

# CARIBBEAN SPA AND WELLNESS SECTOR STRATEGY

2014 - 2018



# **CARIBBEAN SPA AND WELLNESS SECTOR STRATEGY**

## **2014 – 2018**

### **PREPARED FOR**

CARIBBEAN EXPORT DEVELOPMENT AGENCY

Barbados Headquarters:

1st Floor, Baobab Tower, Warrens, St Michael, Barbados

E: [info@carib-export.com](mailto:info@carib-export.com) W: [www.carib-export.com](http://www.carib-export.com)

### **PREPARED BY**

LCT CONSULTING & ASSOCIATES LTD

82 Victoria Gardens South, Diego Martin, Republic of Trinidad & Tobago

E: [michelle@lctconsultingt.com](mailto:michelle@lctconsultingt.com) W: [www.lctconsultingt.com](http://www.lctconsultingt.com)

## Table of Contents

**CARIBBEAN SPA AND WELLNESS SECTOR STRATEGY ..... ERROR! BOOKMARK NOT DEFINED.**

**CARIBBEAN SPA AND WELLNESS SECTOR STRATEGY ..... 1**

**1.0 DEFINITION OF KEY TERMS ..... 6**

1.1 Spa and Wellness Sector .....6

1.2 Spas .....6

1.3 Wellness .....7

1.4 Spa and Wellness Tourism.....7

**2.0 EXECUTIVE SUMMARY..... 8**

**3.0 BACKGROUND..... 11**

**3.1 PARTIES INVOLVED..... 12**

3.2 The Role of Caribbean Export & the Caribbean Spa and Wellness Association (C-SWA)..... 13

**4.0 GLOBAL OVERVIEW AND TRENDS ..... 15**

**4.1 MAIN COMPETITORS ..... 15**

4.1.1 Thailand.....15

4.1.2 India .....16

4.1.3 USA.....16

**4.2 CARIFORUM: TOURISM TRENDS AND ASSESSMENT OF SPA AND WELLNESS SECTOR.. 17**

4.2.1 CARIFORUM Sector Profile .....17

4.2.2 Health and Wellness Tourism Value Chain .....18

**5.0 PROBLEMS FACING THE SECTOR ..... 20**

5.1 Problems Contributing to Insufficient Scale and Uneven Quality .....20

5.2 Problems Contributing to the Lack of a Caribbean S&W Brand Identity .....20

**5.3 Problem Tree: CARIFORUM Spa & Wellness Sector .....21**

**5.4 S.W.O.T. Analysis .....22**

**5.4.1 S.W.O.T. Analysis Matrix .....23**

<b>6.0</b>	<b>VISION .....</b>	<b>26</b>
<b>6.1</b>	<b>STRATEGIC GOALS/OBJECTIVES .....</b>	<b>26</b>
<b>6.2</b>	<b>SECTOR STRATEGY .....</b>	<b>26</b>
<b>6.3</b>	<b>KEY UNDERLYING ASSUMPTIONS .....</b>	<b>27</b>
<b>6.4</b>	<b>FIVE (5) STRATEGIC PILLARS.....</b>	<b>27</b>
<b>6.4.1</b>	<b>Pillar 1: Policy and Regulatory Framework .....</b>	<b>28</b>
6.4.1.1	Policy Development and Legislation .....	28
6.4.1.2	Implementation of Accepted Standards .....	29
6.4.1.3	Advocacy .....	30
6.4.1.4	International Accreditation .....	30
<b>6.4.2</b>	<b>Pillar 2: Organization Development and Strengthening.....</b>	<b>30</b>
6.4.2.1	Training.....	30
6.4.2.2	Organization Development and Strengthening.....	31
<b>6.4.3</b>	<b>Pillar 3: Marketing .....</b>	<b>32</b>
6.4.3.1	Articulation of Unique Selling Proposition .....	32
6.4.3.2	Development of Caribbean Brand .....	33
6.4.3.3	Brand Positioning .....	33
6.4.3.4	Target Markets and Market Access .....	33
6.4.3.5	Marketing Partnerships .....	34
6.4.3.6	Promotions & Campaign .....	34
<b>6.4.4</b>	<b>Pillar 4: Product and Services Development and Capacity Building.....</b>	<b>36</b>
6.4.4.1	Product Improvement .....	37
6.4.4.2	Capacity Building .....	37
<b>6.4.5</b>	<b>Pillar 5: Resource Mobilization.....</b>	<b>38</b>
6.4.5.1	Donor Coordination.....	38
6.4.5.2	Public Private Sector Partnerships (PPP) .....	38
<b>7.0</b>	<b>MECHANISMS FOR IMPLEMENTATION OF SECTOR STRATEGY .....</b>	<b>40</b>
7.1	Governance Structure .....	40
7.2	Regional level implementation and coordination.....	40
7.3	National level implementation and coordination .....	41
7.4	Role and Function of Spa and Wellness Implementation Unit .....	41
<b>8.0</b>	<b>THREE-YEAR ACTION PLAN CARIBBEAN SPA &amp; WELLNESS SECTOR STRATEGY.....</b>	<b>43</b>

## List of Acronyms

CANTA	-	Caribbean Association of National Training Agencies
CARIFORUM	-	Caribbean Forum of African, Caribbean and Pacific (ACP) States
CARPHA	-	Caribbean Public Health Agency
CARTFund	-	Caribbean Aid for Trade and Regional Integration Trust Fund
CARIBBEAN		
EXPORT	-	Caribbean Export Development Agency
CDB	-	Caribbean Development Bank
CHTA	-	Caribbean Hotel and Tourism Association
CNSC	-	Caribbean Network of Service Coalitions
CSME	-	CARICOM Single Market and Economy
CSWSA	-	Caribbean Spa & Wellness Seal of Approval
CROSQ	-	CARICOM Regional Organization for Standards and Quality
CTO	-	Caribbean Tourism Organization
C-SWA	-	Caribbean Spa and Wellness Association
DPIL	-	Denzil Phillips International Ltd
DRP	-	Draft Regional Policies
EPA	-	Economic Partnership Agreement
EU	-	European Union
GIDC	-	Grenada Industrial Development Corporation
GSWS	-	Global Spa & Wellness Summit
HEART	-	Human Employment and Resource Training Trust
H&W	-	Health and Wellness
HW&T	-	Health, Wellness and Tourism
IDB	-	Inter-American Development Bank
IICA	-	Inter-American Institute for Cooperation on Agriculture
ISPA	-	International SPA Association
ITB	-	International Tourismus-Börse Berlin
MICE	-	Meetings, Incentives, Conferences and Events
PPP	-	Public-Private sector Partnership
RCC	-	Regional Coordinating Committee
R&D	-	Research and Development
RPCM	-	Regional Policy Creation Mechanism
SMEs	-	Small and Medium Enterprises

SPDF	-	Special Product Development Facilities
SWPS	-	Spa & Wellness Programme Secretariat
TOR	-	Terms of Reference
USP	-	Unique selling proposition
UWI	-	University of the West Indies
WTM	-	World Tourism Market

## 1.0 Definition of Key Terms

### 1.1 Spa and Wellness Sector

The Health Sector is defined as the combination of economic activities that cater to the preservation and /or promotion of health. The sector therefore is multi-industrial in its reach and it cuts across many if not all major economic sectors such as manufacturing, professional services, wholesale and retail trade etc.

In this document, The Spa and Wellness (S&W) Sector refers to a specific subset of activities within the wider Health sector. The activities include inter alia:

- Non-surgical cosmetic procedures
- Manufacture and distribution of cosmetic products (not requiring a prescription from a certified medical practitioner)
- Manufacture and distribution of health promoting products<sup>1</sup>
- Health promoting procedures and treatment conducted in Day and Resort Spas

The following are specifically NOT included in the Spa and Wellness Sector:

- Surgical procedures (cosmetic or otherwise)
- Medical procedures or treatments
- The manufacture or distribution of pharmaceuticals and/or products claiming to be health restoring.

### 1.2 Spas

The International Spa Association (ISPA) defines Spas as “places devoted to overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit”.

The ISPA further categorizes spas as:

**Day Spa:** A spa offering a variety of professionally administered spa services to clients on a day-use basis.

**Destination Spa:** A destination spa is a facility with the primary purpose of guiding individual spa-goers to develop healthy habits. This lifestyle transformation can be accomplished by providing a comprehensive program that includes spa services, physical fitness activities, wellness education, healthful cuisine and special interest programming.

**Resort/Hotel Spa:** A spa located within a resort or hotel providing professionally administered spa services, fitness and wellness components.

**Club Spa:** A facility whose primary purpose is fitness and which offers a variety of professionally administered spa services on a day-use basis.

---

<sup>1</sup> A contradistinction is made between health promoting and health restoring, the latter relates to treatment of illness, while the former relates to sustenance of health.

### **1.3 Wellness**

Mueller and Kaufmann defined Wellness as ‘a state of health featuring the harmony of body, mind and spirit, with self-responsibility, physical fitness/beauty care, healthy nutrition/diet, relaxation/ need for de-stressing/meditation, mental activity/education and environmental sensitivity/social contacts as fundamental elements’.

### **1.4 Spa and Wellness Tourism**

The University of Berne’s Research Institute for Leisure and Tourism, defines wellness tourism as ‘the sum of all the relationships and phenomena resulting from a journey and residence by people whose main motivation is to preserve or promote their health.’

## 2.0 Executive Summary

The global Health and Wellness industry is a rapidly expanding, multi-billion dollar market. Spa and Wellness Tourism is a substantial component of the Health and Wellness Industry. According to the Global Spa and Wellness Summit (GSWS) sponsored Stanford Research Institute (SRI) International Report of 2010, the estimated global market size of the health and wellness industry is said to be nearly USD 2 trillion.

The Spa and Wellness Tourism sector in CARIFORUM countries is generally perceived to be relatively underdeveloped in comparison to destinations such as South East Asia, Western Europe and USA. Spas in CARIFORUM countries generally offer a limited range of treatments.

Several significant problems face the sector. Conceptually these problems can be characterized into two categories: those contributing to insufficient scale and those contributing to the lack of a Caribbean H&W brand identity. Both contribute to an inability by various marketing agencies to effectively market the Caribbean S&W sector, ultimately leading to limited export earnings from the S&W sector. Notwithstanding these problems, the sector has significant strengths which can be leveraged. The proximity of CARIFORUM member states to major centers of demand as well as the diversity of ethnicities, cultural legacies and their associated health and healing practices in the CARIFORUM region are two such leverage points.

