

BUSINESS PLAN



Portland Bight Discovery Centre (PBDC)



August 2018

TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
THE COMPANY	13
COMPANY OVERVIEW	12
MANAGEMENT TEAM.....	13
MISSION STATEMENT	14
LOCATION & FACILITIES	13
APPLICANT GROUP & BENEFICIARIES	14
PRODUCT & SERVICES	16
FUTURE PRODUCTS & SERVICES.....	20
COMPETITION.....	21
TARGET MARKET	25
MARKET OVERVIEW.....	25
MARKET NEEDS.....	27
MARKET TRENDS	27
MARKET GROWTH	29
INDUSTRY ANALYSIS	29
MARKET DEMAND ANALYSIS	30
TOUR GUIDING.....	33
CONCLUSIONS & RECOMMENDATIONS FOR C-CAM.....	33
KEY CUSTOMERS.....	34
RELEVANCE OF THE PROPOSED INVESTMENT.....	37
STRATEGY & IMPLEMENTATION	38
MARKETING STRATEGY	38
SWOT ANALYSIS.....	44
COMPETITIVE EDGE	45
RISK ANALYSIS & CONTINGENCY PLAN	46
MARKETING ACTIVITIES.....	48
MARKETING BUDGET	51
SALES ACTIVITIES	52
STRATEGIC ALLIANCES	52
FINANCIAL PLAN	53
PERSONNEL PLAN	53

PROFIT & LOSS STATEMENT.....53

KEY METRICS FOR SUCCESS..... 55

SENSITIVITY ANALYSIS.....56

OPERATING EXPENSES 56

ENVIRONMENTAL & REGULATORY ANALYSIS..... 57

RECOMMENDATIONS FOR THE FUTURE.....63

REFERENCES..... 63

EXECUTIVE SUMMARY

Caribbean Coastal Area Management (C-CAM) is a limited liability company established to promote coastal conservation in Jamaica. C-CAM Eco Tours is the registered name for the operation of C-CAM's tourism activities. Their mission is to promote sustainable development of the Portland Bight Protected Area (PBPA) and Pedro through stakeholder participation in the implementation and management of programmes and projects. This includes executing livelihood enhancement activities for stakeholders as well as establishing a sustainable financing programme for C-CAM.

C-CAM is pursuing a community ecotourism approach in the development of its tourism programme in central PBPA, specifically the Portland Bight Discovery Centre (PBDC) in Salt River, Clarendon. C-CAM understands the importance of ecotourism as both an environmental sustainability effort and an economic development venture and intends to adhere to the definition of this form of tourism as proposed by The International Ecotourism Society / TIES (2017) :

“Responsible travel to natural areas which conserves the environment, improves the welfare of the local people and involves interpretation and education”

With this premise, C-CAM Eco Tours will be offering ecotourism experience from the newly constructed PBDC which consists of a three-story building containing an audio-visual room, kids activity space, display space, observation deck, gift shop, snack bar and office. The PBDC will offer interpretative services to increase awareness of the biodiversity and geospatial realm of the area, therefore adding educational value to the centre.

There will be complimentary activities. The PBDC facility will also offer recreational activities to enhance the experiences to be had by visitors by way of a dipping pond mainly for children to see small aquatic creatures, a turtle pond, a covered outside kiosk where children can participate in educational activities, a boardwalk through the wetlands and a bird hide for bird watchers. A plant nursery will also be further developed, primarily for the preservation of endemic plant life from the area and offering seedlings for sale. The PBDC's product and service offerings in the short to medium term will include tours of the main building, the boardwalk and boat tours, as well as access to the other amenities. Complementing the facility will be a 160 meters boardwalk in the wetlands with a dock area for river tours up and down the river.

Aside from education, adventure and enjoying nature, visitors to the PBDC will enjoy recreational facilities and experience the culture of the community through their participation as well as complimentary products. In summary, the PBDC will be positioned as an ecotourism attraction, providing educational, cultural and recreational experiences and hence, will be marketed as an “experiential learning eco-attraction” within a community-tourism setting. Currently, the PBDC has little direct competition as it offers a unique combination of recreational and educational activities. Jamaica's two zoos (in Kingston and St. Elizabeth) and the Black River Safari Tour are considered indirect competitors.

C-CAM's current visitors are comprised mainly of teachers and students from various local educational institutions, ranging from basic schools to universities, who come mostly for a boat

tour. With the new facilities, PBDC's product offerings are expected to appeal to a variety of market segments, including those seeking leisure and recreation, educational, nature, heritage and adventure experiences. It is expected that those seeking educational experiences (students and teachers) will continue to be the largest target segment for the PBDC. However, with the start-up of the business and the expansion of its product offerings, PBDC intends to broaden its target market to include tour companies, local private sector, church and civic groups, as well as foreign students, researchers, teachers and other foreign visitors. PBDC's target market will therefore include both local and foreign visitors looking for an experience of Jamaica's natural environment.

There are financial opportunities for the PBDC as the products being offered are unique and very much differentiated when compared to other attractions. The company will achieve revenue of approximately J\$13M in the first year based on the projected number of 6000 visitors (including students, adults and persons for boat tours). The plan projects a 15 percent increase in revenue annually (without grant funding) to an accumulated increase of 60 percent by year 5. The projection shows that by year 5, Net Profit is projected to be approximately J\$3.67M with a Net Profit Ratio of 15.8 percent.

This business plan is an update of a previous one developed in collaboration with C-CAM in 2015 using the Jamaica Social Investment Fund (JSIF) business plan template. This business plan has taken into consideration the strategies, guidelines and principles outlined in the National Community Tourism Policy and Strategy developed by the Ministry of Tourism (MOT). The main goals outlined in the policy are as follows:

- Facilitation of an internationally competitive and robust community tourism sector;
- Support for local communities and appropriate entrepreneurs and NGOs in local communities to develop export market ready, sustainable community tourism experiences;
- Promotion of community tourism that is consistent with, and does not compromise, national policies for resource protection, cultural integrity, and community governance;
- Support for community tourism that creates the conditions to advance national policies and generate social, cultural, economic, and environmental benefits for local communities.

The plan has also taken into consideration the three pillars of sustainable tourism development; economic, social and environmental as well as the two premises of eco-tourism; environmental sustainability and economic development.

PBDC's Business Objectives

These are to:

- Generate awareness and visits to the attraction;
- Achieve profitability in under three years;
- Encourage resident participation in the PBDC business as well as members of the PBPA community;

- Improve the livelihoods of residents through community and cottage industry initiatives; Conserve the biodiversity and ensure that wildlife such as the mangroves and other natural resources are not harassed and depleted;
- Encourage responsible action on the part of the visitors;
- Use the stakeholder approach (individuals, communities, eco tourists, tour operators and government institutions) in the planning, development, implementation and monitoring phases. Limit group sizes and the number of groups daily based on carrying capacity;
- Hire local people and buy supplies locally, where possible; Train local people to offer the various services and experiences as well as interpretation of scientific or natural history and Respect the privacy and culture of local people.

Keys to Success

The keys to success are as follows:

- Offering a high quality recreational and educational tourism product to meet the needs of visitors;
- Successfully executing an effective marketing campaign to generate awareness and visits to the PBDC facilities.
- Securing the cooperation and support of the community, educational institutions, relevant tour operators, and other travel partners;
- Maintenance of the overall environment ensuring the safety and satisfaction of visitors.
- Having a community –based Management Board Establishing a Portland Bight Tourism Council constituting stakeholder/resource user group which will serve in an advisory capacity
- Having a “Friend of the PBDC” group comprising of internal community members and other stakeholders to promote the PBDC through publicity and provide support.
- Establishing a social media group to be responsible for providing updated and current data to this sect of users.

Table 1: Executive Summary Key Points

EXECUTIVE SUMMARY	KEY POINTS
Applicant's Group Name and Description of the Business' Direct Beneficiaries	
1.1 Applicant's group name:	Caribbean Coastal Area Management (C-CAM) Foundation
1.2 Direct employee/applicant group beneficiaries:	12 including tour guides who will be on roster as needed plus one volunteer
1.3 Direct customer beneficiaries:	An estimate of over 150 families to be direct beneficiaries
1.4 Name and location of the proposed business:	
Name:	Portland Bight Discovery Centre (PBDC)
Location:	Salt River, Clarendon
Actual Postal Address	Bustamante Blvd, P.O. Box 33, Lionel Town, Clarendon
2.0 Products : Goods & Services	
2.1 Core goods & services to be offered to create an ecotourism experience for the visitor.	Interpretive Visitor Centre with interpretative boards, observation deck, audio visual room and kids activity space with turtle pond, dipping pond, plant nursery, boardwalks through the wetlands leading to dock area for river tours as well as to bird hide for bird watchers.
2.2 Supporting goods & services to be offered to create an ecotourism experience for the visitor.	<p>Snack bar/ gift shop inside and a covered outside gazebo where children can participate in educational activities or persons can host events.</p> <p>Branded Portland Bight Protected Area (PBPA) memorabilia (gift items), water and local confectionaries</p> <p>Eco-label will be used to show that the PBPA brand to which the products and services are identified are environmentally recognized</p>
2.3 Augmented product	<p>Quality customer service</p> <p>Well trained and informed tour guides who will provide ecological,</p>

	<p>historical and cultural information to the guests.</p> <p>The tour guides are being selected from the surrounding community and to date several persons have been trained to carry out this role.</p>
2.4 Goods and services available from the community.	<p>To encourage the following :</p> <p>Cottage Industry to include craft work, honey and products made from honey e.g. honey soap (Training to be ascertained through C-CAM)</p> <p>Bed and Breakfast accommodation</p> <p>Food and beverage services: Juices and other products made from locally grown produce to include mango, ackee and breadfruit</p> <p>Fruit trees and vegetable garden cultivations to be named and to accommodate sampling of fruits and vegetables</p> <p>Cultural and Religious Practices : Hoosay by the Indian community Johnkanoo by the African community</p> <p>Special church and school services and events</p>
2.5 Other resources in the community that can be added to the experience of the visitors	<p>The Salt River mineral has been leased from SCJ Holdings by the Clarendon Municipal Corporation and they have plans to develop and market the facility. The nearby Welcome Beach is a registered fishing beach which is also used for recreational activities that the fisher folk in the area want to develop and manage.</p>
2.6 Involvement of adjoining communities in the PBPA	<p>Adjoining communities such as Mitchell Town and Portland Cottage can be involved by providing the PBDC with local craft, food and beverage items as well as tour guides.</p>
3.0 Target Market	
3.1 Target Market for the PBDC and boat ride and tours	<p>(i) Educational institutions (basic schools to universities) -64%</p> <p>(ii) Other Adults -12%</p> <p>(iii) Boat Rides /Tours - 24%</p>
3.2 Main reason/s for visiting the PBDC	<ul style="list-style-type: none"> ✓ Education ✓ Recreation ✓ To enjoy nature
3.3 Visitors' attitudes toward the boat ride and tours in the PBPA.	<p>They :</p> <ul style="list-style-type: none"> ➤ Generally enjoy the boat ride and tours in the PBPA

	<ul style="list-style-type: none"> ➤ Learn from the experiences and information gathered ➤ Tend to be repeat visitors
3.5 Future target market for the PBDC.	<p>Persons / groups seeking leisure and recreation, educational, nature, heritage, adventure and fishing experiences to include :</p> <ul style="list-style-type: none"> (i) Regional and international educational sector (researchers, students, instructors), (ii) Local residents, (iii) Tourists to hotels especially the Sandals Resorts International who embrace responsible tourism can be targeted to take their visitors on scheduled tours to the area (iv) Churches, other interest groups)
4.0 Competitive Analysis	
4.1 Direct competitor to the PBDC.	<p>PBDC has little direct competition as it offers a unique combination of recreational and educational activities.</p> <p>Indirect competitors are: The Jamaica Zoo in St. Elizabeth, Hope Zoo in Kingston and the Black River Safari Tour in St. Elizabeth. Welcome Beach and the Salt River Mineral Spa are two other local attractions in close proximity.</p>
4.2 Direct competition to the intended food and beverage and gift shop services	Local small shops, restaurants and vendors in the community
4.3 Strategies for managing the competition	<p>Community members will be included in the enterprise through the provision of local craft items, natural juices and food items.</p> <p>This will be controlled through the C-CAM.</p> <p>Training will be facilitated and encouraged by C-CAM.</p>
5.0 Technology / Utility Services	
5.1 Data base to capture visitors' attitudes toward the PBDC	<p>The PBDC will collect data on visitors (demographics and attitude towards the product) as well as track their visits to the attraction.</p> <p>This will be useful in planning to meet visitor needs, improve the</p>

	offerings and communicating updates.
5.2 Technology (e.g., machinery or equipment) to be utilised by the PBDC (inclusive of carrying out promotion activities)?	
5.3 Internet access for the PBDC	Internet service is required for on-line booking and on-site payment via bank transaction cards. The main internet providers are not in the area, therefore cellular telephone is the only realistic option.
5.4 Other form of communication access for the PBDC	Telephone services : Cellular telephone will be used in addition to landline telephone services when made available by the providers
5.5 Access to potable water supply	<p>Currently, there is no potable water supply, however the Government is planning to put that in place by 2019</p> <p>In the interim, the following will be used :</p> <ul style="list-style-type: none"> ▸ Trucked water, bottled water and treated water from spring ▸ Rainwater harvest system/Salt Spring for flushing toilets and washing hands ▸ Grey water from sewage treatment, Rainwater harvest (see below) Salt River Spring for nursery. <p>The latter three (3) sources will be used continuously, as a means of conservation.</p>
Access to electricity	Renewable solar energy by way of solar panels/batteries will be in place with a backup generator.
6.0 Human Resources	
6.1 Training or technical assistance needs	The staff will be trained in other areas such as lifeguarding, community awareness as well as CPR & First Aid.
6.2 Training already done	Business training for C-CAM administrative staff focusing mainly on marketing and social media methods have been done to ensure the success of the business.

