



STRATEGIC TOURISM MASTER PLAN

A BEAUTIFUL LIFE AWAITS



UCF UNIVERSITY OF CENTRAL FLORIDA



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EXECUTIVE SUMMARY: ACTION PLAN HIGHLIGHTS, COMMON VISION, AND VALUE PROPOSITION

This report documents the Saba Strategic Tourism Master Plan, 2023-2028. The report provides directions to help Saba capitalize on new tourism related opportunities and overcome challenges that have emerged post pandemic. The plan is the outcome of a participatory process that includes multiple layers of tourism stakeholders including the residents, government officials, business owners, NGOs, community leaders, local organizations, and tourists. The plan observes that overall, there is a disconnect in the stakeholders' message regarding the value of Saba. Tourists appreciate the value and beauty of Saba's natural resources and authentic culture, yet residents undervalue themselves and Saba due to social and economic confines. Currently, tourists come to the island and enjoy its paradise, but the residents do not get much in return. Moreover, the people seek opportunities to improve their quality of life and tourism can provide these opportunities providing the residents believe in themselves and can celebrate Saba's authenticity. This plan provides a pathway that provides the means for Saba's people to achieve the beautiful life that awaits them.

The tourism plan helps to identify the needs and wants of Saban people. Saban residents were clear in their message during the research process regarding their desire to improve their social and economic opportunities, to be involved in the tourism development process, and in their desire for modest tourism growth. The 2023-2028 Strategic Tourism Master Plan wholistically identifies the opportunities that the Saban people expressed as desires to help enhance their quality of life. For Saba, tourism can be a catalyst force toward enhancing residents' quality of life. If Saba acts now to capitalize on the new emerging travel trends, the island will stand to make nearly US\$18 million per year, or nearly US\$90 million over five years. The time for action is now!

In addition to the existing tourists and day-trippers, the tourism plan also forwards an action plan that aims to attract 9,629 new international arrivals, including 8,415 tourists, and 1,154 day-trippers during the next five years. The tourism sector will accommodate a total of 19,181 international visitors by 2028, which equals one visitor for every three

residents per week. This growth aligns with the expressed interest of the local population to experience limited development, albeit enough to invigorate community life, expand economic and social opportunities, and diversify income sources. An increase in international arrivals will provoke financial viability to the airport, while enhancing the profitability levels of tourism businesses. However, because the accommodation sector is currently underperforming, an increase in international arrivals would imply minimum job creation in the hotel sector.

The expansion of the tourism sector follows a gradual scaling up process reaching nearly US\$22 million in 2027 or nearly 39% of the local economy. This gradual scaling up process excludes the local population and references only tourist/visitor arrivals. It means about 369 visitors per week in Saba, which equals one in three working Sabans. The plan rests on four guiding principles: 1) value, 2) inclusivity, 3) opportunity, and 4) sustainability. Value involves bringing more high-spending and low-impact visitors to Saba. Inclusivity should ensure that tourism and the community enrich each other, opportunity to

diversify residents' income sources, triggering entrepreneurial opportunities that invigorate community life, maintaining sustainability to support environmental conservation, respecting local culture to celebrate the deep roots of Saban history in order to support and enhance Saba's natural resources and cultural sites, which act to enhance residents' quality of life.

These four guiding principles emerged from a bottom-up participatory research approach where stakeholders repeatedly referenced statements pertaining to three strategic goals that they would like the Tourism Master Plan (TMP) to accomplish:

1. *Enhance quality of life of community and visitors*
2. *Safeguard scarce resources and protect and conserve a fragile environment*
3. *Increase economic and social value of tourism*





The TMP highlights five strategic directions to achieve these three goals:

- 1. Accessibility:** The focus on accessibility is to increase airlift and ferry transportation to the island.
- 2. Steady financial resources:** The focus of financial resources pertains to the budget for the Tourism Office and monetizing natural resources.
- 3. Collaboration amongst stakeholders-institutional governance structure:** The focus of improving collaboration amongst stakeholders pertains to the purpose, role, and scope of the Tourism Office.
- 4. Building capacities for product development:** Building capacities pertains to the necessary training for product development, entrepreneurial development, and talent enhancement.
- 5. Increase the economic value of tourism competitiveness:** The tourism sector should enhance its competitiveness through delivery of quality offerings and services.

To achieve these goals, the Government of Saba, the Dutch Government and agencies, the island agencies, and the Tourism Office must make tourism a priority and work closely with the private sector and island stakeholders. The TMP’s anticipated direct annual costs are US\$500,000 annual budget for the Tourism Office, and a US\$400,000 escrow account to subsidize an increase in airlift with a third daily flight in 2025 from St. Maarten. To cover these expenses, the TMP recommends charging US\$50 entry fee per person per trip (excluding residents). The tourist entry fee should be collected along with tourists’ market segment information and purpose of travel to help the Tourism Office profile niche market segments for marketing and promotional efforts. In addition to the \$50 tourist entry fee, tourists and visitors will be charged a \$25 nature conservation fee per person. It is recommended that US\$15 of the nature fee go to the Saba Conservation Foundation. The increase in tourist entry and nature fees are in line with Bonaire’s entry fee structure and diving fee. The collection, processing, and administrative efforts would be managed via the Finance and Tax Agency, a similar procedure as in Bonaire¹.

1 Bonaire’s management and administrative process of its travel tourist fee collection could serve as a template for Saba’s adoption.

The TMP provides goals and objectives to track success. The four principles, three goals, and the five strategic directions support an integrated destination management system with four overall key performance indicators (KPIs), representing the most important ways the Tourism Office will be accountable to stakeholders:

- KPI 1: Residents’ satisfaction
- KPI 2: Tourists’/Visitors’ satisfaction
- KPI 3: Average daily Tourist/Visitor spending
- KPI 4: Total Tourist/Visitor spending

These KPIs provide insight on tourism’s value and Saba’s tourism value proposition. A value proposition refers to destination offerings that are considered innovative, unique, and competitive, which make the destination attractive to tourists. Research reveals that Saba’s value proposition is an unspoiled, unplugged, and authentic Caribbean Island. The authenticity of the island flashes from the moment of arrival with unique architecture, incredibly beautiful natural landscape, Mount Scenery, a deep sea, and the largest atoll in the Atlantic Ocean - the third largest of its kind

in the world.

The TMP forwards a vision to unite local people in pursuit of the benefits of Saba’s tourism.

Vision: to build a unique tourism experience leveraging authenticity and nature to benefit the community, local businesses, and tourists, and to enhance the community’s resilience.

The vision strives to motivate a collective effort from residents to move Saba’s economic, professional, and social opportunities forward. The vision encompasses the collective effort in phrasing such as: “Tourism belongs to all of us! Tourism benefits everybody.

Saba is our island, and our future is driven by us: Our ideas. Our aspirations. Our dreams.” To achieve this vision and to move opportunities for residents forward, the people must learn from the Tourism Office the type of experience the tourists desire, which is rooted in authenticity, culture, and environmental conservation. The Saba Strategic Tourism Master Plan framework is below.



BACKGROUND

Saba is a quiet, small, and genuinely unspoiled volcanic island in the Caribbean. It is five square miles with four charming villages. Each home in Saba is maintained with custom Saban craft that includes white paint, green trim, and an orange roof. The appearance of the traditional Saban home has been described as “gingerbread cottages.” Saba’s topography is among the most beautiful in the world with a mountainous terrain that is surrounded by rough seas, steeply rising rocky shores, and cliffs, which make the island remote and isolated.

The island has mysterious and unique features, such as the Saba Bank, one of the largest atolls in the world, the Elfin Forest, and the rainforest on top of Mount Scenery. Saba also has one of the finest diving sites in the world.² The island is home to a population of fewer than 2,000 people. The history and culture of Saban people is rich and long

with the official languages being English and Dutch. The Saban people are proud of their history, heritage, and authenticity.

The island can be exposed to extreme weather like storms and hurricanes.³ Saba’s small size (scale) coupled with limited economic and social opportunities create distinct insular features that make opportunities hard to come by and have thus compelled many residents to leave the island. Saba has a mixed population, with approximately 27% having been born on the island. This means only about one in six young Saban residents is a Saban native. The cost of living as well as the cost of doing business on the island is high.

Saba’s economy is dependent upon tourism. Between May 2021 and May 2022 Saba received 9,612 international arrivals of which 8,468 were tourists and 1,148 were

day trippers. Tourism presently accounts for nearly 25%⁴ of the approximate \$50 million island economy. Tourism development will help scale the island’s economic structure by increasing tourist demand and providing career, business, and social opportunities for residents. Tourism could also facilitate better social life, alleviate poverty, and enhance residents’ life satisfaction and happiness. Prosperous people tend to be more engaged, empowered, healthier, and happier. These elements are the foundation of a strong and resilient community and help express how tourism may enhance residents’ quality of life. Tourism can be used as an economic vehicle that generates positive returns for the island while bolstering respect for the local culture and conservation of natural resources.

Saban residents are optimistic about the future. They express a desire for change in their living conditions. Through extensive research and interviews, Saban’s life aspirations were unveiled, highlighting a yearning for economic and social opportunities, inclusiveness, and empowerment. These aspirations are echoed in the Three Pillars Vision Saba 2030.⁵

Focusing on a better and sustained quality of life is also at the heart of this tourism plan. This focus stems from the voices of the people residing in Saba. The ultimate objective of this plan is for Saban residents to reach their full potential while realistically assessing the evolving community issues and need to conserve natural resources. A new evolving need to address is the people’s desire to build their adaptive capacity in a

post-pandemic world without outsourcing work but by growing internal capabilities. Residents’ wellbeing and human development⁶ are the anchors of the recommendations provided within this plan.

While tourism has potential, Sabans do not seem entirely convinced that tourism could provide them with more opportunities to improve the economy and their living conditions. There is a disconnect between the island leadership and residents. This disconnect could prevent the required community commitment that is necessary for tourism development from coming to fruition. Moreover, ambivalence about tourism development’s potential to enhance wellbeing and human development could jeopardize Saba’s attractiveness and unique tourism offerings.

Therefore, convincing Saban residents about tourism development’s potential requires inclusiveness, accountability, and capabilities (skills) development. Tourism development should be economically, socially, and environmentally balanced to realize sustainable and competitive tourism growth that benefits the people of Saba. That said, responsible and sustainable use of Saba’s unique natural resources connects with residents’ wellbeing and prosperity.

⁴ Another report mentions that tourism is 60% of the economic output of the island. Reference: Wolf, E. (2014). What is Saba’s nature worth? <https://www.wolfscompany.com/wp-content/uploads/2014/05/Total-economic-value-of-Saba.pdf>.

⁵ See Saba Vision 2030.

⁶ Human development is at the heart of the Saba 2030 Vision and the Saba Package Agreement 2022-2025.

² PADI praises the beauty and health of Saba marine resources, the incredible diving experience and conservation practices. Visit <https://blog.padi.com/why-you-should-go-diving-in-saba/>.

³ See NMBP Report (2020).

THE BIG PICTURE

TOURISM STRATEGIC MASTER PLAN

The question that may come to mind is why now a strategic tourism plan? Saba’s tourism industry suffered greatly from the Covid-19 pandemic, negatively impacting arrivals and tourism revenues and triggering fears and uncertainties. However, the pandemic also brought opportunities for change and innovation to do some things better and quicker. The pandemic compels new ways of thinking and approaches to tourism development from both supply and demand sides of business operations.

The COVID-19 pandemic unleashed transformative forces impacting the travel industry. New trends are emerging where travelers seem more inclined to search for places that enable connecting with family and friends, are authentic, and genuinely embrace sustainable practices. This emerging new traveler sees the world through different lenses and perspectives that embrace inclusiveness, community-based tourism, and sustainability as critical offerings in their selection process of a destination. This type of traveler requires an exceptional experiential product embedded in authenticity and low-density tourism.⁷ These transformative forces provide a unique opportunity for Saba to reposition its tourism industry and recover from hurricanes Irma and Maria as well as the COVID-19 pandemic. For Saba to seize these opportunities, a pragmatic vision is required where tourism development is viewed as a strategic economic and social opportunity that amplifies partnership and collaboration

between the public and private sectors.

Saba is a unique island due to its authenticity, guarded by isolation and remoteness, its small population, and by its unique and authentic architecture and unspoiled nature. Leveraging isolation, authentic architecture, and nature, the island can build a niche tourism industry that engages, empowers, and benefits the community and Saban residents. Authenticity is a critical feature in the formation of tourist satisfaction because it affects the quality of the experience. It connects tourists with the community, putting community at the heart of every tourist touchpoint and activity, ensuring engagement and empowering the community to participate and benefit from tourism development. In embracing this vision, Saba can ensure a path for sustainable destination development.



7 See, for example, World Economic Forum (2022). Travel and Tourism Development Index 2021. Rebuilding for a sustainable and resilient future. https://www3.weforum.org/docs/WEF_Travel_Tourism_Development_2021.pdf.

VISION

To build a unique tourism experience leveraging authenticity and nature to benefit the community, local businesses, and tourists and to enhance the community’s resilience.

