



OPENBAAR LICHAAM
BONAIRE



TOURISM **RECOVERY** **PLAN**

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Our tourism vision

Tourism must serve as the stepping-stone for development and well-being for all Bonairians. Tourism must enable all Bonairians to unleash their transformative and creative power to create a blue economy and live in harmony with nature

SUMMARY & ACTION PLAN

Short-term goals	Actions	Resources	Timeline
Restructure TCB	BHM project	BHM budget	by end of 2021
New tourist 'entry' tax	New ordinance	TBD/OLB budget	Q2 2021
	Implementation	OLB budget	Q3 2021
Engaging local community	Training programs	TCB budget (RESEMBID)	Q3-Q4 2021 and ongoing
	Incentive to visit local businesses/ activities (discount or game)	TCB budget (RESEMBID)	Q3 2021 then ongoing
	Cultural/culinary activities	Private sector	Ongoing
Repositioning Bonaire	Epicenter of outdoor adventure, water activities, eco luxury	TCB funds*	Q1-Q4 2021
	Showcasing premium accommodations	TCB funds	Q1-Q4 2021
	Targeted campaigns to affluent groups in existing markets	TCB funds	Q1-Q4 2021
	Engage niche markets for experiential 'off the beaten path' tourism	TCB funds	Q3-Q4 2021

Short-term goals	Actions	Resources	Timeline
	Writers, blog-, vloggers for adventure and experiential tourism	TCB funds	Q1-Q4 2021
	Top-of-mind for discerning travelers seeking premium adventure/experience	TCB funds	Q1-Q4 2021
Bonaire as safe haven	Bonaire Friendly Safety Seal (Virus aware seal)	TCB funds	Q1-Q4 2021
Incentives for hotel /tourism sector	Marketing support budget for existing resorts (with upgrade)	TCB funds	Q3-Q4 2021
	Certification Program	TCB (RESEMBID)	Q1-Q4 2021
	Subsidize sustainability initiatives	OLB funds	Q4 2021
Diversification	Entrepreneurship training	Chamber of Comm	Ongoing
	More morning and evening activities	Private sector (TCB facilitation)	Ongoing
New markets	Super yachts (adapt harbor for mooring)	TBD – request to Ministries NL	Q3 2021
	Increase airlift incl. private jets	BIA/TCB action	Ongoing
Product improvement	Popular nature spots (include beach or area access)	OLB funds	Ongoing
Cruise tourism	Smaller, upscale and specialty cruises	TCB budget	2021
	Replace head tax with higher tourist 'entry tax'	OLB	Q3 2021
	Requirement: initiative to comply with sustainability goals	TCB / Harbor office	
	Less ships per week and only 1 on a day		
Tourism Statistics	Exit Survey	TCB (RESEMBID)	Q3 2021

*TCB Funds available: USD 750,000. Request submitted for additional USD 2 million from NL ministries for a stimulus of the economy in the short term for the long term and EUR 750,000 EU RESEMBID funds.

Long-term goals	Actions	Resources	Timeline
Post-Disaster Needs Assessment	World Bank and WFP surveys	European Union	Q2-03 2021
Infrastructural improvements	Road improvement program	NL funds	Ongoing-2025
Skilled human capital	Scholarships and TOP program for island youth	OLB/NL	2021-2024
	MBO programs	OCW/ROA	Ongoing -2022
	Expand educational offerings	OCW	2022-2025
Continued marketing efforts TCB	See TCB sales & marketing efforts (paragr. 5.1.1)	TCB funds*	2021-2023
Incentives for hotel /tourism sector	Subsidize sustainability initiatives	OLB funds	2022-2023
	Financial and fiscal incentives	Government	2022
Repositioning Bonaire	Update marketing strategy	TCB funds	2022-2023
	Use Exit Survey results to fine-tune strategy and policy	TCB funds (RESEMBID)	2022
Community engagement	Informational/awareness campaigns	TCB funds	Ongoing-2025
	School programs	TCB funds	Ongoing-2025
Diversification	Incentives/policy for development eco-resorts	OLB/NL	2022-2023
	Diversifying offer of on-land and water activities, sports	Private sector	2022
	Community activities: Engage the tourist with the community	TCB + private sector	Ongoing
	More morning and evening activities	Private sector (TCB facilitation)	Ongoing
	Develop voluntourism	OLB + Local NGO's	Q4 2021-2022
Product Improvement	Addition of shipwreck in Marine Park	Stinapa	2022

The above summary with a short-term and long-term action plan is intended as a framework. Tourism stakeholders will add further detail in their respective specific action plans.

The execution of several action points in the above tables has already started



1. INTRODUCTION

Who would have thought at the start of 2020, that in a matter of weeks the world would be facing a widespread pandemic, affecting nearly every country on earth? In the meantime, living with the COVID-19 outbreak has become the norm. Across the globe, governments are implementing strong measures to contain the spread of the novel coronavirus and ease the pressure off of (overwhelmed) health systems. Necessary drastic measures such as travel restrictions have directly and severely impacted the global tourism industry and world-wide capacity utilization of the tourism sector.

Bonaire is a unique island with a rich history, vibrant culture and a global forerunner role in nature preservation on land and under water. The island embraces a vision of a balanced, sustainable development with respect for nature and its authentic culture.

Like many Caribbean islands, up to the worldwide outbreak Bonaire was highly dependent on tourism as its main economic industry and source of income. Consequently, the crisis has hit Bonaire's economy hard. Due to the pandemic Bonaire's borders were closed between mid-March and July 2020 to manage the public health threat and safety. Travel from the US was banned until January 15, 2021. New laws and regulations enacted by The Netherlands in January 2021 created further challenges for travel to Bonaire. These necessary measures led to a very sharp decline in stay-over tourism and complete standstill of cruise tourism.

We now know that this is a crisis of unprecedented magnitude, and daily new developments make it nearly impossible to predict what will follow. What is clear is that, in order to shorten recovery time and minimize losses, a fundamental redefinition of our economic model is required. Our tourism industry, especially, must show resiliency to respond effectively. What can we learn from the crisis and how do we emerge stronger? How can we turn this situation to our advantage to create a better, smarter, innovative, more inclusive and more balanced society for Bonaire's residents?

Recognizing the importance of the tourism industry for Bonaire while keeping the above in mind, we have developed this Tourism Recovery Plan as a guide to reviving Bonaire's tourism in the 'new normal'. While we realize that the worldwide pandemic crisis calls for a reset, we find that the main objectives of Bonaire's 2017 Strategic Tourism Masterplan (STMP) are still relevant: the plan designs a blueprint that guides and directs the Bonaire tourism sector to new heights while considering its core attributes of ocean, nature, and heritage. The main objective of the tourism master plan is for Bonaire to thrive as a destination that enhances people's quality of life. In order to accomplish this it is required that an optimal balance between tourism supply and demand (arrivals) be obtained while considering the diverse and increasing competition in the Caribbean. The optimal balance between supply and demand will include product innovation, industry restructuring, and unique marketing efforts in order to compete on a global platform.





The strategic move to focus on an affluent conscious tourist who will spend more on the island, will also reduce the chance of bringing the virus to the island, since Bonaire won't need to welcome as many tourists as before while still reaching a healthy GDP. This is why a fast implementation of this strategic repositioning of Bonaire is required.

The process to arrive at this recovery plan involved ongoing discussions and brainstorming sessions with stakeholders and residents, to ensure island-wide participation in redefining our strategy. Halfway through, the COVID-19 crisis instilled higher urgency and significantly affected the course of the discussion. How to recover, and how to reshape our tourism industry is the main part of this.