	Tour Guide, Team Jamaica Certification, Coxswain, boat handling, lifeguard (still need to be certified) fire safety, Cardiopulmonary Resuscitation (CPR), & First Aid, customer service, social media and Marketing – boot camp
6.3 (i) How many positions will be in place on the Organisation Structure? (ii) Name them in order of hierarchy (if possible)	PBDC Manager, PBDC Security/ gardener, Finance Officer of C-CAM, Executive Director of C-CAM, Science Officer of C-CAM, Tour guides (staff and community) (on roster as needed), Interns/community volunteers
6.4 Training of community members	<p>Community members have already participated in Fire safety, CPR, First Aid, lifeguard, tour guide and Team Jamaica training.</p> <p>They will be included in future training as funding allows. Individuals from adjoining communities such as Mitchell Town and Portland Cottage will be included in the future training plans to ensure a pool of trained human resources.</p>
7.0 Funding	
7.1 (i) Relevant funds / funding agencies (ii) Estimated amount of financing for this venture.	<p>Funding to date: Various sources which was used towards construction, training, interpretation material, signage, landscaping, staff support to move towards full operationalization</p> <p>Support – property which is leased from SCJ Holdings and current administrative cost is assumed by C-CAM</p> <p>Funding Sources : Alcoa Foundation Critical Ecosystems Partnership Fund CCCCC with support from KFW Global Environment Facility Small Grants Programme Custos of Clarendon Food for the Poor Jamaica Social Investment Fund Sugar Transformation Unit Seacology</p>

7.2 Use of funds	<ul style="list-style-type: none"> ‣ Equipment : (electrical engines for boats), office equipment and furnishings, office supplies; ‣ Marketing activities: marketing consultants, marketing campaign and material / collateral; promotional activities (advertising etc.); ‣ Social media consultants ‣ Insurance: Public Liability and facilities ‣ Signage (interpretive and directional) ‣ Business training and development ‣ Other business start-up expenses <ul style="list-style-type: none"> -Interpretation consultants -Develop nursery -Infrastructural development – main and other buildings, board walks etc.
7.3 Financial self-sustainability	The business will achieve financial self-sustainability by year three (Refer to Financial Analysis)
8.0 Pricing	
8.1 Pricing strategy Indicate those suggested	<ul style="list-style-type: none"> ○ Individual ○ Group Discounts ○ Packaging of activities ○ Loss leader (lowest possible price)/ initial pricing mechanism at start-up
8.2 Cost for current visitors to the C-CAM tours.	<p>J\$1500.00 : Infant to Secondary High school students</p> <p>J\$3000.00 : Tertiary students</p> <p>\$3000.00 : boat rides /tour for students.</p> <p>\$4000.00 : other adults</p> <p>All other tours are priced based on objectives of group.</p>
8.3 Mode of payment	<ul style="list-style-type: none"> ○ Onsite payment mode: <ul style="list-style-type: none"> ▪ Credit Card (requires internet source) ▪ Mobile ATM Cellular / Cell Phone Swipe Card Credit / Debit/ ATM Card (Refer to Appendix 3) ○ Company / Business Cheque (This is to be collected/ deposited to PBDC bank account prior the visit / tour) ○ Managers Cheque (To be paid prior to the visit / tour) ○ Electronic Payment via Bank Transfer (This is to be done prior the visit/ tour) ○ Lodgment to Bank Account (This is to be done prior the visit

	/ tour) <ul style="list-style-type: none"> ○ Through Tour Operator and other Intermediaries <p>*NB: For security purpose:</p> <ul style="list-style-type: none"> (i) The tendering of cash will not be facilitated (ii) Personal cheques will not be accepted
9.0 Promotion	
9.1 Promotion strategies	<ul style="list-style-type: none"> ○ Digital channels : website, social media platforms and travel media ○ Public relations campaign ○ Leveraging C-CAM strategic partners ○ Traditional advertising : Print and electronic media, outdoor signs and billboards; magazines, fliers and brochures ○ Word of mouth publicity
10.0 Accessibility	
10.1 Accessibility by road	<ul style="list-style-type: none"> ○ The new highways will provide easy access to the PBDC ○ The roadway from the main town to the South, Lionel Town was recently renovated. ○ The main thoroughfare from the capital, May Pen to Salt River, was repaired a few years ago and is in relatively good condition. ○ Sections of the roadway from Dawkins Pen through to Salt River have now been repaired.
10.2 Accessible by public transportation	<ul style="list-style-type: none"> ○ There is no public bus service to the area. ○ Public passenger taxis are available from Lionel Town through Mitchell Town or from May Pen to Freetown and then through to Salt River.
11.0 Potential Impacts of the PBDC	
11.1 Main Potential Negative Environmental Impacts	<ul style="list-style-type: none"> ○ Carbon foot prints from the increased number of persons visiting the area and touring the river, beaches and cays. ○ Subsequent increase in the production of solid waste. ○ Natural hazards such as heavy rains, flooding, drought and hurricane can impact the operations of the PBDC.
11.2 Main Potential Economic Impacts	<ul style="list-style-type: none"> ○ Financial viability largely depends on the economic environment in Jamaica. The PBDC will be economically

	<p>sustained as Jamaica is poised for economic growth and the tourism industry itself has shown growth trajectory over the past five years. This growth is expected to continue.</p> <ul style="list-style-type: none"> ○ Items sold at the gift shop and café can contribute to the revenue of the PBDC ○ The PBDC is expected to contribute to the livelihood of residents by way of the establishment of cottage industries to include craft making, food and beverage services, honey and honey derived products as well as direct (tour guide) and indirect employment (boat tours, community activities) . ○ Possible increase in the number of residents who would have purchased lands/lots, built, houses built and the corresponding construction work will cumulatively provide financial outcomes and multiplier effects in the area.
11.3 Main Potential Social Impacts	<ul style="list-style-type: none"> ○ Improved standard of living for residents from training and employment opportunities. ○ Increased tourism activity is likely to attract new residents to the area which can result in squatting and informal settlements. ○ Increased need for housing, utility, water and garbage collection and disposal system resulting from the increase in local population.
11.4 Main Cultural Impacts	<ul style="list-style-type: none"> ○ The local culture will be expressed through the sale of traditional items in the gift shop. ○ The visitors will have an appreciation of the local culture through their engagement with the community. ○ Some community members may not be welcoming of visitors into their community.
12.0 Operations	
12.1 Opening time / hours/ days	<p>Initially: Open three (3) days per week, with pre-scheduled tours</p> <p>Medium Term :</p> <ul style="list-style-type: none"> ○ Open five (5) days per week with pre-scheduled tours ○ Open on weekends for special groups / events through reservation ○ Open on public holidays where necessary so as not to exceed the carrying capacity of the area.
12.2 Operating Structure	Refer to Company Overview

11.0 Business Financing	
12.1 Reason why the business is worth financing and implementing	<p>PBDC is worth financing as it is a unique eco attraction on Jamaica's South Coast. This eco-friendly attraction supports the development plan that has been established for the South Coast. It is a vital educational, recreational and geospatial attraction, located only an hour away from Kingston, the capital of Jamaica and is connected to the resort areas in Jamaica (Montego Bay, Trelawny, Ocho Rios and Port Maria) by way of the Edward Seaga Highway (North/South Highway).</p> <p>The business is a unique offering of community ecotourism which provides economic development within an environmental sustainability framework. There is no direct competition to the PBDC and its authentic bio-system.</p> <p>The business will be managed by experienced and qualified personnel.</p> <p>The financial analysis shows that the business is financially viable. By year three, the PBDC will be making profit.</p> <p>The business will be able to exploit the growing demand for eco-tourism products worldwide through social media in addition to the local demand from schools and universities.</p>

THE COMPANY

COMPANY OVERVIEW

C-CAM was established in 1997 and registered as a limited liability company in 1998 to promote coastal conservation in Jamaica. C-CAM Eco Tours is the registered name for the operation of the tourism activities. Their mission is to promote sustainable development of the Portland Bight Protected Area (PBPA) through stakeholder participation in the implementation and management of programmes and projects. This includes executing livelihood enhancement activities for stakeholders as well establishing a sustainable financing programme for C-CAM.

MANAGEMENT TEAM

C-CAM is managed by a team all qualified in their areas of responsibility. Because of budgetary constraints, some of the positions are part-time contracts and some positions are voluntary. The following is the C-CAM Board of Directors:

- Dr. Thera Edwards, chairperson: Dr. Edwards is a forester and is currently employed as a Map Curator, Geography Department at the University of the West Indies, Mona
- Dr. Karl Aiken (fisheries biologist/lecturer): Dr. Aiken is a senior lecturer in the Department of Life Sciences at the University of the West Indies, Mona and is a fisheries expert
- Mr. Krishna Desai: Mr. Desai is an attorney-at-law and partner working with a local law firm

- The operation of C-CAM is carried out by the following team members:
 - Ingrid Parchment, Executive Director, Project Manager
 - Donovan Brandon Hay, Science Officer / PBPA Fish Sanctuary Manager
 - Audrey Fowling Bennett, Finance Officer/Office Manager
 - Angeli Williams, PBDC Manager/Community Development Officer
 - Moya Black, Administrative Assistant
 - Sonnet Morgan, Project Assistant (USAID project)
 - Sherron Barker, Fish Sanctuary Manager, Pedro (USAID Project)
 - Devante Cooper, Lawrence Morgan, Jason Mowatt and Fabian Lindo & Keneik Brown & Winston Williams Conservation Officers for the PBPA SFCAs. (Fisheries Division & NEPA funding)
- Augustus Bennet, Delroy Nembhard, Ashad Lindo and Cedella Harvey are Fisheries Wardens for SWCSFCA at Pedro. (USAID Project)
- Barbara Graham, Office Helper – Lionel Town/ Salt River
- Michael Johnson, Maintenance Officer/Caretaker at the Field Station
- Hillary Thompson, Gardener/Caretaker/ Security at the PBDC
- Dr. Ann Sutton, Environmental specialist who offers consulting and volunteer support to the team.

MISSION STATEMENT

“To enhance the management of the Portland Bight Protected Area and Pedro by providing a focal point for promoting conservation, public education, sustainable livelihoods, ecotourism and scientific research; demonstrating environmental best practices, community engagement and financial sustainability”.

The C-CAM mission is to “Promote sustainable development of the Portland Bight Protected Area (PBPA).” The major objectives of C-CAM are as follows:

- Clean land, water and air
- Sustainable use of natural resources
- Improved quality of life of residents
- Conserve threatened species, ecosystems
- Community involvement
- Community environmental education
- Providing the best available information
- Financial sustainability
- Efficient and effective institutional capacity

LOCATION & FACILITIES

The Portland Bight Discovery Centre (PBDC) is located in the community of Salt River, Clarendon. The C-CAM Main Office which will be overseeing the operations of the PBDC is located on Bustamante Drive, Lionel Town, Clarendon and the mailing address is P.O. Box 33. They also have a Field Office located in Salt River, Clarendon.

APPLICANT GROUP & BENEFICIARIES

Table 2 provides a summary of the applicant group and beneficiaries.

Table 2: Applicant Group and Beneficiaries Summary

APPLICANT GROUP	
Name of the organization:	Caribbean Coastal Area Management (C-CAM) Foundation
Location of the organization:	Salt River, Lionel Town, Clarendon
E-mail of the organization:	ccamfngo@gmail.com
Website of the organization:	http://www.ccam.org.jm/
Legal status and structure:	Limited Liability Company (seeking charity status)
Number of members of the organization:	Approximately 12 (including 2 tour guides each day / rotational)

Date the group was established:	1997
List relevant previous activities of the group:	Conservation of the Portland Bight Protected Area and the management and monitoring of all the three Fish Sanctuaries within the area as well as at Pedro. In addition, C-CAM hosts a number of educational training programmes for the community and provides educational tours of the protected area mainly to educational institutions.
Partners of the organization (if any):	N.A.
Management structure of the organization and of the proposed business:	See Organizational Chart outlined in Personnel Plan
Length of time the people in the management structure have worked together:	The Project Manager has been working with C-CAM since its registration in 1998- in and the other key personnel have worked together for over five years.
Strengths and weakness of the organization:	Registered as a company (limited by guarantee) since 1998. 20 years of experience in protected area management, and community outreach. Major weakness is the lack of sufficient long-term financing to fully implement all planned development projects.
Contact person for this business plan:	Ingrid Parchment, Executive Director
Address:	P.O. Box 33, Lionel Town Clarendon, Jamaica, W.I.
Telephone no: City code + no	(876) 986-3344
Mobile no:	(876) 289-8253 (C-CAM mobile number)
Fax number: City code + no	-
Contact person's email address:	iparchment@yahoo.com
DIRECT BENEFICIARIES	
¹ Population census for Salt River	606
# of Dwellings for Salt River	217
Gender Statistics for Salt River :	
Male	327 (54%)
Female	279 (46%)

PRODUCT & SERVICES

The core goods and services to be offered at the PBDC will be the Interpretive Visitor Centre which is a three (3) story building containing an audio visual room and activity space for kids, interpretation space and observation deck. The Centre will provide both scientific and educative interpretation to raise awareness of the ecology system at the site; both biotic and abiotic. There will be several interpretation boards to explain the ecological system to include the endangered flora and fauna; various species of morass; manatees and birds among other wildlife.

The educational activities will be linked to the schools' curriculum to reinforce what is taught in the classroom. This form of experiential learning will assist the student / learner in not only remembering the content of the lesson but also to understand the association between what is taught by the teacher and what they experience. As part of the public education programme, efforts will be made to engage the surrounding educational institutions (mainly secondary high and primary schools) in workshops and seminars regarding the importance of the area to meeting curriculum outcomes.

To create a more fulfilling ecotourism experience for the visitor there are outdoor activities such as the viewing of turtles in the turtle pond, dipping pond mainly for children to see small aquatic creatures; a bird hide for bird watchers, boardwalk in the wetlands and tours to both the Interpretative / Discovery Centre & its surroundings as well as boat tours. Additionally, there is a dock area for river tours, plant nursery with several species of flora with the aim of preserving endemic plant life from the area and selling of seedlings.

