agencies focused on the following activities:

- Monitoring of aggregate mining
- Developing guidelines for mining and restoration of mined-out areas
- Introducing new regulations that would establish a cess on aggregate. The tax revenues generated by the proposed new tax can be redirected to support infrastructure and community development initiatives.

4.0 Enhance Market Readiness of MSMTEs

TABLE 65: Priority actions for enhancing market readiness of MSMTEs.

4.1 STRATEGY	PRIORITY ACTIONS
Enhance market readiness of MSMTEs.	<p>4.1.1 Formalize tourism enterprises, in particular accommodation providers, transportation providers and tour operators.</p> <p>4.1.2 Ensure licensing of attractions that have cultural, natural or national significance.</p>

Critical to the readiness of any destination is having tourism products that are licensed and meet local and international standards. Only 3 of the 27 accommodation providers listed in St. Thomas are licensed, and none of the tourism attractions are licensed. Jamaica's Micro Small and Medium Enterprise (MSME) Policy (2013) posits that the prevalence of business informality among Jamaican MSMEs poses a challenge to the growth and development of the economy. It suggests that informal operations remain invisible to the legal system, face restrictions in carrying out certain business activities, have a limited number of customers, and have limited access to certain government support (for example, participation in the 15 percent procurement set-aside) which is crucial to their survival. Excessive regulatory and administrative procedures, fees and financial requirements are cited as barriers for micro and small enterprises. A cultural paradigm shift is needed for compliance to be considered a priority.

A tourism enterprise cannot be considered market ready (locally or internationally) when basic requirements remain unmet. In St. Thomas, typical unmet requirements include

Proof of Ownership/Lease or Rental Agreement, Certificate of Incorporation of a Company, Public Liability Insurance, registration fees, relevant permits (Health, NEPA, etc.) and other specific requirements based on the nature of the attraction or accommodation. Technical assistance for general business planning and management competencies may also be required.

Formalization of marquee attractions and places of interest or worship will be an important early strategy to increase visitor arrivals to the parish. The Morant Bay Courthouse, and the Yallahs Salt Pond are examples of iconic locations in St. Thomas which are not licensed. Early identification and formalization of these and similar locations may help to spur tourism development and enhance the array of tourism activities and experiences as well as visibility of the parish.

Priority initiatives are outlined in Table 66.



TABLE 66: Action plan for enhancing market readiness of MSMTEs

40. PRIORITY INITIATIVE

Formalize tourism enterprises and support compliance.

Short term: Years 1-3 Budget: US\$154,000 per annum *(these figures are estimates)*

Partners: TPDCo, JBDC, TEF, EXIM Bank, Jamaica National Bank, Ministry of Finance, JSIF, SDC

DESCRIPTION

Increase compliance of tourism businesses in St. Thomas by:

- Conducting an audit of MSMTEs in the parish to determine readiness status and requirements for compliance.
- Educating managers of attractions, providers of accommodations and other service providers about the licensing processes and benefits of compliance.
- Providing business development and support services as well as technical assistance to unlicensed enterprises to help them meet requirements.
- Creating mechanisms to minimize cost and other requirements including discounts for group registration—e.g., a network of homestays and cluster-specific networks of enterprises.
- Providing affordable financing to support compliance.

Pillars of Growth and Linkages Programmes: All Linkage networks will be impacted

41. PRIORITY INITIATIVE

Ensure licensing of attractions that have national, cultural and natural significance.

Short term: Years 1-3 Budget: US\$385,000 *(these figures are estimates)*

Partners: TPDCo, JNHT, TEF, MOT

DESCRIPTION

Launch an initiative to formally license key locations of national significance or those which may be government owned (e.g., Paul Bogle's Stoney Gut) as a Place of Interest. Criteria should be developed to define these locations which could receive support towards compliance.

The objective of this initiative is to Increase the number of licensed attractions or places of interest in St. Thomas by:

- identifying and auditing attractions and sites of national, natural or cultural importance—in particular areas of great national significance and those that are government owned; and
- implementing steps to support licensing.

Pillars of Growth and Linkages Programmes: Sports and Entertainment, Knowledge



4.1 Provide Affordable Financing to MSMTEs

TABLE 67: Priority actions for providing affordable financing to MSMTEs

4.2 STRATEGY	PRIORITY ACTIONS
Provide affordable financing to help start-up and grow MSMTEs.	4.2.1 Promote entrepreneurship. 4.2.2 Secure loan allotments for MSMTEs in St. Thomas through existing TEF-funded loan facilities.