This document addresses:

- Summary and action plan
- An estimation of the economic losses due to the pandemic, in order to measure the impact;
- Review of the 2017 STMP objectives and how these are still relevant, as well as input received from focus group sessions;
- Strategy: Upgrading and diversification of the Tourism sector;
- Ideas for increased involvement from the community (inclusion)



THE OPTIMAL BALANCE BETWEEN SUPPLY AND DEMAND WILL INCLUDE PRODUCT INNOVATION, INDUSTRY RESTRUCTURING, AND UNIQUE MARKETING EFFORTS IN ORDER TO COMPETE ON A GLOBAL PLATFORM.

2. CALCULATION OF ECONOMIC LOSSES

Like many other islands and countries Bonaire has been massively affected by the COVID-19 pandemic. Tourism came to a complete stop, resulting in thousands of people left without work and dependent on Government support. Tourism is the back bone of Bonaire's economy, good for 30% of its GDP annually. Besides that, there is also a considerable indirect contribution spinning off of the tourism sector. In short, the COVID-19 crisis brought Bonaire in a very difficult social economic situation with unprecedented challenges on all levels in society.

The 2017 Strategic Tourism Master Plan (STMP) states that the tourism industry contributed nearly USD 229 million in direct economic spending to the Bonairian economy in 2017, representing an estimated 30% of the economic Gross Domestic Product (GDP). When the indirect spin-off (restaurants, retail, and all services catering to the tourism sector) is taken into account, the percentage that tourism contributes to the economy is estimated to be much higher, close to 80%. After 2017 the tourism industry of Bonaire experienced continued growth, so that per 2019 the total economic income from tourism would have been higher than the figure stated in the STMP.

An initial calculation of the damage from the closing of the borders for tourists and cruise ships shows a loss of at least \$ 46 million in the first 90 days. By now, the borders have been partially closed for nearly a year and tourism has sharply declined. In 2020, 66,000 visitors came to the island, compared to almost 158,000 in 2019, a decrease of 58%. Bonaire has been and will be receiving significantly fewer overnight tourists for at least the next 4 to 6 months or more, resulting in much lower occupancy rates at tourist accommodations.

The number of cruise passengers that visited Bonaire for the whole of 2020 was approximately 62 percent lower than the year before. This industry is not expected to resume on short term.

The Bonaire Business and Employers' Association (BBE) conducted a survey among companies on Bonaire in early July 2020, to which 57 companies responded. The objective was to gain insight into the revenue loss in the second quarter of 2020 compared to the same quarter in 2019, the relationship between the revenue and fixed costs (excl. labor costs) and to get an idea on how many companies make use of the emergency program of the Ministry of Social Affairs and Labor (SZW) which reimburses wage costs of up to 80%.

OUTCOME OF THE BBE SURVEY: JUL. 2020

98%
of the respondents saw a loss of revenue

82%

experienced more than 30% revenue loss; of these, 58.2% saw a loss of revenue of more than 50%

55.8%

state that fixed costs (excl. personnel wages) amount to more than 31% of revenue

70%

of all respondents make use of the SZW emergency regulation.

60%

of all respondents operate in the tourism and travel sector

21%

operate in the service sector

10%

operate in the retail sector and 9% in other sectors or did not respond to this question

In addition, a follow-up BBE survey in December 2020 to gauge the impact of the “Code Orange” high-risk designation of Bonaire, returned the following results:

83% of the respondents received cancellations of reservations as result of the Code Orange designation:

- 16% saw 11 to 20% of reservations cancelled
- 16% saw 21 to 40% of reservations cancelled
- 16% saw 41 to 50% of reservations cancelled
- 33% saw more than 76% of reservations cancelled

OUTCOME OF THE BBE SURVEY: DEC. 2020

Expected loss of revenue in December 2020 vs. December 2019 between..

60% - 100%

Expected loss of revenue in January 2021 vs. January 2020:

75% - 100%

Early in 2021 The Bonaire Hotel and Tourism Association (BONHATA) also conducted a survey among its members to have an indication of revenue losses among its affiliated companies in 2020 compared to 2019. More than a third of the BONHATA members participated.

The results can be summarized as follows:

Average turnover loss 2020 vs. 2019 among responders: 61%

Overall range of turnover loss (2020 vs. 2019): 20% to 90%

Entrepreneurs focusing on the European market are on the lower end of the range, while those focusing on the American market report up to 90% turnover loss.

Members forecast continued loss of revenue in the first half of 2021 due to travel from North American markets not picking up. 8% of respondents will have to close until US and Canada travelers come back, and 5% expect bankruptcy if visitors from US and Canada stay away.

From the surveys conducted we can establish that the impact has been substantial to the Bonairian economy.

As of March 15, 2021 the local government in collaboration with the World Bank launched an island wide post-disaster needs analysis (PDNA) to further determine the socio-economic impact of the pandemic for the island.

Due to the uncertainty how the COVID-19 pandemic and the global response will continue to develop, it is impossible to make forecasts at this point. Nonetheless, it is clear that the overall economic impact of the crisis will be substantial and will likely continue beyond 2021 and until possibly 2023.

3. REVIEW

RECOMMENDATIONS OF STRATEGIC TOURISM MASTERPLAN 2017

Bonaire's vision for the development of the tourism sector was outlined in the 2017 Strategic Tourism Masterplan (STMP). This plan was commissioned by the Tourism Corporation Bonaire (TCB) and compiled by the Dick Pope Sr. Institute for Tourism Studies at the Rosen College of Hospitality Management at the University of Central Florida.

The plan provided a blueprint for the development of the Bonaire tourism sector built on its core attributes of ocean, nature, and heritage. The STMP premise is to place people first while preserving the environment. The main objective is for Bonaire to thrive as a destination that enhances people's quality of life. To accomplish this, an optimal balance between tourism supply and demand (arrivals) must be realized in the context of a diverse and increasing competition in the Caribbean.

The underlying research done in preparing the STMP remains valuable. Its recommendations are based on empirical research conducted among a wide and diverse range of tourism stakeholders, employers, employees and residents. However, as we recognize that the world has fundamentally changed as result of the COVID-19 pandemic, some core assumptions within the STMP may not apply anymore. Fortunately, the authentic character of Bonaire in itself is a unique product. The STMP objectives of community inclusion, high-value low-impact tourism and a cohesive branding strategy with focus on the tourist experience fit perfectly with what Bonaire has to offer: The Bonairian experience of authenticity, hospitality, nature and tranquility.

BONAIRE'S TOURISM VISION AS DEFINED IN THE STMP, IS STILL THE SAME:

Tourism must serve as the stepping-stone for development and well-being for all Bonairians. Tourism must enable all Bonairians to unleash their transformative and creative power to create a blue economy and live in harmony with nature.

3.1 CONCRETE OBJECTIVES



OBJECTIVE 1 **Community inclusion:**

Expand the benefits stemming from tourism development to a broader segment of the Bonaire population



OBJECTIVE 2
High-value, low-impact tourism:

Redefine Bonaire as a unique premium destination, especially as the world looks for a way to get away from the COVID stress.



OBJECTIVE 3
a cohesive (re)branding strategy:

Practice this to attract the right type of tourists and increase revenue and profitability. Focus on the premium tourism customer that is looking to experience an authentic product. High added value.



OBJECTIVE 4
Elevate the tourist experience:

Elevate the tourist experience: Highlight Bonaire’s culture, culinary arts, and the variety of land and sea adventures. Improved supply chain inclusion and spreading of activities/expenditures.

REDEFINITION OF TOURISM STRATEGY

The COVID crisis presents an opportunity to redirect Bonaire’s strategic tourism objectives.