This sector strategy was designed to guide interventions in the Spa and Wellness sector during what this document considers to be a period of *Development and Organization for Growth*. The strategy will contribute to the development of a *Caribbean (CARIFORUM) Spa and Wellness brand identity anchored in quality products and services reflecting unique Caribbean resources and cultural heritage*, and ultimately to the overall objective of *Increasing Spa and Wellness export earnings in the CARIFORUM region*.

The expected duration of this period of *Development and Organization for Growth* is five years, the completion of which will result in:

1. Consistent quality attained across operators within their respective “operation class”
2. Products, services and treatments differentiated through greater use of inputs indigenous to the Caribbean
3. Caribbean Spa and Wellness Seal of Approval (CSWSA) established, displayed on facilities and products, promoted and marketed.

With respect to the last point, it is expected that the seal of approval (CSWSA) will signify - in the case of Spa and Wellness Facilities, that:

1. Minimum operating Standards and Procedures are met.
2. That a large percentage of products used carry the C-SWA seal of approval.

And with respect to products the C-SWA seal will mean that:

1. The product has been tested and meets appropriate regional and international standards
2. The product contains a stipulated minimum percentage of ingredients that are indigenous to the Caribbean.

Five strategic pillars for action are proposed in an effort to realize the Caribbean's vision as a global leader in Spa and Wellness industries. It is imperative that all pillars are addressed, as they are co-dependent and the strategy will not succeed without decisive action in each area.

The five (5) strategic pillars are:

- **Pillar 1: Policy and Regulatory Framework**
- **Pillar 2: Organization Development & Strengthening**
- **Pillar 3: Marketing**
- **Pillar 4: Product and Services Development and Capacity Building**
- **Pillar 5: Resource Mobilization**

The first pillar provides a framework for the development and implementation of accepted regional standards to be applied across the board within a specific product class as well as "best in class" standards that will be maintained by facilities and products bearing the Seal of Approval. Additionally, the pillar focuses on policy setting, advocacy and accreditation within the sector.

The capacity building pillar focuses on professional development and institutional strengthening. Pillar 3 speaks to the Marketing strategy and the sub-strategies identified in this regard relate to:

- Clearly articulating the Unique Selling Proposition for the Caribbean S&W brand
- Developing and appropriately positioning the brand
- Identification of target markets and securing market access
- Developing Marketing Partnerships
- Launching and sustaining effective promotions and campaigns

Pillar 4, focuses on product improvement as well as initiatives aimed at building the capacity of operators in the sector. The resource mobilization pillar focuses on donor coordination and the use of public private partnerships to encourage investment in the sector. In total the intervention for the sector for the first three years amounts to USD 6.6 million.

## Section 1: Background and Parties Involved

---

### 3.0 Background

The development of specialized tourism markets has been recognized by the Governments of the CARIFORUM region as a means to economic diversification. The Regional Private Sector Development Programme of the 10<sup>th</sup> EDF has consequently identified the development of specialized tourism as a priority area for export development. Spa and Wellness (S&W) tourism has therefore been selected as one of the specialized tourism products in this regard.

S&W tourism a spinoff from the Health and Wellness revolution, has been sweeping through much of the Western world, in particular Western Europe and North America. The estimated global market size of the health and wellness industry is said to be nearly USD 2 trillion, with contribution from the following sub-sectors:

- Spa - \$60B
- Complementary and Alternative medicine - \$113B
- Healthy Eating/Nutrition/Weight Loss - \$277B
- Preventative/Personalized Health - \$243B
- Wellness Tourism - \$106B
- Medical Tourism - \$50B
- Workplace wellness - \$31B
- Fitness and mind-body - \$390B
- Beauty and anti-aging - \$679B

While statistics on the size of S&W tourism in CARIFORUM are not available, it is widely believed that the sector is relatively small and underdeveloped. However the region possesses key infrastructure and resources that could allow it to be a major regional player in the global S&W tourism market space. The region already boasts of over twenty world class spas inclusive of The Body Holiday- Le Sport (St Lucia), Sandy Lane (Barbados), Four Seasons (Nevis) and Sugar Ridge (Antigua).

The Caribbean Export Development Agency (Caribbean Export) has therefore signed an agreement with the Caribbean Development Bank (CDB) as Administrator of the CARTFund for implementation of a Health and Wellness Tourism project, with the specific objective of contributing to the growth of the spa and wellness segment of the tourism industry in CARIFORUM countries.

The project supports the implementation of a first phase of the longer-term development of a Caribbean Brand for the Caribbean Spa and Wellness Sector as detailed in C-SWA's Work Plan. The three major components of the Project are:

- (a) *Market Research and Strategy Development* to give strategic direction for improving the capability of the health and wellness (H&W) sector in CARIFORUM countries, to highlight its Caribbean characteristics and to realize its potential in the fast growing global market. This research will be a useful first step towards the ultimate goal of developing a Caribbean H&W tourism brand;
- (b) *Marketing and Promotion* of the Region's H&W product with the aim of raising the Caribbean's international profile and reputation in relation to this sector, through inter alia the development of a website, exposure to best practice and participation in trade shows; and

- (c) *Standards Development* for improved quality of goods and services in the industry and consumer protection in keeping with international benchmarks.

This strategy for the Spa and Wellness sector in CARIFORUM countries represents the final component in fulfillment of Part a (*Market Research and Strategy Development*) above. It has been developed on behalf of Caribbean Export. In developing this strategy the consultant has been guided by the Terms of Reference (TOR) as approved by Caribbean Export, several sector studies and by the views of key sector players.

### **3.1 Parties Involved**

The stakeholders involved in the development of the Caribbean Spa and Wellness sector will include *inter alia*:

Caribbean Agricultural Research and Development Institute - CARDI  
Caribbean Aid for Trade and Regional Integration Trust Fund - CARTFund  
Caribbean Alliance for Sustainable Tourism - CAST  
Caribbean Association of National Training Agencies - CANTA  
Caribbean Association for Research Practitioners – CARAPA  
Caribbean Development Bank – CDB  
Caribbean Export Development Agency – Caribbean Export  
Caribbean Food and Nutrition Institute – CFNI  
Caribbean Herb Business Association – CHBA  
Caribbean Hotel and Tourism Association - CHTA  
Caribbean Media Exchange – CMEx  
Caribbean Organic Agricultural Movement - COAM  
Caribbean Public Health Agency – CARPHA  
Caribbean Spa and Wellness Association – C-SWA  
Caribbean Tourism Organisation - CTO  
CARICOM Regional Organisation for Standards and Quality - CROSQ  
Deutsche Gesellschaft für Internationale Zusammenarbeit - GIZ  
Global Spa and Wellness Summit – GSWS  
Heart Trust NTA  
Inter-American Association for Cooperation on Agriculture – IICA  
International Spa Association - ISPA  
Trinidad and Tobago National Training Agency  
UKAID –Department for International Development  
University of West Indies-UWI

Strategic alliance building must include linkages with national organisations such as the Coalition of Services Industries, Grenada Industrial Development Corporation (GIDC), Beltraide and Jamaica

Promotions Corporation (Jampro), as these organisations have been actively involved in supporting their national and regional S&W promotion efforts.

### **3.2 The Role of Caribbean Export & the Caribbean Spa and Wellness Association (C-SWA)**

Caribbean Export is the regional trade and investment agency representing all CARIFORUM countries. A key element of the agency's mandate is to increase the competitiveness of regional businesses by providing export development and investment promotion services.

Under the aegis of the Caribbean Development Bank, the agency manages the CARTFund project for the development of the Caribbean's spa and wellness sector.

Notwithstanding, Caribbean Export has a significant role to play in the provision of linkages created with the wellness product suppliers and developers and wellness service suppliers and raising awareness of the potential of this sector.

The C-SWA is the only professional association dedicated to the S&W industry across the region. The Membership includes representatives from each segment of the S&W sector. The Association's mission is essentially to foster and promote the growth of the industry and to serve its members through training and education, public relations, legislative advocacy, membership development and ethics enforcement.

Founded in 2006, C-SWA is a major S&W stakeholder. The CARTFund project was developed and submitted by C-SWA for funding support, in an effort to further develop the spa and wellness sector in the Caribbean. C-SWA therefore provides a critical interface between regional and national public sector actors, and industry players. This linkage would be a catalyzing force in executing strategies outlined in this document.

## Section 2: Sector Overview/Situation Analysis

---

## 4.0 Global Overview and Trends

The global Health and Wellness industry is a rapidly expanding, multi-billion dollar market. Spa and Wellness Tourism is substantial component of the Health and Wellness Industry.

Extensive global research and market trend analysis strongly points to a boom in health and wellness vacations. In recent years, North America has witnessed significant growth rates in health and wellness consumers seeking to look and feel better; to lose weight; to slow the effects of aging; to relieve pain or discomfort; to manage stress; or to partake in the use of natural supplements like vitamins and minerals to improve their health.

Today's health and wellness programs respond to growing consumer demands for fitness level improvement; for healthy lifestyle education; for nutrition counseling; for healing; for preventative medicine; for solving personal problems like stress or depression; and, for holistic, naturopathic, alternative or eastern medicinal practices/therapies. The travel industry is reaping benefits of the health and wellness phenomenon.

Europe, USA & Canada have been identified as the main international source markets for spa and wellness tourism, with the leading destinations for spa and wellness - Thailand, Germany, France and the USA. Other destinations where spa and wellness is making a significant impact on their economies include Malaysia, Japan, Australia, Indonesia, China, India, UAE and the Maldives. On the African continent, South Africa is leading the charge in the spa and wellness sector. High end niche destinations are being developed in the Maldives, Mauritius and Australia with India and the Middle East investing heavily in medical spas.

Standards and practices continue to be one of the key issues for the spa and wellness industry as identified each year by delegates attending the Global Spa and Wellness Summits.

### 4.1 Main Competitors

As a late entrant into the S&W sector, the region must look at the performance and strategies adopted by the sector leaders, in developing the Caribbean S&W identity. A brief review of leading destinations is presented below.