Viable and successful Micro, Small, Medium Tourism Enterprises (MSMTE) will be needed in St. Thomas to support ecotourism development over the next decade. Tourism businesses in five main industry groups will be needed: food and beverage services, recreation and entertainment, transportation, accommodation and tour operation.

A critical factor for creating and expanding the pool of tourism related entrepreneurs in St. Thomas will be access to affordable financing. The availability of affordable financing ensures that anyone in the community with a good tourism business idea has access to opportunities.

The Tourism Enhancement Fund (TEF) has established MSMTE loan facilities through partnerships with the Export Import Bank of Jamaica and the Jamaica National Small

Business Loans Ltd. These programs provide loans at more competitive rates. Other offerings may exist at other financial institutions.

Special allotments could be set aside for MSMTEs from St. Thomas under existing TEF loan facilities. Treasure Beach stakeholders were beneficiaries of a similar scheme with a view to increasing compliance by tourism enterprises. The special allotment designed for Treasure Beach can be used as a model for St. Thomas. Financing mechanisms are already in place and need only to be expanded where necessary to support the growing pool of MSMTEs which may emerge in St. Thomas. Policies to incentivize licensing of MSMTEs should be developed. Table 68 presents the priority initiatives for providing affordable financing to MSMTEs.



TABLE 68: Action plan for providing affordable financing to MSMTEs

42. PRIORITY INITIATIVE

Promote entrepreneurship.

Short term: Years 1-3 US\$154,000. per annum *(these figures are estimates)*

Partners: JBDC, JAMPRO, MICAFA, TPDCo, SDC, SMTEs

DESCRIPTION

Organize business development workshops at strategic locations that will cover key topics associated to starting and growing a tourism enterprise. The topics should include:

- Basics of setting up and running a tourism enterprise
- Business models and what could work best for various types of micro and small enterprises including strategic business partnerships that will strengthen survival of businesses
- Range of tourism opportunities in the tourism value chain such as tour guides, tour companies, culinary, entertainment, crafts and also linkages with other key sectors such as agriculture
- Licensing requirements and the importance of compliance for maintaining tourism standards and marketability
- The importance of quality assurance and remaining compliant
- Packaging, marketing and sales of tourism products and experiences through the local and international tourism distribution systems.

In addition to the workshops, business development support services should be provided throughout the parish. These may be provided at concessionary rates if not fully funded.

Pillars of Growth and Linkages Programmes: All Linkage networks will be impacted

43. PRIORITY INITIATIVE

Offer affordable financing for MSMTEs.

Short to Long term: Years 1-10 Budget: US\$193,000 *(these figures are estimates)*

Partners: TPDCo, Jamaica Business Development Center (JBDC), TEF, EXIM Bank, Jamaica National Bank, Ministry of Finance, JSIF, SDC

DESCRIPTION

Design and launch a special financing window for MSMTEs from St. Thomas under existing TEF loan facilities with banks such as the Jamaica National Small Business Loans Ltd and EXIM Bank. The special allotment designed for Treasure Beach should be used as a model.

4.2 Build Community Awareness of Tourism

TABLE 69: Priority actions for building community awareness of tourism

5.1 STRATEGY	PRIORITY ACTIONS
Build community awareness of tourism.	5.1.1 Educate residents about tourism and its potential impacts through public awareness campaigns and programs.

Educating residents about tourism and its potential impacts (positive and negative) on their lives is an important step in preparing the community to support and participate in tourism. Research indicates that as entrepreneurial

endeavours and public awareness increase, residents will be in a better position to participate in tourism development. Table 70 outlines priority actions for educating residents of St. Thomas about tourism.

TABLE 70: Action plan for building community awareness of tourism

44. PRIORITY INITIATIVE
<p>Launch a tourism awareness campaign and program.</p> <p>Short term: Years 1-3 Budget: US\$193,000 per annum <i>(these figures are estimates)</i></p> <p>Partners: TPDCo, JIS</p>
<p>DESCRIPTION</p> <p>Organize parish-wide community sensitization and awareness sessions on tourism. The content should include elements of the current Team Jamaica curriculum. These sessions will target the general St. Thomas populace, community development area committees, schools, churches, government based and other service providers and other key stakeholders.</p> <p>The content of the tourism education and awareness programme for St. Thomas should include the following key themes:</p> <ul style="list-style-type: none"> • Potential benefits of tourism for St. Thomas given its contribution to Jamaica’s GDP and ways that community members can actively participate in tourism • Information about main attractions and other tourism product offerings in the parish to help instill more community pride in their locales • The role of community members in promoting the parish by sharing information about the natural and cultural heritage of St. Thomas so that visitors can have a deeper understanding of the place, and helping to ensure visitor safety and mitigating harassment • Highlighting that tourism can occur even where infrastructure requirements are not perfect, i.e. tourism can occur even without the roads to help counter the community’s belief of being the ‘forgotten parish’