What does not change is the unique product that is Bonaire and its inhabitants: “Bonaire’s people are recognized as a happy, confident, and hospitable people with the capacity to interact with tourists to create an inviting, pleasant, fun, and diverse atmosphere that can enrich themselves, as well as tourists. This cultural empowerment has received global attention and has instilled in the local people a sense of pride and achievement. Such conviction propels Bonaire’s actions in a highly competitive tourist global setting to achieve new heights for the benefit of its people.” (STMP)

Our authentic, enjoyable and welcoming culture combined with Bonaire’s well-preserved natural

beauty, distinguishes us from ‘the rest’ and allows for targeting of premium niche markets and developing a strategy on our strengths.

We evaluate the STMP recommended strategies against the current global reality:

Strategy 1:

A STRONG AND PROFESSIONAL TCB

The recommendation to strengthen and professionalize Tourism Corporation Bonaire (TCB) remains valid and necessary. The revamped TCB will become a prime Destination Management Organization (DMO). A strong TCB is essential for the rebranding and promoting of Bonaire in its chosen target markets.

The recommendations for restructuring TCB as laid out in the STMP need to be implemented as

rapidly as possible. (See STMP pages 69-72) Aside from creating a strong tourism management organization, the STMP recommends the development of a new tourist tax structure. A new tourist tax structure is actually in development.

Strategy 2:

STRONG ACCOMMODATION SECTOR PERFORMANCE AND SKILLED HUMAN CAPITAL

The second strategy is to boost accommodation sector performance and invest in improved qualifications and skills of people working in the tourism sector. Compared to other tourism sub-sectors, the accommodation sector contributes the highest value added component. Prior to the COVID-19 pandemic, the Bonaire hotel sector had an average occupancy rate of 68%, which was just above the Caribbean breakeven benchmark. Hotels in Bonaire were under financial duress due to a number of

reasons, one being low quality of hotel rooms. One of the challenges of the hotel sector was that the majority of tourists did not stay in hotels. Until 2017, an estimate of only 41% of Bonaire's visitors stayed in hotels.

The STMP recommends targeting new market segments that are likely to stay in hotels and contribute more to the island economy. This part needs to be redefined: While it is important to ensure profitable occupation of current accommodation suppliers, the strategy should include innovative alternatives such as long-term occupation, as well as investing in preparation of a wider population segment in order to rebrand Bonaire as a high-end tourist experience.

Strategy 3:

INCREASED TOURISM DEMAND

The STMP aims to increase tourist arrivals by 60,000 from its baseline of 140,000 to 200,000 arrivals over the next ten years. Because of the COVID-19 pandemic this strategy must be revised and long-term objectives need to be reevaluated.

Strategy 4:

INCREASE AIRLIFT

The third strategy is to increase airlift and consequently tourism demand (arrivals). Bonaire has faced relatively limited airlift, whereas the limited flights tend to be expensive and lengthy (long stretch). Flights from neighboring islands are also pricey as well as unreliable.

To increase Bonaire's competitive position in the Caribbean, the STMP recommends a transportation policy with the focus on route development that is subsidized with the aim to increase airlift while considering tourists' spending power, brand allegiance, and source market reach in terms of capitalizing on alliances, networks



and interlines. While to an extent this is still valid, COVID-related travel constraints have considerably affected the airline industry and route profitability. By leveraging the Bonaire International Airport's excellent runway and developing general aviation services, Bonaire can attract charters and private jets to bring the more affluent visitor.

Strategy 5:

GOVERNING THE CRUISE TOURISM FLOWS

The STMP assumes that managing cruise growth while maintaining the viability of natural ecosystems is possible. The plan recommends enhanced enforcement authority of the harbor master and structuring information flow through the harbor master. Survey analysis revealed that 55% of cruise visitors expressed an interest to return to Bonaire as a stay-over tourist.

At the moment Bonaire's harbor is closed for cruise ships, and cruise companies across the world are at a complete standstill. According to a study of Magna Global in the USA in 2020, 60.6% of the travelers will never travel on cruise ships again because of the COVID-19 pandemic. It is evident that the cruise tourism industry has been substantially changed due to the pandemic, so

the strategies outlined in the 2017 STMP need to be adapted.

A redefined strategy could entail:

- Positioning Bonaire as a port for specialty cruises (f.e. Windjammers),
- Limiting cruise ship visits to a few days per week, and one ship per day,
- Applying price strategies to decrease the amount of cruise ships, i.e. replace the 'head tax' by an entry tourist tax (amount being suggested is USD10 p/p)
- Applying strategies to transport cruise passengers to locations spread over the island. Also, controlling the number of visitors allowed to visit protected areas and beaches makes it possible to mitigate potential eco stressors,
- The nature fee from Stinapa should be applied to cruise passengers who make use of the Marine Park and for example Klein Bonaire or Washington National Park.

The COVID-19 pandemic has significantly altered the economic landscape and forces us to redefine our tourism strategy. This Recovery Plan can still align with the main objectives of the 2017 STMP with adjustments to the new reality

4. PROCESS AND APPROACH

As we move into the Recovery phase of the crisis, we require a rapid and practical approach to re-ignite and boost the economy.

With tourism as a major economic activity, this document is focused specifically on the recovery of tourism.

This Tourism Recovery Plan is composed with input from various focus group sessions with tourism stakeholders, while using the 2017 Strategic Tourism Masterplan of Bonaire and its objectives as basis. Our first priority will be to revitalize stay-over tourism, without losing sight of developments in the cruise sector.

The following process was applied to arrive at this document:

- A Project team was assigned to guide the tourism recovery efforts.
- The project team included representatives from the government, the tourism office and other tourism stakeholders (these stakeholders are in continuous contact with their members in the sector for input and feedback).
- The project team first carried out extensive desk research on all the developments in the tourism industry due to the COVID-19 pandemic and its implications for the future of tourism.
- Furthermore, the results from this research were compared and analyzed with the objectives and strategies outlined in the 2017 STMP.
- Afterwards various brainstorm sessions were held specifically for the Tourism Recovery Plan, with various representatives of service providers in the tourism sector, accommodation owners, nature protection organizations, shop-owners, touring companies, and taxi owners.
- All the input and suggestions received were compiled and used further to complete the plan.
- A draft of the plan was presented to Island Council members.
- The final draft was reviewed one final time by various tourism stakeholders and organizations and their remarks were compiled to finalize the plan.

4.1 THE 3 STRATEGIES OF THIS PLAN

The 3 main strategies that have been chosen for this plan are intended to contribute to the recovery of the tourism industry on Bonaire out of the crisis as rapidly as possible and enhance the economic benefits in the long term for the island and its people.

The 3 main objectives:

- 1. Target existing markets and increase average expenditure:** Efforts geared towards getting tourists from the existing markets back to Bonaire after re-opening borders
- 2. Diversify the tourism product:** Efforts geared towards evolving the island into a sustainable and 'premium destination', focusing on the active, adventurous, nature lover, the more affluent tourist who enjoys the 'Bonaire experience'.
- 3. Engage the local community:** Efforts geared towards the engagement of locals and organizations in the development of 'authentic local experiences' for the more affluent tourist.

These objectives are designed to mitigate the effects of the crisis, embrace the 'new normal', and transition Bonaire toward a more resilient economy and tourism sector. In the short term the emphasis will be on regaining existing markets, while also working on product diversification (approach 2) and community engagement (approach 3). The objective is to move in a coordinated manner to becoming a sustainable and premium destination offering more inclusive 'Bonaire experiences' with local community involvement.