MISSION

To establish a forum for partnership between the government, businesses, and the community to create, coordinate, promote activities that attract and improve visitors’ experience, and inject vibrancy in community life.

PROCESS

Stakeholders [60], Townhall meetings [five], Visitor feedback [1055 surveys, including residents], Priorities, and Action plan

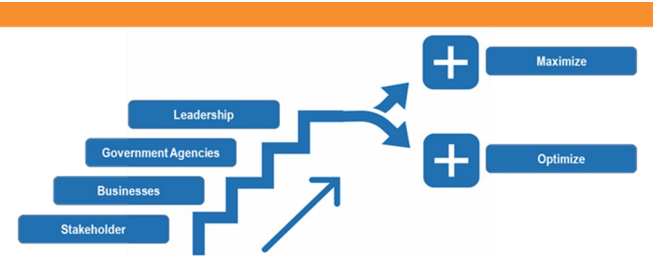
➤ COMMON VISION

A pragmatic bottom-up framework for sustainable and competitive tourism development

BOTTOM-UP RESEARCH APPROACH: AN INCLUSIVE PROCESS

The bottom-up research approach is a participatory process guided by stakeholders’ generated vision, strategies and goals based on assessment of the stakeholders’ priorities and needs. The premise of this approach is that tourism development is a tool to improve the quality of life of the Saban community. The Saba 2023-2028 Strategic Tourism Master Plan (TMP) follows this inclusive process and forwards goals and objectives to enhance opportunities for the community, to increase tourism value, and to ensure sustainability for the Saban way of life. Following these principles will help optimize the performance of the industry while identifying strategies and solutions to overcome the challenges that may present obstacles for stakeholders, industry and community stakeholders alike.

FIGURE 1 THE BOTTOM-UP APPROACH 1 THE BOTTOM-UP APPROACH



Optimizing the tourism industry’s performance, for purposes of this TMP, requires that the benefits from tourism translate to measurable improvements in the residents’ quality of life as well protection of Saba’s natural resources. Measurable improvements may include but are not limited to stable revenue streams for the industry and community through job creation, profitability, economic and social opportunities, promotional resources for

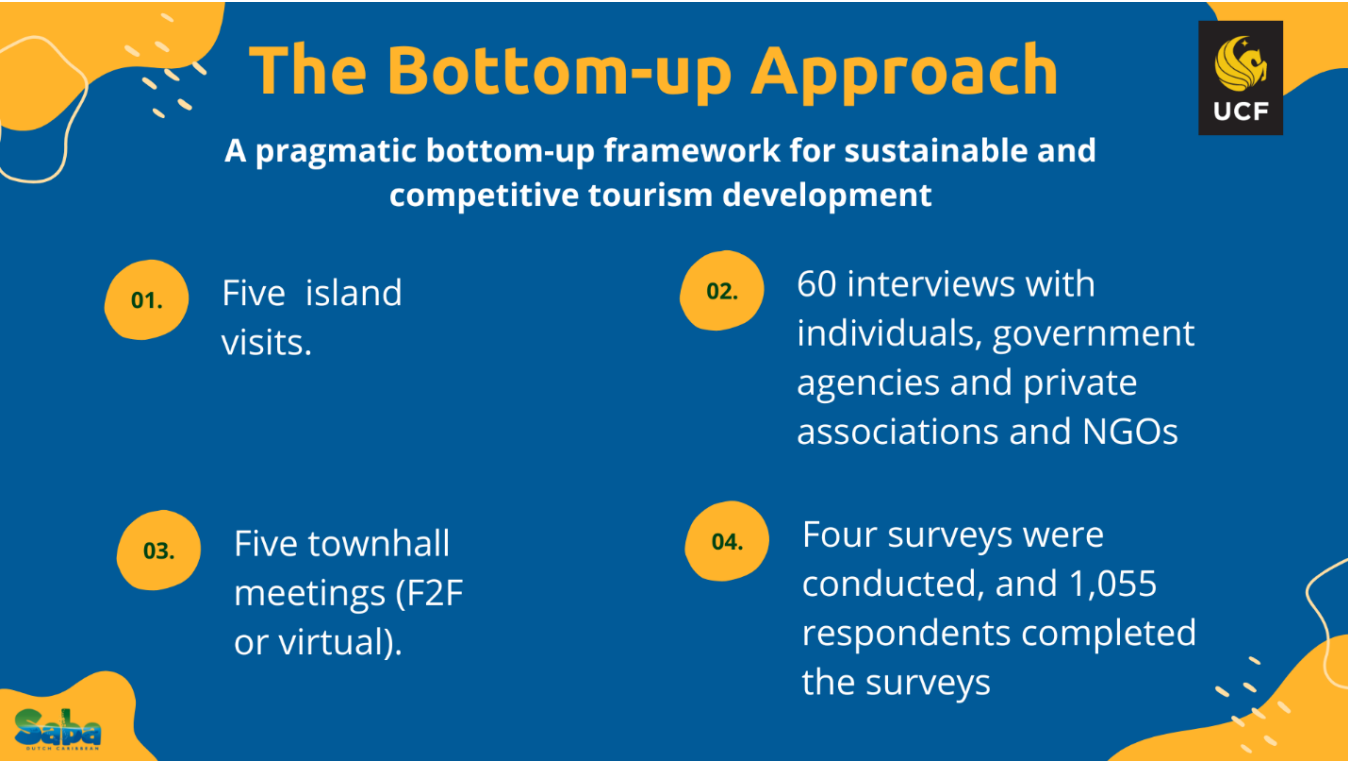
the Saba Tourist Bureau, as well as funds to maintain the island’s unique natural resources.

The 2023-2028 TMP is distinct to Saba. The concepts and strategies recommended within the plan integrate tourist demand according to the current tourism supply product. Traditionally, most master plans concentrate on the supply side of tourism, thereby misaligning supply and demand functions, which stunts continued sustainable growth for destinations. Therefore, the suggested actions, solutions, and goals generated in the 2023-2028 TMP will be positioned with the objective to generate demand for the existing tourism product portfolio.

The bottom-up research approach provides all tourism industry stakeholders the opportunity to share their thoughts, perceptions, ideas, and challenges regarding the tourism industry as well as their perceptions about living in Saba. The bottom-up research approach begins at the level of the people’s voice and moves up the pyramid to tourism employees, NGO’s, social organizations, professional organizations, private businesses, entrepreneurs, community leaders, cultural organizations, labor unions, religious leaders, educational institutions, government officials, as well as the tourists.

Ultimately, the bottom-up research approach encompasses the voices from a wide range of tourism stakeholders with the purpose to create as complete a picture of the community’s health, assets, and needs as possible to fully understand what changes need to take place, and how they might be set in motion. Thus, the 2023-2028 TMP is representative of a collective Saban voice that

FIGURE 2 CONCEPTUALIZES THE BOTTOM-UP EFFORT THAT WAS UNDERTAKEN IN THE DEVELOPMENT OF THE 2023-2027 TMP.



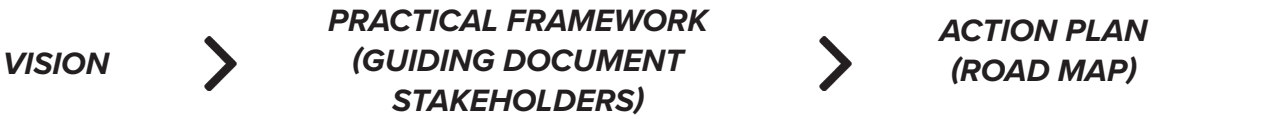
is supported by most Sabans and benefits the island of Saba.

As part of the bottom-up process, the researchers met with more than 60 stakeholders from January to October 2022. The meetings helped to ensure that the research team created a participatory process guided by a community generated vision; strategies and goals based on an assessment of the community’s priorities and needs; an action plan that grows from the vision and the goals; and the implementation and results of the action plan. The reason for this elaborate and time-consuming effort of the bottom-up research approach was to assess the meaning

of Saba’s tourism system through the eyes of society members, as well as to provide a voice to stakeholders in the construction of the plan.

From the stakeholder meetings and community forum presentations, a variety of surveys were designed, approved by Saba tourism officials, and administered to further understand the state of tourism in Saba. Four surveys were conducted, and 1,055 respondents completed the surveys, including stay-over tourists, visitors, Caribbean tourists who had never visited the island (latent demand), employees, and the local population at large.

PROCESS



STEERING THE VISION

Saba is a small, isolated island with a tiny population. Tourism businesses as well as other types of businesses, in general, are very small. They lack the prowess and network to plan, coordinate and execute activities. The government is the only large entity with the power to coordinate, plan and manage the tourism industry in Saba.

Through its Tourism Office, the government should actively engage with the private sector and community to create innovative and sustainable tourism activities that attract tourists to the island. The role of the Tourism Office includes coordination, planning, legislation and regulation, entrepreneurship, providing stimulation, and protecting business and community interests. These interests

include residents' wellbeing, Saba's incredible and unique natural resources, the island's heritage, and the tourist's experience.

That said, the Tourism Office should reveal a proactive approach towards partnerships, collaboration, and alignment of the tourist experience and what the island offers centered on community benefits. Innovation and collaboration are key to the new role of the Tourism Office. The Tourism Office objectives are:

- To assist in raising the quality of life of residents
- To position Saba as an attractive destination
- To increase international tourist demand
- To employ effective partnerships working to achieve benefits for Saba
- To encourage and support innovation and sustainable practices
- To encourage training to enhance a skilled and professional workforce

Therefore, the Tourism Office functions are:

- Marketing and promotion as the primary responsibility. The marketing division formulates the marketing strategy, and its task is to maintain the website, produce the advertizing campaign and publicity materials, interact with social media, and promote sales through the media and the travel trade. The staff of this division is one

person with tourism marketing expertise and experience.

- Development consists of training programs, activities, and building partnerships. This division functions in disseminating business intelligence to the partners, engages in the planning process with other government agencies in permitting, licenses, and product development. This unit is also involved in setting up training programs and coordinating events and activities across the island. The staff of this unit is one person with product development expertise, and community building experience.
- Build an information network to provide tourist/visitor information as well as for residents to be informed about tourism events, activities, and attractions. This unit helps decrease distribution costs of suppliers and reduces search costs for tourists and visitors. This unit is also in charge of research to support business intelligence and product development.

The Tourism Office will have a director who is responsible for promoting the destination to potential visitors and coordinating with stakeholders the delivery of quality offerings for a memorable tourist experience. Moreover, the director will collaborate with other tourism-related businesses in the community to promote the island's image as a tourist destination. To accomplish such tasks the director will require the support of two additional staff.

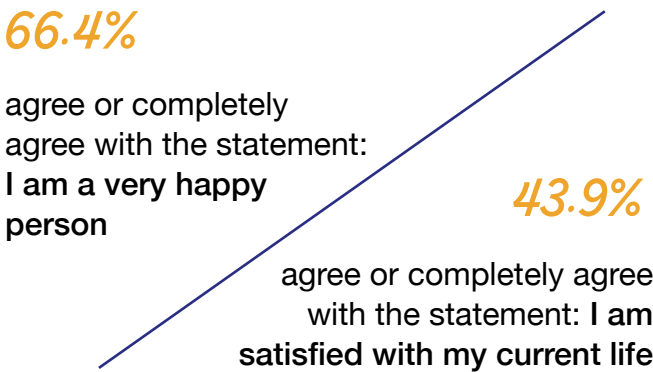
The tourism office's role is to align Saba's brand promise with the tourist experience benefiting the community and tourism businesses

SABAN RESIDENTS’ NEEDS AND WANTS

Saban people aspire to have a good and long life, a strong sense of belonging, and a strong social network. The people are clear that they would like to have a society with social and economic opportunities to fulfill the life that each resident wants. These aspirations propel pride, engagement, empowerment, and a healthy, productive, and happy life.

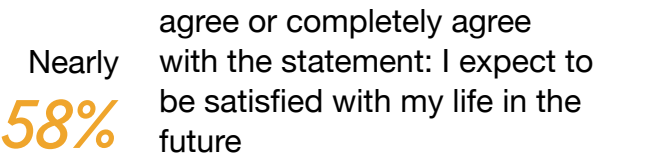
Happiness is a fundamental societal metric and is an indicator of quality of life. Saban’s are moderately happy people. The happiness score stems from individuals’ assessments of their lives. Seven (66.4%) out of ten respondents⁸ agree or completely agree with the statement, “I am a very happy person.” Another 21% are somewhat happy, expressing some doubts about their happiness. Saban’s happiness level is lower than Aruba, Bonaire, and Curacao.

Saba has a relatively low level of overall life satisfaction, and this low satisfaction level is concerning.⁹ Life satisfaction measures how people evaluate their life rather than their current feelings. Fewer than half of respondents (43.9%) expressed that they are satisfied with their present life. This satisfaction level is lower than the score expressed by Bonaire’s residents (49%) in 2017. The results reveal that Saban’s do not feel satisfied with their current circumstances. The island’s small size has an outsized effect on residents’ satisfaction with life. All the



expressed needs concern scale problems, such as the high cost of living, cost of necessities (e.g., food, housing, and clothing), social opportunities, leisure time, income, job security, and existing facilities.¹⁰ The overall impression is that Sabans are moderately happy but highly unsatisfied with their lives.

