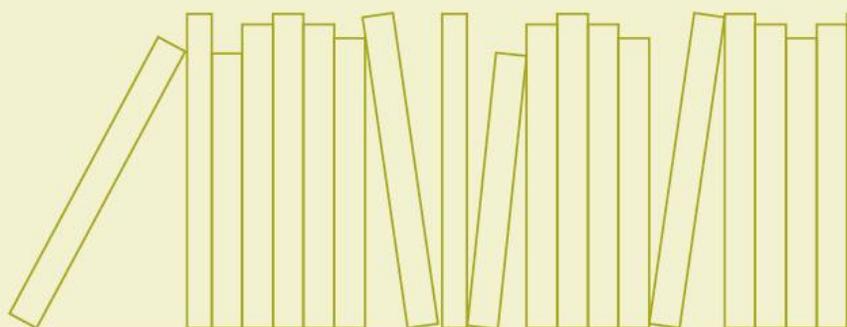


Economic Commission for Latin America and the Caribbean

ECLAC SUBREGIONAL HEADQUARTERS FOR THE CARIBBEAN



Report of the expert group meeting to consider an analysis of the art and craft sector and its potential for sustainable tourism development in the Caribbean



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Economic Commission for Latin America and the Caribbean
Subregional Headquarters for the Caribbean

Expert group meeting to consider an analysis of
the art and craft sector and its potential for
sustainable tourism development in the Caribbean
26 July 2017
Port of Spain, Trinidad and Tobago

LIMITED
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28 August 2017
ORIGINAL: ENGLISH

**REPORT OF THE EXPERT GROUP MEETING TO CONSIDER AN
ANALYSIS OF THE ART AND CRAFT SECTOR AND ITS POTENTIAL
FOR SUSTAINABLE TOURISM DEVELOPMENT IN THE CARIBBEAN**

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A. SUMMARY OF RECOMMENDATIONS

1. The meeting recommended the following:
 - That considerations be given to the establishment of suitable public spaces for artisans to conduct their trade in the Caribbean region.
 - That considerations be explored on strategies for improved financing of the operations of artisans in the Caribbean.
 - That steps be taken to facilitate improved engagement of artisans with the hotel sector, especially in the case of all-inclusive establishments.
 - That greater efforts be made to facilitate the development of online presence for Caribbean artisans.

B. ATTENDANCE AND ORGANIZATION OF WORK

1. Place and date

2. The Economic Commission for Latin America and the Caribbean (ECLAC) convened an Expert group meeting to consider an analysis of the art and craft sector and its potential for sustainable tourism development in the Caribbean. The meeting took place at its office, in Port of Spain, Trinidad and Tobago on 26 July 2017.

3. Attendance

3. Three were representatives from the Culture Division of the Ministry of Community Development, Culture and the Arts of Trinidad and Tobago attended the meeting. Representatives from the following organizations were in attendance: Artisans of Saint Lucia, Association of Caribbean States (ACS) and the Caribbean Tourism Organization (CTO). An ECLAC consultant was also present.

C. SUMMARY OF PROCEEDINGS

1. Opening of meeting

4. The Economic Affairs Officer of the Sustainable Development and Disaster Unit of the ECLAC subregional headquarters for the Caribbean welcomed all participants both online and those physically present at ECLAC, and proceeded to introduce the Deputy Director of ECLAC subregional headquarters for the Caribbean, who delivered opening remarks on behalf of the Director. He indicated that the purpose of the meeting was to review the paper titled “An Analysis of the Art and Craft Sector and its potential for Sustainable Tourism Development in the Caribbean”. Meeting participants were then invited to introduce themselves and to briefly share their involvement in the art and craft sector.

**D. PRESENTATION OF REPORT: “AN ANALYSIS OF THE ART
AND CRAFT SECTOR AND ITS POTENTIAL FOR SUSTAINABLE
TOURISM DEVELOPMENT IN THE CARIBBEAN”**

6. The Economic Affairs Officer then made a presentation titled “An analysis of the art and craft sector and its potential for sustainable tourism development in the Caribbean” which highlighted the approach, methodology, findings and policy recommendations of the above titled study. His presentation of the analysis of the art and craft sector and its potential for sustainable development in the Caribbean was organized around 6 key areas, these being: positioning of art and craft in the region, art and craft in tourism, application to the study, survey results, value chain analysis, policy implications and conclusions.

