CAYMAN ISLANDS

NTP

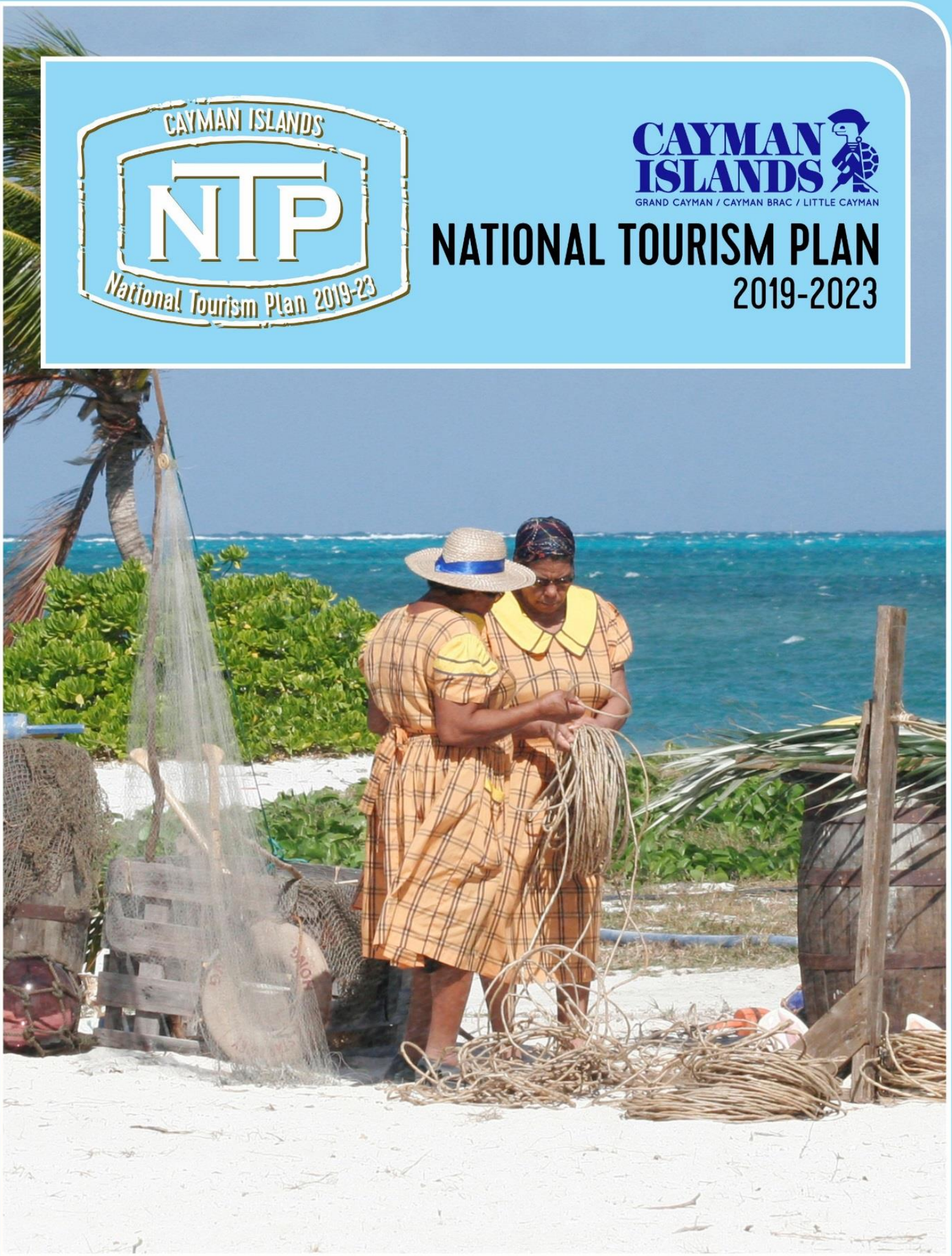
National Tourism Plan 2019-23

CAYMAN ISLANDS

GRAND CAYMAN / CAYMAN BRAC / LITTLE CAYMAN

NATIONAL TOURISM PLAN

2019-2023



The Cayman Islands will protect our environment, celebrate our cultural heritage, while supporting a vibrant tourism economy that benefits the people of the Cayman Islands.



Message from Hon. Moses Kirkconnell. JP, MLA
Deputy Premier and Minister for District Administration, Tourism and Transport

Tourism is an important aspect of the Cayman Islands economy and way of life. It provides jobs and economic opportunity for our residents, while showcasing our Islands' natural beauty and cultural heritage to visitors from all around the world.

Traditional performance indicators such as tourist arrivals, employment statistics and contribution to GDP all confirm that the Cayman Islands tourism industry is booming. In 2017, stayover visitor arrivals crossed the 400,000 threshold, achieving a historic 418,403. Total arrivals for 2018 in both air and cruise visitation was 2,394,058, an 11.05 percent increase over the same period in 2017. In 2018 we received 463,001 stayover visitors, an increase of 10.66 percent over 2018.

Although tourism is increasingly shouldering more responsibility for our economic well-being, it continues to deliver positive benefits to our Islands. To fully leverage these benefits, it is vital that the industry's growth is managed in a way that is socially, commercially and environmentally viable. This is why this National Tourism Plan 2019-2023 is so important. It marks the achievement of a further milestone for the industry and provides our Country with an overarching framework for managing purposeful tourism growth over the next five years. The Plan has been developed to share both a long-term vision and medium-term objectives that will help the tourism sector to continue thriving and prospering, while conserving our natural resources and cultural heritage.

My vision, and the ultimate goal this Government is working towards, is to not only build a tourism industry that achieves greater sustainability, but one that improves the lives of our Caymanian people through greater inclusivity.

I am therefore very pleased that this National Tourism Plan has not been created within a silo, but rather with the input and collaboration from our tourism businesses, partners and the wider community. This spirit of inclusivity and support is crucial to ensuring that we achieve our aims and capitalize on future opportunities.

In 2018, my Ministry and the Department of Tourism visited every District in the Cayman Islands, as well as Cayman Brac and Little Cayman, which afforded me the opportunity to meet with the public to discuss this plan and hear their feedback. The response was exceedingly positive, and I am grateful for the valuable insight that was gained.

I thank the many individuals and organizations who contributed to the process by attending the meetings and offering their suggestions. The result is an excellent plan and I am confident it will serve us well as we strive to continually renew, rebuild and reinvigorate our tourism industry and product.



Message from Mrs. Rosa Harris, Director of Tourism, Cayman Islands Department of Tourism

From our establishment in 1974, the Cayman Islands Department of Tourism (CIDOT) has sought, through its vision, to responsibly lead the tourism industry and position the Cayman Islands as the warm weather destination of choice.

Over the decades, we have changed and adapted our techniques to be able to keep up with the demands of this vibrant industry. From the steady increases in air lift and cruise arrivals, to the introduction of mass media platforms and the rapid growth in development across much of our three islands, the Cayman Islands Department of Tourism continues to be successful in building a strong Caymankind brand awareness around the globe. This has led us to record-breaking stayover and cruise arrivals which has contributed to a robust industry and economy.

While our remit as a Department is to attract and retain visitation, we also have an influential role to play in the development and implementation of sustainable policies and initiatives. The National Tourism Plan 2019– 2023 is so consequential for the future of this nation, as it will provide a comprehensive framework for sustainable tourism development and management. Through this rigorous and multi-dimensional process, we hope to leverage the growth in our industry, and by extension our economy, into direct benefits for the people of the Cayman Islands.

The plan considers a multitude of activities including supporting local business and the economy, industry training and customer service development, advancing heritage, culture and values as well as promoting the protection of our local environment for the benefit of future generations of Caymanians. The development of the plan allowed every Caymanian and industry-partner to use their experience and knowledge, to provide feedback on the direction they wish to see the tourism industry head in the years to come. The Department took this feedback and used it to build a plan that promotes tourism in a socially, commercially and environmentally viable way.