They are cautiously optimistic about the future. Six out of ten respondents agree or completely agree with the statement, “I expect to be satisfied with my life in the future.” This optimism is a positive sign that Sabans want to act to better their lives. Optimism is fundamentally a belief that residents can achieve aspirations through their efforts. Saban’s would like to change their lives. The



8 The Quality-of-Life survey administered in Bonaire in 2017 found that 76% of respondents were happy. It is plausible that the Covid-19 pandemic influenced the Saba Quality-of-Life survey results.

9 Various subjective well-being studies have shown that a happy person lives longer, has better physical health, and establishes better interpersonal relationships.

10 Saba 2030 Vision and the Saba Package Agreement 2022-2025 also reflect these concerns. These documents designed actions to alleviate these concerns.

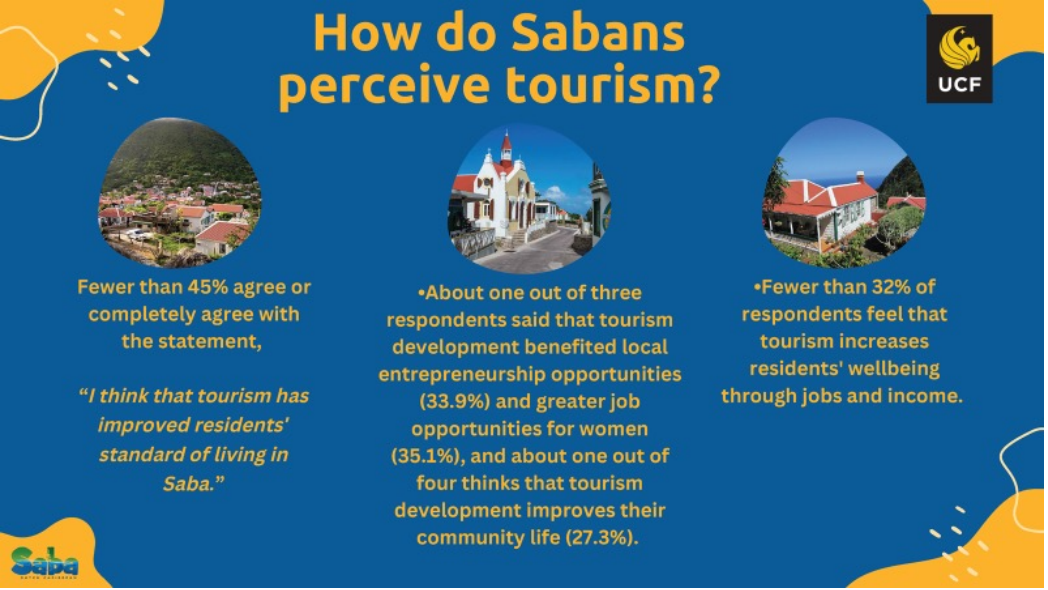


FIGURE 3 SABANS PERCEPTION OF TOURISM

Quality of Life Survey reveals that Sabans are neither satisfied with their present quality of life nor their past quality of life. For example, nearly seven out of ten respondents want to change their lives. While only 34.1% agree or completely agree with the statement, “The current conditions of my life are excellent.” Only 28.2% concurred with the statement, “I am satisfied with my life in the past.” This means that the past does not seem helpful in

guiding how to improve people’s life evaluation because they are neither satisfied with their past nor current life. Sabans seem to struggle with the desire to change and the complexities and challenges they face in everyday life, such as high costs of living, low income, and lack of development and social opportunities. They seem skeptical about their lives and how to move forward toward a better life.

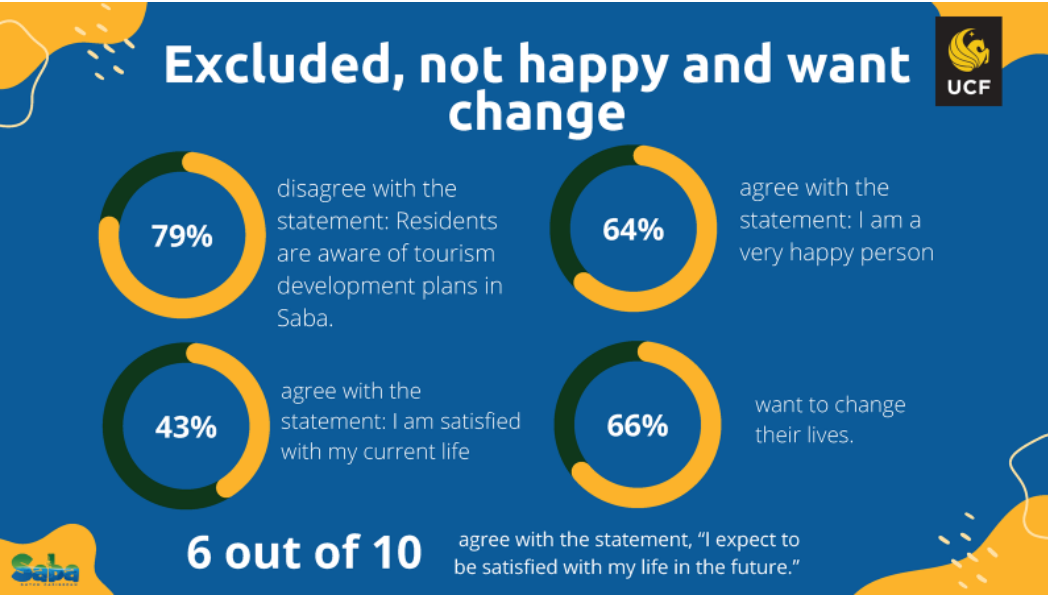


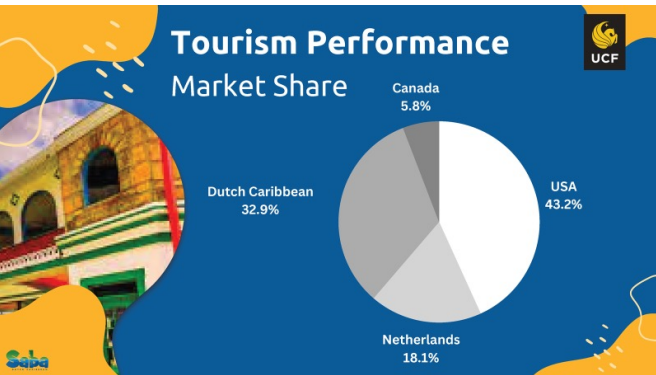
FIGURE 4 SABANS HAPPINESS AND DESIRE FOR CHANGE

TOURISTS’ NEEDS AND WANTS

Saba received 9,612 international arrivals between May 2021 and May 2022. The international arrivals included 8,464 tourists¹¹ and 1,148 day trippers. The United States yielded the largest number of international arrivals followed by the Dutch Caribbean (St. Maarten at the top with 1,251 arrivals), the Netherlands with 1,477 and Canada with 477. Within the USA, New York and Florida delivered the largest number of international arrivals.¹² See Figure 5.

About one-third of international arrivals (3,230) stayed in hotels, while 5,234 stayed at private addresses, which includes family homes, villas, cottages, and vacation rentals. Visitors identified five major reasons to visit Saba, i.e., diving (20.5%), hiking (18.8%), visiting family and friends (17.6%), business (17.7%), and medical students (5.5%). The “Other” reason category represented 20.1% of the visitors’ reason for coming to Saba.

FIGURE 5 TOURISM MARKET PERFORMANCE



11 The report defines tourists following the United Nations World Tourism Organization (UNWTO). According to the definition of UNWTO “a visitor (domestic, inbound or outbound) is classified as a tourist, if his/her trip includes an overnight stay.” (UNWTO, 2014). Glossary of tourism terms. [https://www.unwto.org/glossary-tourism-terms#:~:text=Tourist%20\(or%20overnight%20visitor\)%3A,\(IRTS%202008%2C%202.13\).](https://www.unwto.org/glossary-tourism-terms#:~:text=Tourist%20(or%20overnight%20visitor)%3A,(IRTS%202008%2C%202.13).)

12 See the EHAS Systems Statistics, Part 1, May 1st 2021 to May 1st, 2022.

13 According to a recent survey by Global Data, 42% of respondents from the U.S. typically take warm-weather beach vacations, which was the most popular type of trip.

The sustained growth of the tourism industry involves product development according to market needs. Identifying, assessing, and understanding the distinctive factors and preferences that drive travel demand to Saba is critical. Profound changes in how tourists experience destinations and existing fierce competition compel destinations to center their attention on tourists’ preferences and choices. This demand-based focus requires cracking the code of a more dynamic market characterized by greatly expanded destination choices.

People are diverse, meaning everyone has needs and wants, motivation, behavior, and destination choice process. The American market’s needs and wants were assessed given the large number of tourists that come to Saba from the USA. The U.S. market is desirable due to its high average overseas expenditure, tendency to stay for long periods, and demand for a range of different experiences.

The Caribbean region is well known to U.S. tourists. In order of preference, U.S. tourists seek destinations with beaches, cultural heritage, unique-exotic, festivals and events, quietness, nightlife and entertainment, mountains, marine resources (diving, fishing, and wildlife), and eco-friendly.¹³

Americans preferred top ten activities

FIGURE 6 IDEAL CARIBBEAN DESTINATION



include eating out at restaurants, swimming, shopping, boating or sailing, visiting cultural and historical sites, diving or snorkeling, sunbathing, partying and nightlife, hiking, and photography. They also prefer to go on a family vacation or couples’ getaway for a full week (seven days) or a weekend getaway (3-4 days). U.S. tourists also prefer a family vacation experience with less crowds, relaxation, and wellness tourism.

Tourists’ perceptions of Saba’s offering and service delivery

Tourists from the United States and the Netherlands were asked about their satisfaction with several Caribbean destination attributes, performance in offerings, and service delivery. Additionally, tourists were asked to rank Caribbean destinations based on their satisfaction level. They were also asked to rate the factors influencing their destination selection choice. These queries facilitated the identification of travelers’ choice ranking order. The factors were safety, accessibility, culture, variety, quality, price, and infrastructure. As expected, tourists’ experience and satisfaction are not homogenous. That said, there are significant differences between tourists from the United States and those from the Netherlands. For example, on a scale of 1 not at all satisfied and 7 being highly satisfied, American

tourists revealed a higher satisfaction (mean = 5.00) level than Dutch tourists (mean = 4.80). Overall, American tourists disclosed a higher positive perception than their Dutch counterparts in Saba’s culture, infrastructure, price, and overall satisfaction.

Overall, Saba is below the other Caribbean
FIGURE 7 AMERICAN AND DUTCH SIMILAR PERCEPTIONS

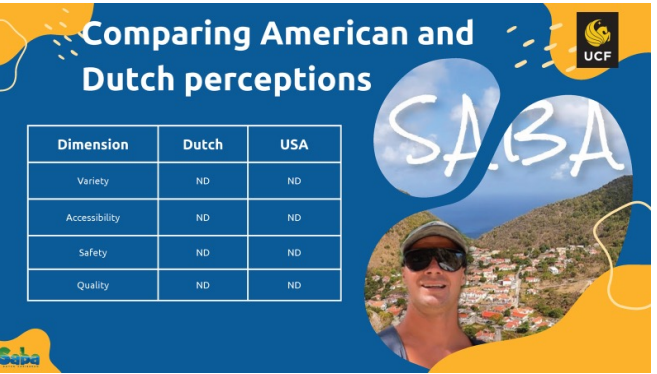
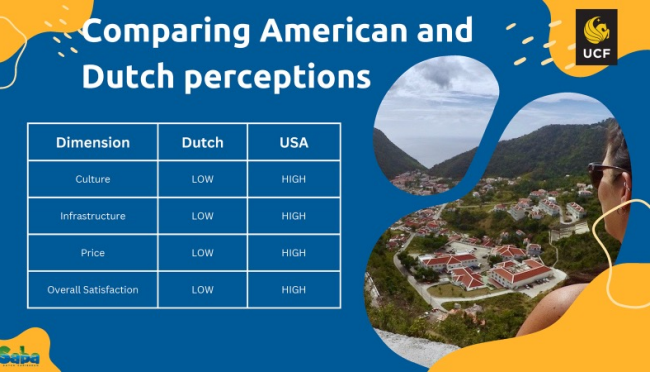


FIGURE 8 AMERICAN AND DUTCH DIFFERENT PERCEPTIONS



islands’ sample average (Satisfaction Index = 5.19). Saba’s competitive position concerns the quality of its service delivery and offerings. Competitiveness is measured by the satisfaction level across a list of attributes revealed in the previous figure. We asked respondents to mark their satisfaction level across a sample of destinations in the



"..THE DISTINCTIVE FACTORS AND PREFERENCES THAT DRIVE TRAVEL DEMAND TO SABA IS CRITICAL."