7. He elaborated the details of the research by first presenting a brief review of the status of the art and craft sector in the Caribbean in the context of the regional creative economy and the global trade in creative goods. He noted that there was an upward trend in global trade in creative goods with increases from approximately 0.3 to 0.8 billion dollars of exports for the region between 2002 and 2008. He further noted a significant decline in Caribbean creative exports between 2009 and 2012, with some recovery in 2013 and 2014.

8. The study also revealed that for Caribbean artisans, the main areas of creative goods produced were design goods (more specifically jewelry), fashion, and paintings.

9. Based on the findings of the study, the Economic Affairs Officer also expressed concern over the weak linkage between art and craft and the tourism sector, in the Caribbean, noting that this linkage was primarily through the purchase of art and craft as souvenirs and mementos.

10. In terms of methodology he noted that a regional survey was administered to 118 respondents from 16 Caribbean countries, with approximately 35 and 27 of these each being respondents from 2 targeted case countries of Saint Lucia, and Trinidad and Tobago respectively.

11. Results were also presented from a value chain analysis conducted on the basis of the survey to identify where the largest shares of value added were to be found for selected artisanal products in the Caribbean.

12. Other highlights from his presentation involved a discussion on major constraints impacting artisans in their production of creative goods, including inability to access financing for the driving of their businesses, as well as inadequate marketing infrastructure and limited markets.

13. The presentation was concluded with a synopsis of the main policy implications of the study identified to include the following:

- Financing
- Infrastructure
- Market structure and development
- Government support
- Strengthening tourism linkages
- Investment in art and craft
- Export potential
- Job creation and entrepreneurship
- Innovation strategy and industrial policy

14. Overall the study concluded that in the Caribbean there were limited prospects at this current time for linking the art and craft sector with tourism, but there is a high potential of this subsector in enhancing the tourism experience in the Caribbean region.

E. DISCUSSION

15. The representative from CTO expressed interest in the calculation of the some of the measures in the value chain, noting that the ranges of variables from the survey were possibly too wide to afford a reasonable assessment of value added at various stages of the value chain.

16. The Economic Affairs Officer, ECLAC acknowledged the concern while noting that the survey considered the cumulative share of the 75 per cent and the mid-range as the average. He also explained that the type of data sought for the purpose of the value chain analysis (revenues and incomes) were data for which respondents were typically reluctant to reveal, so that the wide range of responses were applied as a strategy for mitigating this challenge. He noted that these details were itemized in the annex of the study for reference.

17. The participant from Saint Lucia also lamented that connecting art and craft to tourism was constrained by the fact that 90 per cent of Saint Lucia hotels were all inclusive, thereby restricting direct interaction between visitors and artisans, and noted this reality may have impacted the study significantly. She further explained that efforts were afoot to promote “made in Saint Lucia” products in order to anchor the visitor’s experience with the country. She also advised that many of the products marketed as art and craft in Saint Lucia were in fact made in China, India and Indonesia with only a “made in Saint Lucia” label affixed to the products. She observed that because of this, art and craft artisans could not compete with these imports. Finally, she noted that many Saint Lucian artisans were inaccessible to the tourist market as they produced mostly at home away from the tourist centers. She informed the meeting that in order to overcome this challenge her organization had in the past organized visits to the artisans’ homes by tourists, but this effort was curtailed by the high costs of this venture.

18. The representative from the ACS noted there were many areas that required improvement with respect to the development of the art and craft sector. She noted that the ACS was pursuing the linkage between small hotels and artisans as they believed these establishments may be more open to embracing best practices and ethics involved in the linking of the two sectors. She enquired whether ELAC considered developing a survey targeted to consumers to ascertain their needs. The ECLAC official noted the comment and agreed it would explore the possibility of such a survey in the future.

