

Annex A – Tourism Strategy Summary

In March 2019, the Government of Montserrat approved the Tourism Strategy 2019-2022 and coming out of that exercise, a new Vision for tourism was defined: **“Sustainable Development through Quality Tourism”**. This vision is being supported by four key strategic pillars – the customer, the environment, technology, and the people of Montserrat, all built on a solid foundation of quality. This is the logical response to the destination’s current situation and aspirations. In order to become competitive in the global travel and tourism marketplace and to attract visitors who will spend more, while leaving a minimal footprint on the environment, quality tourism is the answer.

The Tourism Strategy recognizes that the current situation does not allow Montserrat to attract high-end visitors at this time. However, attracting and promoting high spend is achievable. The combination of strategies will help the destination to achieve higher visitor spend in the medium term while setting the foundation to put Montserrat on the right path to being able to target high-end visitors in the long-term. Sustainable development through quality tourism will be achieved through the following six (6) strategic areas:

1. Use the Volcano as a strong pull factor to position Montserrat as a must-visit destination in the Caribbean
2. Move up the value chain and deliver exceptional transformational experiences to exceed the expectations of the ‘new travelers’
3. Use technology to drive Montserrat’s competitiveness.
4. Conserve the Environment
5. Develop quality tourism products
6. Deploy the latest digital techniques to effectively and efficiently market Montserrat.

The key **Marketing Objectives** are as follows:

- Increase visitor arrivals
- Increase tourism receipts
- Increase website visits and social media following and engagement
- Generate leads and store in a contact database
- Generate an image of the island of Montserrat as a safe and vibrant tourism destination
- Change the perception that in Montserrat there is nothing to do and that it is an island that has been ravaged by a natural disaster
- Promote a new ideology of “volcano tourism”.

- Attract a new type of tourist to the island of Montserrat; those preferring the authentic yet hi-tech lifestyle, living differently and with a love for the environment.
- Maximize benefits to local tourism stakeholders by improving market accessibility and making locals the First Tourists.

The strategies to achieve these objectives would be:

- To attract more quality tourists to Montserrat that would stay longer and spend more.
- To use data analytics to understand and target discerning customers to Montserrat and ensure that their expectations are exceeded.
- To use available digital technologies to more effectively and efficiently target priority markets.
- To prioritize and target both old and new demographic, as well as psychographic and geographic markets and market segments.

Montserrat's marketing strategy aims at efficiency and effectiveness, and is **SMART**.



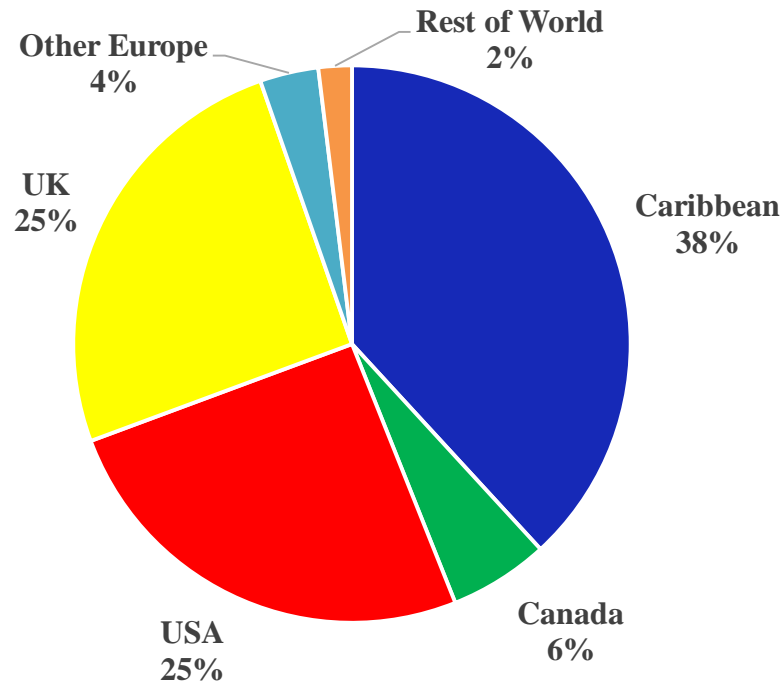
It is grounded on the use of ICT and precise target marketing with measurable results. Elements of the strategy include:

