Remarks by the Honorable Commissioner of Tourism, Mr. Ibi Martis
Good morning everyone,

I hope that you all have had your cup of coffee this morning, because today’s event is packed with insightful information that we all can benefit from. Information that will direct us to tomorrow’s path that is imbued with optimism and hope for a bright future. Our people are optimistic about our future, a future we can build, shape, and alter if we please. This optimistic path is possible if we all work together towards one vision. This is the transformative and creative power we have in our hands.
Our people and our island have longed for a clear path, a direction that will move us to the next level of development filled with opportunities and hope. I feel and I am confident this is our moment, our moment to make a difference for generations to come.

A few months ago, I had the opportunity to meet with the University of Central Florida tourism research team. During that meeting, I understood that tourism could be the vehicle to create opportunities, to strengthen and expand the foundations of a prosperous and happy future for all of us.
Currently, tourism represents 16% of our economy and 20% of all jobs on the island. However, we are far from reaching all of the benefits that tourism can bring for our people. Tourism can help us overcome the tyranny of scale and can propel us forward by offering better jobs for our people.

For too long, we have considered tourism development only marginally, as a sideline sector, while other islands in our region have reaped the benefits of tourism. We have seen how neighboring islands have thrived, how quality of life has been positively affected by tourism. This is our greater goal: a better quality of life for our people.
Does this sound like a daunting task? Absolutely! However, we as Bonairians will face this task with confidence and courage. Enhancing our people’s quality of life is a noble task that we will accomplish by way of optimizing the profits from the tourism industry.

Our government is ready to act, to support tourism, and to work towards a new beginning in which you all will work together for this greater goal. Tourism can count on our support to strengthen the TCB, to procure more resources to support our tourism vision, and to ensure that we broaden the business opportunities for the private sector. We consider the private sector as the growth engine for this brighter future.
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The time to act is now. I am standing before you with the promise to support all actions that can take us to new heights and prosperous tomorrows for all of us. Small islands have few windows of opportunity. Not to seize the opportunities that tourism may afford us may be devastating to our prospects. Please listen to the research findings presented during this summit. Ponder the research results. Ask questions. Provide your feedback. Learn how you can help advance our bright future. Let’s seize this opportunity together!

Thank you for having me here today. I declare this summit officially open.
The six takeaways
The six takeaways (#1)

• Bonaire has many opportunities as a tourist destination.

• Therefore, there is no need to under leverage (undersell) your destination and your products.
The six takeaways (#2)

• It behooves destination managers and tourist stakeholders to quickly contact the local population to inform people of tourism benefits.

• The tourism sector should be an integral part of the island society.
• Small destinations have few windows of economic opportunities. Therefore, acting quickly to seize opportunities is crucial for enhancing tourism benefits and people’s well-being.

• The way forward is to support a synergy between nature and tourism for the benefit of Bonaire’s people.
The six takeaways (#4)

- Tourism is a competitive and collaborative endeavor.
  - Working as a team is the only way for Bonaire to bode success and spawn more opportunities for everyone.
• Tourism is a strategic spearhead that can enhance people’s well-being. It behooves the political system to consider tourism above party politics.

• *Tourism is non-partisan. Make sure that your elected officials understand this condition for success.*
The six takeaways (#6)

• Success requires a new attitude. Tourism stakeholders must hold a positive attitude that no longer is based on intuition.

• Decisions must be based on data and business intelligence.
The way forward

• “Each stakeholder has the responsibility to achieve a quality standard that must be grounded in a transformative and creative team power. Success is achievable but only if there is one tourism team for Bonaire.”
TOURISM SUMMIT
BONAIRE

Challenges Bonaire Tourism: where are we?

Dr. Robertico Croes  |  Dr. Manuel Rivera
Dr. Valeriya Shapoval  |  Dr. Mathilda Van Niekerk
Dr. Kelly Semrad
Our Assignment-Tourism Master Plan

1. How? (Bottom up approach)
2. Spoke to more than 100 stakeholders
3. Conducted Seven Surveys
4. In depth review of literature
5. Novel techniques and method
Our Approach

1. **Bonaireans**
   - Voice

2. **Tourists**
   - Visitor
   - Experience
   - Image
   - Impressions

3. **Opportunities**
   - Quality of Life
   - Happiness
   - SwL

4. **Tourism Master Plan**
   - Book
Today’s agenda

- Findings
- Suggestions
- People + Product + Demand =
- Impact (Industry) + Relevance (People)

\[ P + P + D = I + R \]
Presentation framework

What is the important question?
The dichotomy
Tourism as means, not an end
Residents’ “Quality of Life”

Residents’ perception of change
Current state of tourism
Bonaire as a destination
Concluding remarks
What is the important question?