#### 4.1.1 Thailand

Faced with excess capacity during the early 1990's Thailand set out to attract overseas patients as an alternate revenue stream by blending its therapeutic spa industry with its respected medical facilities. This strategic decision was the key to Thailand becoming the "Spa Capital of Asia"<sup>2</sup>

In 2005 Thailand's 796 registered spas earned USD 197 million. Spas are considered a major selling point for Thailand's four and five star hotels and resorts, reporting over 4.6 million spa visits in 2005.

In 2007 there were 1,200 hospitals in Thailand some of which have international accreditation, thus able to attract medical tourists from India, China, and Russia.

---

<sup>2</sup> Tourism Intelligence International. Marketing and promotion plan for the Caribbean spa and wellness sector: Draft report. February 2012.

Thai herbs are key ingredient in Thai style spa. The spa and beauty products export trade was worth USD8.7 million in 2005.

The government and private sector operators inclusive of spa associations work collaboratively to develop specific standards for the industry and have taken this a step further through to regulation and the enforcement of industry standards via legislation.

To promote its excellence in the world's spa industry, Thailand's spa operators will focus on new developments of natural and Eastern approaches to treatments. With government's support they will also have the opportunity to draw more heavily from medical science.

Thailand's success is hinged on its culture, healing traditions and many scenic locations which provide strategic advantages in the area of wellness tourism. Many of Thailand's spa treatments and techniques are exported and offered around the world in high-end spas.

#### **4.1.2 India**

India has long been associated with spirituality and has entered both the wellness and the medicinal tourism sector with a number of spas built around either the large luxury palace hotels that have been converted by big hotel chains or have developed within the context of Ashrams, yoga and meditation or ayurvedic treatment centres. India's destination resorts, wellness retreats and spas address body, mind and spiritual wellness through the traditions of yoga, Ayurveda and numerous other healing practices.

The S&W sector is complemented by developments in medical tourism namely recent privatization efforts, which have fostered improved facilities and service levels in hospitals and medical centres.

India is marketing its holistic offerings successfully bridging the gap between wellness tourism which includes Ayurveda, hi-tech healing (medical tourism), spas, yoga and wellness centres and its cultural life which is practiced in most Indian homes, along with vegetarianism, yoga and meditation.

India's success is built largely on specialisation, international standards and regulation and significant investment in the sector.

#### **4.1.3 USA**

The US S&W industry is dominated by Day spas with the resort/hotel group identified as the fastest growing sector. There is a strong trend towards "medical type" products and services. The use of food and plant-based treatments has also gained widespread popularity. The Eastern/Asian influence continues to be very strong in the industry, influencing products, services and spa design.

According to the International Spa Association (ISPA) 2011 US Spa Industry Study, revenues increased by 4.3% to \$12.8billion and spa visits by 4.7% to 150million in the 2009/2010 period. However, the number of spa locations reduced by 3% from 20,600 to 19,900. The ISPA study stated that spas increased revenues through Websites, special values and promotions, social media and connecting with local communities.

The top two spa categories in the US are massage and facials. Combined these account for more than half of revenues in spas. Notwithstanding spa goers switched from luxury to maintenance treatments which gave birth to compact services being offered across the US. Spas offering "smaller price and smaller time packages" to their clients are now expanding.

## 4.2 CARIFORUM: Tourism Trends and Assessment of Spa and Wellness Sector

The Spa and Wellness Tourism sector in CARIFORUM countries is generally perceived to be relatively underdeveloped in comparison to destinations such as South East Asia, Western Europe and USA. Spas in CARIFORUM countries generally offer a limited range of treatments. These typically center around:

- Water Therapies (Hydrotherapy)
- Facials
- Massage
- Sauna
- Jacuzzi
- Salon Services (manicure, pedicure, nails, waxing)
- Dietary
- Restricted consultant (specialist) treatments are available at select spa resorts.

### 4.2.1 CARIFORUM Sector Profile

The S&W sector in CARIFORUM countries is characterized by relatively few purpose built facilities and as such most facilities do not offer an ambiance and service that is in keeping with the expectation of S&W tourists.

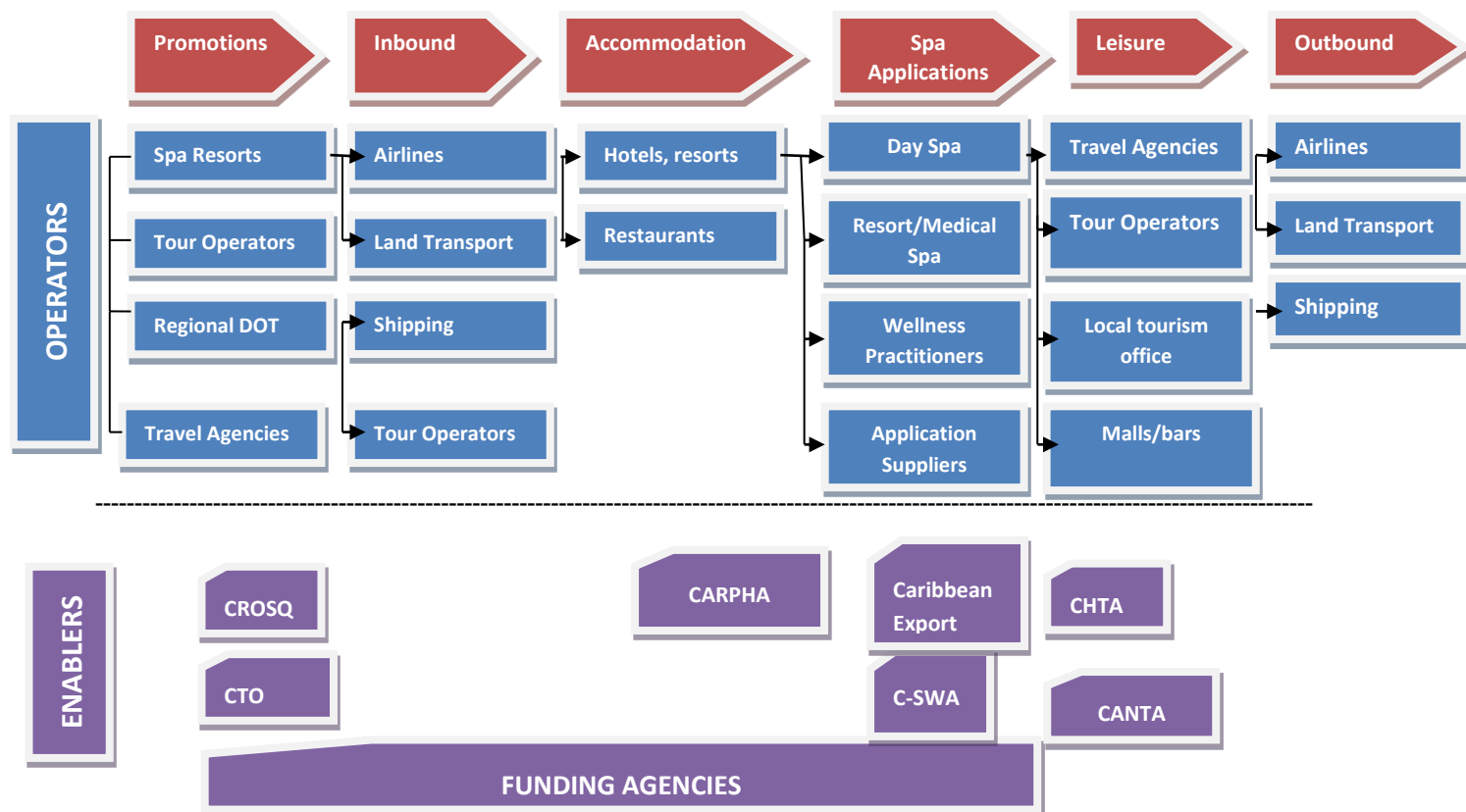
The Caribbean Spa sector is characterized as the following:

- Small establishments of less than five (5) employees
- Spas are mainly locally owned
- Many spa owners have been in business for less than ten (10) years
- Many Spas have less than (5) treatment rooms
- In most of the region No official national standards exist for the S&W sector
- Lack of trained professionals
- Nature and natural beauty, good infrastructure, climate/weather, (Ideal fit with spa & wellness)
- Geographic position
- Rich and varied cultural heritage
- A strong and vibrant tourism industry
- World class operators/players
- A growing educated middle class and growing urbanization
- Relatively easy market access
- CSME and CARIFORUM - EPA Agreements

#### 4.2.2 Health and Wellness Tourism Value Chain

The region's competitiveness in the global S&W tourism market requires harmonization of a diverse set of interdependent industries and the public sector. The Health and Wellness tourism value chain demonstrates the linkages to other service providers, industries and institutions in the overall S&W tourism experience. Figure 1 illustrates this.

**Figure 1: Health and Wellness Tourism Value Chain**



The value chain demonstrates the multiple interactions between private and public agencies and the linkages between spa and wellness and the other sectors. The S&W subsector exercises a very strong demand pull on other local industries. The Caribbean becomes the attraction to which visitors are drawn. Visitors are able to sample other goods and services for sale creating linkages with other sectors directly through their consumption of spa and wellness products and services or indirectly through the health sector, travel and tourism, banking and insurance, culture and heritage, culinary and other services sectors.

The strategy recognizes that to bring about the significant changes needed in S&W tourism issues, it is necessary to engage the many different actors, governance structure, institutional framework and cost along the value chain.

## Problem Tree and SWOT Analysis

---

## 5.0 Problems Facing the Sector

There are several significant problems facing the sector. Conceptually these problems can be characterized into two categories: those contributing to insufficient scale and uneven quality, and those contributing to the lack of a Caribbean S&W brand identity. Both contribute to an inability to effectively market the Caribbean S&W sector, leading ultimately to limited export earnings. The problem tree below graphically illustrates the nexus of problems the sector faces.

### 5.1 Problems Contributing to Insufficient Scale and Uneven Quality

The potential of the S&W sector to deliver meaningful livelihoods and significantly contribute to national economic output is not recognized by policy makers. Nationally and regionally the main players are not sufficiently organized to advocate for the S&W sector in the national development plans.

Existing operators and new entrants have limited access to finance for business development and expansion. As the sector has not been identified as a development priority area, favourable credit terms or tax holidays (which ultimately is a source of financing) is not available to Day Spas (unless included as part of a hotel project). Furthermore as much of the assets in purpose built spas are not easily converted into other commercial uses, financiers generally regard the sector as high risk. The net result is that limited investment takes place in the sector.