² Our more affluent tourist (visitor) is the tourist who enjoys the good things in life, values things that go along with a life of leisure and luxury, is adventurous, has a high spending budget, puts quality and experiences ahead of anything else.



TIME TO CONNECT

The savvier destinations and media are using the downtime effectively to amp up their communication with key editors and stakeholders. Those that step up will survive the wave



PENT UP DEMAND SURGING

Intrepid travelers will always travel, millennials are at the ready, people on lockdown have already had enough and will be more ready than ever to move around. There is a sense of wanting to stay closer to home regionally, and we believe this will be the first wave, thus affording the Caribbean a large opportunity as travelers seem averse at first to consider Europe and beyond.



MONEY VS VALUE SETTING THE PRICE PRECEDENT

Lockdowns and quarantines, combined with a challenging economy, are showing that money means less than quality time and meaningful experiences. There is no need to execute a fire sale, however, added value and enriching experiences will be key. Value propositions, cultural interactions, multi-destination journeys, outdoors adventures, are ideas to consider.



SUPPORT FOR THOSE THAT ARE SUPPORTING THEM

Media feel like they are floating out at sea. There are destinations, hotels and firms backing away, staying quiet and saying they'll be back when the storm passes. And this is being noticed. The destinations and hotels that are being proactive with help, support, leadership and consistent information are the ones that media will remember long after, and the ones they are much more likely to support and visit.



FAST FORWARD TO FALL

When things start improving, the speed of the recovery should match the speed of fallout with leisure travel leading the way, followed by corporate travel, then group travel. Media will be apt to report on last minute offers for summer, fall escapes and more.





5. TOURISM RECOVERY

The island is currently reopening in phases for existing markets. Measures have been taken to protect the health of inhabitants and to adapt to the “new normal” in society and travel. The tourism industry and the supply chain as a whole - locally and internationally – have been involved in preparing for reopening. The situation is currently fluid depending on the outbreak situation, travel restrictions and measurements in neighboring islands and origin countries.

As per July 2020 passengers from and through Europe and Curacao are allowed entry with a negative PCR-test (taken within 72 hours before departure time in Amsterdam or Curacao). On January 15, 2021 the flight ban was lifted for USA and Canada as well. As the worldwide situation evolves toward manageable risks, the island hopes to open up conditionally to other areas as well.

The re-opening in phases is continuously monitored by a Taskforce consisting of the Public Health Department, the Surveillance and Enforcement Department, Cabinet of the Lieutenant Governor, Policy Advisors of the government of Bonaire and the Communication Department through weekly meetings. While at the same time intensive contact with Tourism Corporation Bonaire, Bonaire International Airport, the Harbormaster, Koninklijke Marechaussee is maintained. Adjustments can and are made on the list regarding low-risk countries and travel requirements depending on the COVID-19 developments in the relevant countries and Bonaire, and measurements are taken, and adjusted when needed, to minimize the risk of admitting infected people.

Awareness of the consumer stages of COVID-19 is important while going through the re-opening process as well as taking some insights in considerations. These stages are explained on the next page.
(source: Diamond PR)

As indicated, the Recovery Plan entails 3 areas of action, namely:

- **Recovery of existing markets and increasing average expenditure**
- **Target premium markets and diversify the tourism product**
- **Engaging the local community**



Consumer stages of COVID-19

1. FEAR

Some consumers are still in the fear phase, on edge and anxious to know how long the virus will last. Others are ready to travel and have started booking future trips.

2. UNDERSTANDING

As the virus slows, consumers will start to understand the state of affairs. Experts expect the industry to begin its rebound 45-90 days after the pandemic peaks with forward progress gaining traction in Q3.

3. ACTION

Hospitality and tourism will be among the first industries to bounce back. Experts believe the most resilient travelers will be micro-segments like millennials and high-earning couples.

Domestic trips and short stints to Mexico and the Caribbean will be the first vacations consumers consider.

4. RECOVERY

Competition for media attention will be fierce, thus actionable plans need to be enacted now. Short-lead offers for summer and fall will encourage near-term travel.

5.1 RECOVERY OF EXISTING MARKETS AND INCREASING AVERAGE EXPENDITURE

A first area of attention is the recovery of markets which existed pre-COVID-19. In order to achieve this, Bonaire must invest in:

- Sales & Branding, Marketing and Trade efforts
- Implementation of the new normal
- Upgrading of existing facilities

5.1.1 Sales & Branding, Marketing and Trade efforts

Although COVID-19 caused a crisis on Bonaire, the crisis is not exclusive to Bonaire or the region. Therefore, a detailed crisis plan is not the recommended course of action. Unlike a natural disaster or situation affecting an area, the COVID-19 pandemic significantly impacted the whole world and the future remains highly uncertain. Consumers world-wide are cautious and holding off on decisions. For Bonaire, informing the consumer continuously about the next steps will be important, but more important is to look ahead and make clear moves forward. Place our focus on recovery, especially travel recovery.

Bonaire must be prepared to move quickly as soon as the borders open. Seek a balance between public health safety and economic recovery, in keeping with the advice of health authorities. With the entire world reeling from the effects of COVID-19, promoting and selling Bonaire as a destination during a wave of competition requires a strategic, forward-looking, and proactive approach.

The project team has compiled a list of action points which include:

- Create awareness of Bonaire as an epicenter of independent outdoor adventure, diving and eco luxury;
- Focus on our main markets
- Respond to post-COVID-19 travel trends by showcasing the island's premium hotels, villas and vacation rentals;
- Draw attention to Bonaire's safe environment, stable economy, good healthcare and low number of COVID-19 cases;
- Highlight the ease of travelling to Bonaire including non-stop routes;
- Increase visibility through targeted promotional campaigns, influencers, etcetera to positively affect load factors of airlines in need markets;
- Engage niche markets with new experiences including 'off the beaten path' travel and voluntourism;
- Target writers, bloggers, vloggers and influencers in

key feeder markets to increase widespread consumer awareness with a strong focus on top niche segments specifically divers, nature lovers, water enthusiasts, adventure seekers, green travelers, premium visitors/tourists;

- Drive sustainable growth and extend traditional seasonality by promoting Bonaire as a premier year-round destination;
- Safeguard a good and pro-active communication.
- Establish synergistic relationships among private and public sector partners, beyond the regional and international tourism offices of Bonaire, to ensure that we are all aligned in our external communications;
- Bring the island of Bonaire top-of-mind for discerning travelers seeking a premium adventure vacation.

PR-plan and budget

Different reports and insights like the Strategic Tourism Master Plan show that the marketing budget of TCB should be between USD 3 million and USD 6 million per year to promote the island in a strong and competitive manner. Bonaire must create a marketing & PR strategy based on the proposed 3-way approach. The strategic framework must be robust, including clear content and strategies towards the target groups (both local and international), an in-depth financial overview and a clear plan of action including allocated manpower.

TCB's current annual budget for marketing purposes amounts to USD 1.2 million. This is not nearly enough to conduct an effective marketing campaign to attract visitors from different parts of the world. It was inadequate in a pre-COVID world, and even more so in this global crisis.

Bonaire's government is developing plans to introduce a one-fee (arrival) tourist tax for tourists, which will help the government generate additional income in the future, that can be allocated in part towards raising the marketing budget for Tourism Corporation Bonaire. Past experience with the current room tax system, where (hotel and private sector) accommodations collect and remit the room tax, the local government collects less than 50% of the potential room tax income. With improved control and collection, the entry fee is expected to double 'tourist tax' income, reduce red tape

and at the same time be more convenient for the tourist.

The cruise tourists will also be subject to this new tourist tax with a lower day-fee. The current headtax will be replaced by the tourist tax.