To enhance the visitors' experience, supporting goods and services will be offered. These are a snack bar, gift shop and a covered gazebo where children can participate in educational activities such as board games, musical cheers and craft work relating to the natural environment. Locally made food items will be packaged with the already existing PBPA eco-label (Refer to Figure 1). This will not only encourage community cottage industry but eco-labelling will increase visibility of the site. The PBDC will partner with a bottled water packaging company to brand bottled water with the Portland Bight Protected Area logo which will make it an eco-label product. Aside from the revenue to be derived from the sale of bottled water, the plastic bottles will be collected in specially marked recycled bins and sold to the recycling company.

The gift shop will also include branded memorabilia with the eco-label. These handcraft items will also be produced locally. Branded items will create a memorable experience for the guest and assist in marketing the PBDC as it can be shown to others.

To further its development goal of increasing the standard of living of residents of the PBPA, C-CAM is supporting a community approach to its tourism programme in the PBPA. This is based on the premise of economic sustainability where income generating activities

are encouraged to facilitate the multiplier effect of profits from tourism activities in the area.

Cottage industry will be encouraged and properly coordinated and monitored to allow community members the opportunity to provide goods and services to visitors. These include honey and products made from honey, for example, honey soap, since bee keeping is a common activity in the community. Food and beverage will be sourced from local entrepreneurs and local craft items made by local artisans will be offered for sale. The food and beverage services will be properly regulated through the requisite Food Handler's Permit and Certification from the Ministry of Health. The community tourism thrust will be further embraced by naming trees in the residents' homes and encouraging realism and authenticity from the eating of these fruits.

Figure 1 : Portland Bight Protected Area Logo



The Discovery Centre's product and service offerings are outlined below:

Tour of the Main Centre Building – (i) Displays of wildlife in the PBPA, to include crocodile skeleton, shells of conch and other creatures, display boards, interpretative boards, banners, brochures, leaflets, video displays, PowerPoint displays and other educational/fun displays.

(ii) . Discussions surrounding the displays and exhibits

Guided Tour of Boardwalk to Bird Hide – Tour using the 160 meters boardwalk along the river to the bird hide to view wildlife in the pond; this will include interpretation signs/displays along the way as well as interpretation displays in the bird hide.

Boat Tours – Tour using boats owned by locals with electric engines, canopies, padded seats, igloos, life jackets, life rings, first aid kits (tours outlined below);

Dipping Pond – Pond maintained with some plants and small creatures where kids can view wildlife under a microscope and make discoveries, and generally have fun.

Turtle Pond - Pond where river turtles can be viewed, named, photographed etc.

Native Plant Nursery – Nursery where various species of seeds from Portland Ridge/Hellshire Hills will be collected and planted and the seedlings distributed a) to gardeners who want to be a part of the Conservation Garden Programme (plant and care for seedlings in their yards and sign up for a minimum two year agreement to do this), b) general sales to anyone, and c) replanting in the Portland Ridge area.

Café / Snack Bar – Where possible, conveniently packaged food and beverage items with eco-label will be sold from this area. This will include branded bottled drinking water, local juices and confectionaries produced by the community.

Recycling Venture : Specially assigned bins for plastic bottles and other recyclables will be placed in strategic locations for collection. This will also be a part of the tour and will underscore the importance of the principles of “Reduce, Reuse and Recycle”. Special arrangements will be made for their collection by the Recycling Company and this will also provide additional revenue for the PBDC.

Gift Shop - Shop to offer memorabilia and other branded souvenir items for sale to include local craft to include table mats, carvings, embroidery and crochet items, kids educational kits, birds of Jamaica posters and books, mugs, cups, t-shirts, bags, notebooks, pens, pencils, honey and its by-products.

Boardwalk to River Tour- Complementing the facility is a 50 meters boardwalk in the wetlands with a dock area for river tours up and down the river.

Figure 2: Salt River, Clarendon



Boat tours to be offered in the medium to long term:

Salt Island Picnic, Salt River to Salt Island -This is a recreational and educational boat tour featuring swimming, picnicking and snorkelling. It is suitable for all weather conditions. The duration is approximately 4 hours and is suitable for anyone who can get in and out of a fisher's canoe. It is not suitable for people with limited ability to walk. The boat will leave from Salt River as shown in Figure 1 and go through the mangroves, past the old WHISCO wharf and out to sea beside Welcome Beach. A short crossing takes them to Salt Island, where the canoe can take them through a narrow mangrove channel into a small mangrove lagoon in the centre of the island. Visitors can then go to a small shallow beach, where they can picnic, swim and snorkel, and cook.

Man 'o War Tour, Salt River to Two Bush Cay and Half Moon Cays – This is a recreational and educational tour featuring bird watching, swimming, snorkelling and a picnic area. This tour is suitable for calm weather only. Duration is four hours. The level of difficulty is rated as easy and it is suitable for anyone who can get in and out of a fisher's canoe but not suitable for people with limited ability to walk. The boat will leave from Salt River, travel through the mangroves, past the old WHISCO wharf and out to sea beside Welcome Beach, passing Salt Island and Rocky Point Port to get to Two Bush Cay, occupied by breeding and roosting Magnificent Frigate birds. The tour also passes a breeding colony of Brown Noddies on Little Half Moon Cay and there is the opportunity to explore Big Half Moon Cay, swim, snorkel and picnic.

Castaway on Pigeon Island – This tour is a recreational, educational and sport fishing adventure and It is suitable for calm weather only. The duration is approximately 4 hours. The boat will leave from Salt River and go through the mangroves, past the old WHISCO wharf and out to sea beside Welcome Beach, passing Salt Island and Rocky Point Port to get to Pigeon Island where there are good beaches, a mangrove lagoon and the site of a World War II American base. Clients can dock to swim, picnic and explore.

Peake Bay Beach and Mangrove Tour - This is a recreational and educational tour providing some wetland interpretation, beach (swimming, picnic) and is suitable for all weather conditions. It has duration of approximately four hours, depending on how long visitors want to spend on the beach. The level of difficulty is rated moderate. Getting to the boat may encounter walking through some mud, so suitable footwear is essential. Starting from the south side of Rocky Point peninsula, the boat goes through a series of mangrove lagoons, and out into Peake Bay. After crossing Peake Bay, the boat enters the northern lagoons of West Harbour, then returns to Peake Bay to swim and picnic.

Bowers River Adventure - This is a recreational and educational tour providing some wetland interpretation, beach (swimming, picnic) and is suitable for calm weather conditions. It has duration of approximately four hours. This tour is rated with an easy level of difficulty suitable for anyone who can get in and out of a fisher's canoe. The boat will leave from the Salt River area and goes north along the western coast of Portland Bight, to Bowers River beside Port

Esquivel, then explores the scenic rivers of the freshwater marsh, before returning to Salt River, with a stop on Salt Island to swim and picnic.

The new facility will be inspected and the tours approved by the Jamaica Tourist Board. C-CAM will obtain all the required permits and approvals.

FUTURE PRODUCTS & SERVICES

In the long term C-CAM will be collaborating with the community to offer bed and breakfast services and will consult with the Tourism Product Development Company (TPDCo) to establish the programme. The surrounding communities such as Mitchell Town are being developed through housing projects especially by persons who are overseas who seemingly have the resources to build proper houses. These can be used to accommodate visitors who want to have the desire to overnight or for longer periods.

In addition, C-CAM will be working with the Clarendon Municipal Corporation to develop the adjoining Salt River Mineral Spa to create a “riverside” style eating and recreational facility. The Salt River natural spring will also be considered as an outdoor spa treatment area. This can only be made possible if managed, maintained and regulated by the Clarendon Municipal Corporation.

Being considered for the long term is the Welcome Beach which is a registered fishing beach for which the Fishers Association is seeking to upgrade road accessibility to make the space operational. Although it is currently inaccessible due to the influx of sargassum, it can be a future recreational activity to visitors of the PBDC where they would go to have a fishing beach experience.

C-CAM will be looking at developing other community tourism products and services including nature trails, community events, and additional tours as well as fishing activities. Entertainment will be added to the supporting product offering to enhance the cultural experience being sought by visitors. This includes hoosay by the Indian community, John Canoe (Jankunu / Junkanoo / Jangkunu) by the African community and other related cultural activities. It will be easier to revive these traditions, than to start new ones and these will help to preserve these cultural practices that are known in this area. The attraction site will be used for events such as wedding, birthday parties, twilight movies and other art forms to include music, dance, storytelling, literature and poetry to bring people closer to nature.

In the long term, digital animation can be used for the displays and interpretation boards. This is very creative and stimulates attention and interest, having moving objects on a screen telling the story instead of using narratives.

Tours to other places of interest in the PBPA will be incorporated to expand the focus of the PBDC and add revenue. This will include the St. Peter’s Anglican Church in Alley (said to be the third oldest church in the Caribbean), the old jail house and sugar factory ruins in Alley Downer (Figures 2, 3 and 4), Portland Point Light House, Rocky Point Fishing Village and other places of interest. Tour guides will be selected from local residents, some of whom have already been trained to carry out such role.

There will also be tours to other places of interest in the parish such as the Milk River Bath and Jamalco Great House; as well to neighbouring parishes for example Old Harbour Bay and Hellshire in St. Catherine, and Guts River and Little Ochi in Manchester for seafood delights. The tour can be extended across the South Coast to St. Elizabeth. In this case visitors would overnight in the Salt River area and then proceed on the tour on day two. The PBDC through the C-CAM will in the future seek Green Globe Certification. This will further brand the attraction as an eco-friendly and responsible destination as well as improve its market visibility.

Figure 3: St. Peter's Anglican Church, Alley



Figure 4: The Old Jail House in Alley Downer



Figure 5: Sugar Factory Ruins in Alley Downer



COMPETITION

The PBDC has little direct competition due to its unique combination of nature-based, geo-vista, recreational and educational activities. Jamaica's two (2) zoos (Hope Zoo in Kingston and Jamaica Zoo in St. Elizabeth) and the Black River Safari tour (Figure 4) are being considered as indirect competitors.

Figure 6: Black River, St. Elizabeth



Figure 7: Salt River Mineral Spa



The profile of each competitive attraction is outlined below in Table 3. -

Table 3: Competitive Analysis

Name	Location	Product/Service Features	Pricing
Hope Zoo	Kingston	Animal displays, tours, snack bar. Hope Zoo has recently been renovated and is home to 900 animals across 60 species, including indigenous, endangered, and endemic animals from Jamaica, Africa, and the Americas. Among the main attractions is Lucas the Lion, which was a fairly recent addition to the zoo. Zoo located within Hope Gardens.	Adults and children over 12: J\$1,500 per person Children 3 -11 years: J\$1,000 Children under 3: Free Group discounts: 25-49 persons: 10% discount 50+ persons: 15% discount
Jamaica Zoo	Lacovia, St. Elizabeth	Animal displays and tours. Jamaica Zoo is home to approximately 25 different animals including birds, lions, llama, zebras, monkeys, crocodiles, toucans; petting area, in which visitors can take pictures with animals; landscaped lawns/picnic area; restaurant/snack bar; play area for kids; donkey rides. One can learn about the plants and the different animals from trained tour guides.	Adults: J\$1,200 Children: J\$700 Group rates: Adults: J\$1,000 Children: J\$500
Black River Safari	Black River, St. Elizabeth	The Black River Safari is a popular attraction for tourists. There are several companies that offer a tour of the river, most include a one hour boat ride, viewing of birds, crocodiles, nature. There is also a food stop on the river.	Price vary per company: US\$25 for Adults Children under 12 free
Milk River Bath	Milk River, Clarendon	The Milk River Bath, located in Clarendon is known for its mineral spa. It has nine baths which allows for 30 minutes spa experience. There is a hotel which offers accommodation, food and beverage and also accommodates small events.	Adults: J\$600 Children (under 12) : J\$300 Boat ride to Alligator Hole US\$10.00 Boat ride to Little Ochi US\$20.00
Welcome Beach	Salt River, Clarendon	Fishing beach mainly used by locals for bathing.	Free
Salt River Mineral Spa	Salt River, Clarendon	A natural mineral river used by locals for bathing.	Free

TARGET MARKET

MARKET OVERVIEW

Current Visitor Demographic and Psychographic Profile

C-CAM's current visitors are comprised mainly of teachers and students from various local educational institutions, ranging from basic schools to universities, who come for educational purposes to fulfill curricular requirements as well as to do the boat tour. The students are both male and females, and range in age from 12 to 18 years. The teachers are mainly female adults. And so, approximately 80 percent of C-CAM's current visitors are school children.

C-CAM is currently conducting about three tours per month averaging six persons per tour. Approximately every three months, there is a school tour of about 40 persons. The tours are charged a minimal price of J\$3000.00 per person mainly to cover costs. Currently there are very few foreign visitors.

C-CAM acquires their current visitors mainly by word of mouth and by working with their strategic partners. There is no formal demographic or psychographic data on past visitors. A data bank mechanism will be put in place to record this data once the PBDC is in operation. Initially, a free online data management system can be downloaded from the internet and used to avoid the cost of purchasing one. However, these have capacity limitations and therefore, this situation has to be addressed in the future. These data ware-housing or management systems are able to store, report and analyze data allowing for marketing advantages.

Although, there are no formal statistics regarding the current use of the area informal data suggest that Welcome Beach and Salt River Mineral Spa do attract some visitors, mainly locals on weekends whose principal interests are bathing and eating fish. Salt River Mineral Spa is popular especially on holidays and special events and tends to attract visitors from nearby communities to include Mitchell Town and Lionel Town although the potential catchment for the Salt River area stretches as far as Kingston (one hour's drive), Spanish Town (40 minutes), Old Harbour (30 minutes), Longville (15 minutes) and May Pen (40 minutes).

Overview of the Target Market

PBDC's core product offering is expected to appeal to a variety of market segments including those seeking, educational, nature and heritage experiences. Each of these markets has different needs and expectations. It is expected that those seeking educational experiences (students and teachers) will continue to be the largest target segment for PBDC as schools groups from all over the island already visit the Portland Bight area regularly to see the wetlands and to meet curriculum requirements. School groups are generally large and youthful, requiring special supervision and skills in interpretation. A key target market for the PBDC will therefore continue to be mainly teachers and students from local educational institutions (primary, secondary and tertiary).