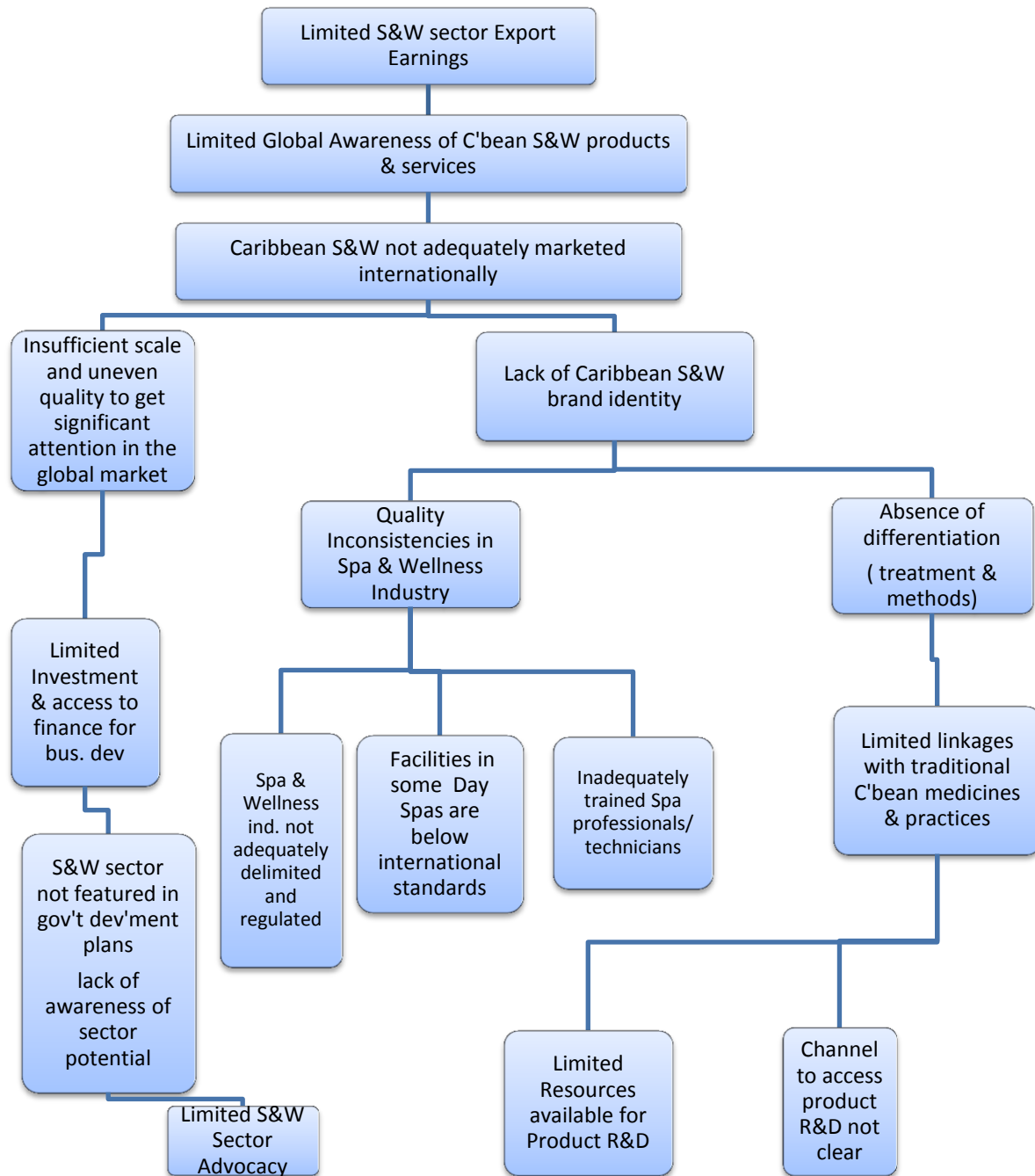
Issues of awareness and adequacy of finance as outlined above ultimately conspire to create a sector that lacks sufficient scale to get significant attention in the global market.

### 5.2 Problems Contributing to the Lack of a Caribbean S&W Brand Identity

The Spa and Wellness industry has not been adequately delimited and defined within the context of CARIFORUM as such the industry is neither recognized nor regulated. Draft standards developed by the UWI were only accepted in April 2013. Furthermore a rating system that may allow the uninitiated consumer to distinguish between spas of varying quality does not exist. Related to this is the fact that many of the Day Spas in the region do not operate in purpose built facilities and at times do not utilize established best practices. The industry is significantly challenged at all levels by the limited pool of trained and certified spa professionals and technicians. The confluence of these problems creates quality inconsistencies in the Spa and Wellness industry within the context of the nonexistence of a guide to differentiate the various degrees of quality.

Another major problem contributing to the lack of brand identity is the absence of differentiation points in relation to product and practice between the Caribbean S&W industry and that of other locations (North America and Europe). The location is obviously different however there is little of the distinctly Caribbean influence in the way of preparations and therapies. In part this problem is due to the virtual nonexistence of linkages between the sector and traditional health and wellness products and practices of the Caribbean. Many of these products have not been adequately researched; hence their curative properties are yet to be scientifically established. In many cases where research has been done, the information is not widely known nor easily accessed. Generally traditional health and wellness practices have not been systematically documented with much of the information on these being resident, almost exclusively, in the oral folk traditions. The limited resources available for research and development of traditional S&W products as well as the lack of clear channels to access product research and development are significant underlying problems facing the sector.

### 5.3 Problem Tree: CARIFORUM Spa & Wellness Sector



## 5.4 S.W.O.T. Analysis

An analysis of Strengths, Weaknesses, Opportunities and Threats pertaining to the Spa and Wellness sector in CARIFORUM is presented below. The analysis is based on the findings of the studies conducted previously on the sector by Denzil Phillips International Limited (DPIL) and Tourism Intelligence International, as well as discussions with key individuals involved in the sector.

### 5.4.1 S.W.O.T. Analysis Matrix

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• The Caribbean is a well-established and positioned tourist destination in the international market</li> <li>• Moderate growth in the tourism sector</li> <li>• Excellent geographic location, climate/weather conditions</li> <li>• Rich and varied cultural heritage which is an ideal fit for S&amp;W tourism</li> <li>• Major infrastructure in terms of ports; airports and telecommunication facilities are in place</li> <li>• Large resort hotel infrastructure has been built up in many CARIFORUM countries</li> <li>• Over the last 5 years, the Caribbean has seen an increase of just over 20 world class spas</li> <li>• Rich natural resources and a varied number of medicinal and aromatic plants that have uses in wellness and beauty care</li> <li>• Market access is relatively easy with NO major barriers to entry</li> <li>• The creation of the CSME and the European Partnership Agreement (EPA) combined, offer new opportunities for investors in the H&amp;W sector.</li> <li>• The free movement of staff and products around the region should help unify the H&amp;W sector and help develop uniform regional standards</li> <li>• A growing educated middle class and growing urbanization</li> </ul>	<ul style="list-style-type: none"> <li>• Unregulated sector, with no existing quality standards for physical amenities and service levels. (When declared UWI standards should enhance the sector's marketability and growth)</li> <li>• No proper market study has been undertaken to assess the size and structure of the region's spa health and wellness market and there are virtually no monitoring facilities to track the growth of the industry in the region.</li> <li>• Variations in quality of services and facilities in CARIFORUM</li> <li>• Tourism planners aware of S&amp;W but some are yet to prioritize it as a sector ready for export development</li> <li>• Environmental degradation in the Caribbean</li> <li>• Poor products and/or product development</li> <li>• Sector in region dominated by large international resort based hotel groups</li> <li>• Limited government support for the sector in the region.</li> <li>• Lack of associations and interest groups to support the sector across the region</li> <li>• Lack of public-private sector partnership investments stymies the growth and development of the sector.</li> <li>• Lack of a well-defined S&amp;W Caribbean brand</li> <li>• Lack of adequate (detailed) sector profiles</li> <li>• Difficulty in doing business in Member States</li> <li>• Small size of S&amp;W market</li> </ul>

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• Global increase in spa and wellness travel</li> <li>• Increased funding for inward and local investments from governments and donor agencies</li> <li>• Limited supply and high cost of local beauty care products and treatments</li> <li>• Growth potential in the regional spa and wellness sector</li> <li>• Local and regional market for spa products created from natural resources</li> <li>• Creation of new business and employment opportunities</li> <li>• Caribbean participation at international associations and interests groups</li> <li>• Integration of state-of-the-art technologies and processes in the S&amp;W identity</li> <li>• Growth in consumer health consciousness</li> <li>• Changing demographic structure</li> <li>• Caribbean healing traditions used for the production of indigenous spa treatments and products</li> </ul>	<ul style="list-style-type: none"> <li>• Established S&amp;W operators have a strong international presence</li> <li>• Increase competition from Latin America and other “new ” destinations pursuing S&amp;W tourism</li> <li>• Lack of uniform quality standards and controls</li> <li>• CARIFORUM countries prone to natural disasters</li> <li>• Limited access to trained staff</li> <li>• Non-cooperation from CARIFORUM Member States</li> <li>• Insufficient trained personnel</li> <li>• Limited and unreliable transportation links within the Caribbean region</li> <li>• Perception of security caused by violent crimes in Caribbean countries</li> </ul>

## Section 4:

# Spa and Wellness Sector Strategy

---

.

## 6.0 Vision

***By 2030 the Caribbean will be recognized as a global leader in the Spa and Wellness industry, with the sector creating meaningful livelihoods and opportunities for economic advancement of its peoples.***

### 6.1 Strategic Goals/Objectives

This vision is supported by a set of strategic objectives that drives the Caribbean's Spa & Wellness sector strategy. They are:

- To build an identifiable S&W brand using the natural resources of the region (culture, indigenous foods, herbal medicines etc.) and to market this brand locally, regionally and globally.
- To develop a range of unique Caribbean spa and wellness products, services and experiences to support the brand.
- To develop a cadre of trained professionals to deliver exceptional Caribbean spa and wellness products, services and experiences.
- To develop and strengthen the institutions needed to serve Caribbean S&W stakeholders and market the brand globally.
- To increase public and private sector investment into the Caribbean S&W sector.
- To ensure that the regional and national policy framework supports and encourages the expansion of the S&W sector.
- To diversify the Caribbean tourism sector and expand the local market for S&W services.