- Tourism productivity in Bonaire
- Opportunities created by tourism
- Standard of living from tourism
1. Disconnect people and tourism
2. Weak links tourism and the economy
3. Oversupply of room inventory
4. Lack of airlift
5. Weak governance structure
Disconnect people and tourism

• Low perception of residents about tourism
  • 27% agrees that “My community life has been improved by tourism”
  • 22% agrees “their family life has been positively impacted by tourism”
  • 32% thinks that “Bonaire’s standard of living has increased by tourism”
Low satisfaction levels

- 48% agrees that “I am satisfied with my life”
- 32% agrees that “when compared to others their life is better”
Weak links tourism and the economy

• Tourism represents 16% of the economy

• Negative GDP per capita growth; 45% of the local population lost spending power

• Around 50% of young Bonairians are not looking for a job
GDP and Arrivals

LARR  LGDP
Is Bonaire’s tourism valued?

Need a new vision?

Current View:
Marine ecosystems are considered more economically important than terrestrial ecosystems.

LOW VALUE
US$105 million value

PEOPLE?
Everything is nature ($3.9 mil km²)

PESSIMISTIC
Tourism $ will decrease:
$60 mil. 10 years
$40 mil. 30 years

SOURCE: The Economics of Ecosystems and Biodiversity on Bonaire What’s Bonaire’s Nature Worth?
The dichotomy: Nature vs. People?
The goal should be to preserve the Bonairians?

Put people first!
Oversupply of room inventory
• Issues with connections (Regional, USA, and Latin America)
• Results in high cost in terms of Time and Money
Weak governance structure

- Low levels of efficient collaborations
- Lack of resources to support tourism
Opportunities

• People are happy (76% say they are happy)
• Relatively optimistic (63% optimistic about the future)
• Believe in tourism (50% hope tourism has promise for the future)
• 75% employees are proud of working in the tourism industry.
Opportunities

• Residents want change and opportunities (62%)
• Desire more tourism development (70%)
• Measured development (More conservation (62%))
• Caribbean is the most desired foreign vacation for US residents.
Can tourism achieve this?

- Drivers of Tourism
- Satisfaction with Life

Diagram:
- Tourism
- Development
- Happiness
- Life Satisfaction
What does it mean in terms of tourists?

• Airport needs about 60,000 arrivals to break even.

• Accommodation sector needs at 73% 26,000 more arrivals; at 75%, you need 30,000 more arrivals; at 80%, you need 41,000 arrivals.
Can the product align with these opportunities?
Bonaire Tourism Product: What do we offer?
Can the current product support these opportunities?
1. The People of Bonaire
What motivates them?

• Employees are vital to any business.

• Motivated workforce means a high productivity

• Thus helping achieve business goals.
What motivates them?

The Job

- Quality of work life
- Characteristics
- Benefits
- Commitment
- Feelings

Satisfaction
Quality of work life

% that agree

47% • allows a person to care for their family

39% • provides adequate work hours

44% • the workload is reasonable

36% • ensures balance between work and life

47% • is easily accessible (transport)
Job characteristics

% that agree

72% • meaningful
72% • challenging
50% • opportunities for promotions
39% • provides adequate training
33% • opportunities for salary increases
The job benefits....

% that agree

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

% that agree

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

% that agree
Congeniality...

% that agree

- 75% • my personality fits a career in tourism
- 64% • consider myself a hospitable person
- 53% • can use my skills and abilities in tourism
- 66% • get pleasure working in tourism
- 56% • take pride in seeing satisfied tourists
- 44% • like a job that allows to interact with tourists
Tourism jobs feeling...

% that agree

- **66%** I feel attached to Bonaire’s tourism
- **63%** I “belong” in tourism
- **52%** I am a valued member of tourism industry
- **64%** I do my best to assist tourists
- **86%** I try my best to give tourists directions
- **91%** I am always friendly to tourists
Job satisfaction

% that agree

52% • satisfied with my working conditions
69% • satisfied with my tourism job
42% • satisfied with the opportunities to grow
30% • satisfied with my income
Job-Life Satisfaction-Happiness