As a Department, we are extremely thankful to the Ministry of District Administration, Tourism and Transport (MDATT) for their support in this venture. With the support of the Government and the collaboration of the local stakeholders and the wider community, we are confident that the future of the tourism industry in the Cayman Islands will not only be one that augments our success, but one that present and future generations can be extremely proud of.



Message from Ms. Theresa Broderick, President, Cayman Islands Tourism Association

Having participated in the public and NGO consultations, I do believe that this National Tourism Plan has encapsulated all the contributing factors to our tourism's triumphs and tribulations and formulated them into a document that can indeed get everyone on the same page, with a shared vision.

The process has been lengthy and rigorous, but the Plan is comprehensive and has captured all the challenges and opportunities, yet it is easy to read and comprehend. Those who have participated in any of the various consultation sessions know that many individuals shared their experiences and insight with deep passion. Yet, this Plan is not emotional but rather straightforward, factual and objective and with our people's core values interwoven.

We must be mindful that the Plan is just that, a plan. The real work is still yet to be done and every stakeholder has a role to play. There is a very clear framework and concise explanation. I implore you to review the Plan, share it with others and personally commit to it.

We must draw a line between the past and the present; let us not dwell on previous plans and shortcomings. Instead, we must focus on building the future we have collectively envisioned through this process. We must also refrain from casting blame. Instead, let us each get clarity on our responsibilities, let us be accountable and, in turn, hold each other accountable, including the present Government and the Government that will follow.

It is clear that intergovernmental coordination is critical to the implementation of the National Tourism Plan. The strategies undertaken will not be successful, nor the goals achievable, without coordination amongst governmental agencies and on all levels. Similarly, government actions and resources are optimized with private sector coordination. Therefore, public-private partnership is also critical and hinges upon effective communication.

Just as coordination requires communication, partnerships require collaboration. May this National Tourism Plan and the Vision herein, serve to bond us together for tourism, for the benefit of present and future generations.

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INTRODUCTION

Purpose of the National Tourism Plan

The purpose of the National Tourism Plan (NTP) is to define, through a consensus-oriented process, a road map for enhancing the competitiveness of the Cayman Islands tourism industry and ensuring the sustainability of the islands' cultural and natural assets. The intent of the plan is to maximise and spread the benefits of tourism development throughout the country.

Strategic Planning Process

The Draft NTP was shared with the public during the final public consultation process which was offered from August 10th through September 10th, 2018 to solicit final feedback from tourism stakeholders, partners and the public on the outcomes of the planning process to date. Their inputs were reviewed and used to finalize the National Tourism Plan 2019-2023 as well as draft detailed Action Plans and the Evaluation Plan. Prior to this, the strategic planning process involved District Tourism Committee Meetings, focus groups, interviews, and visioning workshops that took place in Seven Mile Beach, East End, Cayman Brac and Little Cayman.

These consultations were designed to facilitate discussions and consensus around answering four questions:

Where Are We Now? – An analysis of the destination's current competitive position and major challenges and opportunities for enhancing that position.

Where Do We Want to Be? - A process for defining a consensus vision for sustainably transitioning the industry to maximise local benefits and minimise negative social and environmental impacts. Through the visioning process, targets were set to help define operational objectives to be met in attaining the shared vision.

How Do We Get There? - Collaboration, operating goals, strategies, objectives and preliminary action plans were drafted to provide a roadmap for achieving the vision. This road map details each step, public and private sector roles and responsibilities.

How Do We Know When We've Arrived? - This is the most critical question in any planning process. This phase of work identified indicators to measure results and track implementation progress.

Focus on Visitor Management & Sustainable Development

Visitor management and sustainable development are critical components of the National Tourism Plan. As part of the strategic planning process, a Visitor Management Strategy was developed in parallel to the National Tourism Plan in which it is referenced. The objective of the Visitor Management Strategy is to provide a more in-depth description and analysis of the strategies and associated actions for managing visitors, their activities and related impacts focusing on an initial set of

highly visited sites and attractions in the Cayman Islands. An Executive Summary of the Visitor Management Strategy is provided as Annex A.

The Plan also recognises tourism's growth and contribution to the local economy over the years, but we must ensure that any future tourism growth is managed and developed while taking full account of its current and future economic, social and environmental impacts; addressing the needs of visitors, the industry, the environment, Caymanians and residents. Visitor impact management and sustainable tourism development are a key aspect of destination stewardship. This includes a shared responsibility of both public and private organisations.

Why a Sustainable Tourism Plan is Needed?

The last National Tourism Management Plan was set in place in 2009 and expired in 2013, with the CIDOT continuing to operate on the same principles while addressing technical resource requirements to support the update and implementation of the National Tourism Plan. While the Cayman Islands are a popular cruise and stayover tourist destination, there are several issues that need to be addressed. For the CIDOT to effectively plan and manage the development and operation of the tourism industry and market the destination, the people of the Cayman Islands deserve a concrete Tourism Plan that will give local destinations throughout the Islands a guideline to follow to accomplish the goals set by the industry. Additionally, there is a need to increase industry support for destination management and better regulation of tourism-related activities which expose the destination and its visitors to increased risk from incidents involving safety and security. Due to low geographic altitude, their island vulnerabilities and developing infrastructure, Caribbean nations are also at risk to climate change and its accompanying impacts - including weather irregularities, accelerated coastal erosion and rising sea levels. For nations that depend significantly on the tourism sector—a sector that is threatened by the impacts of climate change—building resilient infrastructure and ensuring that the industry operates more responsibly is extremely important.

The Cayman Islands also need to increase its destination competitiveness and bolster the luxury brand to meet desired tourism goals and strategies.

At the current visitor levels that the Cayman Islands handles, there has been an inability to effectively spread the social and economic benefits across Caymanian society. This negatively limits the economy and the standard of living of Caymanians, while creating a negative multiplier effect in areas such as business opportunities or tourism-related tax and fee revenue, which impacts provision of services and infrastructure upgrades. The Islands have also been experiencing the worsening effects of unsustainable tourism practices such as overcrowding of popular tourist attractions, environmental degradation, poor visitor management, increased negative social and digital media coverage of the destination, increased social issues such as crime and poverty, and more uneven distribution of wealth. The inability to adequately address tourism industry challenges, threats, and take advantage of strengths and opportunities, limits the success and future growth of the Cayman Islands. This sustainable Tourism Plan aims to address those challenges.

NATIONAL TOURISM PLAN SUMMARY

VISION

Protecting our environment, celebrating our cultural heritage, while ensuring a vibrant tourism economy that benefits the people of the Cayman Islands.

GOALS

STRATEGIES



KEY DEFINITIONS

Sustainable Tourism - Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.

Destination Management - The coordinated management of all elements that make up a destination, including the attractions, amenities, access, marketing and pricing.

Tourism Product - A combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and activities around a specific centre of interest which represents the core of the destination marketing mix and creates an overall visitor experience including emotional aspects for the potential customers. A tourism product is priced and sold through distribution channels and it has a life-cycle.

Tourism Value Chain - The sequence of primary and support activities which are strategically fundamental for the performance of the tourism sector. Linked processes such as policy making and integrated planning, product development and packaging, promotion and marketing, distribution and sales, and destination operations and services, are the key primary activities of the tourism value chain. Support activities involve transport and infrastructure, human resource development, technology and systems development and other complementary goods and services which may not be related to core tourism businesses but have a high impact on the value of tourism.

Competitiveness of a Tourism Destination - The ability of the destination to use its natural, cultural, human, man-made and capital resources efficiently to develop and deliver quality, innovative, ethical and attractive tourism products and services in order to achieve a sustainable growth within its overall vision and strategic goals, increase the added value of the tourism sector, improve and diversify its market components and optimize its attractiveness and benefits both for visitors and the local community in a sustainable perspective.

Quality of a Tourism Destination -The result of a process which implies the satisfaction of all tourism product and service needs, requirements and expectations of the consumer at an acceptable price, in conformity with mutually accepted contractual conditions and the implicit underlying factors such as safety and security, hygiene, accessibility, communication, infrastructure and public amenities and services. It also involves aspects of ethics, transparency and respect towards the human, natural and cultural environment.
Quality, as one of the key drivers of tourism competitiveness, is also a professional tool for organizational, operational and perception purposes for tourism suppliers.