19. The Trinidad and Tobago representative noted there were several developments taking place locally with respect to the development of the creative – and by extension – the art and craft sector. Some of these included efforts to promote collaboration in order to mitigate challenges facing artisans, as for instance the promotion of shared spaces for artisans. She noted an example of this kind of collaboration to be the hosting of pop-up shops organized by some local hotels in collaboration with the artisans and private sector. She further cited regional initiatives, for example the Caribbean Festival of Creative Arts (CARIFESTA) buyers’ market which was hosted in different Caribbean countries each year, and explained that this market brought buyers and artisans together, thereby presenting improved marketing opportunities for artisans.

20. The Economic Affairs Officer asked the meeting participants if their fiscal policies incorporated incentives for the use of indigenous material as inputs in the art and craft industry. The

Trinidad and Tobago representative noted this was not presently the case. However, using Carnival industry as an example, it was noted that there was significant movement with respect to the development of designing expertise through the Caribbean region. She also expressed interest in the possibility of using Carnival as an opportunity to promote the use of indigenous materials especially if this criterion was including in the judging of carnival costumes.

21. The Deputy Director referred to the intervention made by the Saint Lucian participant who expressed frustration at the absence of appropriate infrastructure to encourage hotels buy-in regarding concessions. He noted that the Jamaican scenario also demonstrated similar conflicts between tourism and artisans.

22. In responding to this observation, the Saint Lucian representative endorsed this experience by noting that on the occasion that large hotels do engage the artisans, the all-inclusive ones especially, could take as much as 3 to 6 months to pay. This makes it difficult for artisans to do business with the hotel sector.

23. The Deputy Director proposed these issues could provide evidence to encourage government investment in the field.

24. The Economic Affairs Officer noted from their field experience that artisans were not mindful of the value or the potential role of national organizations in the development of the artisanal sector. He noted that this was different to for instance the Chilean situation where art and craft was a major attraction compared to the prevailing situation in the Caribbean.

25. The CTO representative sought an explanation as to how the case studies were selected. The Consultant in her response explained that the survey sampled respondents from the wider Caribbean but gave focus to Trinidad and Tobago and Saint Lucia as case countries in which the possible strength of linkages between the art and craft sector and the tourism sector could have been assessed and compared.

26. The Saint Lucian representative also shared her artisan experience with Guyana where she observed that artisans were generally not as concerned with business aspects, as they typically were more preoccupied with the creative side of the business.

27. In responding to this observation, the Economic Affairs Officer noted that the United Nations Conference on Trade and Development (UNCTAD) identified two types of artists: those that created for the sake of it and those that were interested in the business aspects. He identified this as a challenge that would have to be addressed at the policy level to treat with that reality.

28. Another issue raised in the discussions was the question of artisans' engagement with technology particularly in respect of online marketing of artisanal products. The Economic Affairs Officer observed that in this regard, one of the principal challenges remained the issue of online payment facilitation which was a key hindrance to the establishment of online commercial presence in the Caribbean.

29. The Deputy Director expressed his amazement at the quality of products that he had seen when attending shows hosted by manufacturers, agriculturalists, and craftsmen.

30. In concluding, the participants expressed their gratitude for the meeting and each in turn expressed their interests to remain engaged in the dialogue with ECLAC.

31. The Economic Affairs Officer thanked all the participants for their valuable contributions. He explained the next steps for the study as being the finalization of the publication, the dissemination of the final study via email to all participants and its placement in the ECLAC digital repository by September 2017.

F. CLOSURE OF MEETING

32. The Economic Affairs Officer, Sustainable Development and Disaster Unit, ECLAC wrapped up the meeting, thanking the participants for their valuable input.

Annex I**LIST OF PARTICIPANTS**

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Annex II

AGENDA

1. Opening of the meeting
2. Presentation of report “An analysis of the art and craft sector and its potential for sustainable tourism development in the Caribbean”
3. Discussion
4. Conclusion and recommendations
5. Closure of meeting



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