4.3 Develop a Skilled Workforce in Tourism and Hospitality

The development of tourism in St. Thomas will rely almost exclusively on the competences and skills of its human capital. Tourism can provide employment both to highly qualified, as well as to low-skilled workers. High-quality client service, provided by adequately skilled staff, is the key precondition for establishing and growing ecotourism. One of the first critical steps will involve assessing current gaps in service delivery related to the workforce competencies, customer service and the visitor experience.

The success of tourism will depend on several factors that include but are not limited to the extent to which the human capacity can be found in either St. Thomas or neighboring parishes to fill industry needs, the skill competencies that are presently available or that will be required, the ability of training institutions to prepare a cadre of skilled workers, and the extent to which youth are interested in pursuing careers in tourism.

As the tourism sector grows in St. Thomas, it may attract and recruit more of its residents to fill tourism jobs which may in turn reduce the number of residents leaving the parish to seek employment in either Kingston or other parishes. This trajectory may have dramatic implications on the

community. People’s widespread perception of St. Thomas as a ‘dormitory’ parish may shift and St. Thomas could evolve into a vibrant region that is growing, rather than, decreasing in population.

Another critical action area involves the development of a network of training institutions that can help provide ongoing training in the areas identified as high priority from the competencies and skills gap assessment. This network may include secondary to tertiary educational institutions and vocational training centres such as the HEART Trust NTA facility in Yallahs. The HEART Trust NTA facility in Yallahs offers Commercial Food Preparation Training at levels 2 and 3 and has offered Community Tourism training. Between 2016 and 2019, 25 and 34 persons received certification in Commercial Food Preparation level 3 and level 2 respectively. Thirty-five persons were certified in Community Tourism level 1 from enrollment of 80 persons. The current HEART Trust model operates through a franchise based system where independent institutions choose to offer programmes.

Priority actions that can be implemented to build a skilled workforce for tourism in St. Thomas are outlined below.

TABLE 71: Priority actions for developing a skilled workforce in tourism and hospitality

5.2 STRATEGY	PRIORITY ACTIONS
Develop skilled workforce in tourism and hospitality.	5.2.1 Launch a tourism workforce development program.

TABLE 72: Action plan for developing skilled workforce in tourism and hospitality

45. PRIORITY INITIATIVE

Launch a tourism workforce development program.

Short to Long term: Years 1-10 Budget: US\$154,000 per annum *(these figures are estimates)*

Partners: TPDCo, HEART, tertiary institutions, SMTEs

DESCRIPTION

The key steps involved in designing and launching a tourism workforce development program involve:

- Assessing current gaps in service delivery related to the workforce competencies, customer service and visitor experience;
- Developing an inventory of tourism related training offerings in the parish to determine capacities to meet plans for growth in tourism;
- Coordinating with key institutions such as schools to socialize the destination plan and communicate likely growth in tourism so that they can help support plan through enhancement of existing programs or the addition of new educational programs;
- Establishing a network of training partners in St. Thomas that should include the HEART Trust NTA facility in Yallahs. Training partners should be approved to deliver TPDCo's Team Jamaica and other training programs currently on offer;
- Supporting development of new training programmes for formal curriculum and extra-curricular programs in key areas including hotel management, housekeeping, entertainment, tour guiding, culinary arts, and other skill areas; and
- Launching a targeted tourism and hospitality training program that includes but is not limited to customer service and tour guide training. Training programs should be offered year-round.



4.4 Develop the Parish as a Destination

TABLE 73: Priority actions for developing the parish as a destination

6.1 STRATEGY	PRIORITY ACTIONS
Develop the parish as a destination	<div>6.1.1 Establish leadership to shape brand and coordinate marketing of tourism activities</div> <div>6.1.2 Develop the St. Thomas Brand as a community tourism destination that provides visitors with the opportunity to experience Jamaican cultural and natural heritage through authentic experiences</div>

Community and tourism leaders in St. Thomas will need to work together to effectively enhance its public image as a good place to live and work, and to promote the parish as an attractive travel destination. A Destination Management and Marketing Organization (DMO) can help to organize stakeholders into a unified team with shared vision and objectives. The need for ongoing dialogue, cooperation and collaboration among stakeholder groups are especially critical in St. Thomas where tourism is nascent.