Innovation in Tourism - The introduction of a new or improved component which intends to bring tangible and intangible benefits to tourism stakeholders and the local community, improve the value of the tourism experience and the core competencies of the tourism sector and hence enhance tourism competitiveness and /or sustainability. Innovation in tourism may cover potential areas such as tourism destinations, tourism products, technology, processes, organizations and business models, skills, architecture, services, tools and/or practices for management, marketing, communication, operation, quality assurance and pricing.

Source: World Tourism Organization (UNWTO)

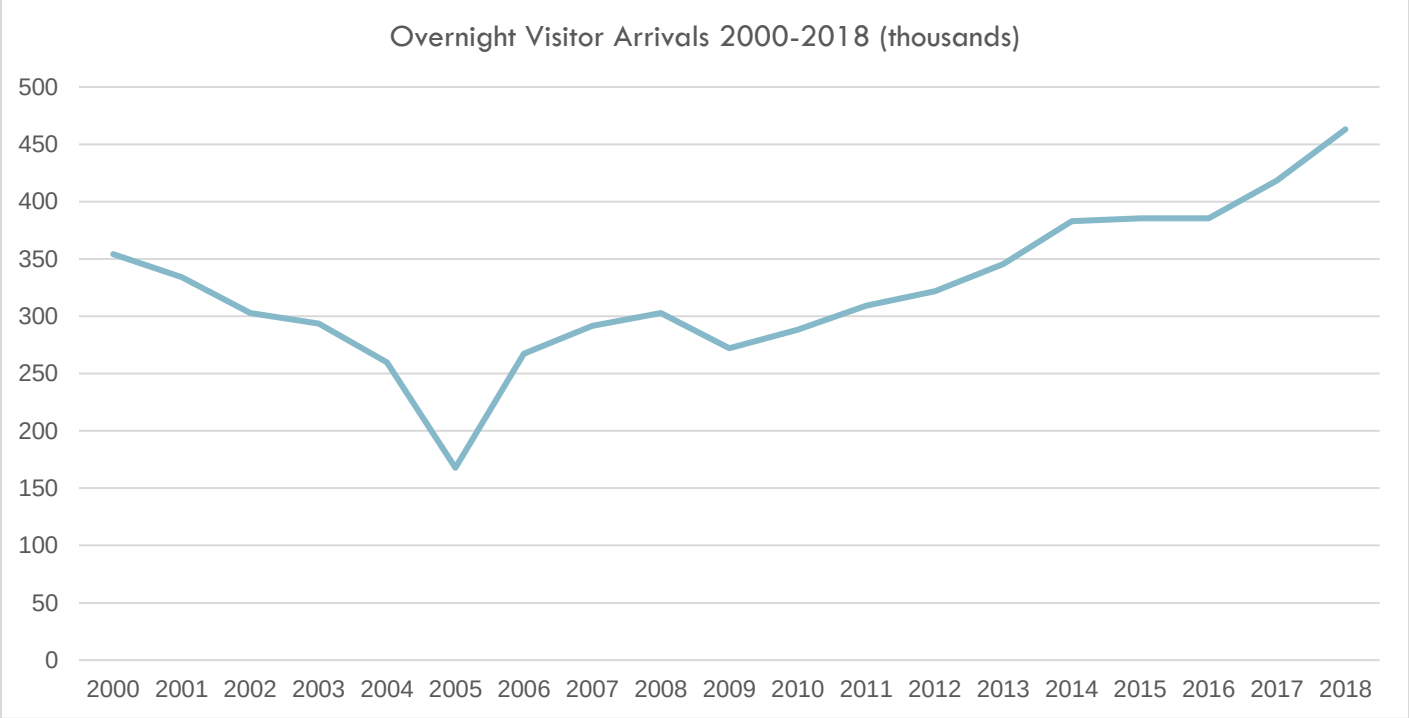
SITUATION ANALYSIS

The objective of the Situation Analysis was to build stakeholder consensus around a shared understanding of the trends and issues impacting the competitiveness of the Cayman Islands tourism industry. It also serves as the foundation for the development of a strategic plan for addressing core challenges to and opportunities for enhancing the Cayman Islands' competitive position.

Tourism Trends & Statistics

Overnight Visitor Arrivals

Overnight visitor arrivals to the Cayman Islands have exceeded the global rate of arrivals growth over the past seven years at 6% per year (2012-2018). Between 2014-2016 arrivals were essentially flat but record overnight arrivals were received for each of the last five years.

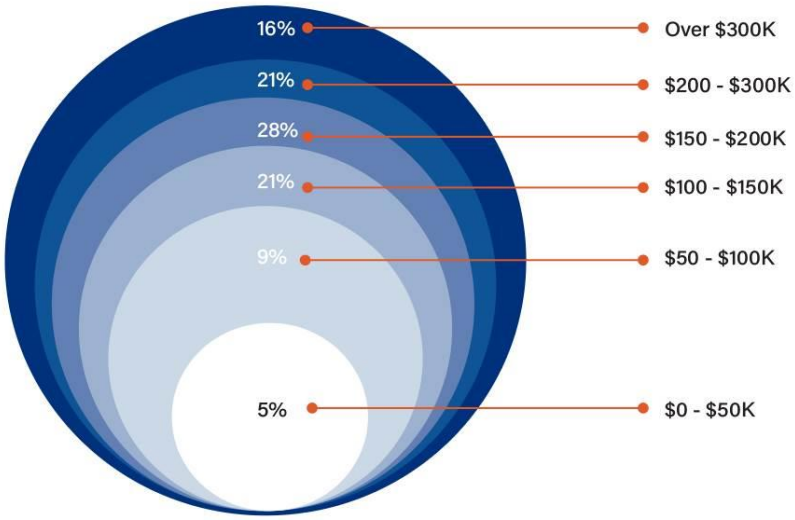


Source: Cayman Islands Immigration Department

Overnight Visitor Demographics

Results from the most recent visitor exit survey (2018) demonstrate that the Cayman Islands is attracting a very affluent segment of international travellers, with more than 30% of visitors reporting household incomes of over $200,000 per year—an income bracket that encompasses less than 5 percent of total U.S. households – as the Cayman Islands' primary source market.[1]

Household Income of Overnight Visitor Arrivals 2018 (USD)



Source: CIDOT Visitor Exit Survey (2018)

The age of overnight visitors is well balanced, with the percentage of visitors by age group roughly reflective of the composition of the U.S. population.

[1] U.S. Census data

Age of Overnight Visitors to the Cayman Islands (2018)

	Visitor Arrivals					Percent Share	
	2014	2015	2016	2017	2018	2017	2018
0-18	59,812	60,975	63,257	71,144	77,353	17.0%	16.7%
19-35	76,042	77,276	74,812	81,065	91,301	19.4%	19.7%
36-49	97,869	95,173	94,087	103,227	115,163	24.7%	24.9%
50-60	86,421	86,289	86,977	91,704	99,679	21.9%	21.5%
Over 60	62,672	65,665	66,318	71,263	79,505	17.0%	17.2%
Total	**382,816**	**385,378**	**385,451**	**418,403**	**463,001**	100.0%	100.0%

Source: Cayman Islands Immigration Department

Accommodations Capacity and Distribution

One of the most unique features of the Cayman Islands tourism industry is the composition of the tourist accommodations room stock, which is split roughly 40/60 between hotels vs. condos and villas/guest houses (2019). The composition and geographic distribution of the room supply presents a range of potential challenges and opportunities, discussed in more detail below.