### 6.2 Sector Strategy

This sector strategy was designed to guide interventions in the Spa and Wellness sector during what this document considers to be a period of *Development and Organization for Growth*. The strategy will contribute to the development of a *Caribbean (CARIFORUM) Spa and Wellness brand identity anchored in quality products and services reflecting unique Caribbean resources and cultural heritage*, and ultimately to the overall objective of *Increasing Spa and Wellness export earnings in the CARIFORUM region*.

The expected duration of this period of *Development and Organization for Growth* is five years, the completion of which will result in:

1. Consistent quality attained across operators within their respective "operation class"
2. Products, services and treatments differentiated through greater use of inputs indigenous to the Caribbean
3. Caribbean Spa and Wellness Seal of Approval (CSWA) established, displayed on facilities and products, promoted and marketed.

With respect to the last point, it is expected that the seal of approval (CSWA) will signify - in the case of Spa and Wellness Facilities, that:

1. Minimum operating Standards and Procedures are met.
2. A large percentage of products used carry the CSWSA.

And with respect to products the CSWSA seal will mean that:

1. The product has been tested and meets appropriate regional and international standards.
2. The product contains a stipulated minimum percentage of ingredients that are indigenous to the Caribbean.

### 6.3 Key Underlying Assumptions

The strategy is dependent *inter alia* on the following underlying assumptions:

1. Cooperation between stakeholders of the tourism and spa and wellness industries to solidify marketing and promotion efforts
2. Commitment by stakeholders to implement the five pillars strategy and execute according to its action plan
3. Governments support strategies proposed and accord priority
4. Where, if necessary, public-private sector partnerships will be developed
5. Continuous monitoring and evaluation of the effectiveness of the strategy at each phase employing corrective actions to adjust the implementation process to reach the strategy goals
6. Coordination, administration and management of the sector strategy is carried out effectively and successfully by the Regional Coordinating Committee (RCC)

### 6.4 Five (5) Strategic Pillars

Five strategic pillars for action are proposed in an effort to realize the Caribbean's vision as a global leader in Spa and Wellness tourism. It is imperative that all pillars are addressed, as they are co-dependent and the strategy will not succeed without decisive action in each area.

The five (5) strategic pillars and their sub-components are as follows:

- **Pillar 1: Policy and Regulatory Framework**
- **Pillar 2: Organization Development and Strengthening**
- **Pillar 3: Marketing**
- **Pillar 4: Product and Services Development and Capacity Building**
- **Pillar 5: Resource Mobilization**

Strategic Pillars				
<b>Pillar 1</b> <ul style="list-style-type: none"> <li>• Policy Development and Legislation</li> <li>• Implementation of Accepted Standards</li> <li>• Advocacy</li> <li>• International Accreditation</li> </ul>	<b>Pillar 2</b> <ul style="list-style-type: none"> <li>• Training</li> <li>• Organization Development and Strengthening</li> </ul>	<b>Pillar 3</b> <ul style="list-style-type: none"> <li>• Articulation of Unique Selling Proposition</li> <li>• Development of Caribbean Brand</li> <li>• Brand Positioning</li> <li>• Target Markets and Market Access</li> <li>• Marketing Partnerships</li> <li>• Promotions &amp; Campaigns</li> </ul>	<b>Pillar 4</b> <ul style="list-style-type: none"> <li>• Product and Services Improvement</li> <li>• Capacity Building</li> </ul>	<b>Pillar 5</b> <ul style="list-style-type: none"> <li>• Donor Coordination</li> <li>• Public Private Sector Partnerships</li> </ul>

#### 6.4.1 Pillar 1: Policy and Regulatory Framework

The intervention areas pertaining to this pillar are:

- Policy Development and Legislation
- Implementation of Accepted Standards
- Advocacy
- International Accreditation

##### 6.4.1.1 Policy Development and Legislation

###### Policy Setting

The establishment of a successful Caribbean Spa and Wellness brand may require common or harmonized legislation to govern sector operations. The creation and adoption of sector policy is a precursor to legislation. The strategy envisions the Regional Coordinating Committee (RCC) as the body, who will be responsible for the approval of a Regional Policy Framework (RPF) as it pertains to the S&W sector. The RPF sets out the planning policies for the region and how these are expected to be applied. It provides a framework within which individual CARIFORUM countries can produce their national policies, which reflect the needs and priorities of the sector. It is anticipated that these policies with appropriate lobbying and advocacy will be legislated by national governments.

It is envisaged that the Spa and Wellness Implementation Unit (SWIU) in collaboration with the various technical committees will draft the RPF for approval by the RCC. The RCC in executing its responsibilities may seek technical advice and partner with any competent institution or individual it deems fit.

### **Legislation Development**

It is anticipated that the following policy areas require legislation and may be channeled through the CTO governance framework, for legislative action at the national level.

- Spa and Wellness Industry Standards
- Spa and Wellness Investment Policy

#### **6.4.1.2 Implementation of Accepted Standards**

Within the context of the governance arrangement outlined above, it is recommended that the regional industry standards developed are implemented for the major component areas of the sector.

Accordingly, standards pertaining to the activities of Spas have been identified as a priority area. It is recommended that a framework be established for the administration of the final draft voluntary standards developed under the CARTFund project. This framework should be presented to the RCC in the first instance, followed by the submission of the S&W industry standards for approval. Stakeholder sensitization on the adoption of the Caribbean Spa and Wellness standards should be carried out utilizing national consultations and workshops.

Further, it is recommended that specific standards for operators wishing to be accredited with the Caribbean Spa and Wellness Seal of approval (CSWSA) be established.

It is proposed that a technical committee be established to advise on the development of the CSWSA standards and the draft standards developed by the UWI may be a useful launching pad. The technical committee should comprise *inter alia*:

- CROSQ
- National Bureaus of Standards
- C-SWA
- CTO
- UWI
- CHTA
- CARPHA
- Caribbean Export

Standards relating to the latter probably would not require legislative action and as such should be relatively easily executed.

#### 6.4.1.3 Advocacy

In order to effectively position the sector as one ready for export enhancement, C-SWA and or national spa association, acting in partnership with other stakeholders (i.e. Coalition of Services Industries, Chambers of Commerce, Manufacturing Associations, etc.) will have to mount an effective advocacy campaign to secure the endorsement of regional and national policy makers of spa and wellness as a priority niche sector. This will require development and implementation of effective public-private mechanisms at both levels, and Caribbean Export can and should play a key role in helping to build capacity to that end.

The regional advocacy plan must be based on well-researched advocacy platforms and should complement the national level advocacy efforts. Some issues could include inter alia

- Positioning spa and wellness as a priority niche sector within tourism;
- Establishing baseline standards for the sector and certification requirements;
- Negotiating mutual recognition agreements (MRAs) for spa operators;
- Securing the extension of insurance from foreign insurance services providers for coverage for treatment within the region;
- Achieving regulatory change within the industry at the national level;
- Benchmarking operators against international best practices (i.e. ensuring that operators are formally established and safely operating);

#### 6.4.1.4 International Accreditation

The SWIU in conjunction with other relevant parties will actively seek international accreditation, for the curriculum, developed at the regional level and adopted at the national level, so as to raise the profile of service providers.

Recognizing that both Trinidad & Tobago and Jamaica have commenced work in this area, it is proposed that an assessment of existing curricula is conducted and a committee established to work on a curriculum plan with the goal of infusing and integrating prevailing work into the new curriculum.

The accreditation process will serve as a prerequisite for quality assurance and assist the Caribbean in achieving credibility in the field of Spa and Wellness.

### 6.4.2 Pillar 2: Organization Development and Strengthening

The intervention areas pertaining to this pillar are:

- Training
- Organization Development and Strengthening

#### 6.4.2.1 Training

Appropriate mechanisms to train a cadre of technicians and professionals for the Spa subsector must be developed. The most efficacious manner of doing so is probably through development of a special common curriculum to be implemented through the Caribbean Association of National Training Agencies (CANTA).

National Vocational Qualifications (NVQs) and the associated curriculum developed by some CARIFORUM Member States should be reviewed and improved in accordance with the new curriculum.

To accomplish this, the following actions should be pursued:

- Training needs assessment consultancy is required in order to design and develop appropriate instructional and informational programs and material
- Develop a regional Spa and Wellness curricula, which will include courses for health, wellness and spa as well as courses on customer care, analysing tourist profiles, communication skills and foreign language skills. The curricula will also cover business management inclusive of marketing and finance
- Implement standardized training programmes for all practitioners working in the sector based on alliances with international institutes
- Promote the concept of spa and wellness management as a professional career choice through education and training
- Training provided to hospitality and tourism staff as well as support services staff on aspects of health and wellness tourism
- Existing national vocational qualifications (NVQs) to be measured against new industry based curricula and gaps filled where necessary to standardised training

In addition to the above, advanced and in-service training for H&W professionals (to be provided by the private sector) should be encouraged through suitable incentives at the national level.

#### 6.4.2.2 Organization Development and Strengthening

Founded in 2006, the Caribbean Spa and Wellness Association (C-SWA) is the only trade association that focuses exclusively on Spa and Wellness. C-SWA has been instrumental in securing CARTFund resources to produce several sector studies.

Notwithstanding its achievements C-SWA will be strengthened to allow for its expanded role for the development of this sector. The nature of the strategy will involve *inter alia*:

- Administrative support
- Technical assistance
- Development of national associations

C-SWA is the regional champion and advocate for the S&W sector and its major role will be coordinating and driving the implementation process, promoting and implementing S&W standards, quality assurance mechanisms and specific marketing and sector strategies.

The highest level of collaboration by all relevant partners and stakeholders at the national and regional levels is required for implementation of the S&W sector strategy. To achieve this, C-SWA must be capacitated to carry out key activities and to deliver services to members so that the organization can become a viable vehicle for the development and promotion of the Caribbean Spa and Wellness sector.

To strengthen C-SWA's effectiveness, an assessment should be undertaken to ascertain the organization's skill level, human and financial requirements with a view to developing working groups to advance its agenda.