Photo Credits: Kai Wulf

FIGURE 9 SABA'S COMPETITIVE POSITION

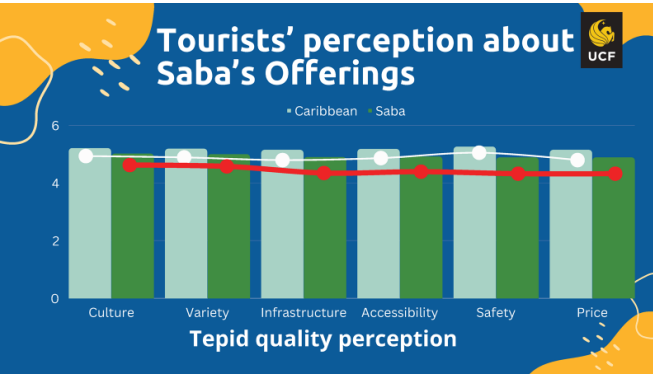


Caribbean region.¹⁴ Except for Aruba and St. Maarten, Saba has a similar satisfaction level to Curacao, Bonaire, and Statia. However, Saba’s competitive position regarding neighboring islands, such as St. Maarten, St. Kitts & Nevis, and St. Barth’s, is not strong. Saba was the least preferred island among destinations in the Caribbean according to the American respondents. The Figure below illustrates Saba’s competitive position in the Caribbean region.

This information called for a closer examination of tourists’ perceptions and feelings about Saba’s tourism product to assess the potential sources of Saba’s moderate tourism competitiveness performance. Saba consistently scored a lower perception across all the satisfaction attributes, including culture, variety of infrastructure, accessibility, safety, price,

and quality when compared to the other Caribbean islands. However, when the individual tourists were questioned on their level of satisfaction while staying in Saba, the tourists were highly satisfied with their hotel, restaurants, interactions with local people, and the attractions.¹⁵

FIGURE 10 COMPARISON CARIBBEAN DESTINATIONS SAMPLE AND SABA



14 These island destinations are sampled from the Caribbean Tourism Organization (CTO).
15 There is a disconnect between the tourists’ satisfaction evaluation process with ranking Saba low in the Caribbean but are actually satisfied with the product.



HOW MUCH DOES THE TOURIST SPEND?

The report also discloses the spending per tourist visiting Saba. Data for this report is from an exit survey administered by the island tourist office in collaboration with the local hospitality industry. The hospitality industry approached tourists staying in their hotels and queried how much they spent on items while on the island. The query also included length of stay, party size, and perceptions about quality and experience with the hospitality industry service delivery and offerings. The Tourism Office also surveyed tourists at the airport and visitors at the ferry terminal. Some caution is warranted on the results due to the small sample size. Nevertheless, the results provide a reasonably good approximation of the spending behavior, distribution, and impact on the local economy.

The average spending was \$1,167.63 per

person per trip, and the average expenditure per person per day was \$162.40. This spending amount is much lower than that estimated in the case of Bonaire. The spending in Saba is also much lower (61%) than what American tourists expressed they would spend (\$3,000) on a vacation in the Caribbean. The lower spending could be a result of price competitiveness, lack of a variety of offerings on the island, or local businesses requiring a cash transaction to purchase goods and services¹⁶. However, price is not the only factor that determines destination choice. Saba has other challenges highlighted in the next section.

If the airfare (\$380.21) is included, the total spending per person per trip equals \$1,547.84. The average length of stay was 7.19 nights, and the party size of 2.43. This spending is

¹⁶ Lack of POS systems for credit card transactions may discourage Americans who are highly dependent on credit card transactions from purchasing. Saban stakeholders are critical

FIGURE 11 TOURISM ECONOMIC IMPACT



much lower than what a tourist spends in Bonaire. This difference could result from the less diversified economy, tourism offering, and the underdeveloped hospitality industry in Saba.

The spending distribution reveals the accommodation sector (33.6%) as the largest recipient of tourist spending while on the island, followed by diving (16.7%) and restaurants and dining (15.9%). The total tourism economic impact is estimated. Direct tourist spending is \$10.1 million, while the one-day visitor direct spending is \$123,742.92.¹⁷ Thus, the total direct spending is approximately \$10.3 million. However, this figure only provides a partial

view of the scale of this economic activity. Because Saba lacks an economic production structure, Bonaire's economic production structure was used given the similarities in economic scale constraints. To give an idea of how this direct tourism economic activity cycles through the island's existing economy, the economic contribution was calculated. The total economic contribution using Bonaire's multiplier of 1.19 is \$12.2 million. Thus, the contribution is equal to about 24.3% of the island's economic output of \$50 million.¹⁸

of the inefficiency of the local banking system.

¹⁷ We estimated that the day visitor has the same spending distribution minus the accommodation costs.

¹⁸ The source for the island's economic output is CBS. See 4. CBS (2021). Trends in the Caribbean Netherlands, 2020. <https://longreads.cbs.nl/ticn2020/saba/>.

ARE SABANS WILLING AND ABLE TO DELIVER WHAT TOURISTS WANT AND NEED?

It is unclear if tourism development could unravel the struggle between the desire for change and the challenges and complexities faced by Sabans. The people seem ambivalent that tourism development could provide them with the economic resources and opportunities to make changes to better their lives. They do not seem to entertain a beneficial experience with tourism development. Fewer than 45% agree or completely agree with the statement, “I think that tourism has improved residents’ standard of living in Saba.”

They are unsure whether tourism development would support their social and cultural lives and can protect their environment. Fewer than 32% of respondents feel that tourism increases residents’

wellbeing through jobs and income. They do not positively perceive tourism development enhancing their standard of living. Similarly, about one out of three respondents said that tourism development benefited local entrepreneurship opportunities (33.9%) and greater job opportunities for women (35.1%), and about one out of four thinks that tourism development improves their community life (27.3%). And yet, 71.2% of respondents agreed or completely agreed with the statement that “The government should encourage further tourism development,” and 65.9% agreed or completely agreed with the statement, “I think my community should encourage tourism development.” Eight (81.8%) out of ten respondents agreed or completely agreed with the statement, “I welcome the presence of tourists in Saba.”

FIGURE 12 SABANS PERCEPTION OF TOURISM

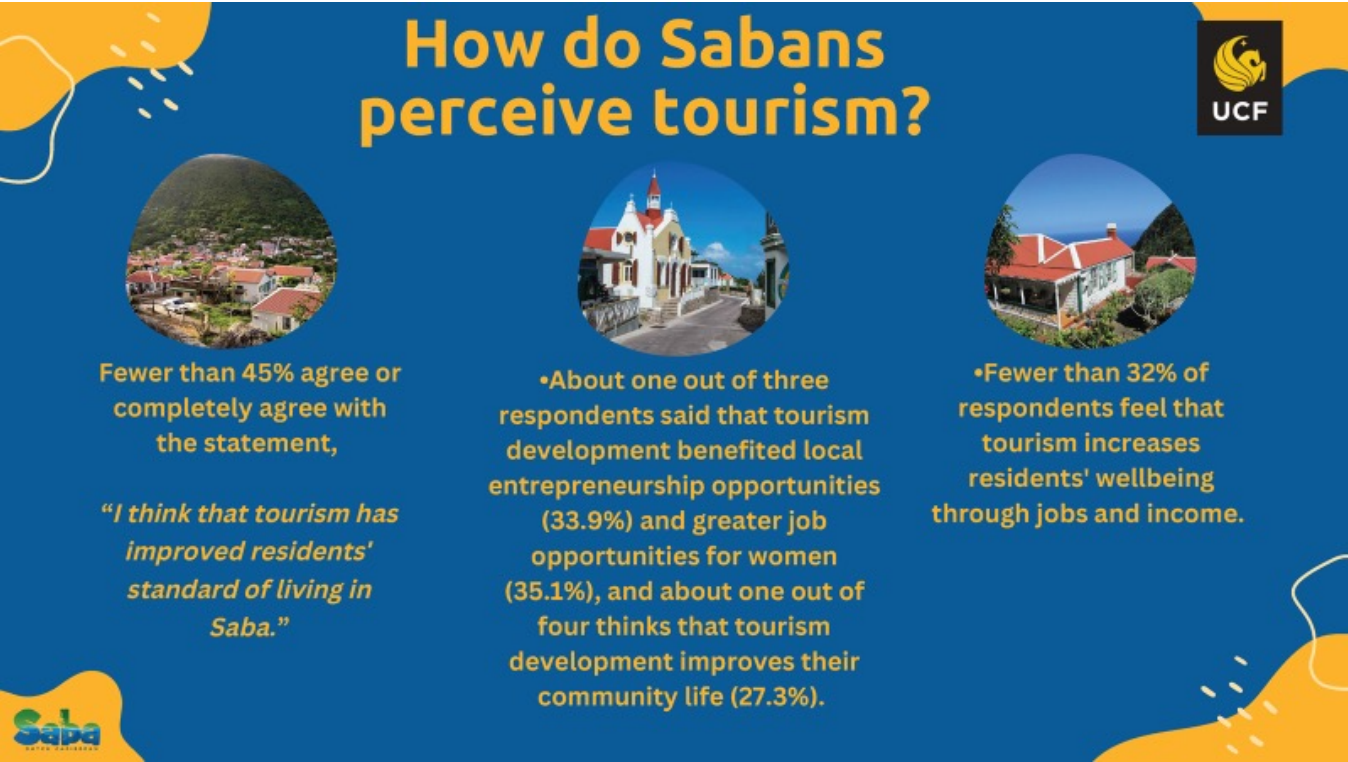


FIGURE 13 RESIDENTS SUPPORT FOR TOURISM DEVELOPMENT



FIGURE 14 DESIRE FOR MORE TOURISM DEVELOPMENT



A plausible reason why Sabans are skeptical about tourism’s potential to enhance wellbeing is due to their lack of awareness and participation in tourism plans. Only 12.2% agreed with the statement that “Residents are aware of tourism development plans in Saba.” Moreover, respondents were not excited about the tourism development pace. For example, only one in four (24.5%) respondents agreed or completely agreed with the statement, “I am satisfied with the current pace of tourism development.”

88.8% Disagree or completely disagree with the statement: **Residents are aware of tourism development plans in Saba.**

Respondents are either skeptical about tourism benefits or outright negative about tourism development externalities. For example, the Table below suggests that Sabans are lukewarm about tourism’s positive economic benefits while entertaining a negative feeling about tourism’s impacts on social, cultural, and environmental realms. Saban’s leadership supports tourism development as one of the two sources of economic activity to fuel growth.¹⁹ The disconnect between Saban leadership and residents about tourism development’s role and scale in the island’s economic vision could stifle initiatives to make tourism stronger, more competitive, and sustainable. Saban’s leadership vision to grow and foster cultural pride based on tourism faces challenges with respondents’ perceptions and feelings about what tourism can do to enhance their wellbeing and opportunities.

19 See Saba 2030.

Tourism holds great promise for Saba’s economic future	56.8%
Tourism has improved Saba’s economy	50.4%
There are better walking trails due to tourism development	58.9%
Tourism promotes an increase in resident wellbeing through jobs and income	31.7%
An increase in tourists will not create conflict between residents and tourists	39%
Tourism promotes authenticity in Saba	28.9%
Tourism development protects Saba’s environment	23%
Tourism development protects Saba’s coral reefs	28.1%