CATEGORY	GRAND CAYMAN	CAYMAN BRAC	LITTLE CAYMAN	TOTAL	PERCENTAGE
CONDOS	2,975	70	42	**3,087**	**45.5%**
VILLAS	808	127	41	**976**	**14.4%**
HOTELS	2,587	52	78	**2,717**	**40.1%**
TOTAL	**6,370**	**249**	**161**	**6,780**	**100%**

Source: CIDOT Room Stock Report (January 2019)

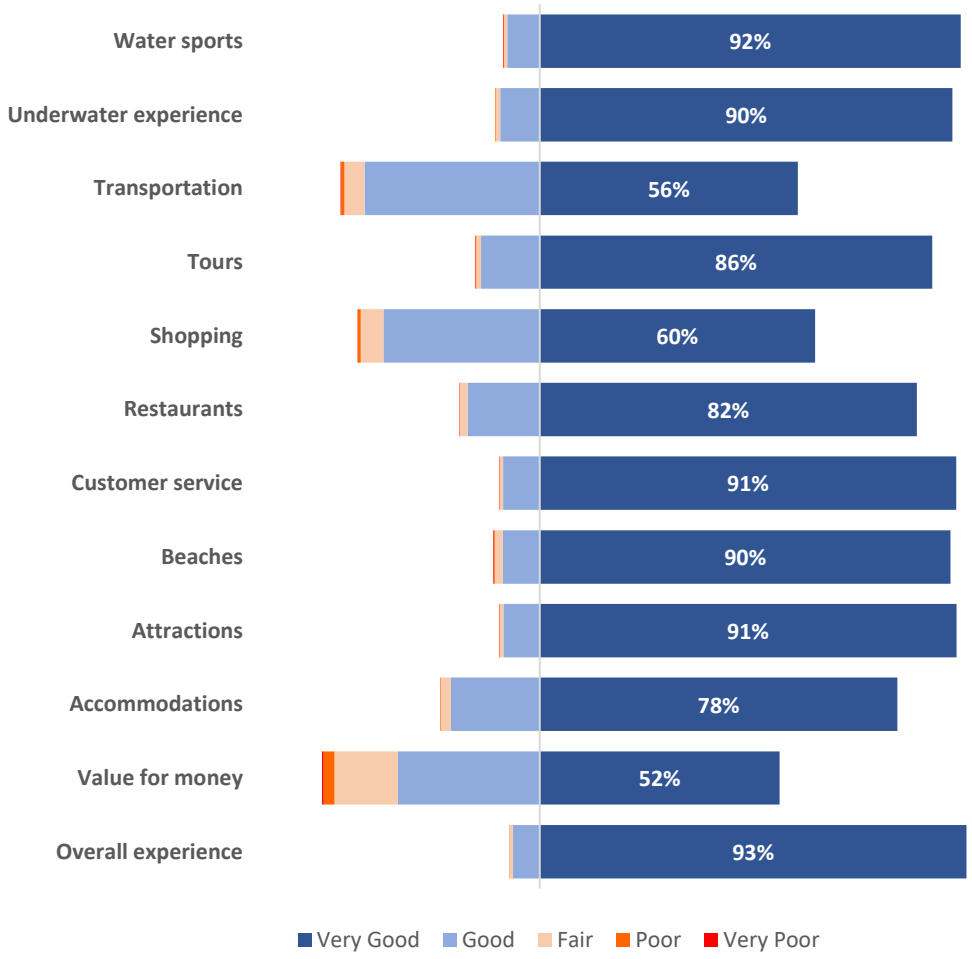
Bedrooms by District

DISTRICT	HOTEL	CONDO/APARTMENT	VILLA/GUEST HOUSE	TOTAL	PERCENTAGE
West Bay	300	799	92	**1,191**	**17.6%**
North Side	0	265	388	**653**	**9.6%**
George Town	1,987	1562	158	**3,707**	**54.7%**
East End	300	267	80	**647**	**9.5%**
Bodden Town	0	82	90	**172**	**2.5%**
Cayman Brac	52	70	127	**249**	**3.7%**
Little Cayman	78	42	41	**161**	**2.4%**
TOTAL	**2717**	**3,087**	**976**	**6,780**	**100%**

Source: CIDOT Room Stock Report (January 2019)

Visitor Satisfaction

The key metric in gauging levels of satisfaction with the Cayman Islands visitor experience are the ratings of various components of that experience highlighted in the annual visitor exit survey. As seen in the chart below, while more than 70% of visitors rated most components as "Very Good" and 93% gave the same rating for the overall experience, a few received a much lower percentage of "Very Good" ratings, including Value for Money (52%), Transportation (56%) and Shopping (60%). Each of these areas are a primary focus of the NTP.

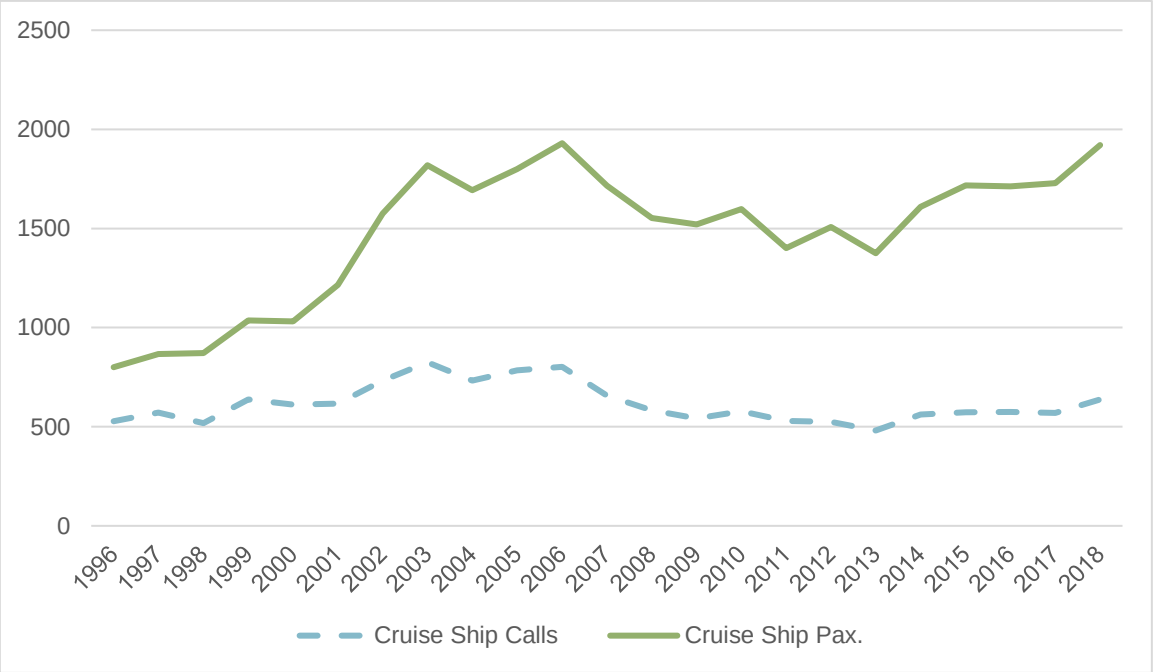


Source: CIDOT Visitor Exit Survey (2018)

Cruise Passenger Arrivals

While the number of cruise ship passenger arrivals to the Cayman Islands has more than doubled over the past two decades, from roughly 800,000 in 1996 to more than 1.92 million in 2018, the number of cruise ship calls has increased by only 21%, from 528 to 638.

Number of Cruise Ship Calls and Passenger Arrivals (thousands), 1996-2018



Source: Cayman Islands Government Compendium of Statistics (2015) and CIDOT data

The takeaway from this trend is the increasing capacity of cruise ships and the growing challenges of:

- Effectively managing the large influx of passengers when several ships arrive in port (taxis, tours, traffic, shopping venues, bars and restaurants, etc.)
- The potential negative impacts on local communities (traffic, congestion)
- The impacts on higher-spending stay over arrivals who spend roughly double the amount spent by cruise passengers (per day), and more on locally produced goods and services
- Attempting to maximise visitor spending and local value added

SWOT Analysis

The following SWOT analysis, which incorporates tourism stakeholder feedback, summarizes the current state of Cayman Islands' tourism industry.