With the expansion of its product offerings, the PBDC will broaden its market segments to include those seeking leisure, recreation, adventure and geotourism experiences. The largest numbers of persons are expected to be attracted to the leisure and adventure tours". The main target markets for this category of ecotourism experience will include the following:

- Community members
- Tour companies
- Local private sector groups
- Local church groups
- Local civic clubs
- Jamaicans outside of Clarendon
- Local schools and universities
- Overseas students, researchers, teachers
- Jamaicans visiting from overseas
- Foreigners living in Jamaica (diplomats, expatriates, etc.)
- Other foreign visitors

Additional or complimentary experiences will be derived from nearby recreational spaces and places of interest such as the Welcome Beach and the Salt River Mineral Spa (Figure 5), two other local attractions in close vicinity.

The other target market segments for PBDC will differ depending on the products on offer. Peake Bay with its white sand beach is likely to attract families and the general public interested in a beach experience drawing from Kingston, Spanish Town, May Pen and other surrounding areas. The boat tours will attract those interested in natural history and an outdoors/adventure/eco experience. The boat tours can also offer visitors an opportunity to explore Portland Bight's beaches, rivers, and related wildlife. The major limitation, however, is that access to this area can only be by boat and there are no facilities such as change area and bathrooms. This can be a future consideration.

Nonetheless, there is the potential market for fishing trips in the area, targeted to sports fishermen mainly from Kingston who visit the area to go fishing. This represents a future market segment to be explored as research is needed to assess the potential for this market.

PBDC's target market will therefore include both local and foreign visitors looking for an experience of Jamaica's natural environment. It is estimated that 90 percent of visitors will continue to be locals, although PBDC will also appeal to foreign visitors who are specifically

interested in learning about and experiencing the PBPA wildlife (crocodiles, birdlife, flora and fauna, fishes, etc.).

In summary, the PBDC will primarily target persons (local and foreign) seeking an eco-tourism experience, particularly those looking to learn about the wildlife in the BPPA area.

MARKET NEEDS

Current tourism trends suggest that tourists today desire authentic, interactive encounters, and desire to travel to new destinations to learn about the culture, environment and history of the places they visit. Both local and international tourists seek out educational, informative and genuine new experiences. Jamaicans and foreign visitors alike continue to be interested in visiting local natural attractions especially those that are educational as well as recreational.

Corporate, religious, student and civic groups also look for new venues for group activities such as retreats, hikes and fun days. Both local and international schools and universities seek out places to visit for field trips especially those that offer a distinctive experience. Additionally, they seek places for research, volunteerism or community service projects, internship and other educational outings. There is also a definite shortage of local family oriented, educational, but interactive and fun attractions, especially within an hour's drive of the Kingston metro area.

MARKET TRENDS

²The year 2017 has shown a 7 percent increase in international tourist arrivals to total 1,322 million. For this same period tourist arrivals in the Caribbean grew by 4 percent and in Jamaica itself by 12.1 percent to 4.3 million. Increase in international tourist arrivals is expected to continue to a forecast of 1.8 billion by the year 2030. This is the underlying reason for claiming tourism as a main driver of economic development. It is the third export sector in the world and is important for job creation, income generation and prosperity of communities worldwide.

There continues to be strong outbound tourism demand from both traditional and emerging markets. There is also higher tourism spending in 2017 with the United States of America leading at US\$12 billion more than the previous year. Emerging source markets have also shown an increase, for example, China has shown growth of US\$8 billion, The Russian Federation of US\$7 billion more and Brazil US\$5 billion more. These emerging source markets play a key role in tourism development. They are also among the market segments seeking more than the traditional sand, sea and sun experience. The educational, nature and heritage offerings of the PBDC would satisfy the travel needs of this potential market.

In 2017, 10 million US tourists travelled for nature-based, culture and adventure. Travel to Jamaica is predicted to remain relatively strong.

The following are some of the key trends currently being experienced by the global travel business, which are relevant to PBDC despite the fact that PBDC is predominantly targeting local visitors:

- › Multigenerational travel is growing – vacations which include the entire family for transformative experiences with a focus on educational travel experiences, e.g. trips that bring siblings, parents and grandparents together;
- › Experiential-tourism continues to be in demand worldwide – cultural, heritage, adventure, eco, agro and community tourism experiences, as well as educational opportunities and visual stimulation are becoming more important to travelers;
- › More and more travelers are going in search of exotic, unfamiliar, and unpredictable destinations and situations;
- › ³ In 2017, historic and heritage experiences including kayaking and canoeing experiences (+49%) ranked in the year's fastest-growing categories.
- › ⁴Historical and heritage experiences may have topped the list of fastest-growing categories for US travelers (+98% in bookings), but aquatic activities dominated the top ten, taking half of the top spots. Sunset cruises (+89% in bookings), snorkeling (+64%), sailing trips (+55%), catamaran cruises (+51%), and kayaking and canoeing experiences (+49%) all ranked in the year's fastest-growing categories;
- › Travelers are becoming more interested in improving themselves intellectually, emotionally and physically;
- › Travelers are becoming increasingly interested in new experiences;
- › In North American and Canada, some of the fastest growing leisure activities are bird watching, hiking, backpacking, and camping;
- › ⁵Consumers are demanding more individual and authentic travel experiences
- › Geotourism is increasing as many persons have become interested in the visual attractiveness of landforms / landscapes.
- › ⁶Eco-conscious consumers travel more frequently than the average consumer. During 2009, nearly 76% took at least two vacations away from home and 22% took five to eight vacations during that time Interest in eco- tourism continues to grow internationally, alongside the broader trend of environmental conservation. Analysts predict continued growth in eco resorts, hotels, and attractions and a boom in nature tourism in general. Green travel continues to grow: 24% Travel Analysts (TA) reported green is highest it has ever been in 10 years; 51% reported that interest remains constant • 38% TAs noted archaeological/caves; 22% wildlife and birds; 18% visiting national parks; 16% culture and communities.

MARKET GROWTH

Exact statistics regarding the size of the global eco-tourism market is difficult to ascertain. This is the same for the local tourism landscape. However, since the 1990s, eco-tourism has been growing at 20 percent to 30 percent per year. TIES maintained that “sun, sand and sea” resort tourism has now matured as a market and so projects its growth to remain flat.

In Jamaica, ⁷the market size for eco-tourism is also difficult to measure. However, recent statistics from the Jamaica Tourist Board (JTB) Visitor Satisfaction Survey 2009 regarding visitor preferences as well as anecdotal evidence from stakeholder interviews suggest that eco-tourism is also growing in Jamaica. For example, according to the JTB survey, 48 percent of visitors are “very interested” in visiting nature areas.

There is no official data regarding local visitors to Jamaican attractions, however, anecdotal data suggests that Jamaicans continue to be interested in visiting local attractions.

INDUSTRY ANALYSIS

The Jamaican tourism industry continues to be a major foreign exchange earner for the country, earning in excess of J\$62.2 billion in revenue in 2017. In recent years, Jamaica has been attracting new international brands of hotels. The opening of the north south highway will enable easier access to the resort areas across the island. Niche markets such as sports, medical, health and wellness, adventure, business and volun-tourism continue to attract attention.

Activity Preferences of Eco Tourists

Eco tourists are often motivated mainly by the types of activities they will be involved in while on their vacation. The following summarizes the general motivations of eco tourists:

“The most important motivations for travel by eco-tourists around the world are to enjoy the natural environment, have an “experiential” vacation and learn while travelling. There is a particularly high interest in admiring scenery, viewing wildlife, hiking and walking, taking guided interpretive tours, and visiting parks and protected areas. Activity preferences vary from destination to destinations. For example, diving and other marine activities are rated highly in the Pacific, while jungle/rainforest trekking and bird watching are rated highly in Latin America and Southeast Asia, and game viewing is popular in Africa. In general, wildlife viewing is the primary attraction for eco-tourists, both independent travelers and those traveling with eco-tour operators. One key special interest among a dedicated segment of the market is bird watching. Bird watching has a very strong appeal to a narrow segment of the eco-tourism market; about 10-15 percent of the market seeks to bird watch for nearly 100 percent of their activity time. Bird watchers are frequently found in countries not yet known for eco-tourism and can help make a name for destinations.” ⁸

The Bird Watching Market

The bird watching market will be an important market segment for PBDC as the PBPA is known for its endemic bird species.⁹ An increasing number of birdwatchers is traveling to long haul destinations to spot new birds that cannot be seen in their own country or region. Studies suggest that approximately ten to 15 percent of the global eco-tourism market is bird watchers. Bird watching has the potential to be a significant tourism market segment with expected growth in future years.¹⁰ The Caribbean Tourism Organizations (CTO), pointed out that “growth is expected to be strong over the next 10 years.” This CTO report estimates that 3 million international trips (worldwide) are taken each year for the main purpose of bird watching, and many more trips combine birding with other activities

Birding is popular especially among baby boomers as people at all fitness levels can participate and prior birding knowledge is not necessary. According to the National Survey on Bird Watching, bird watchers include those engaged in casual bird watching as well as those persons who are highly committed to birding (keeping life lists).

Bird watching is reported as being the fastest growing outdoor activity in America with 51.3 million Americans claiming to watch birds (US Fish and Wildlife Service). Americans take an estimated three million international trips each year for the main purpose of bird watching. It should be noted that bird watching is often not the main reason for the trip, but a secondary activity, although serious bird watchers around the world travel extensively to add endemic birds to their life lists, i.e. birds that can only be seen wild in one location. Bird watching is expected to continue grow over the next decade.

According to onecaribbean.org, “Bird watchers are usually highly educated, affluent, interested in wildlife, keen to see as many species as possible, and travel to areas where bird life is abundant. They are roughly evenly split between women and men. For many bird watching tourists, the primary objective is to see as many species as possible in the most cost-effective manner. Bird watching operators report that clients usually travel by themselves or with one other person (usually spouse or partner). Large groups of bird watchers may travel together. The main source markets for birding are United States, United Kingdom, Europe (especially Germany, Netherlands, France) and Australia.

Jamaica is considered an excellent Caribbean location for bird watching as despite Jamaica’s relatively large size, it is possible to see all of the Jamaican endemic bird species in just a few days.

MARKET DEMAND ANALYSIS

Globally, both business and leisure travel have improved in recent years, recovering from the global slowdown after the 2008/09 financial collapse. Global travel is likely to be a key driver of economic growth worldwide. *Refer to Section on Macro-environmental Analysis.*

¹¹ 4.3 million visitors came to Jamaica in 2017 an increase of 12.1 percent when compared to the previous year 2016. This accounts for 2.4 million stopover visitors and 1.9 million cruise

passengers. It is predicted that the destination will continue to be one of the most popular Caribbean destinations.

Summary of Demand Assessment Stakeholder Market Research

The following is a summary of some of the available relevant market research data compiled to determine the demand for a variety of tourism products in Jamaica. Research data includes information gleaned from interviews held with an assortment of industry stakeholders including the Jamaica Tourist Board, Ministry of Tourism, the Association of Jamaican Attractions, owners and managers of hotels and attractions, tour operators, and current and potential tourists.

Some of the key points gleaned from the research that are relevant for PBDC are as follows:

- Eco tours are growing in popularity in Jamaica but need to be more creative, interactive/participatory, informative, and entertaining;

- Tours that pay specific attention to environmental sustainability are becoming more popular as the market becomes more environmentally conscious;

- Bird watching is a growing segment of the local tourism market although there is little hard data available;

- Visitors' level of interest in eco tourism can be gauged by their interest in nature areas.

- The USAID-REACT Project conducted research on south coast tourism and looked at various issues that affect eco tourism. The REACT Project developed an *International and Domestic Visitor Profile Report (2007)*; the key findings relevant to PBDC include:

- Although many visitors are primarily interested in a beach experience, the demand for nature and cultural experiences is growing;

- European visitors have greater interest in off-the-beaten path destinations and adventure, nature and culture tourism activities;

- At least one-third of those surveyed planned to take day trips to visit nature attractions such as Dunn's River Falls, YS Falls or the Black River Safari;

- Others surveyed planned various different types of excursions which included photography trips (18 percent), visiting historical sites (18 percent), horseback riding (16 percent), visits to local communities (13 percent), visits to a plantation to learn about history and slavery (13 percent), rafting excursions (12 percent), climbing (10 percent), hiking (9 percent), bird watching (7 percent) and swamp visit (6 percent); 37 percent of persons planning excursions used tour operators, 23 percent hired a private driver, 17 percent used route taxis, 13 percent took a mini-bus and 9 percent rented a car;

- T-shirts (61 percent) are the most popular souvenir item purchased, but the survey showed that people are also interested in purchasing locally made items;

44 percent would purchase locally made handicrafts, e.g. baskets, 43 percent would purchase jewelry, 32 percent would purchase artwork, 19 percent would purchase herbs/spices, and 10 percent would purchase ceramics.

In summary, a review of the industry research suggests that the opportunities for new eco-tourism attractions in Jamaica are significant as the global market for these types of experiences/attractions is growing.

There is little current official available data pertaining to attractions' visitor numbers. However, visits made to a number of popular local attractions with a view to collecting anecdotal data on the number of visitors, the visitor profile, the product profile, and the marketing activities of the attraction yielded a wealth of valuable information.

The following are some other important elements to the operation of the PBDC as observed in the previous Business Plan:

- Visits to these attractions range from a low of 20 persons per day to a high of over 500 visitors per day;
- Tour operators are critical to the success of the large attractions;
- The quality of the tour guides is of paramount importance, as they make or break the experience; tour guides must be well spoken, intelligent, reasonably educated, engaging, well trained, and able to deal with "off script" questions and a wide variety of visitor personalities;
- The attitude of many attraction employees to local visitors was nonchalant and casual at best; Interaction or interactive activities on tours is key to engaging and entertaining visitors;
- A variety of features/things to do is important to maintaining visitor interest;
- Good signage, both at the attraction and to direct visitors to the attraction, is important to communicate information effectively to visitors and to market the attraction; Gift shops are generally under-stocked and offer the same uninteresting and basic items (t-shirts, caps, etc.); very few offered authentic Jamaican items or items unique to the attraction;
- Church, school, and other local groups are an important potential market segment, especially for the smaller and lower priced attractions; Adequate shaded seating and resting opportunities are important, especially when catering to older visitors. A good relationship with the surrounding community is important to the success of an attraction.