TABLE 1 AGREED OR COMPLETELY AGREED

THREATS TO THE TOURISM INDUSTRY

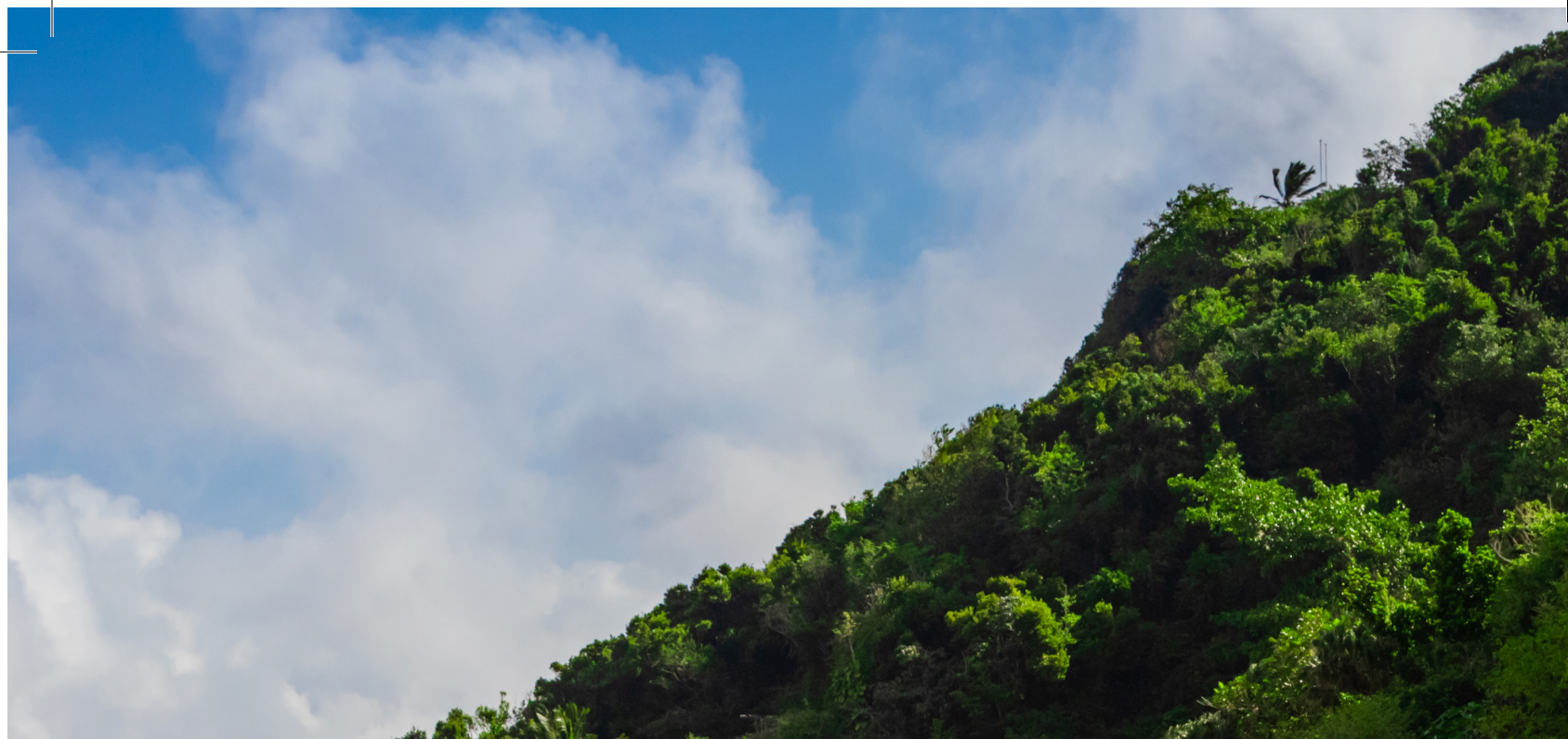
Throughout the research collection phase, Saban impressions were documented regarding the state of the tourism sector in Saba as well as identifying potential gaps and threats that need to be addressed to move the sector forward. The researchers conducted familiarization tours, site visits, interviews, community forums, inspections, and a formal literature review. Documents and data regarding Saba’s tourism development, planning, and marketing were not easy to retrieve. For example, the research team was informed that a 2011 Tourism Masterplan existed but was not able to retrieve the document for review during the data collection phase.

From the various modes of data collection, various themes were depicted regarding the challenges that Saba faces in the development of the tourism industry.

The themes include:

1. Cost of living and business operations in Saba
2. Lack of tourism product image
3. Lack of accessibility to the island
4. Lack of data to formulate strategic decisions²⁰
5. Lack of ability to monetize nature
6. Lack of infrastructure
7. Lack of financial resources to effectively promote the island
8. Lack of the traditional “good beach”

20 Lack of accessibility includes high airfare prices as well as seat availability. Local stakeholders also refer to weak internet connectivity.



Overall, these findings reference the threats and challenges facing Saba’s tourism industry. Qualitatively speaking these themes can be grouped into two categories.

1

FUNDAMENTAL BUSINESS CHALLENGES

The first group relates to **fundamental business challenges** within the tourism sector. These challenges were revealed through conversations with stakeholders as well as documented in the reports that were examined (e.g., high cost of doing business).

2

STRATEGIC TOURISM MANAGEMENT FRAMEWORK

The second group relates to a lack of **strategic tourism management framework**. These strategic challenges, for unknown reasons to the research representatives, have not been specifically addressed by stakeholders or documented in previous reports. For example, the lack of an institutional framework to hear the voice of hotels, or restaurants as well as issues pertaining to quality standards and performance benchmarks.

FUNDAMENTAL BUSINESS CHALLENGES

Accessibility

The fundamental business challenges that were repeatedly expressed amongst most tourism stakeholder meetings included: a lack of skilled labor and talents across all subsectors of the tourism industry; low quality product offerings and lack of a variety of activities; high business costs; lack of direction and opportunities in the tourism industry; lack of planning and policy implementation; lack of data availability to support sound decision-making; and the decline in tourist demand. Exacerbating the issue of declining tourist demand is an issue of limited accessibility to the island.

Accessibility was a consistent business challenge referenced by stakeholders. Stakeholders continuously expressed that it is both difficult to arrive and depart from the island. This is partially due to the island having the shortest commercial runway in the world, only 1,312 ft (about the height of the Empire State Building). The runway is flanked on one side by high hills and has cliffs that drop into the sea at both ends of the runway. The runway is closed to jet traffic. Because the airport is restricted, only regional airline propeller aircrafts (e.g., STOL-capable de Havilland Canada DHC-6 Twin Otter and BN-2 Islander) can land at Juancho E. Iraisquin Airport. The Twin Otter seat capacity is 16 passengers²¹. The ferry system to Saba helps to bring people to the island but has not been

as functional as the industry stakeholders had hoped.

The airport can accommodate a maximum of three Twin Otters at the same time. At present, the airport is losing money and would need 25 to 30 additional flights per month to breakeven. The island only has two flights per day by WinAir with the promise to increase to three daily flights in the high season starting in December. To increase tourist demand, Saba must gain an understanding of exactly where their international tourist markets exist. In other words, precise segmentation strategies must be used to identify existing and potential market segments.

Because of the restricted accessibility to Saba, roundtrip air tickets are expensive, and its dependency on St. Maarten as an airport hub is problematic. St. Maarten’s airport has had a slow recovery since the damage caused by hurricanes Irma and Maria in 2017. This slow recovery has impacted Saba arrivals. For example, previously WinAir had five daily flights from St. Maarten to Saba but post hurricanes the flights are down to two per day. Accessibility constraints (both by air and sea) have an impact on the cost of doing business in Saba as well as the overall cost of living for residents. For example, business stakeholders shared that a supply container shipped to Saba (assuming supplies arrive in decent quality), costs the business around US\$5,000²².

Skilled labor

21 The Twin Otter seat capacity is 19 passengers. However, due to weight and balance the plane carries 16 passengers.
22 Stakeholders were critical of the quality of goods they received after being shipped to the island. Often the produce was spoiled, and merchandise was lost in the transportation with no possibility to claim the insurance or to get reimbursed for the loss. Additionally, the cost of containers from the USA has significantly increased.

Most stakeholders (regardless of the tourism subsector they worked in) reference the daunting challenge of getting the right people with the right skills and competencies to fill vacancies in the tourism and hospitality industry. This challenge can be described as a human capital issue. Human capital is defined as a set of production skills, talent, and knowledge of individuals that is acquired through: education, scientific research, job training, professional experience, and continued professional development.

In general, the successful operation of tourism and hospitality firms depends upon the successful management of human capital, i.e., the ability of businesses to manage talented people who can create value within the consumption process of experiential products, like that of tourism. The value that is created must be something that visitors and tourists are willing to buy and if satisfied recommend to others. Consequently, a tourism industry that is struggling in the maintenance of its human capital is not optimally performing. Thus, resulting in significant opportunity costs resulting in increased costs of doing business (e.g., turnover rates and training).

A challenge for Saba in overcoming human capital issues is that the island has only one hospitality educational program (high school level). The high school hospitality curriculum covers vocational hospitality education with curriculum offerings that are restricted to a level three, which covers professional training. Currently, the program has minimal interest from students. The lack of student interest to enroll in the hospitality program may be attributed to the image that the hospitality industry is a low paying sector, which is

available for less talented students. During interviews, hospitality stakeholders expressed some critical observations about the high school hospitality program. For example, the program does not seem to be aligned with what the industry needs, and



students are not insured. This means that if the students break something (e.g., plate or glass) or has an accident at work, the student is required to pay for damages. Additionally, Saba consists of mostly small businesses. This is the hallmark of Saba’s tourism industry, which for many is viewed as part of Saba’s

Island charm. However, small businesses lack the time and resources to mentor student interns. The lack of time results in less mentorship and training for the student interns, which impacts the overall quality of the workforce entering the industry. What is clear is the lack of a pipeline that provides

a career pathway and career advancement opportunities running from the high school hospitality program to the industry. Stakeholders shared that training opportunities are mostly nonexistent thereby hindering the quality of service delivery that

tourists receive. As well as that it seems that employees/managers were not leveraging creativity to improve and build new innovative offerings for tourists. For example, one manager explained that tourists visiting the island come with expectation levels that most local tourism businesses cannot meet due to constrained resources, accessibility, and human capital issues. Note, the delivery of innovative tourism offerings does not always entail the development of new attractions/sites. It is possible to develop innovative tourism offerings via the bundling of products and developing unique and niche service delivery methods that have minimal associated costs.

Similarly, stakeholders expressed concern regarding the lack of quality and variety of tourism offerings on the island due to supply constraints. For example, the overall hotel sector has a low occupancy rate (some hoteliers believe that the average occupancy rate is around 40%) and hotels are losing money; however, there are some accommodations that have high occupancy rates. This discrepancy in occupancy rates is an example of an inconsistent product offering in the accommodations sector. From an overall perspective, there are limited tourism offerings, limited product developments, and most facilities seem barely able to keep up with the high cost of doing business in Saba, especially with high utility costs. Supply constraints affect business performance which combined with tourism seasonality seems a rampant cause of harm to hospitality firm’s business performance on Saba.

Marketing Saba & lack of data

In conversations with business owners and managers a shared perception was revealed that the public sector seems to be lacking support or interest for tourism development as illustrated with low or no budget for tourism marketing, lack of policies, regulations, and enforcement of policies. In other words, the private sector blames the public sector for the deficient performance of the tourism sector. This lack of support hampers the ability to coordinate efforts between the public and private sectors to move the industry forward. This coordination is required to expedite any socio-economic recovery. The economy seems to be functioning at full capacity with only 2.8% unemployment. Yet, even in this low unemployment situation, the economy does not seem capable of accommodating the existing hospitality businesses with enough customers. This inability appears in the real economy which has only grown modestly by 0.9% on average per year.²³

In addition to funding instability from the public sector is the lack of research-driven tourism business choices. The Saba Tourism Bureau (STB) does not have business intelligence data, the STB does not possess the resources to keep track of the performance of relevant stakeholders, and no one seems to rely on the quality of information that could be provided by the Office of Statistics. Additionally, the CBS data does not provide an in-depth examination of data that would provide evidence-based decision making. Understanding the motivation, demand factors, and behavioral intentions of tourists are critically important in the development and sustainability of a destination. Unfortunately, even rudimentary

public data about these issues seems lacking in the context of Saba.

Lack of strategic tourism management framework

Lack of vision and data

Five tourism management framework gaps were identified via stakeholder conversations as well as enlisted within the documents that were reviewed. The first main gap was the lack of direction for tourism development and tourism’s role in the socio-economic development of the island. During most interviews, the following question was asked, “How would you like to see the island ten years from now?”

Respondents did not have a cohesive vision for the direction the island should take to arrive at some form of future progress for the tourism industry. Some respondents did not embrace change. In part, the lack of cohesive direction may be due to the non-existence of a tourist demand focus that considers the integration with the available supply. Stakeholders discussed and complained about supply constraints and service quality delivery on the island, lack of budget, market orientation, and the lack of data to practice well founded decisions. Overall, residents expressed experience revolved around broken or unfulfilled promises, false perceptions, views, and calculations²⁴ . Empirically, it is demonstrated that there is a perception gap between stakeholders and tourists due to the lack of systematically asking tourists about their tastes and preferences as well as their needs and wants. To be fair, conversations with stakeholders included generic market niches such as:

23 The 8th Sustainable Development Goal (SDG) of the United Nations encourages sustained economic growth.
24 According to the Quality of Life Survey.



Photo Credits: Chad Nuttall



diving, yachting, eco-tourism (e.g., trails) but these segments are relatively saturated throughout the region. Tourist data collection for both actual and potential tourists from target markets is limited. A data set does not exist that references Saba's tourists' tastes and preferences. Therefore, any reference to international standards that represent the needs and wants of tourist market segments that could then be reflected through the enhancement of the existing Saba's tourism products are missing.

Lack of institutional framework

The second main gap is the absence of an institutional framework that brings stakeholders together in a structured and organized way to discuss tourism development, planning, policies, and implementation. The industry is not only exceedingly small but is also scattered with multiple perspectives and perceptions without the opportunity to channel these in a systematic way to support development, planning, and implementation. Some of the industry's professional associations seem stagnant while others are non-existent (e.g., hotel or restaurant association)²⁵. Professional associations, particularly in confined economies, are helpful for stakeholders

to organize efforts that lend themselves towards generating and supporting innovative business ideas that create memorable tourist experiences. Associations also provide a foundational framework to support destination resilience.

Businesses cannot articulate and communicate in one voice due to the lack of institutional opportunities. There is a Chamber of Commerce that has existed for 30 years, yet several business informants perceive the Chamber's work as inadequate. This institutional absence and void hinders the policy and decision-making environment. This unhealthy situation prevents stakeholders from working together towards an effective positioning of the island's tourism product and an island image that underpins it.