Strengths

- Strong desire to showcase Cayman culture
- The Cayman Islands are a popular cruise destination
- Strong brand awareness among established target markets
- Well-known as a premier dive destination
- Popular and renowned attractions including Stingray City, the Turtle Centre, and Seven Mile Beach
- Diverse accommodation offering – 60% of accommodation units (bedrooms) are condo/apartment rentals or guest houses
- Currently capturing a very affluent international market segment

Weaknesses

- Seasonality
- High operating costs, particularly for hotels
- Challenges in management of cruise ship calls
- Limited private sector investment in CIDOT marketing campaigns
- Inadequate number of Caymanians to support the tourism industry
- Poor environmental management threatens some beaches and dive sites
- Some residents' negative attitudes towards tourism
- Poor public transportation system

Opportunities

- New airlift
- Source market diversification
- Redevelopment of airports
- Upgrading cruise port infrastructure
- Expand marketing to target new niche segments such as Meetings, Incentives, Conventions and Exhibitions (MICE), medical/wellness tourism, cultural heritage tourism, nature and adventure-oriented travel, special events, etc.
- Greater participation of Caymanians in labour force and ownership of tourism enterprises
- Growing popularity of sharing economy plays well into diverse accommodation offerings
- Asia-Pacific source markets are the fastest-growing and some of the biggest spenders

Threats

- Spanish-speaking Caribbean destinations are gaining market share
- Growing millennial, Gen Z and conscious travel markets tend to favour cultural and unique experiences and minimizing environmental impact rather than sun, sea and sand
- Climate change threatens the marine environment
- Increasing capacity of cruise ships and new cruise terminals being developed by competitors
- Expanding Caribbean basin room capacity

Priority Issues

Issues or challenges to be addressed to enhance the competitive position of the Cayman Islands, as defined by stakeholders through meetings and workshops across the territory, are presented below.

Governance

1. Inter-Governmental Tourism Management Coordination - Lack of coordination and mechanisms to facilitate coordination of tourism management between government ministries and departments.

2. Localized Destination Management & Marketing - There are no local destination management organizations (DMOs), except for the Cayman Islands and Sister Islands Tourism Associations, that help bring tourism stakeholders together to work collaboratively.

3. Tourism Concession Management on Public Beaches - A new policy was established to manage public beach vending, but the implementation of the new policy has caused confusion and frustration among existing beach vendors. Other public beaches in the East lack visitor services and would greatly benefit from concessions to enhance the visitor experience.

4. Private Sector involvement in CIDOT Marketing & Planning - A variety of stakeholders expressed the need for more private sector engagement and participation in the design and execution of CIDOT marketing activities. Several also expressed a desire to co-invest in marketing, which is currently limited to trade show participation and a small fund dedicated to co-operative advertising for the dive industry.

Public Infrastructure

5. Cruise Berthing Facilities – The Cayman Islands is one of the top cruise destinations in the Caribbean and one of the last destinations without a pier. Without the cruise berthing facilities, the Cayman Islands cannot guarantee a consistent level of cruise arrivals and the ability to create long-term agreements with the main cruise lines. Another critical issue is enhanced management of cruise ship arrivals and related visitor services to maximise the positive impacts on local businesses and by extension, the local economy and the visitor experience (for both cruise and stayover arrivals), and minimise the negative impacts from traffic, congestion, and strains on local service providers and communities.

6. Public Transportation - Public transportation is run by private operators, which tend to cluster in areas where demand is highest, leaving many areas without affordable or convenient transportation options. The Grand Cayman bus and taxi fare system is not easy to understand for visitors. Most bus stops do not have signs, there are no maps, limited information in the hotels etc. This lack of public transport was also identified as a contributing factor to the lack of demand for attractions in the eastern part of the island. The establishment of a shuttle to pick up tourists from hotels to visit attractions in the east has been discussed.

7. Little Cayman Airport - Upgrading of the airport, including fencing and extending the runway so that it can receive an Airport Operating Certificate, would enable the airport to accommodate larger planes. It currently operates under a waiver from the British government that limits the size and weight of planes flying into and out of the airport. Weight limits often result in delayed baggage arrival, which is a major issue for divers who tend to travel with a significant amount of dive-related gear. An upgrade of airport facilities also opens a range of other possibilities in terms of more direct air service to Little Cayman, potentially including from the U.S.

8. Sewage System beyond Seven Mile Beach - The Department of Environment identified the lack of a sewerage system beyond the Seven Mile beach area as one of the most significant long-term threats to the islands' marine resources (and the islands' tourism industry), as the industry continues to grow.

9. Solid Waste Disposal/Recycling –This was raised as an important and growing issue, revolving around landfills. Several studies have been conducted and alternative approaches proposed, including relocation of the existing landfill on Grand Cayman, development of a waste-to-energy facility, and recycling programmes. There appears to be a strong desire within the industry to improve and increase recycling programmes, but these issues have yet to be resolved.

10. Renewable Energy Adoption - Energy is one of the most significant operating costs for hotels and other tourism-related businesses. The use of solar and other forms of renewable energy is viewed by many as a significantly underexploited solution that has not received adequate attention from government.

11. Tourism Signage on Grand Cayman - There is a lack of tourism-related signage (directional and interpretive) on Grand Cayman. Cayman Brac and Little Cayman have signs installed by CIDOT but the National Roads Authority (NRA) will not allow CIDOT to use these types of signs on Grand Cayman and requires the use of international-standard road signage – e.g. brown signs for attractions. More intra-governmental dialogue and engagement with relevant ministries and departments, including those with responsibility for Planning and Culture, is needed to resolve this issue.

12. Traffic and Congestion in George Town - Traffic and congestion in George Town is a critical issue identified by stakeholders which is impacted by a variety of factors beyond tourism but made worse during periods when cruise ships are in port. Traffic problems are also negatively impacting the visitor experience, for both stayover and cruise visitors. The Cayman Islands Government has committed to completing the George Town Revitalization plan and is currently drafting a new Development Plan that has been designed to address several issues, including the traffic congestion.

13. Bike Lanes - There are limited bike lanes on the Islands, making it dangerous for anyone to ride a bike in most parts of the Cayman Islands. The draft Development Plan addresses this issue.

Attractions & Events

14. Overcrowding at Key Attractions - Stingray City, the Cayman Turtle Centre, and Seven Mile Beach public access areas experience massive overcrowding when cruise ships arrive and impact the overall visitor experience. A Visitor Management Strategy developed as part of the National Tourism Plan aims to provide some immediate recommendations for better management of visitors around these key attractions.

15. Interpretation and Codes of Conduct at Wildlife Encounter Attractions – Cayman's main attractions – the Cayman Turtle Centre, Stingray City and Dolphin Discovery – provide visitors with opportunities to have wildlife interactions but interpretation, conservation efforts and visitor codes of conduct for interacting with wildlife could be improved at each.

16. Tourism Attractions in the East are underutilized - The Tourism Attraction Board – which manages the Queen Elizabeth II Botanic Park, Pedro St. James National Historic Site, Hell, Cayman Craft Market, and the Pirates Week Festival – was designed to be self-funding, but due to relatively low visitation it is not generating enough income to fully fund its operations. New approaches and strategies for generating income and driving more visitor traffic into these sites needs to be explored.

17. Heritage Assets, Museums and Public Parks are underutilized – The heritage of the Cayman Islands provides visitors the opportunity to have a deeper appreciation and understanding of the destination and culture. The National Museum is a world class heritage museum in the heart of George Town that unfortunately receives limited visitation and is eager to welcome more visitors. The Cayman Brac Heritage House provides a foundation for creating more cultural experiences and opportunities for visitors to interact with residents. Programmes are primarily focused on promoting Caymanian

culture to residents but could be expanded to cater to both locals and visitors. The newly renovated amphitheatre at the Dart Family Park in George Town also provides an opportunity for more cultural events for both residents and visitors to enjoy.

18. Limited Activities on the Sister Islands - The Sister Islands are primarily known for their diving experiences. However, recent efforts have been made to invest in ecotourism infrastructure that would offer more visitors the opportunity to partake in rock climbing, bird watching and other ecotours, but these are not readily known to guests and should be promoted further. Special events have been identified as a potential driver for increased visitor demand and the operationalization of the National Sports Centre can assist in sports tourism development.