TOUR GUIDING

- ▶ PBDC can use a tour guide to visitor ratio of 1:25. This is in keeping with the projected minimum number of visitors per day. If the number of guests is 30 as is likely from a bus tour group, then they should be divided into two groups or two tour guides should accompany the group.
- ▶ Another option is that the tour group of 30 persons can be divided into three groups. While one group views the bird sanctuary, the second group can view the dock and the third engaged in the Visitor Centre. They are then rotated in a clockwise manner to prevent overcrowding in any one area and will allow each group to hear the tour guide.

CONCLUSIONS & RECOMMENDATIONS

The following are the key conclusions and recommendations for PBDC based on the above market research findings:

- ▶ PBDC can exploit the growing global and local market for eco and adventure tours and attractions but will need to effectively market the attraction to create awareness of its product offerings (Refer to section on Strategy and Implementation for marketing strategies);
- ▶ PBDC must continue to pay close attention to the environmental sustainability of the area to ensure ongoing viability, monitoring of the plans for Goat Island will be key;
- ▶ PBDC can target the growing bird watching market;
- ▶ PBDC can target locals, especially families living in the surrounding areas and in the Kingston metro area who are looking for child friendly outings especially for weekends;
- ▶ European visitors who have a greater interest in off-the-beaten path destinations and adventure and nature tourism activities can be explicitly targeted (as well as the tour companies, hotels, guesthouses, etc. who cater to them);
- ▶ PBDC will need to create awareness and educate the public on the environmental significance of the PBPA to generate interest in visiting the attraction;
- ▶ Ongoing training of tour guides is critical to the visitor experience;
- ▶ Signage, both directional and interpretive needs to be of a high standard in general;
- ▶ A good relationship with the surrounding community will be critical for PBDC's ongoing viability and success.

KEY CUSTOMERS

As indicated above, PBDC is positioned as a Jamaican eco-tourism product targeting primarily the local market, but also targeting specific niches of the international eco tourism market. Jamaica's protected areas generally appeal to persons interested in visiting Jamaica's natural assets for recreational purposes as well as for research or other educational and journalistic activities.

Visitors to PBDC now consist almost completely of local residents, predominantly teachers and students of local educational institutions. Although the majority of PBDC's visitors are now locals, there is still an opportunity to significantly increase the number of visits by foreigners by more aggressively marketing PBDC and the PBPA in general to the overseas market as well as to foreign tourists already in Jamaica.

The specific market segments (both local and international) to be targeted include the below:

The Local Market

Community members

Local community members and persons living in the surrounding areas will be an important market for PBDC both in terms of customers as well as in terms of ensuring excellent community relations. Clarendon's population is approximately 247,000 persons and is Jamaica's third largest parish. May Pen, the capital, has a population of approximately 60,000. Lionel Town is the closest town to PBDC and has a small population of approximately 5,500 persons. Adults and children of all socio economic groups, living in the immediate community and surrounding areas and further afield will be targeted to visit PBDC. Persons living in the Kingston metro area will also be an important target market as Kingston's population is just under 600,000 persons and the city is only about one hour's drive from PBDC. Persons living in the other major populated areas of Jamaica (e.g. Montego Bay, Mandeville, etc.) will also be targeted, especially those who are nature lovers. PBDC's pricing will be such that the attraction will be affordable to the average Jamaican.

PBDC will target locals who are looking for family friendly, affordable, educational, adventure and nature based outings. This group also includes expatriates and diplomats living in Jamaica, especially Europeans who are more likely to be interested in eco-tourism experiences.

Children will be especially targeted as PBDC will have numerous activities specifically designed for children (dipping pond, turtle pond).

Local Educational Institutions

Local educational institutions will continue to be a key market segment for PBDC. This niche includes groups addressing the curriculum needs of local schools and colleges, as well as of postgraduate research.¹² There are 998 public education schools in Jamaica and over 594 independent education institutions together making up a large target market for PBDC.¹

Clarendon alone has 138 schools as outlined below:

Table 4 : Schools in Clarendon, Jamaica

Type of School	Number of Students
Public:	
Infant	4
Primary	67
All Age	10
Primary and Junior High	10
Secondary High	16
Technical High	1
Community College	1
Subtotal	109
Independent:	
Kindergarten/Prep	11
Secondary High with Prep Dept.	3
Secondary High	5
Vocational High	6
Commercial/Business Colleges	9
Special	
Subtotal	34
TOTAL	138

Jamaica has six universities and over 30 other tertiary or post-secondary institutions to include teachers' colleges and community colleges which can be targeted, especially those departments and persons studying topics related to the environment, e.g. botany, zoology, biology, environment science, tourism, etc.

Jamaica's universities are,

- The University of the West Indies
- University of Technology, Jamaica
- Northern Caribbean University
- University College of the Caribbean
- Caribbean Maritime University
- International University of the Caribbean (IUC)

Local Private Sector, Civic, Youth and Church Groups

There are numerous private sector, civic, youth and church groups in Jamaica that the PBDC can target to visit the attraction. Private sector groups include companies and business organizations (e.g. chambers of commerce) looking for activities and venues for their corporate fun days and other events. Civic groups such as the Rotary, Lions, and Kiwanis Clubs can also be targeted for visits, especially those in the immediate surrounding areas. Youth and church groups are also a fertile market as these groups are often planning various types of excursions for their members. There are literally hundreds of church and youth groups that the PBDC can target.

International educators, students, researchers, journalists

Foreign universities, colleges, research centres and other types of educational institutions, as well as their staff and students, can be targeted to visit PBDC, especially those who already come to Jamaica for study abroad experiences. University students will be specifically targeted especially during the summer months. Journalists and bloggers also included in this niche.

Visitors Already In Jamaica

The proximity of the PBDC to Kingston suggests that visitors already in Jamaica, particularly those in Kingston, who are nature enthusiasts or bird watchers would be part of PBDC's target market. Emphasis will be placed on targeting the tourist who is looking for something different - an adventure or eco experience of Jamaica's natural environment. Persons to be targeted will include those visitors particularly interested in taking a river/boat tour and or bird watching, as well as those who simply want to visit and learn about Jamaica's wildlife.

Tour Companies and Taxi Operators

Tour companies and taxi operators are key gateways to visitors interested in exploring Jamaica's attractions. Some of the tour companies who market off-the-beaten path adventure tours include Caribic Vacations, Jamaica Tours, Tropical Tours, Tourwise and Sun Venture Tours. There are also several new 'bespoke' tour companies emerging that customize tours according to their visitors' interests, examples include Jamaica Cultural Enterprises, Jamrock Excursions and Doctor Bird Services. Taxi operators, including JUTA/JACAL are important as they are key sources of information for visitors especially those more adventurous travellers looking to venture out on their own and do something different. Tour companies will be less important for the local market, however, they should be targeted as part of the long-term strategy to attract foreign visitors.

Potential Overseas Visitors (not yet in Jamaica)

Persons overseas looking to come to Jamaica to enjoy nature based and adventure tourism type activities such as hiking, boating, fishing, exploring the countryside and bird watching will be targeted, although attracting this group is more of a long term objective. These individuals are generally well-educated, urban professionals with an interest in environmental and social issues. The majority of this group will be persons who consider themselves eco tourists who are eager to meet local people, be educated about local issues, and to try new things. Bird watchers

interested in a visit to Jamaica will be especially sought after, as the PBDC is an ideal bird watching location.

RELEVANCE OF THE PROPOSED INVESTMENT

The PBDC experience will be a distinctive eco-tourism experience and one of the few located on Jamaica's south coast. It is not only a recreational attraction, but also educational, and will add to the limited roster of Jamaican attractions that have as its mandate environmental education and conservation. The project is relevant to the parish as developing tourism in the area will stimulate the rural economy, beyond the limited commercial activity taking place now (mainly agriculture, retail and distribution, fishing).

The business will provide employment and income for community members in the area, especially for the fishermen who will serve as tour guides and boat operators on the boat tours. The business will also provide opportunities for community persons not immediately employed by PBDC but otherwise involved in the value chain. This area of Jamaica has significant unemployment.

According to The Sustainable Tourism Concept Plan for Rocky Point and Environs, "The communities of the Salt River area have more than 50% unemployment, despite being close to several major cities and towns, and having a wide range of skills and reasonable levels of education. Most people would like to get into their own businesses and have identified the need for entrepreneurial training and financing to get them started. They would like to get involved in a providing a wide range of services but also see the potential for tourism development, including hotels and tour guiding and some of the skills to support the development of tourism are already present in the area. Fishing and related activities are relatively unimportant in this community compared to other coastal areas in Portland Bight".

The business will create linkages between the tourism and agriculture sectors, which is a strategic objective of the government. The community tourism model being used by C-CAM is also in line with the Ministry of Tourism's long-term strategy to develop community tourism in Jamaica.

STRATEGY & IMPLEMENTATION

MARKETING STRATEGY

The marketing approach for PBDC will fit into C-CAM's overall objectives for the development of sustainable tourism which are to:

- Demonstrate sustainable tourism for Portland Bight;
- Increase awareness of wetlands and their importance to sustainable development;
- Increase support and participation in wetland conservation;
- Generate revenue for PBPA/C-CAM;
- Provide alternate livelihoods for fishers and unemployed persons from the area;
- Demonstrate best practices in design, construction and community tourism planning.

Current tourism activity in the area

There is very little international tourism in this area but there are a few locations that are frequented mainly by locals. The three main attractions are Salt River Mineral Spa, Welcome Beach and Monymusk Gun Rod and Tiller Club. Local community people come to the area primarily to bathe, enjoy the water and eat fish. Welcome Beach offers sea bathing and fishing from the shore. The Gun Club is the focus for bird shooters during the hunting season. For the rest of the year it is used as a marina.

Accommodation in the area is limited as there is only one hotel, the Salt River Hotel. Persons visiting may also stay in the Milk River Bath Hotel in Milk River or Hotel Versailles in May Pen. C-CAM's field office is located on the property of the Monymusk Gun Club, which also provides accommodation for staff.

C-CAM aims to develop tourism in the area following a community tourism model, and that is economically, socially, culturally, and environmentally sustainable. PBDC will continue to target mainly local visitors in the short term, and aim to attract foreign visitors over time.

The overall marketing strategy will be to position the attraction as a unique recreational and educational attraction on Jamaica's south coast, known for its varied wildlife and low impact recreational activities, e.g. the boardwalk and boat tours.

Marketing Objectives

PBDC's principal marketing objectives for the first 12 months of the business will be to generate significant awareness of and visits to the attraction as outlined below:

- Generate awareness of and visits to the attraction;
- Increase awareness and understanding of the PBPA in general and of its various recreational and educational experiences available;
- Increase the understanding of the need for environmental sustainability in the area.

Positioning and Branding

The PBPA is an area of ecological and cultural significance. The location is distinctive in terms of its Taino heritage, differentiated ecosystems, varied wildlife and natural beauty. The PBDC brand will therefore be positioned as a community, eco tourism product that offers a wide range of recreational and educational experiences ranging from visiting a top quality interpretation centre to boat rides among the mangroves.

The brand will stand for a quality and unique experience of Jamaica's south coast and the Portland Bight area in particular. The positioning will stress a distinctive eco, adventure and cultural tourism experience as well as the ecological/environmental importance of the region as a unique site for Jamaican endemism and beauty - a must for students, researchers, naturalists and bird watchers.

The C-CAM Eco Tours brand is the registered business name of the attraction. Refer to Figure 8 for logo

Figure 8: C-CAM Logo



Product Strategy

The product strategy for PBDC is to offer a high quality eco/adventure/educational experience superior to competing attractions. These are the core products (to include infrastructure, boardwalk, interpretive signage, dipping pool, supporting (gift shop, café/ snack shop) and augmented (community offerings) products. The attraction will be marketed as an “experiential learning” ecotourism attraction facility for persons interested in Jamaica's natural environment and the corresponding experience to be gained from the activities. This will give visitors a matchless experience of Jamaica's south coast.

The unique selling point of the attraction will be the exceptional nature of the attraction due to its inimitable location, physical facilities (interpretation centre, boardwalk and boat tours, dipping and turtle pools, gift shop, café), tours with trained and informed tour guides, ease of access, distinctive vistas and heritage from its geo-heritage resources coupled with its extensive variety of activities that cater to a wide cross section of persons from children to adults: culture and traditions of the community among others.

In summary, the product strategy will be to offer a consistently high quality distinctive product and service with high experiential value whilst maintaining differentiation and competitive advantage through eco-friendly, responsible, sustainable and pro-tourism activities.

Pricing Strategy

The pricing strategy to be employed will ensure that visitors get value for their money. The product offerings will be competitively priced with other similar attractions. One major advantage is that the PBDC and its unique location have little direct competition. The introductory pricing will be less than key competitors to encourage initial visits and priced such that the entrance fee to the location will be affordable for persons from most socio economic groups and especially for school children (a key market segment). The entrance fee will cover the admission and tour of the interpretive centre, as well as the boardwalk tour and access to dipping pool, turtle pool, nursery, gift shop and snack bar / cafe. The add-on activities (boat tours, plants for sale, gift shop items, café items) will also be priced competitively for the visitors.