Lack of destination management & marketing

The third gap pertains to the lack of a business mindset in managing the overall destination. For example, stakeholders were not aware of how to assess the optimal performance of the destination. There were no benchmarks or metrics in place to constantly assess the destination's performance. If benchmarks did exist, they should center

on the ratio acquisition costs-spending per international arrival, the productivity of spending per visitor, marketing effectiveness and efficiency, and the required marketing budget accommodation profitability.

The STB currently allocates only US\$140,000 to hard marketing dollars, which seems willfully inadequate. However, in addition to those marketing funds the government provided additional funding to mitigate the COVID impact. According to the 2023 budget, the STB office will receive additional marketing dollars for 2023. However, future annual budgets remain unclear, which causes uncertainty in the planning process. Additionally, to use Aruba as a benchmark in this respect, the island of Aruba gives 60% of its tourism budget to hard marketing dollars. Indeed, any level of destination competitiveness and sustainability is grounded on productivity levels and includes human agency, tourist satisfaction, and efforts to enhance the quality of life for island residents. Developing frameworks that can measure each of these variables separately and collectively is of utmost importance for the future of tourism development on the island. And, in general, the island should create an institutional knowledge of how to assess performance, which is even more critical in a resource-poor environment.

Lack of knowledge

The fourth main gap is the lack of knowledge regarding the factors driving tourism demand to Saba. Saba's topography has advantages and disadvantages that impact the tourism industry. For example, the topography

provides a unique opportunity to offer tourists exclusive exploration opportunities and landscapes for celebratory events. However, a disadvantage of the same topography is that it also creates accessibility challenges and substantially increases construction costs.

While Saba's hotel inventory seems at the lower end of the spectrum in terms of the quality star standards, its high GDP per capita exceeds the international benchmark of US\$15,000. Thus, clearly pushing the island as a high-end destination that in actuality is low end in quality.²⁶ It was shared that the island will soon have 35 new hotel rooms as part of its accommodation inventory, the quality of service delivery of these hotel rooms is unclear. What is clear is that Saba's tourism environment, which is characterized by high business costs, is not favorable for a lower-end destination such as Saba.

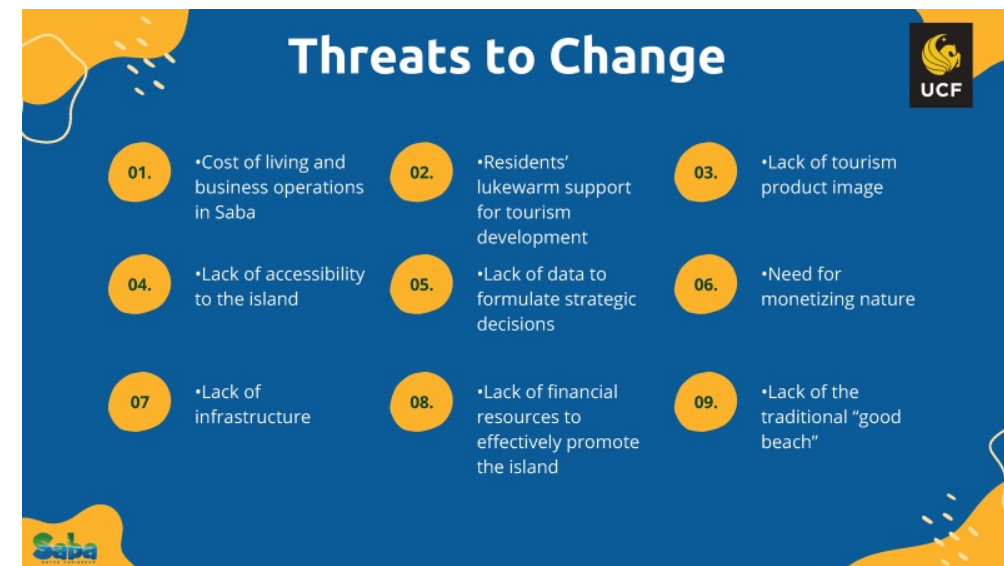
Monetizing nature

The final gap is related to understanding how to extract more revenue from nature (eco-tourism). At present, the diving tourist pays three dollars to dive in the marine park, and US\$1 nature fee per night stay. These charges are willfully too little to dive one of the world's best reefs and pay only ten dollars as airport tax. For example, neighboring Statia charges US\$6 per dive and US\$30 per year to dive. Statia also has an optional US\$10 trail fee. One of the main challenges of any eco-destination is how to determine the charge for tourists who consume the beauty and scenery of the natural landscape. Tourists are mesmerized by the beauty of Saba. However, that consumption of Saba's natural

²⁶ The definition of destinations' quality is based on two typical measures: the presence of 4-5 star hotels and the GDP per capita level. An IMF study defined a low-end destination as having less than 30% of its hotel inventory being 4-5 star hotels and a GDP per capita of less than US\$15,000.00.

²⁵ Those committees that were formed in the past (hotel and tourism) did not enjoy the longevity of committee organization.

FIGURE 15 THREATS TO TOURISM DEVELOPMENT



landscape is free of charge for tourists, yet the quality level is among the best in the world. For example, there is no charge to the Mount Scenery Park unless it's a guided hike, according to the Saba Conservation Foundation. The destination is under-leveraging the incredible natural beauty and value of Saba. That said, there was no other charge for the consumption of the majestically and mystical Saban landscape unless tourists pay for a guided hike.

What is the exact value of the natural landscape? A direct and systematic conversation with tourists can provide the destination with more realistic price points that tourists are willing to pay, which can provide more sustainable economic value

to the destination. A survey that measured the tourists' willingness to pay for nature revealed that tourists are willing to pay US\$1,848.24 during a five-night stay, which is twice as much as the estimated daily spending of US\$162.40.²⁷ This means that Saba is underleveraging its tourism product by US\$208.00 per day, which is a huge opportunity cost of nearly US\$13 million per year. Not only is the Saba tourism product under leveraged but the banking infrastructure limits the tourists' ability to spend more money. Critical attention must be dedicated to providing tourists with the opportunity to swipe credit cards. This means it requires Saba to move away from cash dependent business transactions.

27 The willingness to pay (WTP) estimate is derived from survey results that sampled Americans. The data was analyzed as a double-bounded WTP question using Double Bounded Dichotolous (Doubleb) command in Stata (Lopez-Feldman, 2010). Respondents who answered "maybe" on the survey were coded as "no". The mean WTP is \$1,848.24. The statistical procedure also provides an estimate of the error term (U) in the equation [WTP = XB + U]. Running a Montecarlo simulation with 1,000 runs using the WTP equation to include the error term allows us to get a more subtle view of WTP. The distribution of WTP is censored at zero (i.e., we do not consider negative WTP) and is skewed with a long tail. See Alejandro Lopez-Feldman (2010). DOUBLEB: Stata module to compute Contingent Valuation using Double-Bounded Dichotomous Choice. Statistical Software Components S457168, Boston College Department of Economics, revised 14 Oct 2013.

OPPORTUNITIES FOR TOURISM DEVELOPMENT

While Sabans are critical about tourism development and the authenticity of the tourism experience, tourists believe that Saba is very authentic. However, only 28.9% of Saban respondents feel that tourism promotes authenticity. Authenticity has a tourist mean score of 6.18 on a seven-point Likert scale on the question, "Overall, how satisfied were you with the authenticity of Saba's culture?" Similarly, tourists were highly impressed (mean = 6.08) with the interaction with the local people. Tourist respondents seem to look for opportunities to immerse themselves in the local culture and environments.

Authenticity is a powerful means to attract tourists and an important factor for travel choice. Tourists want to experience authentic local lifestyles, customs, and culture. The next figure offers a glimpse into the U.S tourists' vacation preferences in the future. These

preferences suggest that culture, uniqueness, exclusiveness, quietness, mountain scenery and marine resources could promote Saba's attractiveness based on its authenticity and culture.

The list below also provides opportunities for specific product development. The U.S. respondents rated their preferences for types of activities when in the Caribbean. Beaches are the hallmark of the Caribbean image in the American tourists' mind. While Saba does not have the beaches of other Caribbean islands, the types of activities indicated as preferential clearly suggest there are opportunities available for Saban suppliers. Of the top ten activities, Saban suppliers could bundle either all or combinations of eating out at restaurants, swimming, boating and sailing, visiting historical sites, diving and snorkeling, photography, hiking, and wildlife watching.

FIGURE 16 FUTURE VACATION PREFERENCE IN THE CARIBBEAN



FIGURE 17 OPPORTUNITIES FOR TOURISM DEVELOPMENT



There are two things missing when bundling these activities. The first issue connects price to activities other than diving and eating out at restaurants. The second issue relates to the lack of available “stories”. The island has beautiful scenery and place but there is no story to enlighten and excite tourists about Saba’s heritage. For example, tourists may wonder why all the homes look the same or why there are family cemeteries in the home gardens but there is limited access to information for the tourists. Using the voices of the people who can tell about Saba’s popular attractions, local hangouts, and cultural iconic spots is a great way to create something special and unique about the tourist experience. In essence, a themed

tourist experience that tells and teaches tourists about Saba’s heritage and culture through a local person’s eyes is needed.

Mindfulness about preferred vacation experience type requires understanding the ambience type required to attract tourists. For example, when bundling and offering these activities that are preferred vacation experiences, it is essential to theme these experiences

according to tourists’ preferences. The survey results reveal that among U.S. tourists their first preference is to indulge in a relaxed and wellness experience.

A relaxed and wellness experience could include wellness spa, a focused food philosophy, upgraded hotel facilities, retreats, transforming or healing on a spiritual, emotional, physical, energy, and social level, with a result-oriented approach. Of course, this product development approach entails low crowds, which fits perfectly with the preferred vacation experience revealed in the next table.

Moreover, low crowds and low density of tourism also seem what Sabans want for tourism development in the future. For example, only 40% of respondents reported that they would like to have more tourists, 33.6% revealed that would like to have more tourism development, 37.6% indicated that they want more infrastructure development on the island, and 45.2% suggested that they would like more cultural activities

(e.g., festivals and events). We also queried U.S. tourists about their motivation to buy Saba as a destination. The choice of destination for tourists has been regarded as a decisive factor influencing the competitiveness and life cycle of destinations.

FIGURE 19 PREFERRED TOURISM EXPERIENCE



Knowledge of people’s travel motivations and its association with destination selection plays a critical role in predicting future travel patterns. Understanding motivation is critical in the destination management and planning process and marketing orientation.

However, nearly four (39%) out of ten tourist respondents indicate that they would visit Saba. About 60% of respondents indicate that they would prefer to have convenient air flights to the Caribbean and the traditional Caribbean beach. This puts Saba at a disadvantage with these travelers. However, there is still a relatively large group indicating that they would travel to Saba irrespective of cost or beach.

Tourists’ motivation to select Saba as their destination choice is relaxation and unplugging, wellness, culture, Mount Scenery, and diving.²⁸ The identified traveler motivations to select Saba provides an opportunity to profile potential tourists and

28 Visitors had six options for the purpose of their visit to Saba, including diving (20.4%), hiking (18.8%), visiting friends and family (17.6%), business (17.7%), Medical students (5.5%), and other (20.1%). See EHAS Systems Statistics, Part 1, May 1st 2021 to May 1st, 2022.

FIGURE 20 SABA’S COMPETITIVE POSITION IN THE CARIBBEAN



create a product portfolio that encompasses a tourism product that will attract the tourist seeking a tranquil, eco-active escape infused with cultural experiences. Moreover, it also provides opportunities for business product development and community base tourism. For example, according to the information that tourists shared, unplugging and wellness can be combined with spa businesses or volcano trekking and wildlife watching.

TABLE 2
TOP 5 REASONS TO BUY SABA AS A DESTINATION

1. Relax and unplug
2. Gastronomy, local traditions, arts & crafts
3. Focus on personal care and wellness
4. Trekking the largest volcano in the Caribbean
5. Unique diving



TOURISM DEVELOPMENT AS THE WAY FORWARD

The main purpose of tourism development is to improve the attractiveness of Saba and by improving Saba’s attractiveness, the ultimate objective is to increase the quality of life of the people. To achieve this objective, a community approach must be used that enables partnerships amongst the public and private sectors and the community. A community approach should follow the guidelines below:

1. Community must be an integral part in the planning and management of tourism activities.

2. Destination managers must ensure an authentic experience for the traveler. For example, tourists indicated that they did not want to be in overcrowded touristic locations and tourists expressed wanting to experience something new and unique within the community.
3. Experiences are designed in partnership with the public and private sectors as well as the community where everyone benefits from the financial inclusion and the reinforcement of Saban cultural heritage.²⁹

29 The latter aligns with the Vision Saba 2030.

In following a community-based approach, tourism development can provide the following:

- 1. Diverse employment opportunities
- 2. Opportunities for innovative small-scale business operations
- 3. Support for the promotion of cultural authenticity and natural resources
- 4. Support for infrastructure-related development and maintenance

The importance of this community-based approach and adhering to the guidelines to achieve the potential benefits of tourism is because it aligns to the people’s desires and Saba Vision 2030. Given the small size of Saba (i.e., scale constraints) to achieve the benefits of tourism the community and public and private sectors must work together and coordinate efforts.