Accommodations

19. Tourism Accommodation License Requirements are needed for Home Sharing – The current Tourism Law requires updating to accommodate the rise in home sharing. Home Sharing sites like Airbnb and Homeaway.com should also be partners that can assist with licensing enforcement and possibly the collection of accommodation taxes.

20. Lack of Development Plans, Zoning, and Incentives to attract accommodation investments in priority development areas – Several stakeholders stressed the need for new sustainable, low-density, luxury hotel investments in the Eastern districts and the Sister Islands to match the image of the Cayman Islands that CIDOT is promoting. Without development plans, zoning, incentives and investment promotion, there is an uncertainty as to what can and will be developed in these destinations. The Cayman Islands Government (CIG) is currently developing a new National Planning Framework that will guide development planning.

Services & Retail

21. Taxi Standards and Professionalism – Taxi standards are not always enforced, vehicles are often rundown, and rates are neither posted nor meters used. Taxis could also benefit from adoption of new technologies, including ride hailing apps and payment with credit cards and mobile phones. These issues can be addressed as part of a public transportation plan.

22. Codes of Conduct should be Established for Boat Captains and Guides – Boat captains and guides require training and adherence to regulations established to minimise their impact on the environment.

23. Lack of Specialized Guide Training and Certification – Travelers are increasingly looking for specialised guides based on their interests (birdwatching, heritage, etc.), in different languages, but there is currently a lack of a specialised guide development and certification programme to meet these demands. This is currently being addressed to some extent at the attraction level.

24. Lack of Caymanian Made Souvenirs & Retail Products – Most souvenirs sold in the Cayman Islands are imported. The few Caymanian made products are barely distinguishable from each other and there seems to be little effort to develop or promote Caymanian made handcrafts. For those craft items made in Cayman, there is also limited distribution and opportunities to sell to visitors. Some advancement has been made with the availability and expansion of the range of locally produced art and craft into leather, cigars, wooden and recycled materials items but there is still a need to import most of the materials to produce them.

25. Limited Caymanian Experiential and Cultural Tours Offered – The "Caymankind" brand promotes the culture and friendliness of the Caymanian people, but there are few, if any, tours that offer immersive experiences that provide visitors the opportunity to interact with and meet Caymanians.

Workforce

26. The Education System in the Cayman Islands does not Prepare the Workforce – Tourism industry stakeholders expressed frustrations with the limited training offerings of the soft-skills needed by the tourism workforce to excel in tourism (e.g. attitudes, work ethic, etc.).

27. Young Caymanians and Retirees are not Attracted to the Tourism Industry – The tourism industry would benefit tremendously if more young Caymanians and retirees were attracted to the industry and willing to work part time and seasonally where workforce demand is highest. Young Caymanians also need to value and understand a career path in the industry. The CIDOT's participation in school and organizational career fairs and the School of Hospitality Studies' (SHS) outreach to potential students assist in promoting tourism and hospitality-related career path opportunities.

28. Incentives Needed for Hiring Unemployed Caymanians - Tourism industry stakeholders expressed the desire to help the government bring unemployed residents into the industry, but incentives are needed.

29. Work Permit system for non-Caymanians needs to be updated - Tourism industry stakeholders expressed frustration with the work permit system, starting with the updating of regulations and requirements and streamlining of the process, to reduce the cost of doing business. The CIG's recently established Workforce Opportunities and Residency Cayman (WORC) department will address this issue as well as monitor and manage workforce related issues.

Resident Attitudes

30. Residents and Tourism Pioneers Feel Left out of Tourism Growth – Many of the early tourism pioneers struggle to compete with foreign operators and as a result are forced to focus on the cruise markets where they are getting squeezed by cruise lines. Residents who previously made a living selling informally to visitors are now feeling pushed out of the industry as new regulations are put in place (i.e. the beach vending policy).

31. Residents want to Ensure Tourism Development does not Impact the Environment – Caymanians care deeply for their natural environment and frequently express concern that tourism development is creating negative environmental impacts. The cruise berthing debate is an example of this concern.

32. Tourism Traffic in George Town – After the environment, traffic is another sensitive topic among residents, many of whom blame tourism for their longer commutes to and from work. The Development Plan being formulated addresses this issue under "Circulation and Transportation".

33. Public Access to Beaches – Some businesses are closing public access points to beaches next to their properties, which is upsetting residents. Further to the CIG Lands and Survey department Beach Access Report (2017-2018), this issue is being monitored.

34. Maintaining and Celebrating Cayman Culture – Caymanians are proud of their cultural heritage and worry that tourism and commercialization of George Town will result in the degradation of their cultural identity and lead to a rush to become a destination that looks like anywhere in South Florida. Implementation of the National Culture and Heritage Policy and Strategic Plan (2017 – 2026) can be a conduit to address this issue.

Destination Management

35. Increased Airlift is Needed – Recognizing that great achievements have been made with increased airlift, many industry stakeholders identified increased airlift as one of the biggest priorities for the National Tourism Plan to address. Specific interest in creating direct flights to the US West Coast and direct flights from Europe were mentioned by stakeholders. This issue is being addressed by the Ministry and Department of Tourism.

36. Lack of Research and Reporting to Understand Indirect Impacts of Tourism – CIDOT's Research Unit regularly collects and reports on some of the direct impacts of the tourism industry. However, without a Tourism Satellite Account or regular Economic Impact Studies, the industry and CIDOT is not able to articulate the true economic value of tourism. Development of Tourism Satellite Accounts are being explored by CIDOT.

37. Visitor Safety Efforts Need to be Improved – Several tourism stakeholders expressed concern about the frequency of accidents involving tourists, mostly from road accidents and water-related activities. When accidents do occur, it seems the industry is unprepared and not clear on how to work with the various government authorities required to deal with the situation. The collaborative efforts of CIDOT, CITA, Royal Cayman Islands Police Service (RCIPS) and other entities are seeking to address this issue.

38. Enhanced Management of Cruise Ship Calls – As described in the Visitor Management Strategy, enhanced management of Cruise Ship calls is needed. This could be part of an overall cruise sector strategy.

39. Mosquito Management in Little Cayman – Tourism Stakeholders in the Little Cayman expressed the management of mosquitos as the biggest priority for their destination. The Mosquito Research and Control Unit (MRCU) has been making efforts to address this issue.

Destination Marketing

40. The Industry is Promoting the Cayman Islands Inconsistently and not using the CIDOT Brand Strategy – CIDOT has developed a sophisticated and effective brand strategy around "Caymankind" that research shows resonates with target markets. The issue is the fact that the industry and real estate agents selling and promoting the Cayman Islands are not using this brand strategy or a consistent message about the Cayman Islands Tourism Brand.

41. CIDOT does not have a Dedicated MICE Marketing Manager, Plan, or Budget – Group sales around MICE is a recommended strategy to increase visitation, especially in the low season. Many of the internationally branded hotels are focused on this market but without a MICE Marketing Manager, plan or budget, CIDOT is limited in its ability to focus on this important segment. Research also shows that business travellers that attend a meeting or a conference are very likely to return for a leisure holiday. Other destinations are also strategically targeting industries for events that they hope to attract to invest in the destination. This is another opportunity for CIDOT to use the MICE market to attract Foreign and Local Direct Investment, particularly in the required facilities. Margaritaville Beach Resort has just opened a new meeting and conference facility and several planned developments have included MICE facilities in their plans.

42. Seasonality is a Major Challenge – Industry stakeholders identified seasonality as one of the most important issues that the National Tourism Plan should address. More incentives and activities to attract demand in these slow months should be offered.

43. Wholesalers are not Driving Demand – Wholesalers who are credited for driving demand to destinations through their multiple retail travel agent partners and aggressive marketing budgets can be better utilized to help CIDOT create demand for the Cayman Islands. More partnerships between wholesalers and national tourism authorities can be pursued to create incentives and co-op marketing programmes. This is being addressed by CIDOT.