Tourism Job
- Benefits
- Job Characteristics
- QOL
- Commitment
- Congeniality

Job Satisfaction
- Past
- Present
- Future

Happiness

Happy People
2. The Stayover Tourist

Bonaire product assessment....
The Tourist Experience

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

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

- 55%  Safety and security at the airport
- 53%  Cleanliness of the airport
- 50%  Hospitableness of customs and immigrations
- 50%  Convenience of car rental facilities
- 49%  Safety and security of taxis
- 48%  Cleanliness of taxis
- 48%  Reliability of taxi services
- 47%  Quality of taxi services
- 47%  Hospitableness of taxi drivers
The Tourist Intentions

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

- Not very expensive: 61%
- Very satisfied: 52%
- Better than expected: 47%
- Better than expected: 46%

Accommodations (Price) | Accommodations (Satisfaction) | Accommodations (Value) | Accommodations (Quality)
Activities & attractions

Not very expensive: 66%

Very Satisfied: 49%

Better than expected: 45%

Better than expected: 43%
Guided Tours

- Not very expensive: 62%
- Very Satisfied: 47%
- Better than expected: 44%
- Better than expected: 43%
Restaurants

Not very expensive 55%

Better than expected 49%

Better than expected 48%

Restaurants (Satisfaction) 56%
Car Rental

- Not very expensive: 64%
- Very Satisfied: 45%
- Better than expected: 41%
- Better than expected: 41%

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rental car (Price)</td>
<td>64%</td>
</tr>
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</table>
Shopping

- Not very expensive: 61%
- Very Satisfied: 41%
- Better than expected (Value): 36%
- Better than expected (Quality): 35%

Shopping (Price) | Shopping (Satisfaction) | Shopping (Value) | Shopping (Quality)
Overall Experience: Bonaire

- Not very expensive: 57%
- Very Satisfied: 56%
- Better than expected: 48%
- Better than expected: 45%

| Overall perception of prices in Bonaire (Price) | My overall trip to Bonaire (Satisfaction) | Overall perception of quality in Bonaire was (Quality) | The overall value of what was paid in Bonaire (Value) |
3. The Cruise Visitor
Cruise perceptions: Bonaire

- Pristine natural environment: 88%
- Environmentally friendly island: 87%
- Variety of water activities: 79%
- Beautiful beaches: 72%
- Good variety of restaurants: 47%
- Good quality restaurants: 44%
Cruise perceptions: Bonaire

- Friendliness of residents: 82%
- Overall visit to Bonaire: 80%
- Courtesy of employees: 79%
- Initial shore-side welcome: 77%
What do we know so far?

• The cruise is...
  • not mutually exclusive from the stayover

• There is no clear WOW factor

• Overall, with the exception of cruise, stayovers perceive the product as average
Current Value Proposition

• Bonaire is NATURE
• Bonaire is DIVING/WATER
• Bonaire is PRISTINE
• But....
  • Bonaire is under selling the value of the product
Underleveraging the product

• The Ocean is high value for customer and low value for Bonaire

• On land, is consumed for free
Weak governance system...

• In addition, Bonaire tourism products lack support.

• Lack of efficiencies
  • Fragmentation
  • Collaboration
  • Product development on land
BONAIRE

THANKS

QUESTIONS
Bonaire Tourism Demand: Who are they? What do they want?

Dr. Manuel Rivera | Dr. Robertico Croes
Dr. Valeriya Shapoval | Dr. Mathilda Van Niekerk
Dr. Kelly Semrad
The demand system consist of 4 groups:

• Stayover
• Cruise
• Potential Visitors
• Passive Bonaire Fan
Stayover Tourists
Motivation to visit

- Diving: 51%
- Sun & eco-tourism: 35%
- VFR: 13%
- Business: 10%
- Culture: 9%
- Windsurfing: 7%
- Wellness: 4%
- Shopping: 2%
- Wedding or honeymoon: 1%
Place of stay

- Rented apartment, 26%
- Hotel, 30%
- All-inclusive resort, 22%
- Rented house/villa, 10%
- Room in a particular house, 1%
- With friends and family, 10%
Water Activities

- Snorkeling: 28%
- Diving: 11%
- Beaches: 7%
- Windsurfing: 7%
- Boating: 6%
- Kayaking: 4%
- Kite surfing: 2%
- Sail: 1%
- Water skiing: 1%
- Paddle boarding: 4%
- Deep sea fishing: 50%
Land Activities

- Hiking: 5%
- Bird watching: 13%
- Biking: 5%
- Caving: 5%
- Horseback riding: 16%
- Rock Climbing/Rappelling: 2%
Nightlife Activities

- Dining: 54%
- Bars and cafes: 29%
- Music/concert/festivals: 7%
- Folkloric/cultural show: 2%
- Carnival: 3%
### Behavioral Intentions