Since the process for establishing a DMO may take some time, more immediate efforts should include identifying community and tourism leaders to serve on a St. Thomas Destination Stewardship Committee. This committee will oversee the branding and promotional process, apply for grants and secure funds. This committee would also develop and monitor a Request for Proposal process in order to hire and manage a destination marketing firm that would produce concrete deliverables as outlined below. The group charged with leading this process would be well-served by analyzing and learning from the Treasure Beach brand-building experience. The group should include a cross-section of local individuals including business owners, government representatives and, if possible, local “celebrities”, who could lend their names and clout by becoming so-called brand ambassadors. For example, if Andre Hugh Sutherland (AKA Popcaan) starts talking about St. Thomas, it suddenly starts to have cache. But first, he needs something to talk about.

In tandem with the branding activities, the St. Thomas Destination Stewardship Committee should work with the Ministry of Tourism to identify funding for the development of a DMO business plan. The business plan will provide recommendations for its organizational structure, operating model and strategies for generating revenues which could include membership of all hotels, attractions, tour operators, transportation providers, restaurants, tour guides and other tourism services providers.

Support from the Ministry of Tourism and its portfolio agencies, in particular TPDCo and JTB, will be critical for seeing through these important initial steps.



TABLE 74: Action plan for developing the parish as a destination

46. PRIORITY INITIATIVE

Develop the St. Thomas Brand Architecture and Strategy

Short Term: Years 1-3

Budget: US\$100,000 (*these figures are estimates*)

Partners: Caribbean School of Architecture, Jamaican Institute of Architects,
St. James Municipal Corporation, TPDCo

DESCRIPTION

Hire consultant to develop brand architecture and strategy. The consultant should:

Develop a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis to help define the St. Thomas brand. The SWOT should be based on the insights and findings presented in the TDDMP.

Organize and conduct stakeholder workshops and interviews, again building on work already done, but facilitated by the branding agency or team, to ascertain exactly how stakeholders feel about the parish and to identify its unique characteristics. This step would involve the development, distribution and assessment of stakeholder surveys along with the organization of the collected data. Targeted stakeholders would include community members, business owners, public sector representatives, and representatives from nearby parishes and tourism organizations, associations and businesses. The purpose of this exercise is to determine the key attributes, personality and DNA that characterizes the parish as it is now. How do residents and visitors feel about this place? What makes them most proud? It's important to establish a baseline around the parish's brand reputation, both within and outside of the parish itself. While brands are cultivated, they need to be based on existing characteristics.

Identify current and potential visitors, to assess feeder markets and to segment these markets demographically, by income, education, interests and spending. Before attempting to attract visitors, it's important to determine who the parish would most likely attract. Again, this market analysis would be best conducted by an experienced, outside agency. The market analysis should build on the priority market segments prioritized in the TDDMP.

Determine the unique selling proposition (USP) for St. Thomas. What about the parish is particular to it? For examples, its reef to ridge access, mineral waters/health, hiking, cycling, adventure tours, spas, farms, for example? Which historic, cultural and natural assets could be further enhanced and developed? Which assets could be packaged as a cohesive outdoor or cultural experience? For example, since most parish economic activity centres around agriculture, is there potential for farm-to-table businesses that would attract tourists interested in food and agriculture? Would a coffee house serving the famous Blue Mountain coffee be a viable business? What would attract people to the parish and what would they most likely spend their money on? This activity should build on the USP recommendations outlined in the TDDMP.

After determining the unique selling proposition of the parish, the firm would further articulate the brand's overall identity and so-called brand promise, which would allow visitors to reliably anticipate what they'd find in the parish. What do you feel when you think St. Thomas? This would act as the foundation for storytelling about the parish and its visitor attractions.

Develop a visual identity, logo, tagline, signage and promotional collateral—including digital and brochures—that would reflect the brand and position it visually. Colors, typography and language should all reflect the brand essence.

Build a St. Thomas tourism website that would provide overall information for visitors including transportation, tours, hotels, restaurants, information on tourist sites and that would link to various businesses. The website could possibly serve as a booking platform.