The government of Bonaire and TCB are currently discussing plans to roll out the action points mentioned further above. The government has already allocated funds of USD 750.000 to set up and execute part of this marketing & PR plan. Another 750.000 euro is requested through the European Fund RESEMBID and for a quick boost of our economy in the long term, a request has been submitted for an extra marketing fund of 2 million USD via the ministries in European Netherlands for a stimulus of the economy in the short term for the long term.

5.1.2 Implementation of the 'new normal'

During the past months, stakeholders and businesses across the island have implemented health and safety procedures and taken protective measures to prevent the spread of COVID-19.

Many of Bonaire's attributes place it at an advantage in managing COVID-19:

- Not overcrowded
- An abundance of out-door facilities
- Lots of open spaces
- Outdoor seating/al fresco dining at most restaurants
- Open-air check-in areas at most accommodations and airport
- Strong and inclusive healthcare system, linked with the Netherlands
- Proven strong public health and outbreak management

The risk of COVID-19 infected people entering the island is mitigated by requirements that include a negative PCR-test and completing a health declaration, while steps are being taken to make fast testing possible at the airport.

Marketing and PR campaigns should incorporate and highlight the above-mentioned characteristics to emphasize the fact that Bonaire is a relatively low-risk destination.

5.1.3 Upgrading of existing facilities

As the STMP correctly states, a focus on the premium traveler may require a tourism product which matches a higher price tag. There are various opportunities for a relatively quick/low cost upgrading of existing tourism facilities.

Travel site Expedia lists 20 popular 'attractions' on the island, which could be upgraded. The Tourism Recovery project group, in consultation with stakeholders, has reviewed what upgrades could be implemented at each of these attractions and defined possible parties responsible for those upgrades. A table listing these popular tourist sites and the suggested improvements can be found in appendix 2.

5.1.4 Virus Aware Seal/ Bonaire Friendly Safety Seal

Tourists are looking for safe destinations and establishments. Having a "Virus Aware Seal" gives the visitor confidence that their safety and security is being considered and this can be critical to a faster recovery of the business. In addition, a Virus-Aware label can better protect employees, as it reminds both guests and employees to take all necessary precautions.

5.1.5 Target new markets

Bonaire can target and approach new markets, such as the Canadian market in North America and affluent groups within existing markets. The objective is to attract the outdoor premium tourists, such as divers and other outdoor adventure seekers with a high expenditure behavior. In order to achieve this, Bonaire needs to secure the airlift from these countries and to build a strong relationship within the travel trade sector of these markets, directed to the consumer.

Other countries such as the United Kingdom, Germany and Belgium are markets where Bonaire has the potential to grow among the premium tourists.

5.1.6. Exit Surveys

Bonaire lacks useful tourism data and statistics. Due to privacy laws, Bonaire cannot require visitors to fill out, for example, immigration cards with demographic information or data related to their stay. The government of Bonaire has now entered into a partnership with the Netherlands Bureau for Statistics (CBS) to carry out an exit survey in the coming period, in order to collect data about visiting tourists. This will allow Bonaire to determine tourist needs, market characteristics and economic impact more specifically. Once the data becomes available, Bonaire hopes to be able to further define its tourism product and diversification opportunities.

6. TARGET PREMIUM MARKETS AND DIVERSIFY THE TOURISM PRODUCT

This paragraph covers the second point of the 3-way approach; Development of a premium market focusing on the active, adventurous, nature lover, the more affluent tourist who is seeking an authentic experience.

An important second goal within this chapter is to increase the average tourist expenditure, to support the economy in a speedy recovery.

6.1 PREMIUM MARKETS AND DIVERSIFICATION OF THE TOURISM PRODUCT

6.1.1 Bring nature closer to the tourist; create unique experiences by developing activities and places to stay

Tourists are willing to pay a substantial amount when they can experience nature as closely as possible. Bonaire has a lot to offer: From diving and swimming with turtles to spotting dolphins and bird watching during dawn or sunset hours, naturally with respect for nature and the animals. Conversely, it is imperative to diversify in order to reduce stress on the reef and underwater environment. This can be achieved by promoting more on-land activities and creating a balance between aquatic and land activities.

One idea being considered, it to add a new shipwreck to the Bonaire National Marine Park (BNMP). This can be done in a controlled manner guided by Stinapa and professional experts. Research has proven that a new shipwreck can pull divers away from the natural reef (lower burden) and create a new habitat as well for various underwater species and creatures.

In order to facilitate an all-around unique 'Bonaire nature package' to tourists, Bonaire needs to develop additional elements, for example creating more eco-lodges. Currently, the number of nature areas on Bonaire is being inventoried so that the government can develop a plan to manage or purchase these properties, apply strict building regulations and create more nature activities on land.

Bonaire's Blue Destination vision involves a synergy between sustainable economic development, culture,

and nature. We have several mechanisms to achieve this which include reducing potential eco-stressors, such as, applying pricing strategies and controlling the number of visitors allowed to visit Klein Bonaire. These mechanisms can only be successful through close cooperation with stakeholders and all parties involved. Stakeholders in the tourism sector are currently discussing ideas in order to present an implementation plan in the near future.

6.1.2 Incentives for the hotel sector

The hotel sector generates the largest multiplier effect among the total tourism sector and subsectors on the island. Just before the COVID crisis, the Bonaire hotel sector averaged an occupancy rate of 68%. The breakeven benchmark in the Caribbean is 65%, which leaves Bonaire's hotel sector barely surviving. Only 41% of the tourists visiting Bonaire stay in hotels, while 12% stay with friends or family. According to the 2017 STMP, tourists staying with friends and family spend less than (USD 98) per day compared to tourists staying in hotels (US\$ 220). The STMP recommends targeting several new market segments to raise the percentage of visitors staying in hotels and increase the multiplier effect of this sector, to the benefit of the island economy and the quality of life of the residents.

Government incentives to hotels may include reduction on taxes, tax benefits for renovations and upgrading, expedited terrain assignment and expedited building and hotel permits. Other

incentives might include a marketing support budget for hotels that are making the switch to upgrade their tourism product to at least a 4-star hotel.

By providing incentives to the hotel sector, the Government will not only help the industry survive the current crisis but will also give a positive injection to the sector after the crisis.

According to the STMP, hotels deserve preferential treatment because of the extra income they generate for the economy and the employment that they create. To achieve a premium destination suitable for the more affluent tourist Bonaire should focus on developing high quality, high service hotels (4 and 5 stars) according to international standards as well as eco-lodges and authentic accommodations. Studies show that segments of high-tier incomes are searching for an authentic experience and may be willing to pay premium price for this as well. BONHATA has a certification program for small accommodations. This program contains certain criteria that will help take the (small) accommodations to a higher level and more towards boutique hotels that at the same time fits the vision of the STMP.

The post-COVID-19 Travel survey by Magna Global USA shows that 72,5% of people who wish to travel would be more comfortable in a small hotel (<200 rooms). A good fit for Bonaire.

At the same time, the challenge is to upgrade. Considering that the profitability of Bonaire's hotels is low, with low scores for customer service and value for money, the focus ought to be on upgrading existing accommodations to boost these, rather than building new ones.

6.1.3 Connecting tourists to the culture of the island

In order to provide tourists with the full inclusive 'Bonaire Experience', connecting with the authentic culture of Bonaire's people is key. Elements to think about are music, art, dance, food, spirituality and more. This needs to be organized via a 'step-by-step approach' to make sure both the residents and tourists feel comfortable. Chapter 7 will cover this in more detail.