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Spending per day

- $1,286 per trip (*preliminary estimation)
- $148 per day (*preliminary estimation)
- LOS= 8.69
- Tourism Multiplier for HORECA=1.41
- Total Direct Spending $177.5 Million
Cruise Visitors
Cruise Spending

• $40 per day*
  • One of the lowest in the region (BREA Report)

• (*preliminary estimation)
Cruise Conversion

- Delighted with my experience: 84%
- Meeting expectations: 81%
- Impressed by offer: 71%
- Bonaire has more to offer: 70%
- Non-cruise trip worth time and money: 60%
- Return likelihood: 55%
Cruise Activities

• 20%  Marine-based activity tour
• 12%  Land-based activity tour
•  8%  Tour of historical & cultural sites
•  7%  Shopping tour
•  4%  City center tour
Behavioral Intentions

- Recommend Bonaire: 76%
- Posting photos on social media: 67%
- Comment on social media: 62%
Potential Tourists
What are they interested in?

• Looking for Quality and Value
  • (51% of choice)
  1. Variety of shopping opportunities
  2. Accommodation prices
  3. Prices in the shops
  4. Informational signage at attraction sites
  5. Restaurant prices
The potential traveler is looking...

• Looking for Quality and Value
  • (59% of choice)
  1. Prices in restaurants
  2. Quality of accommodation
  3. Quality of food and beverages
  4. Variety of water activities
  5. Variety of nightlife opportunities
American Market Competitive Set

1. Aruba
2. Belize
3. Cayman Island
4. Saint Martin
5. Mexico Coast
Dutch Market Competitive Set

1. Bahamas
2. Barbados
3. Aruba
4. Cuba
5. Curacao
Positioning Maps
Positioning Maps

Quality of services in accommodation vs. Quality of accommodation facilities
Positioning Maps

Luxury tourism products and services vs. Cost of the trip

- Low agreement
- High agreement

Flags of different countries positioned on the map.
Positioning Maps

Restaurant prices

Quality of food and beverages

HIGH AGREEMENT

LOW AGREEMENT

LOW AGREEMENT

HIGH AGREEMENT
Positioning Maps
Positioning Maps

- High Agreement
- Low Agreement

Cost of the trip

Quality of diving

Flags representing different countries are plotted on the map to show their positions based on cost and quality of diving.
Passive Potential Tourists
The passive Bonaire fan
The passive Bonaire fan

Google Analytics

[Map of the Netherlands with various regions highlighted]
Latent Survey (USA)
Potential Airlift
THANKS
QUESTIONS
Product development:

• What do we sustain?
• What do we enhance?
• What do we change?
Product Development

• Strengthening the TCB
  • Governance strictures
  • Inclusive non-traditional stakeholders
  • Financing and sourcing
  • DMO: ROI culture and strategic intelligence
  • Acquisition and product development
ROI operational mindset

$70-$1,200

$40-$1,200

Google Analytics
Overview

• We know about:
  • Product
  • Demand (current, potential and latent)

• We know where they are

• And we can develop a sustainable product

• A small island with limited opportunities and budget
The BUSINESS travelers?

Attracting Business Travelers is: 3.3 times more likely to happen considering these set of outcomes

- **Info Sources**
- **Previous Visits** 3 to 9 times
- **Length of Stay** (<1) than one week
- **Establish partnerships w/ businesses**
Big Data: Business Travelers

business, prepare, functionality, create, attend, able, environment, access, learn, language, require, experience, complete
Exit Survey

• 10% of travelers to Bonaire
  • 78% Snorkeling
  • 25% Diving
  • 35% Hiking
  • 19% Windsurfing
  • 18% Birdwatching

• Segment
  • 36% Family
  • 54% Travel in group > 2
  • 44% Hotel
Big Data: Likely to return
Big Data: Hotels

Hotels

FREE

WiFi

5444
814
.204
"BONAIRE GREENHORN" WATER ENTHUSIASTS

46%

Vacation & Water Act.

Online

Length of Stay >14 days

Age

24 30 36 42 48 54 60+
Big Data: Beach Lovers

- marina
- tour
- bonaire
- kraledijk
- local
- caribbean
- original
- flamingo
- review
- web
- beach
- resort
Big Data: Ocean
Discussion

Thank you
Generating optimal Tourism Demand:

• How do we do it?
Demand approach

- Data driven
- Airlift: where?
Potential Airlift
Value proposition:

Simple  Pure   Natural  Bonaire

The untouched beauty of the Dutch Caribbean
Final remarks and Discussion
Final Remarks

• Nature and people is one: measured growth.
• Stayover and cruise: not mutually exclusive.