TABLE 74: Action plan for developing the parish as a destination

<div>47. PRIORITY INITIATIVE</div> <div> Establish a functional DMO Short to Medium Term: Years 2-4 Budget: US\$70,000 <i>(these figures are estimates)</i> Partners: MOT, DSC TPDCo, JTB </div>
<div>DESCRIPTION</div> <p>Hire a consultant to develop a business plan for a DMO. The business plan will provide recommendations for organizational structure, financial model, and strategies for generating revenues which could include membership of all hotels, attractions, tour operators, transportation providers, restaurants, tour guides and other tourism services providers.</p> <p>The St. Thomas Destination Stewardship Committee with MOT and its portfolio agencies will oversee the work of the consultant, and ensure that the DMO is established as per recommendations outlined in the DMO business plan.</p>

4.5 Reach Diversified Market Segments

TABLE 75: Priority actions for reaching diversified market segments

<div>6.2 STRATEGY</div> <div>Reach diversified market segments</div>	<div>PRIORITY ACTIONS</div> <div>6.2.1 Develop marketing strategies to reach priority market segments</div>
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Growing visitors to St. Thomas over time will require the development and implementation of marketing strategies that include public relations, earned and social media. Marketing efforts will need to be calibrated to reach each of the following priority markets segments: FIT, leisure tourist, SAVE, MICE, VFR and day visitors.

TABLE 76: Action plan for reaching diversified market segments

<div><div>48.</div><div>PRIORITY INITIATIVE</div></div> <div><div>Develop and implement a marketing strategy</div><div>Short to Medium Term: Years 3-6</div><div>Budget: US\$70,000 <i>(these figures are estimates)</i></div><div>Partners: JAMPRO, MOT</div></div>
<div>DESCRIPTION</div> <div><p>Hire consultant to develop a destination-level marketing strategy that should include development of social media platforms including Facebook page, Instagram and Twitter to target markets segments. The strategy should identify brand ambassadors to promote parish and events on social media.</p><p>The marketing strategy should include tactics for promoting St. Thomas to inbound operators that offer tours in nearby parishes and Kingston, hosting travel media and outbound travel agents and tour operators interested in niche and community tourism, and attending trade shows and other events to expose parish to larger audience.</p><p>It is envisioned that the marketing strategy will be developed after the DMO is established. The DMO will hold responsibility for implementation of the marketing strategy. For this reason, this priority action is tagged as medium term.</p></div>



4.6 Assist Businesses to Promote Themselves

TABLE 77: Priority actions for assisting businesses to promote themselves

6.3 STRATEGY	PRIORITY ACTIONS
Assist businesses to promote themselves	<div>6.3.1 Enhance the quality and quantity of information about tourism attractions, things to do in St. Thomas, and restaurants.</div> <div>6.3.2 Build the capacity of tourism businesses to promote themselves online</div>

In addition to the destination-level marketing efforts outlined so far, tourism enterprises in St. Thomas will need to more effectively promote themselves.

An important first step involves increasing the quality and quantity of online information about attractions, things to do and restaurants. Efforts should be taken to train owners and managers of tourism enterprises on how to create a presence online, develop compelling information and stories about their business, and promote themselves online.



TABLE 78: Action plan for assisting businesses to promote themselves

49. PRIORITY INITIATIVE

Train tourism businesses to promote themselves online

Short to Medium Term: Years 1-6

Budget: US\$7,000 (formation of tourism association) US\$50,000 (annual for training)

(these figures are estimates)

Partners: JTB, Jamaica Social Investment Fund, TPDCo, MICAF

DESCRIPTION

Tourism businesses should organize to form a tourism association. The tourism association will help tourism businesses to unify and develop a strong voice, as well as organize in order to be well represented throughout the TDDMP implementation process. The association can also help to organize collective marketing and promotional efforts.

Offer workshops on the following topics on an annual basis.