1. Branding and Positioning
2. Leveraging international brands
3. Targeted Markets and Marketing
4. Development of new markets
5. Growing established markets

Our Audience

Montserrat currently welcomes approximately 10,000 stayover visitors and 5,000 day-trippers and cruise visitors per year.

Market Share of Stayover Arrivals



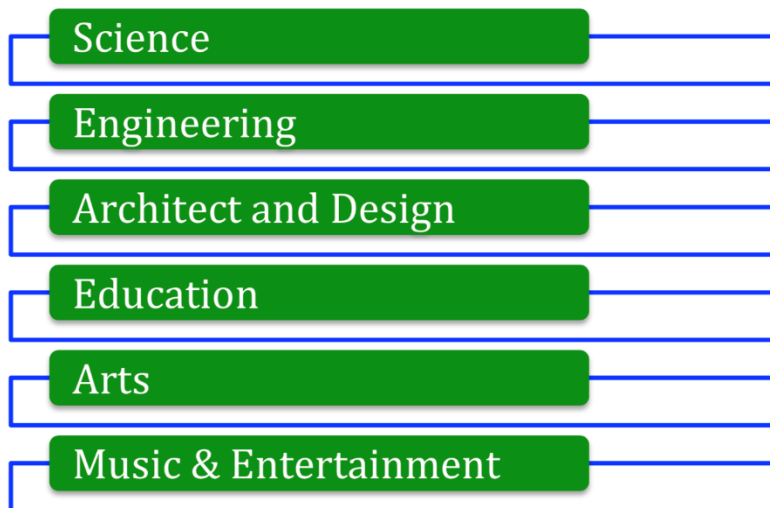
Demographic Market:	Market characteristics relating to age, gender, occupation, income, marital status, etc.	<ul style="list-style-type: none"> • Baby Boomers • Millennials • 52% Male; 48% Female • Montserratian Diaspora
Geographic Market:	Market defined by physical location such as a region, country, state or city.	<ul style="list-style-type: none"> • USA • Canada • UK/Ireland • Caribbean
Psychographic Market:	Market characteristics based on how people think, feel and behave and includes interests, activities, opinions, values and attitudes.	<ul style="list-style-type: none"> • Eco/Outdoor Adventure • Health & Wellness • Historical/Cultural Enthusiasts

		<ul style="list-style-type: none">• Affinity with Residential/Villa Accommodations• Cruise• Yachting• Sport• The Creative Class*
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* The Creative Class

There is a new or emergent class or market made up of knowledge workers, intellectuals and various types of artists and creative people. This market is referred to as the creative class - an ascendant economic force that will drive the demand for future work and leisure. Unlocking the potential of the creative class is key to unlocking the potential for travel, leisure and economic growth in Montserrat. Targeting the creative class will drive demand for working holidays.

Members of the creative class are talented and well educated; they consume and are dependent on the latest technologies. They are not confined by space and are often in search of new experiences. They want to learn about new cultures, participate in work that is driven by creativity and tolerance. They want to be with other creative individuals in order to get inspiration and they can be described as a global mobile workforce. The following are the core professions of the Creative Class:



The famed Air Studios, which was a casualty of Hurricane Hugo, was a perfect example of a co-working space that facilitated the work carried out by the creative class. Singers/song writers such as the Beatles, Sting, Sir Elton John etc. were members of this group who took advantage of Montserrat as a backdrop to fuel their creative juices. So while not necessarily a “new” target market for this destination, there would be a renewed effort to attract and engage with these types of individuals