Table 5 : Proposed Pricing

Product / Service	Local J\$ Adults	Local J\$ (Children)
Entrance Fee (Covers entrance and tour of interpretive centre, boardwalk tour, access to dipping pool, turtle pool, nursery, gift shop and café)	1500	1200
Boat Tours (Price per person including GCT)		
Salt Island Picnic Tour	2,160	
Peake Bay Beach & Mangrove Tour	3,600	
Castaway on Pigeon Island	4,800	
Bowers River Adventure	3,600	
Man 'O War Tour	4,800	
Wetland Centre River Tour	1,200	

**Boat tours are eight persons per tour.*

Table 6 : Competitive Pricing

Name	Product/Service Features	Pricing
Hope Zoo, Kingston	Displays of animals, snack bar	Adults and children over 12: J\$1,500 per person Children 3 -11 years: J\$1,000 Children under 3: Free Group discounts: 25-49 persons: 10% discount 50+ persons: 15% discount
Jamaica Zoo, Lacovia, St. Elizabeth	Displays of animals, tours, petting zoo, picnic area, restaurant/snack bar, children's' play area, donkey rides.	Adults: J\$1,200 Children: J\$700 Group rates: Adults: J\$1,000 Children: J\$500
Black River Safari, St. Elizabeth	1 hour boat ride, viewing of birds, crocodile, nature	US\$25 for Adults Children under 12 free

Promotion Strategy

The promotion strategy will be focused on generating substantial awareness of and visits to the attraction to the target market segments outlined above. The promotion campaign will also aim to generate increased awareness and understanding of the PBPA in general and its ecological and cultural significance.

The promotional message will focus on “experiential learning” by way of eco-friendly, responsible and sustainable activities at the newly established Discovery Centre and by way of the other product offerings (boat tours, boardwalk tour, children’s activities, etc.), as well as the authenticity and wildlife of the area. C-CAM will be highlighted as the entity responsible for the management of the attraction. Promotional messages will also emphasize the “community tourism” nature of the attraction as well as the ecological sustainability and importance of the area. The following promotion strategies will be used :

‣ *Digital channels including social media and mobile devices*

Digital and online channels and tools will be used to generate awareness and to promote visits to the attraction as digital marketing is a powerful and cost effective marketing strategy to reach the local market as well as select international audiences.

Jamaica is now ranked 99th of 175 countries on the 2016 ICT Development Index (IDI). This shows an improvement of two places from the 2015 rankings. In 2016 Jamaica is ranked 23rd of 34 countries in the Americas in terms of internet usage;

The most recent information technology report (2015) found that 80 percent of the population in Jamaica population use social media networks including Facebook and Twitter;

The attraction will be featured on C-CAM's website. This will enable marketing activities that will drive interested persons to the website for more information on the product offerings, tours, prices and other relevant and required information for the PBDC. The website will have visibility among Search Engines such as Google. Twitter is currently being used by C-CAM, hence other social media platforms to include Facebook and Instagram will be used for promotion. Diversity in the use of social media is important to reach a wide cross section of visitors as Facebook targets an older demographic in Jamaica and Instagram targets the 15 to 35 age group. YouTube will also be important as C-CAM can encourage guests to post videos of their experiences on YouTube for sharing on their website and via their other social media channels.

The website will also be hyperlinked to related websites such as the Ministry of Tourism, Jamaica Tourist Board and the National Environmental Protection Agency to take users to the PBDC website. A travel blog will also be created to allow visitors to post their experiences. This will create awareness for potential visitors both locally and internationally.

In the medium term, travel media such as TripAdvisor and Lonely Planet will be considered in the promotional thrust. Request for a link to the C-CAM website will likewise be made to local, regional and international websites promoting responsible tourism and sustainable tourism. Partnerships with these bodies can be considered if necessary and useful.

- *Leveraging strategic alliances to promote the location*

C-CAM through its product brand which focuses on conserving and promoting responsible use of the environment will leverage its strategic alliances with its stakeholders, potential travel partners and key schools and other educational institutions to promote the attraction via their network. Linkages will be made with key tour operators and destination marketing companies (DMCs) for them to include PBPA in their product offerings. C-CAM will specifically target local schools and universities to visit the facility. C-CAM will also attend trade expos where possible.

- *Executing a targeted public relations campaign*

Promotion is a costly venture, hence a targeted public relations campaign aimed at the local media and public will build awareness and interest in the PBPA area in general as well as stimulate visits once the facility has officially opened. This can be achieved through radio and television programmes such as Television Jamaica / TVJ Smile Jamaica and CVM at Sunrise.

- *Using select traditional advertising*

Traditional advertising (mainly print and outdoor signs) will be used selectively as they are expensive and limited in reach. It will focus on introducing the PBDC to the general public in Jamaica and advertising specific events taking place. Radio will be also used to a limited extent to advertise the opening of the attraction and special occasions.

Print advertising will be used mainly to communicate that the facility has officially opened and showcase its product offerings and tours. Advertising executions will be highly targeted and limited to national newspapers and tourism and environmental oriented publications, e.g. Eco magazine, Jamaica Tourist, South Coast Guide, Negril Guide, Destination Jamaica.

Outdoor signs will be strategically located along the main thoroughfares between Kingston and Clarendon and the South Coast area as well as the main roads en route to Lionel Town/Salt River to stimulate awareness of the attraction to persons passing by and to help direct persons to PBDC. Smaller signs will also be used to advertise special events. Directional signs will be strategically placed to assist persons to find their way to PBDC. Billboards may be an expensive venture at the start-up stage and therefore can be considered for the future. Sponsorship or partnership can be sought to have this done.

- *Promotional material and collaterals*

Attractive brochures, leaflets and fliers for the attraction will be designed to communicate the offerings of the PBDC. These will be distributed to hotels, schools and tertiary institutions, tourism offices, tour operators, hotels and guesthouses, restaurants and bars, and other relevant places, key partners and stakeholders.

Other Marketing Strategies

- **Word of Mouth Publicity**

Word of mouth publicity will be relied on heavily as the other forms of promotion are expensive and the revenue generated especially in the start-up period may not be able to cover these expenses. Hence, special attention will be paid to visitor satisfaction; product and service value for money and maintain happy visitors.

- **Friends of the PBPA**

As part of the direct marketing programme, it is being recommended that a group to be called “Friends of Portland Bight” be created. The main objective of this group will be to function as a stakeholder support group to work together to preserve and protect the PBPA area, as well as to cautiously develop and promote the region as a sustainable tourism destination. The “Friends” group will work with C-CAM as a type of support and advisory group to brainstorm ideas and help promote the area and visits to the attraction.

- **Annual Calendar Events**

An annual calendar of local events will be developed to publicise the PBDC offerings. The calendar will also include days that are annually recognized, for example, Earth Day which is celebrated April 22, World Wetlands Day on February 2, World Responsible Tourism Day on November 8 and World Tourism Day on September 27.

Table 7 : SWOT ANALYSIS

<p>Strengths The PBDC areas of competitive advantage</p>	<p>Located within an hour from Kingston and close to other major towns (May Pen, Mandeville, Old Harbour)</p> <p>Roadway access from the western and northern resort areas via the Edward Seaga (North-South) Highway and also from the eastern parishes by way of the PJ Patterson Highway.</p> <p>Unique educational and recreational experience of Jamaica's south coast and ecologically sensitive areas (rivers, mangroves, cays).</p> <p>Varied product offerings including interpretation centre, boardwalk and boat tours, dipping and turtle ponds, plant nursery, café and bird watching</p> <p>Scenic vistas: cays, mountains and river.</p> <p>.Committed leadership in place with significant management experience of projects with external funding agencies</p> <p>Community has some experience of dealing with visitors.</p> <p>PBDC already has some experienced tour guides and others recently trained</p> <p>Strong support from government agencies such as TPDCo.</p> <p>Strong support from other stakeholders to include NEPA and the Clarendon Municipal Corporation.</p> <p>Improved awareness and understanding of PBPA and PBDC</p> <p>Has strong community linkage and engagement through the Citizens Associations and Fisheries Associations.</p> <p>Close proximity to social services such as hospital (Lionel Town) and police stations (Lionel Town and Longville Park)</p> <p>Close proximity to commercial activities (Lionel Town)</p>
<p>Weaknesses Areas of weaknesses internal to the PBDC</p>	<p>Limited relevant commercial experience on the team especially in business enterprise operations, marketing and customer service based activities.</p> <p>Limited funds for promotion</p> <p>Lack of ongoing working capital</p> <p>Limited market intelligence or data re demand for what is being considered</p> <p>Area not now known as a tourist destination</p> <p>Limited public transportation</p> <p>Community members in and around the PBDC depend highly on the burning of charcoal as a source of livelihood. The resulting cutting down of trees within the PBPA is causing deforestation in some areas.</p>
<p>Opportunities Opportunities existing</p>	<p>Growing interest in nature based tourism in Jamaica and internationally</p> <p>Co-marketing opportunities with other nature based tourism entities</p>

within the external environment which the PBDC can capitalise on or leverage	<p>Opportunity to grow Kingston/St. Catherine/Clarendon based tourism</p> <p>Opportunity to create linkages and collaborate with other attractions in the area</p> <p>Potential to develop themed events in area e.g. rum, nature, etc.</p> <p>The surrounding community is fortified with several fruit trees to include mango, breadfruit, ackee, june plum, guinep, naseberry and coconut. These can be used to prepare Jamaican dishes and natural fruit juices for visitors to the PBDC.</p> <p>Non-traditional venue for weddings, birthday parties and outdoor cinema.</p>
<p>Threats</p> <p>Situations existing within the external environment which can negatively impact the successful operation of the PBDC</p>	<p>Environmental damage due to increase in visitors</p> <p>Competition from other locations</p> <p>Natural disasters (hurricanes, etc.)</p> <p>Damage to access roads</p> <p>Increased crime rate in and around the community</p> <p>Limited funding</p>

COMPETITIVE EDGE

The following elements are unique to the C-CAM project:

The PBDC will offer “experiential learning” by way of eco-friendly, responsible and sustainable activities

PBDC complements and will provide business to other ventures in the local

There are very few tourism projects on Jamaica’s south coast and this project has both recreational and educational components.

The area is part of the PBPA and houses an important fishing sanctuary that provides both training and economic opportunities for the community.

It provides a day excursion for the Kingston community and is in close proximity to the Mandeville, Treasure Beach and other highly populated areas.

Table 8: RISK ANALYSIS & CONTINGENCY PLAN

RISK ANALYSIS AND MITIGATION MEASURES	
RISKS	
Physical Risks	Corrective Measure
Facilities not adequately maintained	Preventative maintenance programme
Surrounding environment not adequately maintained	Preventative maintenance programme
Damage to river, cays, mangroves and beaches	Preventative maintenance programme, carrying capacity enforced
Access roads not maintained	Liaising with the National Works Agency or Municipal Corporation to make necessary repairs
Environmental Risks:	
Risk	Corrective Measure
Natural disasters	Assistance from the Office of Disaster Preparedness and Emergency Management (ODPEM) in developing a Disaster Management Plan (natural, man-made and other categories) Instructions from ODPEM in case of natural disasters
Fire hazard	Have evacuation plan with scheduled fire drills. Install fire detection equipment and fire extinguishers Train staff on fire management/safety
Environmental damage due to increased tourism	Carrying Capacity programme enforced limiting persons usage of the area/facilities
Inadequate management of solid waste	Solid waste plan in place to include the 3Rs of environmental management; reduce, recycle and reuse : -Composting made by biodegradable products - Recycling of plastic bottles - Recycling of waste water for irrigation purposes
Flooding due to heavy rains	Implement flood defence mechanisms / items by the rivers to protect the land space Maintain walkways, board walks and drainage systems to ensure access.
Interruption to energy supply if electricity is obtained from the Jamaica Public Service	There is no connection to the main electricity supply. The PBDC will be utilizing renewable energy through a solar powered system. Alternative energy source or back up will be via a diesel generator
Loss of website and data due to natural hazards	Back up data . Data will be securely stored in multiple locations C-CAM will be a reliable option.

Severe weather disrupting access by staff	Staff can work from the C-CAM Lionel Town office
Severe weather disrupting visitor access	Seek publicity announcement from the media and other stakeholders. Use website if operational during that time. Continue to maintain contact with all stakeholders, if possible,
Political Risks:	
Risk	Corrective Measure
Increased regulation of sector	Capacity building of team to ensure ability to comply with increased regulations for individuals and the overall operations
Political instability especially in times of elections	Cooperation of community to ensure safety of visitors
Economic Risks:	
Risk	Corrective Measure
Economic down turn affects demand, especially of local market	Stronger promotional campaigns and attractive packages offered, especially to local market
Social Risks:	
Risk	Corrective Measure
Possible lack of local support by community for tourism in area	Ongoing efforts to engage community support for tourism
Increased crime in area	Increased vigilance by community members. Liaising with the police (Police Stations in Lionel Town and Hayes and police post in Longsville Park)
Lack of capacity development hampers management	Investment in training/capacity development
Competitive Risk (i.e., actions of competitors)	
Risk	Corrective Measure
New competitors enter market	Defensive action by increasing promotional activity, offering special packages, etc.
Key competitors decrease prices	Defensive action by increasing promotional activity, special packages, etc.
Competition from the community for local goods and services	They will be included in the enterprise through the provision of local craft items, natural juices and food items.

	This will be controlled through the C-CAM via training and certification.
Financial Risk	
Risk	Corrective Measure
Fraud	Ensure tight internal controls are in place
Insufficient working capital	Astute management and proper pricing model
Lower than expected revenues/higher than expected expenses	Increased promotional activity/reduce costs where possible

MARKETING ACTIVITIES

The marketing plan will be managed and executed by C-CAM. The marketing activities/tactics will be targeted to the niche market segments as outlined above and will be focused on utilizing cost effective marketing channels and tools.

It is ideal that C-CAM work with a marketing consultant for a period of six months preferably starting prior to the opening of PBDC to help them execute some key marketing activities as C-CAM's management will need significant assistance to execute the recommended marketing plan. However, the cost of doing so can be prohibitive. An alternative is to engage one of the universities that have graduate students in this and related areas to undertake this function as part of their credits or to have student interns carry out this assignment.

The recommended marketing activities are outlined below:

Direct Marketing Programme to Strategic Partners

The objective of the direct marketing programme is to educate stakeholders, strategic partners, local corporate and other civic groups, schools and universities about PBDC to generate awareness and to stimulate visits.

C-CAM will manage the direct marketing program and aim to build alliances with schools, educational institutions, civic groups, tour operators, JUTA/JACAL, hotel tour desks, travel agents, small hotels, guidebooks, and other key industry personnel who will serve as key marketing agents. A database of partners and stakeholders will be managed by C-CAM to enable an email direct marketing campaign whereby strategic partners will be communicated with via regular emails.