- **Websites:** Tourism businesses around the world are building simple, attractive websites on modest budgets and quickly realizing a return on their investment. These workshops could be offered in-person or even online.
- **Storytelling and content production:** To convey what they do and to get consumers to care, businesses of all sizes need to tell stories, both in writing and in pictures. For example, a small guesthouse located near Bath Botanical Gardens might feature lovely photos of the flora and fauna found there with a description of indigenous plants or even a recipe based on breadfruit. A business located near the foot of the Blue Mountains might include an illustrated map and a description of a couple of hikes with accompanying images.
- **Social media marketing:** Most travelers learn about destinations via social media—Facebook, Twitter and Instagram. How can businesses in the parish use these platforms as promotional tools? Again, one or a series of workshops could provide locals with the information to get started.
- **Networking and partnerships:** With guidance, local businesses could learn the importance of and strategies for developing relationships with businesses and organizations both within the parish and from nearby parishes. Rather than waiting to be discovered, they can learn methods for attracting the attention of and connecting with local tour operators and agencies and to promote activities and offerings at local trade shows, to list their businesses on Airbnb or travel aggregator sites such as Expedia or Booking.com, for example.

Pillars of Growth and Linkages Programmes: Knowledge and All Networks

4.7 Establish destination management and plan implementation and monitoring mechanisms

TABLE 79: Priority actions for establishing destination management and plan implementation and monitoring mechanisms

7.1 STRATEGY	PRIORITY ACTIONS
Establish destination management mechanism.	<div>7.1.1 Form a Destination Stewardship Committee that will help to guide implementation of the TDDMP alongside the Ministry of Tourism.</div> <div>7.1.2 Establish Destination Management and Marketing Organization (DMO)</div>

The ultimate objective should be to establish a permanent St. Thomas Destination Management and Marketing Organization (DMO). See Section 4.4 and Table 74 for specific recommendations associated to this priority action.

In the short term efforts should be taken to organize stakeholders into a unified Destination Stewardship Committee (DSC) guided by the shared vision and goals detailed throughout the TDDMP.

The DSC will have a two-fold objective:

- Convene public agencies and coordinate intragovernmental efforts for implementation of the TDDMP
- Establish a multisectorial forum that will bring together private sector, public sector, community leaders, and NGOs to actively participate in the implementation of the TDDMP

Initially, the DSC should be situated in the Prime Minister’s Office (PMO) to ensure the high-level of intragovernmental coordination and collaboration needed for successful plan implementation. The DSC will need dedicated staff. The DSC’s secretariat will track plan implementation and its impacts over time.