Moreover, the following plans by C-SWA are required to establish horizontal and vertical linkages in an effort to develop and grow the sector nationally and regionally.

- Communication Plan
- Advocacy Plan
- Resource Mobilization Plan

It is envisaged that C-SWA establishes national associations in all CARIFORUM countries pursuant to the development of its regional secretariat. It is proposed that national associations should be enrolled as members of C-SWA and work plans for the associations be developed and approved through national committees established to drive its implementation.

Furthermore, the strategy recognizes the importance of building capacity and strengthening institutions such as the Coalition of Services Industries (CSIs) and Business Support Organizations (BSOs) to provide sectoral support for national associations and the services sub-sectors in the various CARIFORUM countries. It is envisioned that national associations will assist in identification and provision of enterprise level support.

### **6.4.3 Pillar 3: Marketing**

The marketing strategy aims to raise awareness of the Caribbean as a leading spa and wellness destination by differentiating the region from other spa and wellness destinations through the following intervention areas under this pillar which are:

- Articulation of Unique Selling Proposition
- Development of a Caribbean Brand
- Brand Positioning
- Target Markets and Market Access
- Marketing Partnerships
- Promotions & Campaigns

#### **6.4.3.1 Articulation of Unique Selling Proposition**

The unique selling proposition (USP) of the proposed Caribbean Spa and Wellness brand has not been fully articulated. However the parties concerned are cognizant of the fact that the USP for the brand will derive from the following:

- The cultural and ethnic diversity of the Caribbean
- The history and heritage of Caribbean peoples
- The natural resources inclusive of climate of the Caribbean

Amongst the first activities to be undertaken in respect of marketing is to conduct a series of focus group meetings aimed, among other things, at canvassing the views of stakeholders on what precisely will be the USP of the proposed brand.

In their deliberations, the focus groups, should give consideration to the idea that, the Caribbean already possessed a clearly defined, well developed, and largely positive identity, in the minds of most leisure seekers and possibly also in the minds of most users of Spa and Wellness products. If this premise is accepted then a USP can be crafted around this identity.

#### 6.4.3.2 Development of Caribbean Brand

In addition to the product and services development activities identified in Pillar 4, suitable imaging, tag lines and other brand paraphernalia will be developed, bearing in mind the unique selling proposition (USP) of the Caribbean Spa and Wellness Brand. Imaging, tag lines etc. should be properly field tested, through surveys and focus groups by the brand development agency. These survey and focus groups should be conducted in the main international markets as well as among industry stakeholders.

Following the development and testing of brand images etc., a Caribbean wide programme of brand sensitization will be rolled out to stakeholders and other interested supply side partners.

It is recommended that standards and regulations regarding the use of the Caribbean Brand be drafted and approved by the RCC for use by Caribbean territories. Further, the Caribbean brand should be featured at all **certified** spa and wellness facilities.

#### 6.4.3.3 Brand Positioning

Position the Caribbean Spa and Wellness brand as a “high quality –high value product/service that is uniquely Caribbean<sup>3</sup>”. The rationale for this positioning strategy is:

- High value must be delivered to support the high quality
- The authentic Caribbean nature of the products and services will be the differentiating feature between the brand and other brands of similar quality

#### 6.4.3.4 Target Markets and Market Access

The consumers targeted in this strategy are high income-high spend consumers who are the main source of demand for luxury spa and wellness products and services. The primary geographical markets that will be targeted in the short to medium term are:

- In the US - major cities in the Mid-Atlantic States region including Florida
- In Canada - Toronto, Montreal
- In UK – London and the greater London regions
- Germany - Frankfurt and Cologne

---

<sup>3</sup> Consumers can expect a high value product or service, and can expect to pay a price commensurate with the high value.

These areas in addition to having high concentrations of high income households are typically regarded as the major catchment areas for tourists to the Caribbean. The Caribbean has great “top of mind” awareness and a favourable perception as a tourist destination region. The strategy is to leverage this Caribbean “goodwill” in the service of the Caribbean Spa and Wellness brand, in particular for the development of Spa and Wellness tourism.

Targeted marketing will be underpinned by a strong web presence which will both be consistent with the targets identified in terms of web adverts, and search engine optimization etc., and also be flexible enough to reach other markets that are not explicitly targeted. Analytics from the websites will be used to evaluate performance of specific markets and may be used to indicate possible new targets.

Specifically concerning the sale of spa and wellness products, the SWPS will engage the services of a trade consultant to determine the market entry requirement for these products under the EU-CARIFORUM Economic Partnerships Agreement (EPA) and other relevant multi-lateral and key bi-lateral trade arrangements.

Furthermore, an assessment of secondary markets is necessary for the Caribbean spa and wellness brand. Latin, Central and South America (e.g. Venezuela and Brazil) has several advantages to the region and should be exploited as possible new markets because of their geographic location and close proximity to the Americas and relationship ties with many CARIFORUM countries. This market provides an opportunity for the Caribbean to tap into new markets for S&W tourism.

#### **6.4.3.5 Marketing Partnerships**

Particular marketing attention should be placed on the Spa and Wellness Tourism aspect of the sector, as this is likely to be the major growth pole in the short to medium term. The present image of CARIFORUM as a spa and wellness tourism destination is weak; however the region generally has a strong favourable image as a warm weather tourism destination. The aim therefore is to leverage these general tourism perception assets to facilitate the development of the S&W tourism niche.

In this regard the SWIU will enter into strategic marketing partnerships with several organizations in marketing and promoting the products, facilities and services of the S&W sector. Among these organizations are:

- The Caribbean Tourism Organisation
- The Caribbean Spa and Wellness Association (C-SWA)
- National Tourism Boards
- Airlines
- The Caribbean Hotel and Tourism Association (CHTA)
- The Caribbean Tourism Development Company (CTDC – a joint marketing company owned by CTO and CHTA)
- Trade Promotion Agencies

#### **6.4.3.6 Promotions & Campaign**

The promotion and campaign strategy for the S&W sector should feature the following:

##### **Publications**

Creation of a quality annual publication featuring those facilities that have achieved international accreditation, certification and the CSWA should be produced.

An electronic publication is preferred, which can be circulated worldwide and adopted into several languages including Spanish. Promotional copies can be distributed at trade shows, conferences and seminars in primary and secondary markets.

A Caribbean Spa and Wellness directory, similar to the “Ins and Outs” publication, should be developed and made available in all hotel rooms throughout the region, targeting visitors already at the destination as well as the local market. Specialist spa advertising campaigns in print publications targeting the spa and wellness sector in key source markets is envisaged

### **Web presence**

A robust online strategy that incorporates online video marketing, social media (Facebook, twitter, LinkedIn, Pinterest etc.), ad campaigns, blogging, partnerships and sharing of information to build awareness and visibility of the S&W sector should be actively pursued.

Organizing and facilitating online campaigns and maintaining an informative blog that shares breaking news and little known information on the S&W sector can help to increase web presence, bolster the sector’s reputation and deepen a sense of personal identification with the region’s spa and wellness product while boosting word-of-mouth advertising as well.

It is strongly suggested that partnerships with existing spa and wellness association’s e.g. ISPA and institutions should be leveraged to maximize impact. Innovative programmes should be jointly developed and the creation of a social media presence specifically for the partnership is encouraged.

It is envisaged that C-SWA develops an additional feature to its website that includes an online destination SPA magazine portal that is a dynamic, interactive community centre and information resource for the entire business spectrum of spa and wellness in the Caribbean. This digital portal presents a huge range of sources for daily inspiration, essential business leading information and vital up to the minute operations intelligence combining them all into an easily navigated online one-stop location.

C-SWA’s website must be configured to include online video marketing that is cohesive with its social media networks. Engaging in online video marketing in the spa and wellness sector is considered necessary to build brand awareness, increase website visitors and growth in revenue streams.

Discussion forums and communities should be used to establish C-SWA as a knowledge leader in the Caribbean’s S&W sector thereby, increasing its reputation. Links to C-SWA’s website and social media outlets should be present in all of its forum signatures.

Use of Google analytics to track the impact of C-SWA’s online activities is recommended. A social media strategy should be developed to inform the online presence of the Caribbean S&W brand. CTDC should be encouraged to feature S&W tourism news and regional developments on [www.caribbeantravel.com](http://www.caribbeantravel.com) and to include a webpage with specific focus on S&W.

### **Launch and annual promotion**

The Caribbean should prepare along with CTO, CHTA and C-SWA to take on a central role at World Tourism Market (WTM) London 2014 and the Wellness Forum at ITB (Internationale Tourismus-Börse Berlin) Berlin 2014. It is expected that each successive year at ITB the Caribbean will have a strong promotional presence involving all the key industry players including C-SWA to market and promote the Spa and Wellness sector.

Organisation of an annual Caribbean S&W conference and trade show to showcase the products and services of the sector and create brand awareness provides increase visibility for the region as a global industry player.

### **Press and PR**

Press visits and familiarization tours are necessary for travel agents and tour operators to sell the destination. Furthermore, these tours are considered best fit for the international press and magazine writers with regards to promoting the destination. Spa magazines and the business press will be targeted.

Participation at main consumer tradeshows in key markets and with key partners is considered strategically important to promoting the sector. A review of international and regional tradeshows should be carried out by the SWIU in collaboration with C-SWA with a view to determining the 'best fit' for attendance by the C-SWA, CTO and S&W tourism operators. This review inclusive of aims, potential benefits to be derived and associated costs will be presented to the RCC for approval on an annual basis.

### **Advertising**

It is envisioned that an advertising campaign will be implemented during the period 2014-2018 in key source markets with a focus on public relations, partnerships, online video and social media, print and using pay-per-click web advertising. C-SWA's spa magazine digital portal represents a new medium for advertising.

### **Web-based marketing**

In conformity with CTO's brand strategy, web-based marketing will be used to target specialist groups, including insurance companies and other enablers and operators in the S&W value chain. Web-based marketing will also be used to link accredited institutions and associations with training academies and vocational centres.

## **6.4.4 Pillar 4: Product and Services Development <sup>4</sup> and Capacity Building**

The intervention areas pertaining to this pillar are:

- Product Improvement
- Capacity Building

---

<sup>4</sup> Product development speaks to tangible products (goods) and intangible products (services).