Tourism development supports the creation of social and economic opportunities. The latter means making the economy more productive via enlarging business opportunities and making businesses stronger with more economic linkages throughout the island. While social opportunities and activities mean providing more social amenities that residents can enjoy such as recreational and wellness facilities as well as entertainment-based activities. For example, activities that align to people’s interests, hobbies, worldviews, or passions (i.e., arts and crafts, festivals, music, industry conferences, nightlife, sports, scavenger hunts, weddings, and more). An expanded albeit limited tourism development

could invigorate the small but nascent “orange economy”³⁰, which includes design, architecture, music, arts and craft and festivals. Information and communications technology provide an opportunity to capitalize on these creative assets. These opportunities are also embedded in the Vision Saba 2030.



30 Orange economy, also referred to as a creative economy, is a production model where goods and services have value because they are the product ideas and expertise of their creators. In other words, it refers to all businesses rooted in creativity involving things like art, culture, heritage, science, etc.

THE SABA VISITOR APPROACH

The voices of the Saban people resonate with a small amount of tourism development and growth in international arrivals. Two out of three Sabans expressed the desire for limited tourism and physical infrastructural growth. While this is a critical consideration in determining the number of additional international arrivals to Saba, other factors such as the viability of the airport and the profitability of the hotel sector are important too. This is because these two sectors are critical to support Saba’s tourism industry. The airport pertains to the accessibility of the island for tourists and the hotel industry is the largest economic contributor to the tourism economic value.

Current data on the airport and hotel occupancy rates reveal the following. The airport operates below a break-even point. For the airport to break-even an additional 25 flights per month, or 360 monthly arrivals. Currently the estimated WinAir load factor is around 62%. It behooves Saba to ensure that WinAir’s load factor increases substantially (around 80% following international aviation standards) assuming conditions remain the same before introducing the third flight. The increase in 2023 based on a load factor of 70% means an additional 997 passengers. According to the visitor resident’s distribution, the total additional international arrivals is 697.³¹ In 2024, based on a 78% load factor

means an additional 934 passengers of which 654 would be international arrivals. The third flight per day would increase the passenger flow, based on 50% load factor in the first year, to an additional 2,920 with 2,044 international visitors. By 2026, the figures would be 4,088 passengers (70% load factor) and 2,852 international visitors, while in 2027 they would increase to 4,380 passengers (75% load factor) and 3,066 international visitors.

As for the hotel industry, hotels are operating at a relatively low profitability level. The average occupancy rate is approximately 29% and is considered low.³² If 2.5 persons stay per room with an average stay of 7 days and 50% of international arrivals stay in hotels, then the new occupancy rate would increase from 29% to 46%. However, if 60% of international arrivals stay in hotels, the occupancy would increase to nearly 55%. The increase is an improvement, but still low compared to regional occupancy rates. The island has an overcapacity in hotel rooms following the current tourists’ accommodation preference visiting the island.³³

The direct economic impact of the additional international arrivals is \$11.7 million with a total economic impact of \$13.9 million.³⁴ The additional economic impact implies that tourism’s portion of the economy could increase to nearly 40% of the total economic



Photo Credits: Laura Grifer

implies setting up an escrow account of about US\$400,000 annually. The increase in tourist spending per day to US\$180.00 more than compensates for the potential escrow account costs.

Currently, Saba has an average of 189 visitors per week. This equates to approximately one visitor per every five Sabans. The additional annual arrivals would mean an additional average of 369 people per week. This equates to one visitor for every three working Saban residents. The proposed increase in annual international arrivals results in a doubling of international visitors per week.

Acquiring these additional visitors to Saba will help increase demand for hotels, airport, and other businesses. However, the priority focus is to gain quality over quantity, which means tourism and hospitality businesses must invest not only in updating the hard infrastructure but also in improving the soft infrastructure

in service delivery. The Tourism Office should approach the hotels as a priority to discuss how to enhance their facilities, offerings and service delivery. Hotels are critical in establishing a quality image and branding for Saba.

To acquire these visitors, it is important to provide a socio demographic profile of who these visitors are and what is motivating them

activities from 24% in 2021.³⁵ However, to realize these economic estimates based on the increase in WinAir’s load factor and the introduction of a third daily flight no later than 2025 presumes that residents would increase their flying frequency to complete the intended load factor. This presumption, however, is not realistic. The government should reach an agreement with the airline company for load factor securitization, which

³⁵ The increase of the tourism share in the economy assumes that international arrivals (tourists and day trippers) would increase by 20% annually, spending would increase by 5% annually, and the economy would increase by 1% annually in the next five years. The annual GDP growth follows this historic trend (see page 27).

³¹ A twin otter plane has 18 seats assuming a load factor of 80%.
³² The estimated hotel occupancy is based on the estimation from the EHAS visitors’ data. The estimate of 29% is average hotel occupancy, which means occupancy rates will fluctuate during peak and low demand seasons.
³³ There are enough international arrivals visiting Saba to warrant a higher hotel occupancy rate. However, that would require a displacement from private homes to hotels.
³⁴ These figures assume the same spending behavior as previous years, which is a conservative assumption.

to travel to Saba. While the financial benefits of the additional tourists are important, it is critical that the community approach and its guidelines are used to ensure public, private, and community partnerships that provide authentic tourist experiences. Authentic experiences ensure inclusiveness and will strengthen cultural pride on the island. Critical to maintaining the island’s authenticity is the maintenance and sustenance of the local-style cottage accommodation with traditional architectural style.

Based on the research and interviews we suggest that Saba pursues niche marketing that centers on the following lifestyle characteristics of the Saba visitor:

- 1. **The Authentic Experienter** - cares about sustainability, the community, culture and the local experience
- 2. **The Active Experienter** – wants to be outside, desires a healthy lifestyle, diving and hiking, mindful living

3. **The Nostalgic Experienter** - visiting friends and family

The first two profiles are supported by the American and Dutch markets while the third profile may be acquired from other Dutch Caribbean islands. For example, the Nostalgic Experienter could be attracted by an activities portfolio that includes festivals and events unique to Saba, including Saba Day, Lobster Festival, Wahoo Festival and Summer Fest. Moreover, Saba could enhance its duo branded program with Statia supporting the Makana Ferry connection between St. Maarten, Saba, Statia, and St. Kitts. It is necessary to improve the current harbor site facilities to enhance the ferry passengers’ experience, including providing overhang shade, taxis, and timely F&B services. The facilities are not adequate for any cruise or yachting development.

The marketing tagline should encompass the spirit of an unspoiled, authentic, unplugged island where the Saba tourism product feels as though it is created “just for you.”

FIGURE 21 THREE POTENTIAL MARKET NICHES



Photo Credits: Chad Nuttall

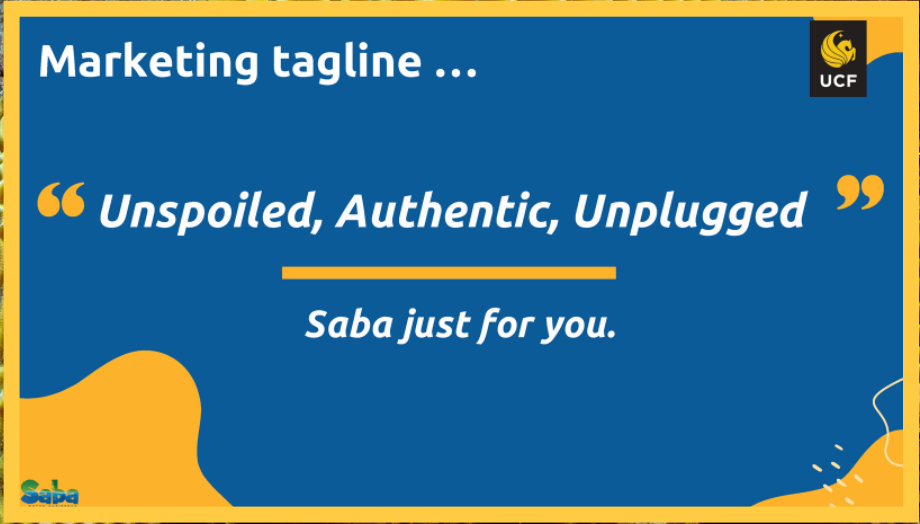


FIGURE 22 POTENTIAL MARKETING TAGLINE



STRATEGIC ACTION PRIORITIES

The strategic action priorities are the recommended directions or actions to continue a path for sustainable destination development. In other words, these priorities provide Saba's destination managers with the actions that will need to be taken to acquire the additional visitors previously mentioned. The priorities are as follows:

1) Accessibility

The focus on accessibility is to increase airlift and ferry transportation to the island. The voices of the people and the residents' quality of life suggests that any expansion of tourism development on the island should consider questions about the appropriate number of visitors. The current numbers of visitors are inadequate to support Saban aspirations. The approximations employed to suggest an increase in visitors were the financial viability

of the airport, business profitability, residents', and diversification of income sources.

The plan envisions an increase to 19,181 international visitors during the next five years. This increase means 9,629 new international visitors, of which 8,415 are tourists, while 1,154 are day trippers. These assumptions suggest an additional increase of 2,765 visitors by air, and 1,252 by ferry during five years. The other objective is to increase the average hotel occupancy from 29% to 53% in five years. The increase will be gradual considering the existing human capabilities and the desire for limited tourism development expansion.

The sourcing of these visitors should primarily come from the U.S., the Dutch Caribbean, and the Netherlands. These markets underscore the three tourists' profiles previously identified, i.e., the Authentic Experienter,

the Active Experienter, and the Nostalgic Experienter. To keep the acquisition costs as low as possible, the Tourism Office should aggressively use social media, information through friends and relatives, and word of mouth to drive repeat visitation. The use of social media and information technology communication in general provides more distribution channels and increases interaction with and between stakeholders.

The government should immediately begin negotiation with the airline(s) and ferry to secure the required airlift and connectivity to Saba. For this purpose, the government should set up an escrow amount of at least US\$400,000.00 per year to support the required airlift and consider continuing with the financial support of the ferry transportation link.

2) Financial resources

The focus of financial resources pertains to the budget for the tourism office and monetizing natural resources. The Tourism Office will consist of six people including the director. The Tourism Office will need a budget of approximately US\$500,000.00 annually, of which US\$300,000.00 would be allocated for marketing purposes and US\$200,000.00 to support the other tasks of the Office. The marketing budget is based on US\$25 per acquisition head cost and accruing 60% of the total Tourism Office budget.

To cover the budget expenses, the report recommends an entry charge to Saba of US\$50.00 per visit for every international visitor like Bonaire. The entry fee is in lieu of the room tax and the one dollar per night nature fee. The entry fee also covers hiking and trails and nature sightseeing on the island. In addition, there is a \$25.00 nature fee for every visitor's stay on the island. The administration processing of the entry and nature fees will follow a similar model to that of Bonaire.

The benefit of the one time and one point entry fee charge is the opportunity to prospect and profile niche markets to support evidence-based marketing and promotion, while the additional benefit of the new nature fee charge system would lower operational costs of small businesses on the island.

The third priority task of the Tourism Office is to begin immediately with an island-wide awareness campaign to garner residents' support for tourism development. People in Saba have little faith that tourism can make a positive difference in their life. They receive little to no information on the benefits of tourism or the plans for tourism development. The Tourism Office must develop an educational outreach program to residents

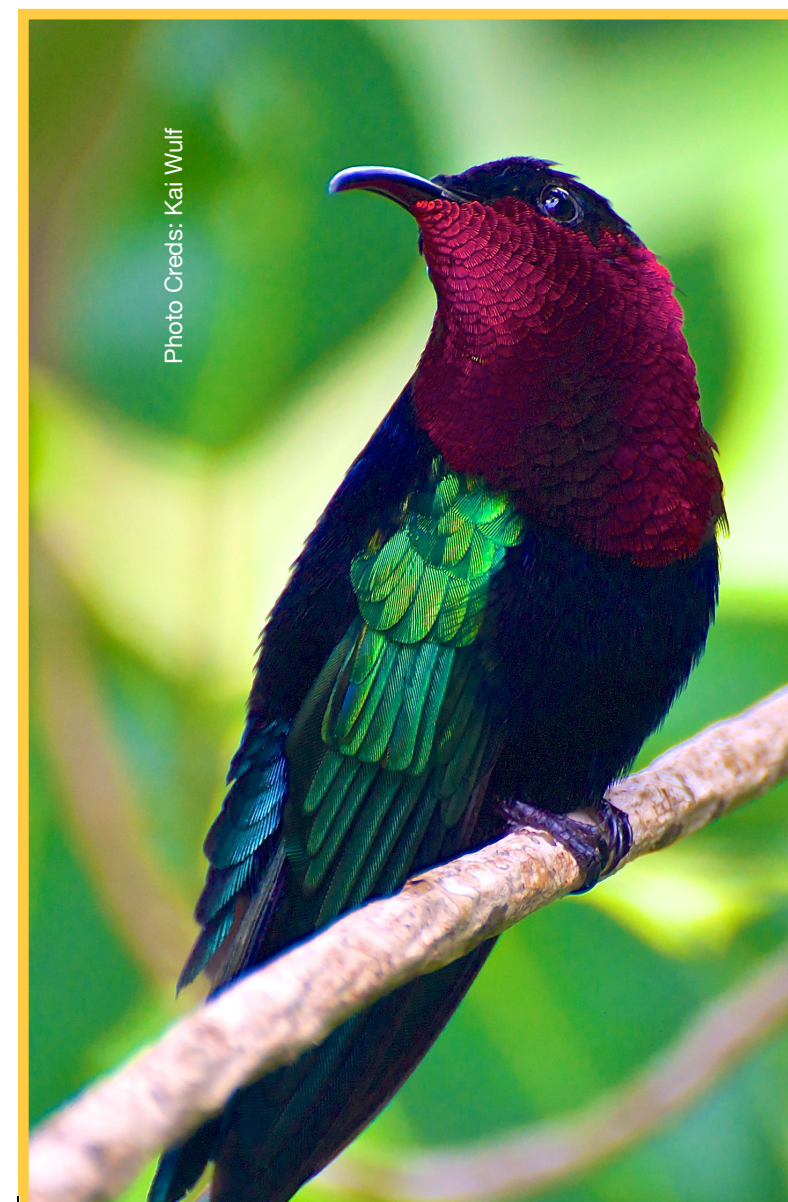


Photo Credits: Kai Wulf

to promote and educate people on the benefits of tourism. Additionally, local people must feel an inclusive process in tourism development and should be included in the production process of the tourism product. The awareness program could use a tagline that says:

***TOURISM IS
GOING TO MAKE A
DIFFERENCE FOR
YOU.***

To track progress and success and to stay accountable to stakeholders, the Tourism Office should perform the following tasks:

- Assess economic performance: spending behavior, bookings, overnights, prices, occupancy, and sales.
- Investigate tourists’ behavior: search terms, page views, conversation rates, stay duration, source countries, age, gender, transportation, and purpose of visit.
- Evaluate tourists’ satisfaction and perception: brand awareness and visibility, knowledge of destination, information sources, destination value areas, activities, attractions, services, and social interaction, experience during visit.
- Evaluate residents’ satisfaction: economic, social, cultural, and environmental impact, tourism development support.

The Tourism Office must endeavor to pursue and adopt innovative low-cost marketing

strategies and promotional efforts to keep Saba’s tourist acquisitional cost low. This will require the Tourism Office to engage in partnerships between the private and public sectors. Further, the Tourism Office will need to develop collaborative marketing efforts with neighboring small islands to promote the island network to visitors and tourists. Finally, opportunities are available to develop digital marketing and communications.

3) Improve collaboration amongst stakeholders-institutional governance structure.

The focus of improving collaboration amongst stakeholders pertains to the purpose, role and scope of the Tourism Office. The Office should convene in a coordinated effort to spearhead, develop and implement several destination initiatives, such as festivals, marketing initiatives, and infrastructural and service delivery improvements, aiming to improve the tourists’/visitors’ experience and inject vibrancy in community life. In order to improve the tourists’/visitors’ experience critical attention should be dedicated towards developing infrastructure to support the tourism industry (e.g., credit card swiping opportunities).

The Office will be assisted by an advisory board of seven people including stakeholders from nature, the hospitality industry, diving, community, NGOs, and the business community. The advisory board will meet at least four times a year or as many times as is required to achieve tourism goals. The board and director will meet twice a year with the Commissioner of Tourism or as many times as is required to achieve tourism goals. The board will assist the director in the sales and marketing plan, allocation of resources to support tourism activities, coordinate events and trade shows to profile the island abroad and identify prospective niche markets.

Moreover, the recommended institutional framework will also assist the director of the Tourism Office in the role of coordination with other government agencies in setting up policies and regulations pertaining to land-use planning and environmental control, zoning, building regulations, taxation, ownership, education and training, and investment incentives. The latter involves reducing capital and operating costs and minimizing market friction when engaging in tourism product development. Critical attention should be paid to streamlining the banking system to support the tourism industry.

Finally, the board should assist the director to formulate the bylaws that should govern the institutional framework between the Tourism Office, the Tourism Commissioner, the board, government agencies, and other community organizations as well as the scope of functions and responsibilities of each. The scope of functions and responsibilities must involve tourism demand and revenue management, as well as supply and cost management.

The first task to carry out is the charging of the advisory board. In addition, actions are needed to boost tourism promotion, simplify regulation, build hospitality infrastructure, and rationalize taxes, which in turn incite companies to invest, innovate and stimulate demand. This public-private sector collaboration should be strongly advanced within and between all tourism stakeholders – as it will help build resilience and recovery across the island’s economy.

4) Building capacities for product development

Building capacities pertains to the necessary training for product development. The Tourism Office together with the island division of education should prepare training programs

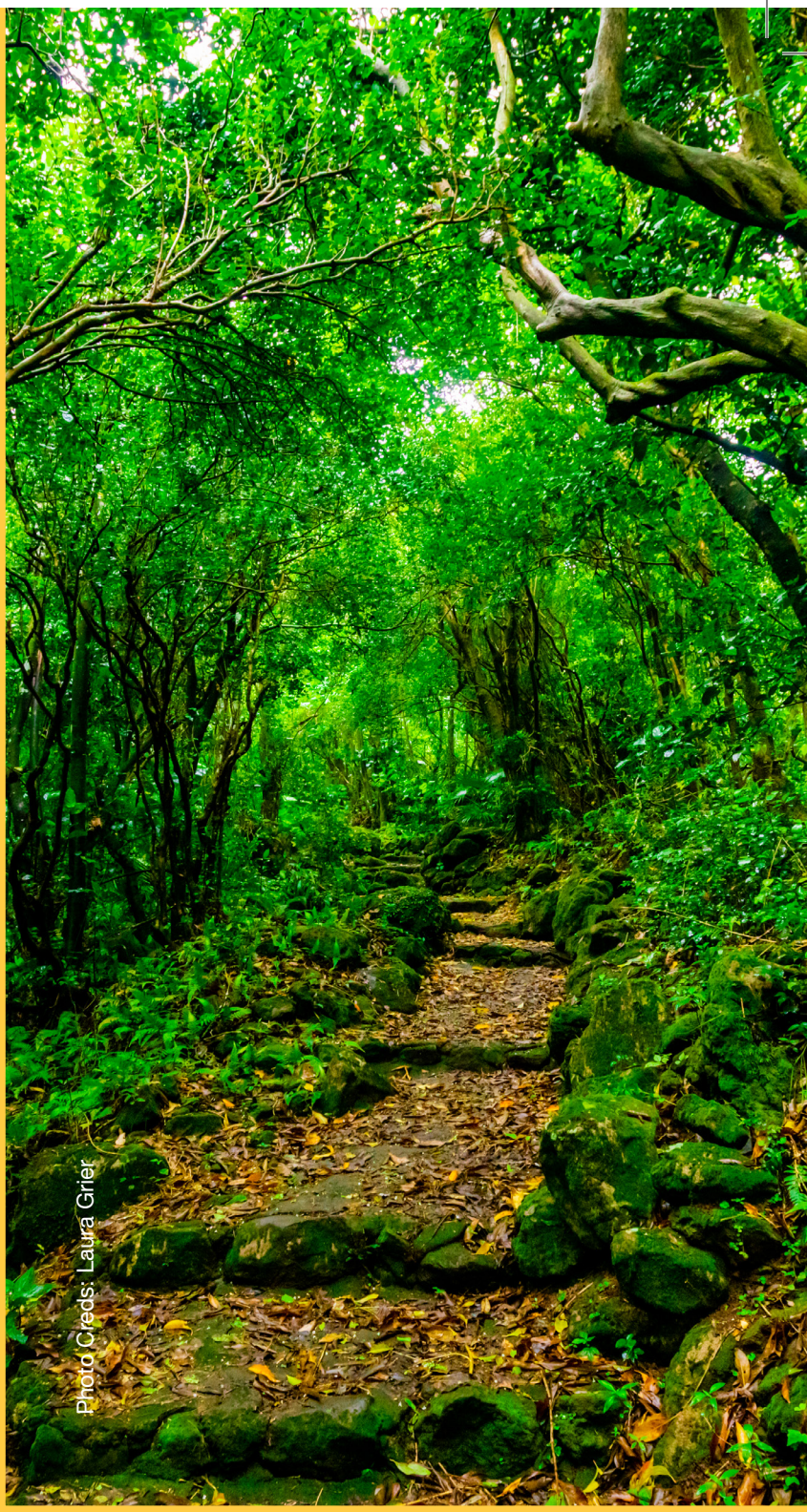


Photo Credits: Laura Grier

aiming to enhance the business capabilities of the tourism sector. The training programs could follow the directives of the UNDP (United Nations Development Program) The Future Tourism Business Adaptation Program e-Guides. The required capabilities are in translating business intelligence to support business and product development.

These programs should center on

understanding how to match niche profiles with offerings and services. Moreover, these programs should cover finance understanding and knowledge in a business context and utilize user-friendly digital and marketing technologies to revitalize and adapt business performance to the new market conditions. Moreover, the Tourism Office together with the educational division of the island should compile and curate educational resources from trusted sources to support business development.

A second action priority is strengthening the capacity of managers (from government, NGOs, and the private sector) to assess, design, implement, and evaluate workforce development programs in the tourism sector. This priority pays attention to the workforce/ employee readiness and preparedness to provide a superior tourism experience. Tourism is

fertile ground for growing opportunity, developing skills, contributing to economic growth, and connecting with other people—all characteristics of positive workforce development objectives. A special focus is on the development of programs that provide employment opportunities to youth. A third action

priority is to assess the tourism demand for workforce skills, assess the capabilities of education and training providers to meet industry demand skills, assess the attitude and perceptions of the workforce towards tourism employment and career, especially among the youth. This workforce assessment facilitates the design of education and management training programs. Finally, a fourth action priority is to beautify, maintain, and enhance infrastructure for tourism development. For

example, at the harbor providing visitors with an overhang for shade.

5) Increase the economic value of tourism competitiveness

The tourism sector should enhance its competitiveness through delivery of quality offerings and services. One way is through rebranding of Saba as an unplugged and nature lover’s island. Another way is to focus on intersectoral integration and business collaboration and to mobilize resources for tourism. Business collaboration involves bundling activities, services, and offerings to extract higher prices for these products. There is room for price increases if the tourists can perceive and experience value. All new offerings should include and demonstrate the economic value of environmental and cultural heritage conservation and authenticity of the island and its people.

The tourism institutional framework should provide the right incentives throughout the value chain to promote sustainability and demonstrate that policies promoting sustainable and inclusive growth should be business friendly but are necessary. For such policies to be successful in the long run, businesses must be inspired to adopt them as a leading principle of their commercial activities, and they must create value for both the wider society and the businesses that serve it.

To create and support tourism economic value, priority should be given to economic sustainability (financial sustainability of businesses), visitor sustainability (exceeding expectations and memorable experiences of visitors), sustainable host community (welcoming, friendly, and supportive community for tourism development), and environmentally sustainable tourism (leading role in protecting and enhancing the environment on which it depends, for the

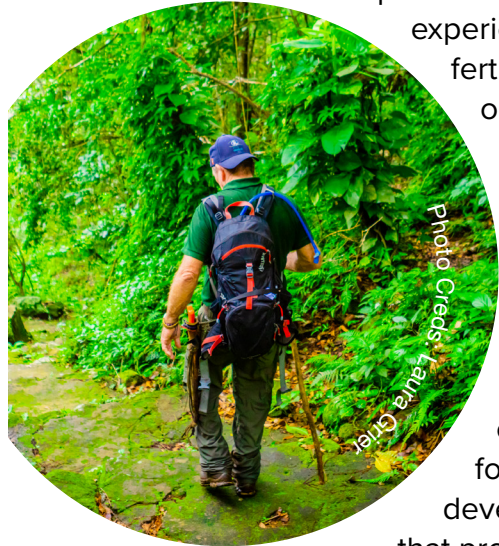


FIGURE 23 FIVE STRATEGIC DIRECTIONS

benefit of future generations). Increasing the economic value of tourism competitiveness pertains to quality product offerings and enhanced tourist experience and getting higher spending visitors. These priorities center on the value of experiences that enrich visitors while highlighting the Saban aspiration to protect, restore and champion the island’s natural resources, culture, and historic heritage, and improve the Saban lives. They provide cultural pride, create greater awareness of the natural environment and its economic value, a sense of ownership, and reduced vulnerability through diversification of income sources.

Each priority will reveal objectives, strategies, tactics, tasks, timeline, outcome, and process. This approach will make the direction clear

that the destination will take in the next five years. The tourism activity monitoring consists of economic metrics (arrivals and receipts) and tourism value in its contribution to societal goals including the preservation of heritage, and benefits to the community.

The action plan highlights considerable thinking, resources, and efforts that went into the report to capture the economic and societal value of tourism and Saban aspirations. The action plan attracts tourists who want a slower pace with comforts along the way, and who cherish meaningful experiences. It is about providing an experience that drives repeat business and positive word of mouth.

***TOURISM DEVELOPMENT SUPPORTS THE
CREATION OF SOCIAL AND ECONOMIC
OPPORTUNITIES.***



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