A direct marketing program targeted specifically to local schools is being recommended which could include a variety of activities, including competitions, special reduced entrance fees on certain days, working with environmental clubs, etc.

It is being recommended that C-CAM participate in relevant trade shows and expos, e.g. Green Expo held in Kingston.

Online/Digital Marketing Campaign

A digital marketing strategy will be developed and implemented by C-CAM primarily to the local market targeted. The digital strategy will define the requirements and parameters for content development, social media activities, user-generated content, search engine optimization and e-commerce opportunities.

It is being proposed that C-CAM work with a social media consultant (the marketing consultant) for six months to develop and execute their online strategy and campaign to exploit all available online marketing tools (website, Facebook, Twitter, YouTube, Instagram, Pinterest, etc.). The objective of the digital campaign is to create awareness and stimulate visits to PBDC, as well as to promote an understanding of the importance of the PBPA in general. The campaign will include,

- Marketing the PBDC website;

- Creatively using social media to promote the area and PBDC;

- Generating awareness for the region by communicating with blogs and other relevant sites/opinion leaders;

- Encouraging positive reviews for C-CAM attractions on customer review sites, e.g. Tripadvisor;

- Maximizing search engine optimization;

- Developing an online photo library continually updated as a valuable resource for local tour operators, external tour operators, travel journalists, etc.

- Expanding the partners/stakeholders/supporters' database via an online opt-in email sign up form on the PBDC website (C-CAM's website already has a sign up form for their mailing list), so persons can receive emails about PBDC happenings and special packages.

Public Relations Campaign

Public relations activities will focus on generating awareness for the area and for PBDC and will include:

- Familiarization (FAM) trips to PBDC for media, key opinion leaders, tour operators and other industry personnel;

- FAM trips for key schools, universities, and other community groups;

- Press releases sent to local news media, blogs, magazines, websites, radio talk shows, etc.;

- Physical and digital press kit including a fact sheet/attraction overview, contact information, photos and other collateral materials;

Interviews on local talk/news shows, e.g. Smile Jamaica, CVM at Sunrise, etc.

Additionally, it will be important to work with the Jamaica Tourist Board, Tourism Product Development Company, the Jamaica Hotel and Tourist Association and other relevant state and private sector agencies and industry associations to disseminate information about PBDC.

It is being recommended that public relations personnel be engaged to work with C-CAM to manage the public relations activities for six months. This individual can be sought from one of the universities or other tertiary institutions with students undertaking studies in this and related areas. The PR function includes generating compelling stories/content and pushing them out through traditional and online media as well as encouraging travel writers to visit. The PR consultant will also identify appropriate “guerrilla marketing” opportunities that are cost-effective and impactful focusing on the key target market audiences, using innovative methods; this will be largely opportunity-driven and therefore reactive.

Other Considerations

It will be important to the success of the “community tourism” model that the PBDC is developed to encourage inclusiveness where community members in the area work together to provide a welcoming environment for visitors to enhance the appeal of a visit to the area.

The marketing of the area as a whole requires a much more extensive marketing plan which is beyond the scope of this plan. However, consideration should be given to developing themed activities and other related product developments to improve the competitiveness and potential of the area to attract ongoing and repeat visitors. Such product developments could include the following:

- More regulated bed and breakfast facilities and guesthouses;

- More signature restaurants/bars embodying the area’s brand;

- Identifying and developing a programme of local mini-festival events;

- Identifying and targeting appropriate nationally mobile events that are compatible with the C-CAM brand, whose organisers might be persuaded to stage them in the area.

It will be important that marketing activities be evaluated for their effectiveness and that all visitors complete a feedback form indicating how they found out about the PBDC and their attitude towards the eco-attraction based on their opinions of the experience. This data will be used by management to improve product offerings.

Table 9: Marketing Budget for Year One

Marketing Set Up Costs	
New website	\$400,000.00
Design of print ads	\$300,000.00
Designing of brochure & other promotional materials (fliers, etc.)	\$250,000.00
Outdoor signs (directional) - design	\$200,000.00
Outdoor sign production (5)	\$500,000.00
Total Marketing Set Up Costs	\$1,650,000.00
Ongoing Marketing Costs	
Local print and radio media	\$500,000.00
Press kits	\$40,000.00
FAM trips (includes refreshments for 5 groups)	\$250,000.00
Promotional items (T-shirts, caps, school books, pencils, etc.)	\$300,000.00
Printing of brochures	\$200,000.00
Attendance at trade shows	\$300,000.00
Tourist association membership dues	\$100,000.00
Total Ongoing Marketing Costs	\$1,690,000.00
PR practitioner (6 months)	\$600,000.00
Marketing / Social media consultant (6 months)	\$900,000.00
Total Services	1,500,000.00
TOTAL MARKETING BUDGET IN YEAR ONE	\$4,840,000.00

SALES ACTIVITIES

The PBDC sales and reservation activities will be managed completely in house by C-CAM, and led by the Executive Director who will develop the internal sales and reservations systems and policies dealing with bookings, cancellations, payments, staffing and inventory management.

PBDC will be opened three days per week to accommodate its main target market. This will also underscore the carrying capacity thrust of the PBDC to limit the number of visitations. Special opening arrangements can be made on weekends where warranted for groups that will not be able to visit the attraction during the week.

STRATEGIC ALLIANCES

C-CAM has ongoing strategic alliances with several public and private sector organisations as outlined below which assist the organisation to manage and promote its work:

Community members

Portland Bight Tourism Council

The Municipal Corporations and Portmore Municipality

The Monymusk Gun Club

Jackson Bay Club

Jamaica Tourist Board

TPDCo

Ministry of Tourism

Jamaica Hotel and Tourism Association (JHTA)

Association of Jamaican Attractions (AJAL)

NEPA

JSIF

National environmental organizations

FINANCIAL PLAN

PERSONNEL PLAN

The following outlines the framework for the key operational elements and procedures to be put in place for C-CAM. Standard operating procedures will be prepared in detail by the management prior to the startup of the business, including detailed environmental best practices recommended for an eco-tourism attraction.

C-CAM has overall responsibility for the development and operation of the C-CAM Eco Tours which houses The Portland Bight Visitors Centre and operates the various boat tours. C-CAM will be staffed with a complement of four persons and five Tour Guides name

Boat operators are currently hired on a contractual agreement between the community fishermen and C-CAM. They will be paid a fixed fee per trip. C-CAM does not own any of the boats however they will be assisting the fishermen with equipping and refurbishing of boats.

The C-CAM staff team consists of the following positions outlined in Table 10.

Table 10 : Positions and Areas of Responsibility

Position	Area of Responsibility
Project Manager	Overall programme/project management to include marketing, booking guests, managing inventory, supervising tour guides, managing facilities including reporting maintenance needs, integrating community (craft, drinks, entertainment etc.), ensuring supplies are in place (items for shop, hand-outs, safety gear, cleaning supplies, etc.). Additional funding will be sought for capital costs and maintenance.
Operations Manager	This position has the responsibility of marketing and sales, and the responsibility of the day-to-day operations of all the C-CAM tourism activities. This position will be part-time in the first instance until business improves and revenue earned will support a full-time position.
Financial Officer (Part-Time)	Responsible for the financial transactions of C-CAM and the preparation of all financial reports and statutory requirements.
Science Officer (Part-Time)	Manages and implements all the scientific programmes being implemented by C-CAM in the area, provides public education programmes on the environment and the biodiversity of the area.
Community Development Officer	Liaison officer on the ground collaborating with communities to foster good relationships between C-CAM and the communities in support of all the programmes being implemented.
Conservation Officers	Work on the Fish Sanctuary Programme - patrolling, education and best practices, ensure that all the regulations and operating practices are being adhered to by the community.
Conservation Interns	Students understudying and supporting the activities of the Conservation Officers.
Tour Guides (15)	Leading all tours (land, sea and river), involved with all guest services, light cleaning/maintenance, assist manager as needed. University students may also be used as interns.
Security/caretaker/gardener	Maintenance of facility including the nursery

PROFIT & LOSS STATEMENT

Visits to PBDC are projected to be 500 persons per month as noted below in Table 11.

Table 11: PBDC Year One Revenue Projection

PORTLAND BIGHT DEVELOPMENT CENTRE YEAR ONE REVENUE PROJECTION						
Projected Revenue	Day	Week (3 Days)	Monthly	Annually	J\$ /person	J\$ TOTAL
Jamaican Student (Infant to Secondary High)	25	75	300	3600	1500	5,400,000.00
Jamaican Student (Tertiary)			20	240	3000	720,000.00
Other Adults	5	15	60	720	4000	2,880,000.00
Boat Rides / Tours	10	30	120	1440	3000	4,320, 000.00
Total			500	6000		13, 320,000.00

Table 12: PBDC Five Year Revenue Projection

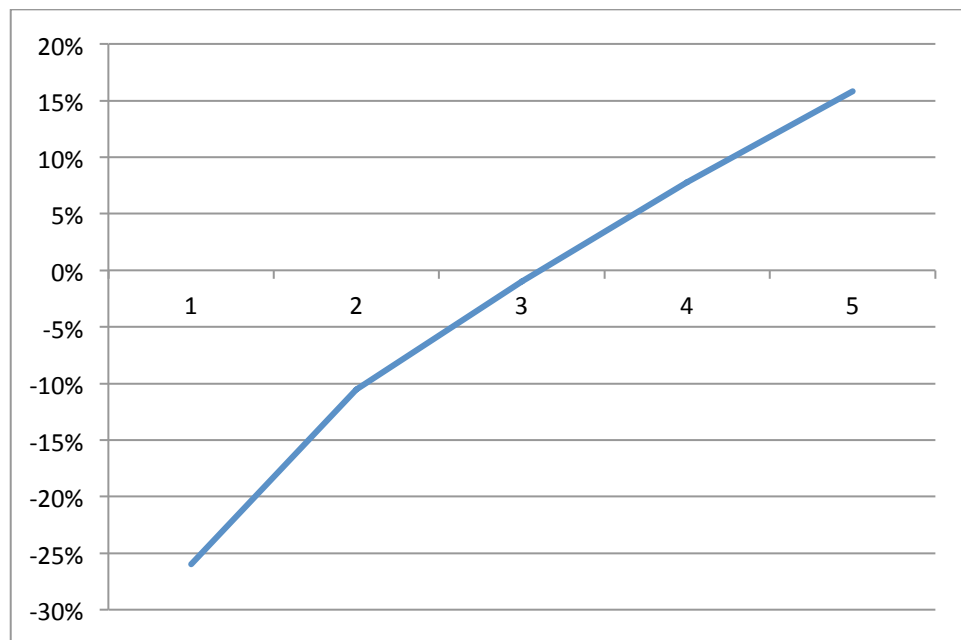
PORTLAND BIGHT DEVELOPMENT CENTRE FIVE YEARS FINANCIAL PROJECTION					
(JMD)	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
*% Revenue Increase		15%	15%	15%	15%
Revenue	13, 320,000.00	15,318,000.00	17,615,700.00	20,258,055.00	23,296,763.25
**Total Variable Cost	7,323,660.00	11,689,920.00	12,274,416.00	12,888,137.00	13,532,544.00
Revenue less Variable Cost	5996340.00	3,628,080.00	5,341,284.00	7369918.00	9,764,219.25
***Expenses	9,447,647.00	5,246,079.00	5,508,383.00	5,783,802.00	6,072,993.00
NET PROFIT	(3,451,307.00)	(1617999.00)	167,099.00	1,586,116.00	3,691,226.25
NP %	(26%)	(10.56%)	(1%)	7.80%	15.80%

*5 years projection is the norm to get a sense of the trajectory envisioned with a 60% increase by year 5 (Kraakman, 2014. How to Determine A Realistic Growth Rate for a Company. <https://www.valuespreadsheet.com/value-investing-blog/how-to-determine-a-realistic-growth-rate-for-a-company>).

**Variable Costs: 10 % increase based on historical data

*** Expenses: 10 % increase based on historical data

Figure 9: Net Profit Percentage



KEY METRICS FOR SUCCESS

The key metrics for success are as follows:

- Net profit by year three of approximately J\$167,000 with progressive increase to year five to 3.69M .
- Maintaining 15 percent or more revenue each year

SENSITIVITY ANALYSIS

SENSITIVITY ANALYSIS	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
Variable Cost	7,323,660.00	11,689,920.00	12,274,416.00	12,888,137.00	13,532,544.00
10 % increase based on historical data					
Annual Variable Cost % Change	-	60	5	5	5
Expenses	9,447,647.00	5,246,079.00	5,508,383.00	5,783,802.00	6,072,993.00
10 % increase based on historical data	-				
Annual Expenses % Change	-	44.5	5	5	5
Net Profit	-3,451,307.00	-1,617,999.00	167,099.00	1,586,116.00	3,691,226.25
Net Profit %	-26	-11.56	-1	7.80	15.80
Annual Net Profit / Loss % Change	-26% loss in Year 1 without grant funding	-14.44% decrease in loss when compared to year 1 without grant funding	-13.44% decrease in loss when compared to year 2 without grant funding	-5.64% decrease in loss when compared to year 3 without grant funding	10.16 % increase when compared to year 4 resulting in profit without grant funding

OPERATING EXPENSES

Advertising
 Salaries (C-CAM Staff)
 Contract Employees
 Commissions
 Incentives
 Payroll Taxes
 Travel Expenses
 Training
 Insurance (Public Liability)
 Permits and Licenses
 Office Expenses
 Operating Supplies (Toiletries)
 Building Maintenance and Repairs
 Garden Supplies
 Utilities - Battery
 -Cellular Phone

MACRO-ENVIRONMENTAL & REGULATORY ANALYSIS

The following analysis highlights the environmental and regulatory factors that impact on C-CAM and the surrounding Portland Bight area. .

The management of C-CAM recognized the importance of the macro-environment and the critical impact it has on the long-term success of this venture. As a result, C-CAM management has planned and executed a series of educational and awareness building campaigns for the surrounding communities and have implemented and managed a number of projects designed to preserve the natural environment of the area.