#### 6.4.4.1 Product Improvement

A twin track approach to product improvement will be adopted. The approach requires that products (inclusive of spas) applying for use of the Caribbean Spa and Wellness Seal of Approval (CSWSA) are sorted into three categories based on the standards set for its use for that class of product.

Products classified as:

- **Category 1:** are CSWA compliant and as such are recommended for immediate marketing and promotion.
- **Category 2:** are not CSWA compliant, however, they only require **minor** improvements to be CSWSA compliant.
- **Category 3:** are not CSWA compliant, however, they require **major** improvements to be CSWSA compliant.

Category 2 products will be able to access a special product development facility that will result in a customized intervention aimed at getting the product CSWSA compliant **within eighteen (18) months**. Firms accessing this Special Product Development Facility (SPDF) will be required to sign a memorandum of understanding with the Spa and Wellness Implementation Unit (SWIU).

Category 3 products would not be able to access the SPDF but are offered the opportunity to attend training geared towards showcasing the means of improving their class of products. Eighteen (18) months after undergoing such training, Category 3 firms will be assessed to determine if they can be upgraded to Category 2 status.

#### 6.4.4.2 Capacity Building

It is envisaged that the Caribbean spa and wellness products and services meet international quality standards and are being used by Caribbean spa and wellness operators as part of the Caribbean branding process.

To facilitate this key result, it is recommended that a project proposal is developed to identify existing as well as new products and services, manufacturers/producers and industry service providers with potential that can be linked to the Caribbean Brand. This information would be utilized as a major industry resource with regard to the growth and development of the spa and wellness sector.

Further, it is proposed that a Technical Assistance programme is developed and implemented to improve product and services quality to meet international health and safety requirements; and production management systems and capabilities.

To support local/regional spa and wellness product development and to augment capacity building efforts, it is recommended that linkages be created with the sector's value chain: agriculture, culture/heritage and manufacturing.

### **6.4.5 Pillar 5: Resource Mobilization**

The intervention areas pertaining to this pillar are:

- Donor Coordination
- Public Private Sector Partnerships

#### **6.4.5.1 Donor Coordination**

It is envisioned that the RCC will develop a regional resource mobilization plan for implementation at the national level. Further, the RCC will engage in donor cultivation and coordinate the S&W sector related donor funded projects, as well as provide briefings to development partners inclusive of governments and private sector when required.

It is recommended that the Spa and Wellness Implementation Unit support the RCC in the functions of donor coordination and to particularly give guidance to C-SWA. The SWIU will advise and brief the RCC on specific issues and projects that relevant donor agencies are involved in on a quarterly basis. Additionally, the SWIU will develop a regional resource mobilization plan for approval by the RCC.

#### **6.4.5.2 Public Private Sector Partnerships (PPP)**

To advance development in the S&W sector, it is recommended that the RCC appoint a technical committee with administrative oversight provided by the SWIU to develop a public private sector investment policy and strategy that details procedures to identify, formulate, appraise and approve PPP projects.

In this context, the objectives of this Policy and Strategy are to:

- Detail the principles of partnership with private sector for undertaking various projects related to infrastructure as well as public service delivery
- Define an institutional framework inclusive of investment incentives that is conducive and efficient in handling the PPP projects as well as effective to protect public interest
- Ensure balance between risk and reward for both the government and private partners while aiming to keep the undertaking attractive for the private sector

This policy requires legislation by national governments for adoption by CARIFORUM Member States aimed at the growth and development of the sector.

## Section 5: Mechanisms for Implementation of Sector Strategy

---

## 7.0 Mechanisms for Implementation of Sector Strategy

The following operational mechanisms and governance structure are recommended for the implementation and coordination of the Caribbean Spa and Wellness Sector Strategy:

### 7.1 Governance Structure

It is proposed that the Governance mechanism of the CARIFORUM Spa and Wellness Sector Programme comprise:

- a) Regional Coordinating Committee (RCC)
- b) Spa and Wellness Implementation Unit (SWIU)
- c) Various technical committees

The RCC will encompass representatives from private and public sectors inclusive of senior technocrats from the following institutions and agencies:

- CTO
- CHTA
- CSWA
- Caribbean Export
- CROSQ
- CANTA
- CNSC
- CARPHA
- UWI
- CARICOM Secretariat
- IICA

It is proposed that the RCC be charged with implementing the sector strategy and action plan in accordance with the pillars and direction of this strategy.

It is recommended that a Spa and Wellness Implementation Unit (SWIU) be established to support the RCC to effectively perform its role.

### 7.2 Regional level implementation and coordination

- The RCC and the SWIU will facilitate and coordinate the implementation of the regional sector strategy and three-year action plan
- The Regional Policy Framework (RPF) will function as the primary regional mechanism to support the implementation of the S&W sector strategies and programmes at the regional and national levels, to monitor progress and to facilitate coordination and information-sharing between governments, private sector organizations and other stakeholder groups.
- Quarterly high-level meetings will ensure regional consensus on key issues on spa and wellness.

- Through the RCC strategic partnerships with various agencies, institutions and organizations at the regional level will be developed
- A monitoring and evaluation system will be developed by the RCC to track the progress of the Regional Sector Strategy at the regional and national levels
- Legislation drafted for adoption by regional governments would be presented by the RCC
- The C-SWA will coordinate and drive the implementation process, promoting and implementing S&W standards, quality assurance mechanisms and specific marketing and sector strategies.

### 7.3 National level implementation and coordination

- CARIFORUM Member States in collaboration with C-SWA and the SWIU will have the primary responsibility to operationalize their S&W national policies in support of the regional sector strategy
- Multi-stakeholder national platforms or national committees, including Ministries dealing with spa and wellness such as Health, Education, Urban Development, Environment, Finance and Planning, as well as CSIs, BSOs, private sector, scientific and educational institutions, will contribute skills and knowledge to the development planning and implementation processes of the national spa and wellness sector strategies
- National associations developed in all CARIFORUM countries falls under the ambit of the C-SWA
- For the purpose of assessing progress of the implementation of the Regional Sector Strategy, a quarterly national report will be submitted by each national association to the SWIU

### 7.4 Role and Function of Spa and Wellness Implementation Unit

To ensure the effective and timely implementation of the Caribbean Spa and Wellness Sector Strategy and Action Plan, it is proposed that the Regional Coordinating Committee establish the Spa and Wellness Implementation Unit (SWIU).

The SWIU will assist the RCC and CARIFORUM Member States to implement the Regional Sector Strategy. It is recommended that the RCC determine the staffing structure for the Unit. It is anticipated that the SWIU will operate with full time staff and is accountable to the RCC. Funding would be provided by regional governments or donor agencies over the five-year period of 2014-2018.

The functions of the SWIU include the following:

- To develop a model project management system
- To coordinate, monitor and review the implementation of the sector strategy and action plan
- To liaise with the S&W sector stakeholders such as national governments, funding agencies, training providers, C-SWA, CSIs etc.
- To collaborate with technical committees and to prepare guideline documents
- To develop close linkages and network among different agencies
- To conduct training workshops on effective project implementation
- Sector Liaison between operators/producers and the research community

## Section 6: Three Year Action Plan

---

# **8.0 THREE YEAR ACTION PLAN**

## **FOR THE CARIBBEAN SPA AND WELLNESS SECTOR**

The seven (7) priority areas are:

1. Organization Development and Strengthening
2. Implementation of Internationally accepted standards (Standards, Certification and Training)
3. Development and promotion of a Caribbean Brand
4. Marketing and Positioning of the Caribbean as a Spa and Wellness Destination
5. Product and services development and capacity building
6. Advocacy, policy development and legislation
7. Resource mobilization

Acronyms:

CEDA – Caribbean Export Development Agency

CHTA – Caribbean Hotel and Tourism Association

CROSQ – CARICOM Regional Organization for Standards and Quality

C-SWA – Caribbean Spa and Wellness Association

CTDC – Caribbean Tourism Development Company

CTO – Caribbean Tourism Organization

NA – National Associations

NES – National Export Strategy

RCC – Regional Coordinating Committee

SWIU – Spa and Wellness Implementation Unit

CSWSA – Caribbean Spa and Wellness Seal of Approval

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
1. To develop and strengthen the institutions needed to support Caribbean Spa and Wellness stakeholders and market the brand globally	Organization Development and Strengthening	<ul style="list-style-type: none"> <li>15 National associations established</li> <li>National and Regional strategic alliances and partnerships developed</li> </ul>	National associations established in 15 CARIFORUM countries	Establish national associations	6 associations established by 12/14 and all by 12/16	\$100,000	CSWA, SWIU working with Coalition of Services
			National associations have work plans which are linked to the regional work plan	Regional work plan shared and accepted by national stakeholders.  Develop work plans for national associations	6 work plans completed by 12/14 and remaining 9 by 12/16	\$10,000	NAs
			15 National Committees established to drive the implementation of the work plans	Establish National Committee to drive implementation of work plans	6 national committees developed by 12/14 and remaining 9 by 12/16	\$10,000	NAs
			15 national associations enrolled as C-SWA members	National Associations enrolled as Members of C-SWA	6 national associations enrolled as C-SWA members and paying dues by 12/14 and remaining 9 by	--	NAs

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
					12/16		
				National Associations establish strategic alliances and partnerships	Ongoing	--	NAs
		<ul style="list-style-type: none"> <li>C-SWA strengthened</li> </ul>	<ul style="list-style-type: none"> <li>C-SWA Secretariat established (partially virtual and physical)</li> </ul>	Establish and operationalize Governance and management structures and systems for C-SWA	January 2014	\$75,000	C-SWA Executive
			<ul style="list-style-type: none"> <li>C-SWA website Enhanced to include social media capabilities and video marketing</li> </ul>		January 2014	\$10,000	C-SWA
			<ul style="list-style-type: none"> <li>C-SWA membership database developed</li> </ul>	Questionnaire created and distributed for member feedback	June 2014	\$5,000	C-SWA
			<ul style="list-style-type: none"> <li>C-SWA Communication and Advocacy plan</li> </ul>	Develop communication and advocacy plan	June 2014	\$5,000	C-SWA