6.1.4 Create more early morning and evening activities

Bonaire is characterized by various day activities, yet there is a lack of early morning and evening programs. Looking at our weather conditions, the island is an ideal place for early morning activities, e.g. beautiful walking tours through nature and around spots like



Gotomeer and Fontein to spot flamingos and birds. During the evening hours tourists can go for a night dive, -snorkel, dinner with live entertainment. A greater diversity of early morning and evening programming needs to be added to the offerings of the island, such as early morning walks, cultural evenings, and nightly nature walks. This can be achieved quite easily in good collaboration with stakeholders, culture and nature organizations. Shopping nights or a change in opening hours of the shops in town, following a more 'Caribbean siesta' schedule will allow tourist and residents to leisurely go shopping in the evening. This will also solve part of the parking problems occurring in town in recent years.

6.1.5 Infrastructure improvements

One of the basic elements that must be in place to receive the more affluent tourist and to deliver a positive service experience is a good infrastructure. Bonaire already possesses a detailed road improvement plan and implementation has initiated with roads being repaved. Ideally, the plan should include construction of walking and cycling routes to link up with the popular tourist (nature) attractions and activities.



6.1.6 Sport tourism

Bonaire will focus on the active, sporty, adventurous, and nature-loving tourist, with an above-average spending behavior. Bonaire already offers exciting activities in this sector, such as: diving, wind- and kitesurfing, sailing, hiking, cycling, swimming, and snorkeling. There are opportunities to broaden the spectrum of sports which can be practiced on the island. Sports such as beach tennis, golf in open nature, and the organization of marathons or other competitions on the island can attract famous athletes and spectators, and thus more tourists.

6.1.7 Digital Nomads

Focus on digital nomads. Digital nomads use the internet to carry out their work location-independent. They live a “nomadic” life by traveling a lot and thus making use of their flexible way of working and earning money. The Wi-Fi facilities on Bonaire are generally good and this market is constantly growing. Especially now that working digitally has become more common during the COVID pandemic.

6.2 CRUISE TOURISM

The cruise industry has also deeply been impacted by the pandemic. It is very difficult to predict how this industry will re-establish itself after this crisis.

The cruise industry had been growing on Bonaire exponentially before the crisis and had reached a point where the island could not guarantee the best tourist experience for the cruise- and stayover tourist.

Eline van Haasteren, a Tourism Management student at Tio University and WWF intern, has conducted research on cruiseship visits to Bonaire. She points out:

“Research has indicated that (cruise)tourists are less likely to come to Bonaire if coral reefs decline or if crowds

increase further (Schep, van Beukering, Brander, & Wolfs, 2013). Stay-over tourists are found to contribute more to the tourism industry than cruise tourists, and those same stay-over tourists have proven to return in higher numbers than cruise tourists. However, the impact of changes in crowdedness on the island and a degradation of the coral reef ecosystems has more impact on stay-over tourists than the cruise tourists. Marine ecosystems are found to be far more economically significant than terrestrial ecosystems on the island.”

Moreover, she found that a majority of the cruise industry is far from meeting the requirements of the Paris Agreement on Climate Change (NABU - Nature and Biodiversity Conservation Union (Germany), 2020a). In order for the cruise companies to establish a business model that complies to the Paris climate change goals as well as the United Nations SDGs, the cruise industry has to switch to emission-free drive technologies until 2050 at the latest (NABU, 2020b).

As a fore-runner in sustainability, Bonaire looks to embrace these goals and become selective. Visiting ships will be required to have taken initiative to meet sustainability goals.

In general, to guarantee the best Bonaire experience for tourist and also the locals, we will need to lower the amount of cruise passengers arriving on Bonaire, shifting from quantity to quality. It has been decided to apply price strategies to decrease the amount of cruise ships docking in our port. The government will do this by increasing the taxes of every cruise

passenger arriving on Bonaire. We will focus on controlling the number of visitors allowed to visit protected areas and beaches which makes it possible to mitigate potential eco stressors and while maintaining the best possible tourist experience. The island has also decided to focus more on smaller luxury cruise ships and superyachts.

6.2.1 Smaller luxury cruise ships

A sub segment in the cruising industry are smaller or alternative cruise ships with about 100 to a 1000 passengers on board. These ships typically call for a few days at a time and passengers are interested in getting to know the island (much) more in depth compared to the 'big' cruise line passengers. For various reasons, the passengers on these cruise ships match the high-end tourist the STMP considers desirable, such as

- Relative high income
- More demanding
- More critical
- More interested in authentic or meaningful experience

Due to their size or the fact that they use alternate propulsion (wind or solar energy), they fit in well with the 'eco' aspect of the desired visitor. These ships will also be selected based on their compliance with sustainability goals.

6.2.2 Super Yachts

Super Yachts represent the premium tourists. Super Yachts are owned or rented by high-income tourists, often looking for authentic and top culinary experiences, unspoiled nature, and destinations with an easy access to all that makes their stay a unique experience. Currently Bonaire does not have mooring options for this market. The few super yachts that visit Bonaire must use one of the city piers and cannot stay longer than a few days, because the piers are needed for mooring of freight ships or, if applicable, cruise ships. Yacht passengers are usually looking to stay at least a few weeks. If they have an easy access to an international airport, the stay can easily be extended to months. Bonaire has the required facilities to offer such demands and could be enhanced when the moorings are in place.

The daily average spending of this target group is very high. Currently Bonaire is limited in providing to the demands and must reject many requests. When there are enough berths, Super Yachts can be accommodated relatively easily.



7. ENGAGING THE LOCAL COMMUNITY IN TOURISM (INCLUSION)

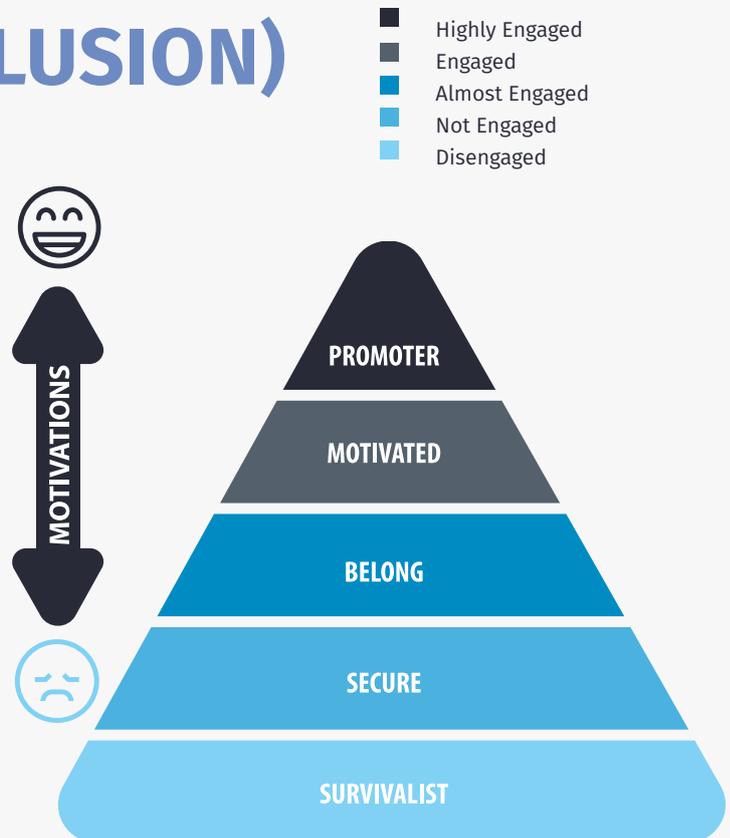
The strategic tourism masterplan 2017³ argues that Bonaire’s development vision was grounded on a narrow vision of nature first for far too long. Over time it has now become necessary to broaden the vision for people and nature to live in harmony. Our vision for tourism is that it serves as a stepping-stone for development and well-being for all Bonairians, enabling Bonairians to unleash their transformative and creative power to develop a thriving island while living in harmony with nature.