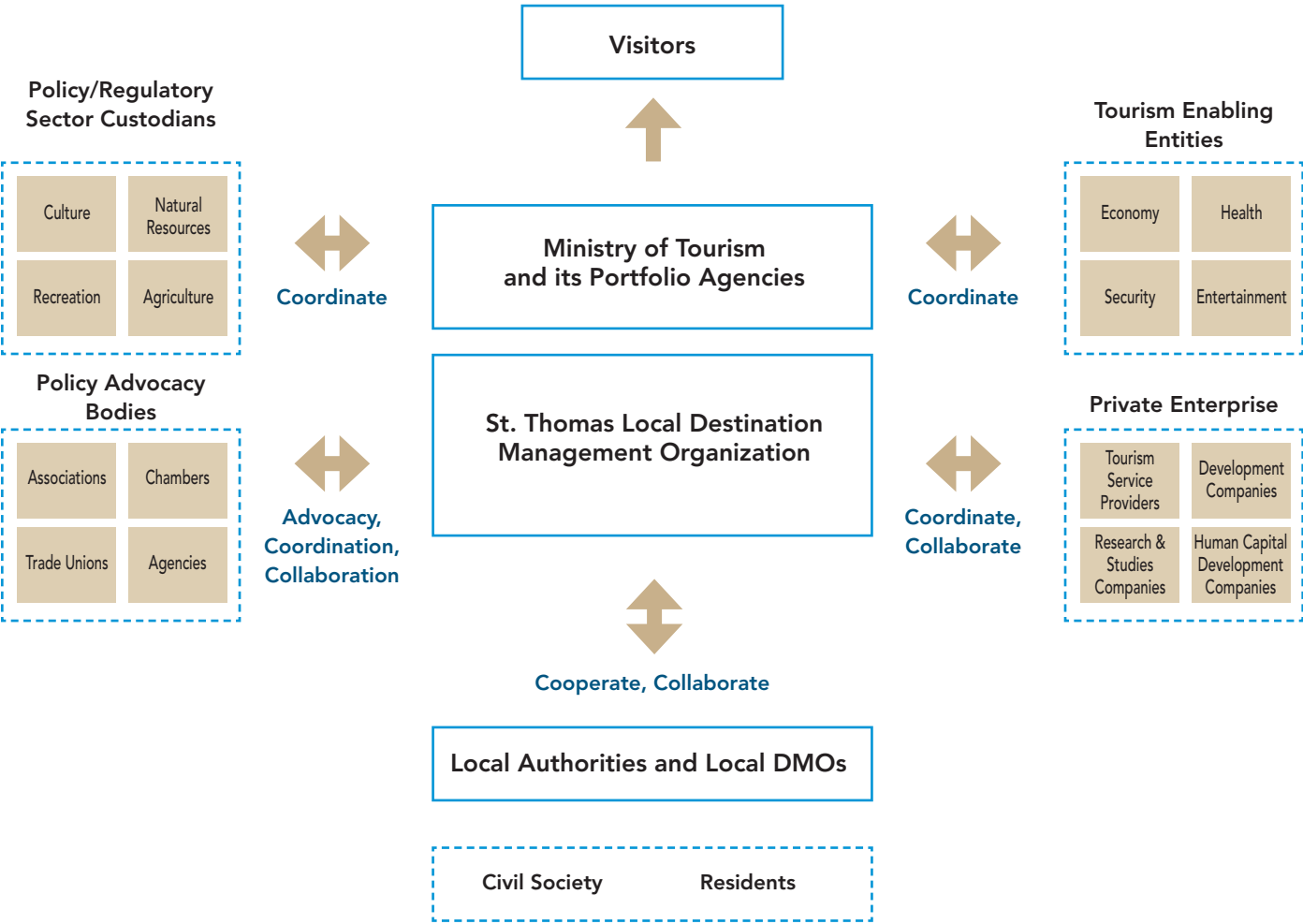


TABLE 80: Action plan for establishing destination management mechanism

<div>50. PRIORITY INITIATIVE</div> <div>Establish Destination Stewardship Committee. Short term: Years 1-3 Budget: US\$150,000 per annum <i>(these figures are estimates)</i> Partners: MOT, TPDCo, SDC, Parish Development Committee</div>
<div>DESCRIPTION</div> <div><p>Establish a Destination Stewardship Committee (DSC) to guide implementation of the TDDMP alongside the Ministry of Tourism (MOT) and its portfolio agencies. The DSC will have a two-fold objective:</p><ul style="list-style-type: none">• Convene public agencies and coordinate intragovernmental efforts for implementation of the TDDMP• Establish a multisectoral forum that will bring together private sector, public sector, community leaders, and NGOs to actively participate in the implementation of the TDDMP<p>Initially, the DSC should be situated in the Prime Minister’s Office (PMO) to ensure the high-level of intragovernmental and multisectoral coordination and collaboration needed for successful plan implementation. The DSC secretariat will consist of 2-3 dedicated staff members. The secretariat will facilitate coordination, track plan implementation and its impacts over time. It will report to the PMO and MOT and publish periodic updates on progress, challenges and impacts.</p><p>Committee members should include a cross-section of community leaders and tourism business owners from all three clusters identified in the TDDMP, key local and national government agencies, and NGOs and academic institutions actively working in St. Thomas.</p><p>The MOT and DSC should identify quick-win projects based on priority initiatives outlined in the TDDMP and work together to implement these quick-win projects. Given that there are many tourism business owners operating independently without any coordination as a destination, it is highly recommended that one of the first quick-win projects be focused on assisting tourism enterprises to promote themselves. This project will provide a strong incentive for individuals to continue contributing their time to the DSC over time.</p></div>

The DSC will also work with the MOT to secure funding for the development of a business plan that will provide the guidance needed for the establishment of a permanent DMO (see Table 74). It is envisioned that the DSC will help to “pave the road” for a functional DMO. Figure 34 illustrates the ideal structure for effective destination management in St. Thomas.

FIGURE 34: Local Destination Management Framework



4.8 Priority Actions for Attracting Investors and Plan Implementation Partners

TABLE 81: Priority actions for attracting investors and plan implementation partners

7.2 STRATEGY	PRIORITY ACTIONS
Attract investors and plan implementation partners.	<div>7.2.1 Develop an investment prospectus for major attractions and product development opportunities outlined in the TDDMP.</div> <div>7.2.2 Identify incentives to stimulate private sector investment in tourism projects.</div> <div>7.2.3 Initiate and deliver at least three quick-win priority initiatives by 2022.</div>

The TDDMP outlines a wide range of infrastructural priority initiatives as well as potential attractions and product development investment projects.

There is a need to socialize these opportunities with the Jamaica Promotions Corporation (JAMPRO), develop an investment prospectus for catalyst projects, and develop an action plan with JAMPRO for attracting international and national investors.