The C-CAM business contributes to protecting and conserving these ecosystems. C-CAM is in the process of developing an ecotourism facility which is a more sustainable operation that will provide both economic development to support the operation financially as well as contribute to community development and sustainability, and simultaneously enable environmental sustainability of the ecosystem on which the operation highly depends. In doing so, this facility will achieve the objectives of being an international ecotourism venture.

The process of planning and sound management principles are guided by the PESTEL analysis to ensure that internal and external factors are duly considered in setting priority goals for the business plan. The following information presents information obtained from the micro-environmental scanning process. These are presented within the framework of the environmental and regulatory factors that impact C-CAM / PBDC : political, economic, social, technological, environmental and legal (PESTEL) factors .

Macro-environmental Scan (PESTEL Analysis)

Political Factors

Although Jamaica is a relatively stable democratic country, it suffers from a perception of instability which negatively impacts the tourism sector;

The Government of Jamaica (GOJ) actively encourages investment in tourism and tourism diversification, and is now focusing specifically on developing community and experiential tourism experiences/attractions/tours;

The GOJ through the Ministry of Tourism (MOT) has developed a community tourism policy to provide a framework for community tourism enterprises;

The GOJ is actively promoting local vacations for Jamaicans, as evidenced by their 'If You Go You Will Know "" programme first launched in 2009;

Tourism is aligned to the United Nation's 2030 Agenda where close attention is being given to the industry's capacity to expand economic benefits to local residents, generate prosperity and create wealth, hence reducing poverty and creating equity for Jamaicans.

The Ministry of Tourism has introduced five networks to enable tourism development in Jamaica.; namely, knowledge, gastronomy, shopping, health and wellness, and sports and entertainment.

There are regulatory frameworks and institutional support to include licensing and environmental protection laws to assist with the management and operation of ecotourism ventures.

Economic Factors

There will be a 2.5 percent economic growth for the fiscal year 2018 – 19. Unemployment rate shows slow decline. The 2017 rate was 12.20 percent and the projected rate for December 2018 is 11.60 percent, showing a predicted reduction of 0.6 percent. It is further projected that unemployment will decrease to 9.48 percent by December 2022.

There is access to funding through local organizations such as the Jamaica Social Investment Fund (JSIF) and the Development Bank of Jamaica and regional eg. Caribbean Development Bank.

Access to affordable credit remains difficult especially for small businesses;

Globally, international tourism has shown an increase of 3.9 percent from 2015 (928 million) to 2016 (1,235 million).

Tourism in the Caribbean region also showed growth of 4.2 percent (2015 – 29.3 million and 2016 – 28.1 million).

In 2016 travel and tourism generated :

- US\$7.6 trillion (10.2 per cent of global GDP)
- 292 million jobs equivalent to 1 in 10 jobs in the global economy
- 6.6 percent of total global exports
- Approximately 30 per cent of total global service exports.

Tourist arrivals to Jamaica have remained strong; with a total of 2,181,684 visitors to Jamaica in 2016; an increase of 2.8 percent when compared to 2015

Locally, tourism continues to be an engine for economic development in Jamaica by:

- Bringing valuable investments to the country, creating one in every four jobs, and generating sectorial linkages.
- Contributing to the Gross Domestic Product / GDP (DIRECT CONTRIBUTION GDP: TOTAL CONTRIBUTION) which has been increasing since 2012 from 25.3 percent to 2017 at 32.9 percent. This trend is expected to continue. The industry was 27.5 percent of total employment in 2016. This is expected to rise by 4.4 percent in 2027 to 40 percent of total contribution.

- Contribution to revenue :
 - In 2017, tourism contributed approximately \$62.2 billion in revenue, representing 12.1 percent of total recurrent revenue
- Directly supporting employment :
 - In 2016 Travel & Tourism directly supported 8.4 percent of total employment which is expected to increase by 12.2% of total employment by 2027.
 - In 2016, the total contribution of travel and tourism to employment, including jobs indirectly supported by visitor exports was 58.2 percent of total exports in 2016. This is expected to rise by 7.0% in 2017, and rise by 6.8% pa over the next ten years to 21.1% of total in 2027.

Social Factors

Locally and internationally, people continue to become more health conscious causing many health conscious travelers to seek out active vacation options;

There is expected growth from entrepreneurial ventures in Jamaica both at the macro level and in the tourism industry.

Tourism is expected to contribute to the decline in the unemployment rate especially from the expected increase number of hotel rooms

The ongoing aging of the population continues to impact global travel as 'baby boomers' seek out destinations and attractions that meet their needs: authentic, environmentally sustainable, safe, soft adventure, educational, and relaxing;

Europeans, Japanese, and the emerging markets, especially the Chinese market with rising incomes are lucrative potential markets;

Consumers are becoming more sophisticated and demanding increasingly better customer service;

Consumers are craving authenticity - brands with values that reflect their own;

Global culture is becoming more liberal and adventurous in general, persons are becoming less insular and more interested in the world around them.

There is greater focus on gender considerations to include equity to job access, pay range and job position

Greater consideration is being given to vulnerable groups to include the physically, mentally and visually challenged, children and the aged.

The high crime rate in Jamaica continues to impact publicity of the destination; business activities and human capacity.

There is improved roadways and access across Jamaica via the PJ Patterson Highway (East to West bound) and the North to South Highway.

Access to Jamaica from the rest of the world has improved due to the multitude of new airline services and frequency of flights from American Airlines, Air Canada, Spirit Airlines, Caribbean Airlines, Fly Jamaica, Cayman Airlines, Condor, United Airlines and Continental Airlines.

There are frequent flights to Jamaica from major gateways in the USA (Miami and New York), England (London) and Canada (Toronto).

Access to Jamaica from the rest of the Caribbean region remains a challenge in terms of frequency and number of flights as well as ports of disembarkation.

One major challenge is that the community will not be accustomed to increased numbers of persons visiting.

There is the potential increase in the local population due to increased tourism activity in the area attracting new residents.

Technological Factors

¹³ Internet usage has been increasing. As at December 2017, over 4.16 billion persons (54.4% of the world' population) used the internet.

Jamaica is now ranked 99th of 175 countries on the 2016 ICT Development Index (IDI). This shows an improvement of two places from the 2015 rankings.

In 2016 Jamaica was ranked 23rd of 34 countries in the Americas in terms of internet usage;

The most recent information technology report (2015) found that 80 percent of the population in Jamaica population use social media networks including Facebook and Twitter;

¹⁴ The 13-18 age group category (students) has been identified as heavy users of social media both locally and in the USA :

- YouTube* : USA 85 % & Jamaica 21%
- Instagram*: USA 72 % & Jamaica 59%
- Snapchat*: USA 69 % & Jamaica 58%
- *Facebook*: USA 51 % & Jamaica 47%
- Twitter*: USA 32 % & Jamaica 57%
- Tumblr*: USA 9% & Jamaica 48%

More travelers are searching online and with mobile devices for travel information- where to go, how to get there and how much will it cost; travel decisions are being made increasingly online and with mobile devices with internet/mobile bookings for travel, accommodation and entertainment increasing;

There is an increase in smart phone applications (travel apps) to guide the traveler to restaurants, places of interests and other destination offerings
Technology has positively impacted the cost of doing business by significantly reducing marketing costs;

Websites, direct mail campaigns, social media (Facebook, Instagram, Pinterest, Twitter, YouTube, Google +, etc.) have all created new marketing channels for business owners/marketers, which in some cases eliminate and/or reduce the need for expensive traditional advertising campaigns;

The business environment has become highly competitive due to the impact of information and communication technology such as social media, websites, travel applications among other facets;

Environmental Factors

Globally, the environmental conservation movement continues to grow, with persons becoming more interested in preserving the environment and minimizing their environmental footprint;

More consumers are seeking out 'green' destinations and attractions that are committed to sustainable tourism;

The local tourist industry will continue to be vulnerable to severe weather conditions including drought, heavy rains and hurricanes.

Community solid waste management practices are not up to standard - garbage collection, burning and dumping. These affect environmental sustainability.

Commodification of the environment for tourism activities without any conservation efforts is a concern;

There is increase call for the focus on responsible tourism to preserve and conserve on the use of the natural and physical environment;

Ecotourism can foster sustainable development in protected areas and their environs;

Legislative and Regulatory Factors

There are over 15 public sector departments and agencies that have mandates relating to community tourism development in Jamaica. These include a range of private sector tourism associations, environmental and community NGOs.

There are regional and international development organisations that have also been active in community tourism development in Jamaica;

The regulatory regime for the tourism sector in Jamaica has evolved over the years and a fully developed system of laws, regulations and policies is in place to govern and guide tourism development, the only community tourism specific aspects of the system are TPDCo guidelines for the development of community tourism projects;

The GOJ actively regulates the local tourism industry requiring all attractions to be licensed by the JTB/TPDCo;

Team Jamaica training is mandatory for all tourism industry workers;

There is an array of grants or loans available for community tourism development;

There have been a number of community tourism development programmes conducted by various donor and NGO partners, including the development of a National Community Policy;

MOT is also developing guidelines for caving and trails and other nature based attractions;

No one agency been given oversight for community tourism.

C-CAM will also apply for their Jamaica Tourist Board/TPDCo License and in the process ensure that all staff members be Team Jamaica trained.

Business Registration & Licensing

TPDCo Certification

All attractions operating within the tourism sector that provide a service to visitors (local or foreign) are required by law to obtain a Jamaica Tourist Board License for attractions. Obtaining this license is a three step process outlined below:

Submission of completed application form with all the required documents.

Assessment of the operation by an Officer from TPDCo's Product Quality Department.
Operation must be recommended before moving on to step three.

Submission of application, all required documents, and assessment report to the Jamaica Tourist Board for review at their monthly Board Meeting.

The Jamaica Tourist Board Attraction License expires annually and currently costs J\$6,000. Once a company has been licensed and is in operation, the company will then be subject to inspection by TPDCo to have the licenses approved for renewal.

Certified Tour Guide Program

Tour guides are required to be certified by TPDCo. The Training Unit of this agency can provide companies with tour guide training if required. If a company, however, provides its own in-house training, then the TPDCo can assess the training and certify its training programme.

JTB Team Jamaica Certification

All tour personnel will have to be Team Jamaica trained and certified, as this is a requirement for all persons operating in the hospitality sector. The Team Jamaica training covers information on Jamaica and the development of the tourism sector in general. It also covers areas such as customer service, time management, Jamaican history and culture, and the geography of Jamaica.

Environmental Certification (Future Phase)

In order to ensure that the organization's operations remain environmentally sustainable and become internationally recognized, C-CAM will pursue international environmental certification for the PBDC. This designation will assist in the marketing of the facility internationally and facilitate business partnership for expansion and growth.

Two such environmental certifications are EarthCheck and Green Globe. They have been designed specifically for the tourism sector and meet the criteria of all major tour operators operating worldwide. These environmental certifications follow all the principles of the ISO Certification programme. They will offer a degree of credibility to the ecotourism attraction and confidence for persons seeking environmentally friendly tourism products.

Strict carrying capacity will also be instituted. The number of visitors will be managed by way of operating three days per week. Considerations will be given to visits by large groups on the other days or on weekends. If there is an increase in market demand then the number of days will be increased to five, most likely, Monday to Friday, as these are customary opening days for businesses of this nature and also to accommodate its main target market.

Education and Training Certification

The Human Educational and Resource Training (HEART) is offering occupational certification in the skill-based areas. The Career Advancement Programme (CAP) administered by HEART is offering certification in tour guiding and hospitality services. Additionally, the newly created Jamaica Tourism Centre for Innovation is encouraging certification in the skill-based areas in hospitality and tourism.

RECOMMENDATIONS FOR THE FUTURE

-Develop a Hazard / Disaster Risk Management Guide for the C-CAM /PBDC in terms of mitigation, preparedness, response and recovery to various types of hazards as well as to maintain climate change adaptation and disaster management strategies.

-Design a standalone website for the PBDC to allow direct access to information

-Have a designated Marketing Manager with social media skills to market and publicise the entity to a wide cross section of local, regional and international markets

REFERENCES

¹ Statistical Institute of Jamaica (2011). Population Census. Retrieved from <http://statinja.gov.jm/Census/PopCensus/Popcensus2011Index.aspx>.

²United World Tourism Organization / UNWTO (2018). 2017 International Tourism Results: the highest in seven years. Retrieved from <http://media.unwto.org/press-release/2018-01-15/2017-international-tourism-results-highest-seven-years>.

³TripAdvisor (2018) , TripAdvisor Announces Experiences, Tours, And Activities Trend Report For 2018. Retrieved from <http://ir.tripadvisor.com/news-releases/news-release-details/tripadvisor-announces-experiences-tours-and-activities-trend>.

⁴TripAdvisor log files, average monthly unique visitors "2017)

⁵ITB (2012). ITB World Travel Trends Report. Retrieved from https://www.itb-berlin.de/media/itb/itb_dl_all/itb_presse_all/WTTR_Report_2013_web.pdf.

⁶CMIGreen Traveler Study (2010). White Paper. Retrieved from <https://www.greenbook.org/marketing-research/cmigreen-traveler-study>.

⁷ JTB Survey 2009

⁸ Ecolodges: Exploring Opportunities for Sustainable Business", International Finance Corporation

⁹Acorn Consulting Partnership. (February 2008). "Bird Watching." p. 10

¹⁰ CBI Ministry of Foreign Affairs (2013). CBI Product Fact Sheet: Birdwatching Tourism by EU residents." <http://www.cbi.eu/sites/default/files/study/product-factsheet-birdwatching-tourism-europe-tourism-2013.pdf>

¹¹ Jamaica Information Service (2018). Record 4.3 Million Tourist Arrivals in 2017. Retrieved from <https://jis.gov.jm/record-4-3-million-tourist-arrivals-2017/>.

¹²Ministry of Education, Youth and Information. School Profiles 2015-1 <http://www.moe.gov.jm/sites/default/files/Directory%202015-2016%20no%20maps.pdf>.

¹³ Internet usage has been increasing. As at December 2017, over 4.16 billion persons (54.4% of the world' population) used the internet.

¹⁴ Golding, P (2018). Teen trend and technology. Jamaica Observer, Sunday, June 10, 2018