This vision expands the frontiers of possibilities for Bonairians by centering its objectives and actions on improving the quality of life for all Bonairians. Tourism can be a means to enable this transformation if the entire community of Bonaire understands and accepts that tourism rests on social efforts.

The benefits of tourism should support and enhance the quality of life of the local population in a tangible and intangible way. Achieving this goal is crucial for Bonaire’s future - not only because enhancing quality of life should be an ultimate goal of development, but also because it is the people who create a unique atmosphere that can bring about a transformative and memorable tourism experience.

This chapter outlines a strategy to increase the local community involvement in the current tourism industry, to reach the main objective of the Strategic Tourism Master Plan.

Community participation in tourism development and conservation of the local identity and culture, is essential for the creation of a sustainable tourism destination. Community participation ranges from involvement in the decision-making processes to economic involvement and the promotion of the destination. According to Telfer and Sharpley⁴, local communities can



provide a wide range of perspectives on tourism development. Inskeep⁵ argued that only through their involvement in tourism activities, local communities can maximize the socioeconomic benefits from tourism.

Moreover, the accuracy of representations of their traditional lifestyles and values is contingent upon the involvement of the local community in the planning and development process⁶. Therefore, sustainable tourism development relies upon the involvement of the local community.

³ The Dick Pope St. Institute for Tourism Studies The strategic tourism masterplan; 2017. 112 pp.

⁴Telfer DJ, Sharpley R. Tourism and development in the developing world. London: Routledge; 2007. 280 pp.

⁵Inskeep E. Tourism planning: An integrated and sustainable development approach. New York, NY: Van Nostrand Reinhold; 1991. 508 pp.

⁶Sheldon PJ, Abenoja T. Resident attitudes in a mature destination: The case of Waikiki. Tourism Management. 2001;22(5):435–443.

7.1 SOLUTIONS ON HOW TO INCREASE COMMUNITY PARTICIPATION IN TOURISM

With the Maslow pyramid we can indicate solutions to increase community participation in tourism.

7.1.1 Survivalist level

Create more engagement among a section of the Bonairian community that is disengaged with tourism; motivate these citizens to become more engaged through a four-year long tourism awareness and certification program.

- This program can consist of some of these activities:
- Informational campaigns on the benefits of and vision on tourism
- Awareness campaigns about the importance of tourism for the Island and 'your future' at schools
- Facts & figures impact of the tourism sector on the local economy
- Training to involve the community and enhancing competitiveness
- Training community to connect tourists to culture and nature
- A tourism work experience project
- A project to illustrate and explain tourist attractions and activities
- Swimming lessons for kids
- Fish identification

7.1.2 Secure level

In order to feel more secure, the local community can be reassured through clear communication and information of actions taken to increase citizen safety. Officials must take the necessary precautions to ensure the community is aware of the security level and steps to control crime. In general, government should ensure that citizens are well-informed about matters that involve physical, health, social and economic security.

7.1.3 Belonging level

For tourism to be successful in a community, aside from the usual tourism stakeholders, like TCB and sector associations, the following players must be involved (to mention a few):

- Entrepreneurs willing to invest in community culture and nature for profit
- Preservation groups wishing to enhance and preserve the community nature, culture, and heritage
- Artists (like musicians, dancers, craftsmen, and other artists) who provide a vibrant and unique local atmosphere to the tourists

For the community to have a sense of belonging a program should be put in place to allow the community to participate in the decision-making process. This could

involve discussions and debates on tourism topics, and brainstorming sessions in which everyone can actively participate. Programs can be developed to encourage residents from a variety of income groups, ethnicities, and ages to volunteer to help identifying attractions. These groups should also be consulted in the tourism planning process.

7.1.4 Motivated level

In order for Bonaire's community to be more engaged with tourism, a structural domestic tourism program enabling residents to enjoy the local touristic product can be developed.

The program can consist of activities such as:

- Awareness programs on the code of ethics for locals
- Creating an inventory of lesser known attractions by residents
- Publication of an accommodation guide for residents
- Local accommodation rates for residents
- Preparation of a tourist guide map for residents
- Training of youth as guides at tourist sites to assist the resident tourists
- Encouraging tour agents to introduce low budget tour packages for resident tourists
- Media promotional campaign
- Advisory committee on resident tourism

Additionally, a community entrepreneurship program for the local community can offer training how to startup and manage a local business that caters to tourists.

7.1.5 Promoter level

Our goal should be that the entire Bonaire community is actively involved in broadly promoting Bonaire's tourism product. To achieve this, the community needs to be well-informed, engaged, directly benefiting of the tourism sector and enjoying the tourism product of Bonaire. We would like to develop a program that encourages the community to share their experiences when participating at local attractions and events. There should also be moments where tourists meet with local people to learn from them about the local culture, history, folklore, and customs. Eventually every Bonairian should become an ambassador of the island.

8. SUMMARY AND CONCLUSIONS

The COVID-19 pandemic has had a profound impact on the global tourism sector. Same as much of the global economy, tourism on the island of Bonaire has been thrown into crisis by the COVID-19 pandemic, putting lots of businesses and jobs at risk. The priority for the sector is to resume operations as early as it is safe to do so, but re-opening will just be the start of a difficult recovery. The situation requires an urgent response, but also a recognition of the constraints that hamper Bonaire's tourism development.

The Strategic Tourism Master Plan (STMP) of 2017 provides a cohesive vision for tourism that was developed in collaboration with all of Bonaire's tourism stakeholders. Thus, acceptance of the suggested goals, strategies, and tactics in the 2017 STMP is expected to be wide as all the recommendations were derived from participation by all stakeholders. The plan also addresses important challenges that Bonaire's tourism industry will face when converting the tourism industry into an economic engine that serves all of Bonaire. These challenges include: a significant increase in competition within the Caribbean whereas Bonaire's competitive position has waned over time, an underperforming mainstay tourist segment (scuba divers), the need for a diversified tourism product portfolio, inadequate pricing of eco-tourism related activities, the need for an improved accommodation sector, and improved accessibility.

The current global shutdown has no precedent, but history shows that tourism is resilient and can rebound strongly from periods of crisis. Several features are common to successful recoveries: market and consumer diversification, infrastructural investment, effective messaging, and product differentiation. Globally, destination marketing organisations (DMOs) and multilateral organisations have therefore focused their COVID-19 crisis response on risk mitigation, safely restarting operations and reimagining the sector.

The priority for the government of Bonaire is to resume tourism operations as early as it is safe to do so. This will minimize economic and employment impact and position the island for broader economic recovery. At the start of this Tourism Recovery Plan we have included the summarized action plan, providing a framework for steps to be taken to reposition and revive Bonaire's tourism in line with the stated vision.