Incentives for stimulating private sector investment will need to be identified and communicated. Investment by local

entrepreneurs should be encouraged through affordable financing for MSMEs. See Section 4.1 for recommendations to establish a special financing window for St. Thomas under the existing TEF-funded loan facilities.

The short term aim should be to initiate and deliver on at least three quick-win priority initiatives outlined in the TDDMP by 2022. This effort will help to demonstrate tangible and measurable results within the first three years. The quick-wins can be instrumental in garnering support for the more complex initiatives.

TABLE 82: Action plan for attracting investors and plan implementation partners

<div>50. PRIORITY INITIATIVE</div> <div><div>Attract Investors and Implementation Partners</div><div>Short to Medium Term: Years 1-3 Budget: USD\$19,230 <i>(these figures are estimates)</i></div><div>Partners: MOT, JAMPRO, MICAFA, NEPA</div></div>	
<div>DESCRIPTION</div> <div>Attract development of infrastructure, tourism attractions and experiences in St. Thomas through local and foreign investment. There is a need to develop an investment prospectus for major attractions and product development opportunities outlined in the TDDMP, and this condensed TDDMP Synopsis Document. This process will also be guided by principles of sustainability and inclusion. Priority actions will include:</div> <div><ul style="list-style-type: none">• Convene key government entities to further prioritize tourism investment opportunities outlined in the TDDMP.• Package tourism opportunities for local and foreign investors (i.e. investment prospectus).• Promote opportunities to investors through relevant channels, ensuring a right fit of investors that commit to the guiding principles of sustainable and inclusive development.</div>	

4.9 Monitor Plan Implementation

TABLE 83: Priority actions for monitoring plan implementation

<div>7.3 STRATEGY</div> <div>Monitor plan implementation.</div>	<div>PRIORITY ACTIONS</div> <div>7.3.1 Develop key performance indicators.</div> <div>7.3.2 Track progress and challenges and adapt strategies and priority actions as needed over time.</div>
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Successful plan implementation will require diligent oversight by the MOT, DSC in the short term and DMO in the medium to long term. Progress and challenges should be tracked, and strategies and priority actions adapted over time to meet ever-changing local level realities and needs.

Key performance measurement indicators outlined below can help the DSC and MOT to monitor impacts of the plan over time. Table 84 outlines key performance indicators for TDDMP implementation.



TABLE 84: Key performance indicators for TDDMP implementation

GOAL	KEY PERFORMANCE INDICATOR
1. Increase awareness of destination among key market segments.	<p>1.1 Increased target day visitors and expenditure</p> <p>1.2 Increased target international arrivals and expenditure</p>
2. Create and deliver iconic brand experiences.	<p>2.1 Public and private investment in priority experiences, attractions and accommodation</p> <p>2.2 Number of new experiences and attractions launched</p> <p>2.3 Number of staff trained under service and hospitality program</p> <p>2.4 Increase in visitor satisfaction</p>
3. Improve infrastructure and placemaking.	<p>3.1 Support by the various levels of Government of Jamaica for the priority projects</p>
4. Develop the destination using sustainability principles.	<p>4.1 Support by NGOs and the various levels of Government of Jamaica for priority projects aimed at protecting sensitive and/or threatened ecosystems and wildlife</p>
5. Enable tourism enterprise success and viability.	<p>5.1 Number of business development education and awareness programs</p> <p>5.2 Increase in new tourism enterprises</p> <p>5.3 Increase in tourism enterprises receiving affordable financing</p> <p>5.4 Increase in number of tourism enterprises that are operating formally and complying with existing standards</p>
6. Prepare community and skilled workforce for tourism.	<p>6.1 Number of tourism awareness campaigns and programs</p> <p>6.2 Number, range of topics and levels of training programs in tourism and hospitality</p> <p>6.3 Support from the various levels of Government of Jamaica and NGOs for workforce development programs</p> <p>6.4 Increase in people who participate in training programs in tourism and hospitality</p>
7. Manage the destination collaboratively.	<p>7.1 A functional DSC and secretariat that persists over time and is co-chaired by the Ministry of Tourism and the Prime Minister's Office</p> <p>7.2 Annual review of the KPIs</p> <p>7.3 Increase in short and long term funding to deliver the TDDMP</p> <p>7.4 Public and private support for the establishment and operation of the St. Thomas DMO</p>