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
			developed				
			• C-SWA resource mobilization plan developed	Development of the resource mobilization plan	Sep 2014		C-SWA
			• C-SWA Executive and national association key members trained (in areas such as resource mobilization, proposal development, project management, association management etc.)	C-SWA and NAs to prioritize areas for training and seek funding support for said training	Dec 2014	\$20,000	C-SWA and NAs
			• Regional coordinating committee (RCC) established to drive implementation process of	RCC – Four quarterly meetings held annually	March 2014	\$30,000	CTO, C-SWA, CEDA, CDB, RCC

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
			Regional Strategy and Action Plan • Spa and Wellness Implementation Unit (SWIU) established and staff	SWIU established and operationalized	June 2014 – Dec 2016	\$200,000	
			• Monitoring & Evaluation procedures are established for tracking and reporting on implementation of the Regional Strategy and Action Plan at national and regional level	Reporting procedures agreed to at the first meeting of Regional Coordinating Committee	Jan 2014 and ongoing	--	RCC/SWIU
			• Strategic partnerships established (e.g. Training Agencies, Bureaus, Tourism Boards, key donors) at the regional level	Letters of invitation sent to key partners identified by the “Regional Coordinating Committee” and partnerships	June 2014 onwards	--	RCC/ SWIU

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
				established			
2. To develop a cadre of trained professionals that meet regional standards that are internationally benchmarked to deliver exceptional Caribbean spa and wellness products, services and experiences	Implementation of internationally accepted standards (Standards, Training and Certification)	<p>Framework established for the administration of the Caribbean Spa and Wellness Industry Standards</p> <p>Standards developed and implemented for the Caribbean Spa and Wellness Seal of Approval (CSWSA)</p>	<ul style="list-style-type: none"> <li>• Voluntary adoption of the Caribbean spa and wellness standards by 50 of spa and wellness enterprises in the 6 pilot countries by June 2015</li> <li>• Voluntary adoption of the Caribbean spa and wellness standards by 50% of spa and wellness enterprises in the 6 pilot countries by 2017</li> <li>• CSWSA presented to 50% of spa and wellness enterprises in the 6 pilot countries by 2015</li> <li>• CSWSA</li> </ul>	<ul style="list-style-type: none"> <li>• Sensitize stakeholders</li> <li>• Training and certification of management and employees</li> <li>• Train Auditors</li> <li>• Conduct Assessments</li> <li>• Certify Enterprises</li> <li>• Ongoing monitoring of compliance</li> <li>• Regional committee set up to developed standard</li> <li>• Standard approved and accepted by CROSQ</li> </ul>	<p>Sept 2014</p> <p>June 2015</p> <p>December 2014</p> <p>March 2014</p> <p>December 2014</p>	<p>\$100,000</p> <p>\$10,000</p>	<p>SWIU, C-SWA, CROSQ, CTO</p> <p>RCC,SWIU, C-SWA, CROSQ,</p>

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
			presented to 50% of spa and wellness enterprises in the 6 pilot countries by 2017				
3. (a) To build an identifiable Caribbean Spa and Wellness Brand using the natural resources of the region (culture, indigenous foods, herbal medicines, etc.)	Development and promotion of a Caribbean Spa and Wellness Brand	Caribbean Brand image, tagline and standards developed		<p>Conduct USP Focus (4 focus groups)</p> <p>Brand Imaging &amp; tag line development</p> <p>Field testing of Brand Imaging &amp; Tag line</p> <p>Development and implementation of regional brand sensitization programme</p> <p>Consultancy to develop Caribbean S&amp;W brand standard and regulations</p> <p>Consultancy to research consumer profiles in target markets and</p>	<p>Q1 – Q2 2014 (6 mths)</p> <p>Q1 – Q2 2014</p> <p>Q1 – Q2 2014</p> <p>Q2 – Q3 2014</p> <p>Q3 2014 – Q1 2015</p> <p>Q3 2014 – Q1 2015</p>	<p>\$25,000</p> <p>\$20,000</p> <p>\$10,000</p> <p>\$25,000</p> <p>\$5,000</p> <p>\$5,000</p>	SWIU, CTDC, CEDA, C-SWA

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
				evaluate market access issues			
3. (a) <i>Cont'd</i>	Development and promotion of a Caribbean Spa and Wellness Brand	Capacity of spa and wellness enterprises to offer “uniquely Caribbean experiences” is improved	Caribbean Brand features fully incorporated in 50 enterprises in the 6 pilot countries.	(i) Develop project proposal to identify existing spa and wellness businesses which have the potential to meet all or most of the elements of the brand and develop and implement a technical support programme to assist them to fully incorporate the Caribbean Brand in the 6 pilot countries	10 existing entities of the 50 enterprises in the 6 pilot countries identified and incorporating elements by 12/14 and the remaining 40 in 6 pilot countries by 12/15.  15 new entities receiving legislative concessions identified and incorporating elements by 12/16	\$50,000	RCC, SWIU, C-SWA, NAs, CSIs, CTDC
		Caribbean Spa and Wellness Seal of Approval (CSWSA) developed, linked to the Caribbean Brand	50 spa and wellness enterprises in the 6 pilot countries possess the Caribbean Brand quality seal	Develop CSWSA to identify and recognize Caribbean spa and wellness businesses which meet the Caribbean Brand criteria	September 2014	\$20,000	RCC,SWIU, C-SWA, CTDC and CEDA

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
3. (b) To market the Caribbean Spa and Wellness Brand locally, regionally and globally		Recognition of the Caribbean Spa and Wellness Brand in key target markets	Strong brand recognition in key target markets	Identify and participate in main consumer and trade shows in the key markets and with key partners	ITB 03/ 2014 CTO Re-discover the Caribbean Show- 2014 ISPA October 2014	\$20,000	CTDC, C-SWA, NA reps etc.
				Create a Caribbean online market space where buyers meet sellers through the C-SWA website and national association websites		\$30,000	
3. (b) <i>Cont'd</i>				Organize an annual Caribbean Spa and Wellness Conference and Trade Show to showcase the products and services of Caribbean spa and wellness businesses and to create awareness of the Caribbean Spa and Wellness Brand	Dec 2014 Dec 2015 Dec 2016	\$75,000	CSWA, SWIU, Coalition of Services

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
				Develop a directory (soft and hard copy) of Caribbean branded spa and wellness products and services for promotion purposes	Annually Q4 – 2014, update electronic copy annually	\$20,000	SWIU,CTDC, C-SWA,
				Production of Print and audio-visual advertisement and promotional materials	Dec 2014	\$425,000	
				Press Fam trips	June 2014	\$100,000	
				Provision for social media and traditional media advertising campaigns	June 2014 – June 2015	\$1,500,000	
				Use e-marketing strategies and tools (C-SWA website, social media etc.) to market the Caribbean spa and wellness products and services linked to the Caribbean Brand	12/14 and onwards	\$20,000	CTDC, C-SWA

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
<p>4. To diversify the Caribbean tourism sector and expand the local market for Spa and Wellness products and services</p> <p>4. Cont'd</p>	Marketing and Positioning of the Caribbean as a Spa and Wellness Destination	Increased awareness, in targeted markets, of the Caribbean as a spa and wellness destination	Increase in visitors coming to the region for spa and wellness services by 10% by 2015	<ul style="list-style-type: none"> <li>• Prepare terms of reference</li> <li>• Engage Consultants</li> <li>• Select 50 Pilot Spa and wellness enterprises, according to agreed criteria including adoption and implementation of the Caribbean Spa and wellness standards; implementation of the “uniquely Caribbean experiences, willingness to invest in business; etc.)</li> <li>• Conduct Situational analysis</li> <li>• Develop Marketing plan for each participating enterprise</li> </ul>	<p>March 2014</p> <p>Sept 2014</p>	\$30,000	

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
			Increase spa and wellness revenues by 10% per annum reflected in 50 companies identified for support	<ul style="list-style-type: none"> <li>Provide assistance to each participating spa and wellness enterprise to implement marketing plan; upgrade product and service offerings; compliance with standards; business management; etc.</li> </ul>	Ongoing	\$95,000	
			National strategies and action plans developed to guide and support spa and wellness product and services development (linked to #1 above)	Reach agreement on marketing actions to be implemented at the enterprise, national level (e.g. Tourism Boards in partnership with the national associations) and at the regional level	June 2014	--	C-SWA, CTDC, NAs
5. To develop a range of unique Caribbean spa and wellness products,	Product and Services Development and Capacity Building	Capacity of regional manufacturers/ producers and service providers of spa and		Develop project proposal to identify existing products and services, as	2014 and onwards	\$40,000	SWIU, CEDA, C-SWA



Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
		agriculture, culture/heritage and manufacturing, to support local/regional spa and wellness product development	products and services developed reflecting linkages with value chain	* Promote the use of organic products * Create a medium between farmers, chefs and spa businesses(e.g. MOUs developed with farmers to produce specific products under specific conditions)			
6. To ensure that the regional and national policy framework support and encourage the expansion of the Spa and Wellness sector  6. <i>Cont'd</i>	Advocacy, policy development and legislation	Mandatory adoption of the Caribbean spa and wellness standards	Spa and wellness businesses have adopted the mandatory standards	National consultations and workshops organized to introduce the mandatory standards  Present regional strategy and action plan to Ministers and Directors of Tourism to seek their support and engagement	12/15 and onwards  Sept 2013	\$30,000  \$2,000	CROSQ working with CSWA Coalition of Services, NES  CEDA/CTO, C-SWA
7. To increase	Resource	Investment incentives	25 % expansion	Investment	March 2015	\$15,000	Investment

Overall Objective	Priority Area	Key Results	Indicators	Activities	Target Dates	Indicative Cost (USD)	Agency(ies) Responsible
public and private sector investment into the Caribbean Spa and Wellness sector	Mobilization	<p>developed at the national level</p> <p>Resource mobilization plans developed at the national and regional levels linked to sector strategies and action plans</p>	in Caribbean spa and wellness products and services during this period	<p>legislation put in place and publicized nationally, regionally and internationally</p> <p>15 new “startup spas” identified with concessionary assistance and licensure as per legislation</p> <p>Participate in tourism investment conferences (e.g. CHTIC) and other relevant events to showcase the investment opportunities in CARIFORUM countries</p> <p>Counties/the region develop a resource mobilization plan as part of the overall national/regional development plan for Caribbean spa and wellness</p>	<p>January 2015</p> <p>3 and onwards</p>		promotion agencies, working in collaboration with national tourism offices, national associations and other relevant partners