APPENDIX 1: LIST OF PEOPLE AND ORGANIZATIONS WHO ATTEND THE VARIOUS FOCUS GROUP SESSIONS AND HAD A PART IN THE DEVELOPMENT OF THIS PLAN

First Name	Last name	Organization
Albert	Arrias	Taxi Association Bonaire
Annette	Emerenciana	Tourism Corporation Bonaire
Adnan	Hassan	Mindful Enterprices Bonaire
Alvin	Obersi	Mindful Enterprices Bonaire
Bart	Snelder	Council of Underwater Resort Operators
Bas	Noij	Bonaire Hotel and Tourism Association
Board	of BCM	Bonaire Arts and Crafts Cruise Market
Boi	Antoin	Fundashon Históriko Kultural Boneriano (FuHiKuBo)
Burney	el Hage	BHM
Charlene	Bosch	
Cherethy	Kirindongo	Kamer van Koophandel Bonaire
Christian	Schultheiss	Bonaire Destination Services
Clay	Davelaar	Elite Bonaire
Danike	Craane	Lady's Plus Size
Danilo	Christiaan	Fundashon Mangazina di Rei
David	Pandey	Milano Diamond Crollery
Debby	Vermeulen - Rauwers	Afdeling Economische Zaken
Delno	Tromp	Tourism Corporation Bonaire
Dennis	Martinus	Bureau Gedeputeerde Thielman
Derchlien	Vrolijk-Dijkhoff	Tourism Corporation Bonaire
Dianne	Boelemans	Directie R&O afd. Beleid en Projecten
Dudley	Wedervoort	Openbaar Lichaam Bonaire
Eddy	Carillo	Bonaire Business & Employers Association
Edison	Rijna	Bestuurscollege
Eline	Van Haasteren	Tio University Tourism Management / WWF
Elvis	Martinus	Bonaire Windsurf Place
Elvis	Tjin Asjoe	Bestuurscollege / Eilandsraad
Eric	Gietman	The Cadushy Distillery
Eurich	Paulina	Tour Company
Frank	van Slobbe	Afdeling Milieu en Natuur (R&O)
Gianni	V/d Heuvel-Guerrero	Kamer van Koophandel Bonaire
Ghislaine	Monte	Bonaire Blue Destination
Gerrel	Pourier	Taxi Association Bonaire
Gideon	Gerharts	Bonaire Tours & Vacations

First Name	Last name	Organization
Gunther	Flanegin	Haven en Loodswezen
Harald	Linkels	Linkels & Partners
Harry	Somers	Anshalla Fashion
Helvig	Thode	Afdeling Economische Zaken
Hennyson	Thielman	Bestuurscollege
Huub	Groot	Kamer van Koophandel Bonaire
Izain	Mercera	Mangazina di Rei
James	Kroon	Bestuurscollege
Jan	Gramsma	MG Bonaire
Janice	Huckaby	Jan Art Gallery
Jennifer	Martis	Bureau Gedeputeerde Den Heijer
Joy	Koning	Bonaire Destination Services
Jude	Finies	Stichting Terramar Museum
Kerenza	Rannou	STINAPA Bonaire
Kim	van Vaardegem	Watersport Association Bonaire
Leopol	Alexander	Bonaij Adventure Tours
Luite	Berkenbosch	Bonaire Hotel and Tourism Association
Maria-Lucia	de Palm	Directie Samenleving en Zorg
Marjolein	Verhoef	Bonaire Arts & Crafts Association (BACA)
Michiel	van Heusden	Watersport Association Bonaire
Monique	Llewellyn	W @ I Bonaire N.V. (Chez-Claudette)
Nina	Den Heyer	Bestuurscollege
Nixon	Blanca	Bonaij Adventure Tours
Norman	van Holst	Watersport Association Bonaire
Orphaline	Saleh	Bureau Gedeputeerde Thielman
Orlando	Francisca	Bonaire Offroad Adventure Tours
Paul	Coolen	Bonaire Hospitality Group
Rayan	Rammo	Bureau Gedeputeerde den Heyer
Reginald	de Palm	Directie Samenleving en Zorg
Sanne	Meijer	Bureau Gedeputeerde Thielman
Sjoerd	Vanderbrug (aka mr.Saltman)	Saltshop
Stanley	Balentin	Taxi Association Bonaire
Susan	Willems	Jobcentrum
Veroesjka	de Windt	Bonaire Hotel and Tourism Association
Wijnand	de Wolf	STINAPA Bonaire
Yvonne	Schultheiss	Bonaire Destination Services

APPENDIX 2: LIST OF BONAIRE’S TOP 20 ATTRACTIONS WITH SUGGESTIONS ON IMPROVEMENT

Attractions:	Suggestions for Improvement:
1. Klein Bonaire	<p>Draft a management plan for development in balance with conservation (Stinapa)</p> <p>Expand activity possibilities</p> <p>Improve facilities to make the activities possible</p> <p>Dedicate a trained ranger to Klein Bonaire for better communication, awareness and service to visitors</p> <p>Create Walking and biking route (10 KM)</p>
2. Coral reefs	A nature fee should be charged to cruise passengers also
3. Pink beach	<p>Pink beach is currently in the possession of Cargill. Cargill's lease will end by 2024 and they have shown to be willing to negotiate and give pink beach to Bonaire even sooner than that.</p> <p>Pink beach “ rejuvenation project” 1st phase</p>
4. Salt pans:	<p>Make it attractive to tourists, tour of the salt pans, kayak from one side to the other, museums with our salt history, explanations of how it's being processed, souvenir shop. Tour of the Flamingo habitat. Only available with local certified guides and under strict conditions in order not to disturb the flamingoes. The possibility should be investigated to provide food for the flamingoes so most will feed on Bonaire and not leave the island.</p>
5. Atlantis area beaches	<p>Create proper facilities:</p> <ul style="list-style-type: none"> Food and drink vendors Toilets 2 Cabana's Signage with beach rules Local plants and Palm trees
6. Sorobon beach	<p>Windsurfing: Brand Bonaire as the best location in the world to learn to dive with low beach, good winds and top 10 professional windsurfers as instructors.</p>
7. Lac Cai	<p>More activities can be done in Lac, they bay is huge and beautiful. Look at possibility to use Lac bay for other water sports.</p>
8. Donkey Beach	<p>Clean up beach, fix chairs and remove all rocks on beach to create a better beach experience.</p>
9. Bachelors Beach	<p>Create a beach area at the top part of bachelors by placing sand, palm trees and beach cabanas. There should be a few vendors on location to support local entrepreneurship. Government will invest in this area and receive a return on the investment by charging rent for use of the location.</p>

Attractions:	Suggestions for Improvement:
10. Te Amo Beach	Create proper facilities: <ul style="list-style-type: none"> - Food and drink vendors - Toilets - Cabana's - Signage with beach rules - Palm trees
11. Mangrove forest Lac	Open up more channels to be able to kayak and teach locals on the science behind mangroves in a responsible way
12. Thousand steps	Upgrade with facilities to make it better protected against petty crime. Promote the fact that someone can swim with turtles. More focus on promotion of Bonaire as a snorkeling paradise also.
13. Washington Park	Combine reforestation efforts to focus solely on Washington park, confine all goats and donkeys into fenced off enclosures only.
14. Gotomeer	Create a wood platform to sit and relax and enjoy the tranquility of Gotomeer
15. Caves	The Karst and Caves project has opened up many caves to the locals and for tourists. We need to promote all the caving adventures Bonaire has to offer.
16. Fontein	Negotiate with the current owner of Fontein to get it back to the island of Bonaire. Place picnic benches Place solar led lamps Place safety railings
17. Seru Largu	Create facilities for food and drinks Mark road for walking area Mark road for parking Create and place signage for rules Place outdoor gym equipment
18. Museums	Bonaire has 11 museums. They need to unite other 2 to 3 nice museums all specializing on another area.
19. Rincon	Promotion of Rincon as the place to experience the true identity of Bonaire with it being the cultural center of Bonaire.
20. Downtown Kralendijk	Light installation: Place decorative lights for ambience at night time in order to attract more people to the center of town at night Sound equipment: Place fixed sound equipment in downtown to create a cozy atmosphere with Caribbean music to attract locals and tourist to the town center in the day- and night time.



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