44. The Cayman Islands are Considered Primarily a Dive Destination – With good reason, the Cayman Islands are known as one of the premier diving destinations in the world. Because of this, many travellers, media, and travel trade partners think the Islands are only a dive destination. However, the CIDOT's recent marketing campaigns seek to position the destination as one for family vacations, romance, weddings and honeymoons, wellness etc. which is being reinforced with the afore-mentioned groups.

45. Travelers do not understand why the Cayman Islands do not have All-Inclusive Accommodation – Increased marketing messages are needed to explain why the Cayman Islands are not an all-inclusive destination. This should be seen as a strength of the destination and should be messaged accordingly.

46. Difficult for travellers to Plan and Book a Multi-Island Vacation in the Cayman Islands -- Many travellers are looking for destinations where they can visit more than one location during their vacation. The Cayman Islands' three unique islands, combined with the close proximity and direct flights to Jamaica, Cuba, and Honduras, provide an excellent opportunity to market the Cayman Islands as part of a multi-destination vacation. Unfortunately, it is not easy for the Cayman Islands visitor to plan and book a multi-island trip.

47. Cayman Brac and Eastern Districts Lack Their Own Identity – Without a localized DMO or other mechanisms to bring tourism stakeholders together to promote the East and Cayman Brac, both destinations lack their own identity.

Visitor Experience

48. Airport Arrival and Departure is Slow and Frustrating for Visitors – As discussed in the Visitor Management Strategy, the airport arrival and departure process is sometimes slow and frustrating for visitors and creates a poor first and last impression of the destination. With the recent expansion of the Owen Roberts International Airport (ORIA), this issue is being addressed.

49. Overnight Visitors Lose the Feeling of Exclusivity when Cruise Ship Passengers Arrive - The Cayman Islands are being promoted as an exclusive, luxurious destination and many of the accommodation providers are delivering on this promise. These efforts are undermined when large numbers of cruise ship passengers visit the beach areas of these properties and overcrowd the attractions.

These priority issues will set the stage for the management of the tourism industry in the Cayman Islands and better form the action plans and priorities for the next five years.

Climate Change

The UNWTO and UNEP (2008) publication "Climate Change and Tourism – Responding to Global Challenges" concludes the following key points about climate change and tourism:

- Beach tourism remains the dominating market segment, constituting a key part of the economy of most Small Island Developing States (SIDS) and developing countries
- Coastal and island destinations are highly vulnerable to direct and indirect impacts of climate change (such as storms and extreme climatic events, coastal erosion, physical damage to infrastructure, sea level rise, flooding, water shortages and water contamination), given that most infrastructure is located within short distance of the shoreline. This high vulnerability often couples with a low adaptive capacity, especially in SIDS and coastal destinations of developing countries.

- The strong seasonality of beach tourism must be taken into consideration, as it can be exacerbated by climate change. In many beach destinations the high tourist season coincides with low water regimes in dry seasons, aggravating water management and environmental issues.
- The impacts of climate change and global warming will vary greatly in the different coastal regions and might bring opportunities as well.
- It is unmistakable that all tourism businesses and destinations will need to adapt to climate change in order to minimise the risks and to capitalize upon the opportunities brought about by climate change in an economically, socially and environmentally sustainable manner.
- Many adaptation options do not uniquely address the risks of climate change but represent response to a broader range of climate (e.g., weather extremes, water shortages) and non-climate factors (e.g., general diversification of markets and revenue sources, fuel prices, general commitment to sustainability).
- The tourism sector must also be cognizant of the implications of climate change adaptation in other economic sectors. As the financial sector incorporates a company's climate change strategy, or lack of one, into its investment criteria, it will influence credit rating and insurance rates.

"We cannot achieve a meaningful response to climate change by acting alone. No one can. No single organization. No single sector. Only by working together – as a united travel and tourism force – can we make a difference." Peter de Jong, President of the Pacific Asia Travel Association (2007)

The Final Draft of "Achieving a Low Carbon Climate-Resilient Economy: Cayman Islands' Climate Change Policy (September 2011)" acknowledges that the Cayman Islands are inherently vulnerable to current natural hazards because of features which include:

- Small size
- Remoteness
- Environmental factors
- Demography
- Economy

According to the policy,

"In 2010 the Cayman Islands was fortunate to be included in the Caribbean Catastrophe Risk Insurance Facility's 'Economics of Climate Adaptation' Study conducted in partnership with the Caribbean Community Climate Change Centre and UN ECLAC, with analytical support from the McKinsey Group and Swiss Re. Present-day and future expected losses from hurricane-induced winds, coastal flooding from storm surge and inland flooding from both hurricanes and tropical systems for three climate change scenarios were assessed, and the potential loss was then estimated using an approach similar to that applied for calculating insurance premiums. The study found that annual expected losses for the Cayman Islands is already high at 5% of local GDP and under a high climate change scenario could amount to 7% by 2030. While the contribution of storm surge-induced flooding remains at about 45% of the total damage potential across all three scenarios, expected loss nearly triples from US$126 million in 2009 to US$309 million by 2030."

The stated aim of the National Climate Change Policy is "to foster, direct and enable an integrated, holistic, informative and participatory national process that will achieve low-carbon climate-resilient development while protecting and enhancing our economic prosperity, livelihoods, human health, culture and environment for present and future generations."

It will be guided by the following principles:

- society, at all levels and in all sectors, must be adequately informed on the risks and opportunities afforded by climate change;
- Government shall endeavour to obtain the involvement and participation of all stakeholders in facilitating the transition to a climate-resilient, low-carbon economy, and ensure that such involvement and participation occurs on a fully coordinated and consultative basis;
- addressing climate change in a sustainable manner requires the creation of an institutional, administrative and legislative framework supported by sustainable climate change financing;
- the adoption of appropriate technologies and practices will be required to address the causes and effects of climate change;
- the maintenance of food security together with the resilience of people, infrastructure and the natural environment is key to coping with climate change risks, and
- economic resilience is key to coping with climate change and the development of a strong and diversified economy is essential to sustain climate-resilient low-carbon development.

To facilitate the transition to a climate-resilient, low-carbon economy, the policy proposes to implement measures to achieve the following policy goals and objectives:

- Reduce Greenhouse Gas Emissions, in line with agreed national targets, through promoting energy conservation, reducing energy use and encouraging greater use of renewable energy;
- Enhance the resilience of existing critical infrastructure to climate change impacts, while avoiding the construction of new infrastructure in vulnerable areas or with materials prone to climate hazards;
- Promote water conservation and improved rainwater harvesting while reducing impacts from flooding and enhancing the resilience of natural water resources;
- Enhance the resilience and natural adaptive capacity of terrestrial, marine and coastal biodiversity and ecosystems;
- Minimise the vulnerability of insured and mortgaged properties to climate change impacts;
- Strengthen food security by promoting increased use of locally produced food products and appropriate technologies, and
- Create and maintain a more environmentally responsible tourism industry while enhancing the resilience of tourism infrastructure and facilities to climate change impacts.

For the tourism sector, the Policy states the following:

Climate change will likely cause considerable impacts on the Cayman Islands' tourism sector, through:

- Increased risk to tourism facilities from sea level rise, stronger hurricanes, storm surges and flooding;
- Impact on tourism product from more extensive coastal erosion (e.g. degraded beach amenities), increased damage to local attractions, and more frequent coral bleaching events.

In order to create a more environmentally responsible tourism industry and preserve the quality of natural, historical and cultural attractions, while enhancing the resilience of tourism infrastructure and facilities to climate change impacts, the Government of the Cayman Islands will:

Legislation and Policy Actions

- Amend the Tourism legislation to ensure that applications for new tourism development are submitted to the Department of Tourism, Department of Environment and other relevant agencies for review and a climate change risk assessment, and
- Implement "no regrets" measures.

Research, Monitoring & Education

- Undertake mapping to identify critical tourism infrastructure at risk and review current Hotel/Tourism zoning in highly vulnerable areas;
- Determine highest-risk areas and designate as 'vulnerable' zones requiring climate change risk management plans for tourism facilities;
- Diversify the Cayman Islands tourism product from 'sun-sea-sand' – enhance visitor experience (in broadest terms) by increasing the number and type of attractions, and
- Develop scheme for tourists to offset greenhouse gas emissions.

Environmental Best Management Practices

- Implement the recommendations of the National Tourism Management Plan (2009-2013).
- Require tourism facilities to develop, implement and test disaster & climate change risk management and business continuity plans – attached to licensing of business;
- Require climate change risk assessment as part of inspection and licensing of tourism properties, and
- Cost-share beach re-nourishment projects with all beach front property owners.

Overtourism

The publication "Understanding and Managing Urban Tourism Growth beyond Perceptions" (UNWTO 2018) acknowledges that "terms such as 'overtourism' or 'tourismphobia' have made headlines in recent times. They reflect challenges of managing growing tourism flows into urban destinations and the impact of tourism on cities and its residents."

It also states that:

- This increases the use of natural resources, causes socio-cultural impact, and exerts pressure on infrastructure, mobility and other facilities
- Long before the emergence of buzzwords such as 'overtourism', UNWTO defined tourism's carrying capacity as "the maximum number of people that may visit a tourist destination at the same time, without causing destruction of the physical, economic and sociocultural environment and an unacceptable decrease in the quality of visitors' satisfaction".
- Tourism will only be sustainable if developed and managed considering both visitors and local communities. This can be achieved through community engagement, congestion management, reduction of seasonality, careful planning that respects the limits of capacity and the specificities of each destination, and product diversification.
- In 2016, Skift is said to have created (and later trademarked) the word 'overtourism'. Several definitions of 'overtourism' have emerged since. According to the universities collaborating on this project, 'overtourism' can be defined as "the impact of tourism on a destination, or parts thereof, that excessively influences perceived quality of life of citizens and/or quality of visitors experiences in a negative way".

The International Union for the Conservation of Nature (IUCN)'s "Sustainable Tourism in Protected Areas - Guidelines for Planning and Management (2002) publication highlights that:

- During the 1970s, carrying capacity was advanced as a technique for managing tourism in sensitive environments. This encouraged managers to try to solve visitor use problems merely by setting limits to numbers based upon a pre-determined level, derived from ecological, social and other analyses.
- However, this approach has serious limitations. It is basically a restrictive concept, founded on limits and constraints. As a result, it can be seen as working against protected area objectives designed to encourage appropriate visitor enjoyment and valuation of the resource. When the limitations of this approach became evident, a number of more

sophisticated frameworks were developed to provide a structure for the management of protected area visitation and tourism.

- Since then, several management frameworks have been used in various parts of the world including:
    - Limits of Acceptable Change (LAC)
    - Visitor Impact Management (VIM)
    - Visitor Experience and Resource Protection (VERP)
    - Visitor Activity Management Process (VAMP)
    - The Recreation Opportunity Spectrum (ROS)
    - Tourism Optimization Model (TOM)

The Cayman Islands' specific challenge in terms of visitor carrying capacity is in managing and/or limiting the number of tourists visiting popular tourist sites such as George Town and Stingray City and Sandbar particularly on heavy cruise ship days. This is addressed in the Visitor Management Strategy which should be led by government agencies including those with responsibility for tourism, planning, environmental management, safety and security and infrastructure.

According to "Sustainable Cruise Tourism Development Strategies (UNWTO, 2016):

"Applied conceptually, LAC provides the basis that cruise tourism development will change the destination. Assessments should consider that cruise tourism's nature and scale may congest and stress the capacity of facilities, public areas and resident's transit. Visitor carrying capacity studies are important for cruise tourism and specifically for transit ports, as they consolidate large numbers of visitors within the destination and its attractions for short periods. A destination's carrying capacity evaluation for cruise tourism needs to be more granular to define the capacity intervals than the traditional concepts of carrying capacity. Setting annual or even daily visitation limits for an attraction is only part of the equation; visitor flow carrying capacity should also be measured for specific limits at any given time.

Visitor carrying capacity should be viewed in terms of managing visitor flows. Studies should contemplate that at times a destination's capacity can be increased structurally (such as reception facilities or sanitation), while in other situations, it cannot (the size of a coral reef zone or a turtle habitat). Likewise, if capacity is increased in one area, it may result in increased flows affecting another area. Expediting port entry and customs processes for cruise passengers will not be beneficial to the visitors' experience if they then experience long lines and delays in being transported from the cruise terminal to shore excursions. Carrying capacity and limitations or quotas in some cases pertain to the number of ships or calls to a destination within a period.

Carrying capacity assessments will help destination policymakers understand the constraints receiving passengers and handling visitor flows. More importantly, carrying capacity can be used as a tool to adequately structure pricing for fees and costs to visitors and cruise lines and in some cases to control capacity while optimizing revenues."

It should also be noted that several government agencies also play a role in environmental and/or visitor management:

- The Department of Environment (DOE), under the Ministry for Health, Environment, Culture, and Housing (HECH) is the main Government agency responsible for the management and conservation of the environment and natural resources. The DOE works to facilitate responsible management and sustainable use of the natural environment and resources of the Cayman Islands through various environmental protection and conservation programmes and strategies. The DOE works with the Department of Environmental Health (DEH) which is responsible for solid waste management, monitoring of air and water quality from a human health perspective, occupational safety, food safety etc., with the National Trust whose mission is to preserve natural environments and places of historic significance for present and future generations, and with a variety of other agencies.
- The RCIPS' Joint Marine Unit (JMU) is comprised of officers from the Royal Cayman Islands Police Service (RCIPS), Customs and Immigration Departments who work jointly to protect the borders of the Cayman Islands. Strengthening the enforcement of marine safety and conservation regulations, in conjunction with other government departments, is also a priority for the JMU. Marine officers regularly assist Port Authority with patrols of waterborne tourist areas

around Grand Cayman and conduct maritime safety checks of boats and disrupting illegal or unsafe activities. The JMU also partners with officers from the Department of Environment (DOE) to enforce protections for marine life set forth under the Cayman Islands National Conservation Law (http://www.gov.ky/portal/pls/portal/docs/1/12326595.PDF).

Additionally, the Marine Conservation (Marine Park) (Amendment) Regulations, 2007 incorporates Wildlife Interaction Zone Tourist Boat License Conditions including:

- The licensed vessel is not permitted to carry paying passengers into the Sand Bar Area of the Sand Bar Wildlife Interaction Zone after 2:00 pm on weekends or after 3:00 pm on public holidays.
- The licensed vessel is not permitted to carry more than 100 people per trip into the Sand Bar Area of the Sand Bar Wildlife Interaction Zone, regardless of the total capacity of the vessel.
- The licensed vessel is not permitted to discharge paying passengers into the Sand Bar Area of the San Bar Wildlife Interaction Zone if there are more than 1,500 people in the area.
- The licensed vessel may not enter within the Sand Bar Area of the Sand Bar Wildlife Interaction Zone if there are already more than 20 licensed tourist boats in the area.
- The licensed vessel may not remain at the Sand Bar Area of the Sand Bar Wildlife Interaction Zone for a more than one (1) hour per visit.

It should also be noted that the Draft National Planning Framework (November 2018) also includes measures that will address planning for the potential impacts of climate change in the Cayman Islands and facilitating better visitor management including area and development planning, coastal zone management, infrastructure development and capacity studies.

2023 TOURISM VISION

Introduction

A clear and well-defined vision is critical to the development of a tourism plan. It gives the plan a precise direction and helps focus strategies and actions. Without a well-defined vision, there is no way to prioritize and justify actions and ensure that progress is made.

Because of the unique characteristics of each region within the Cayman Islands, separate vision statements were developed for each destination (Cayman Brac, Little Cayman, and the Eastern and Western Districts on Grand Cayman). A National Tourism Plan vision statement was also developed for the Cayman Islands as a whole by pulling common themes from the regional vision statements.

Cayman Brac

Despite recent increases in airlift, there has been moderate new investment in the island's tourism industry, particularly in the accommodation sector. Stakeholders would like to see the industry achieve a greater critical mass for accommodations, visitor services, and airlift to sustainably grow the annual number of visitor arrivals, visitor spending and make local tourism businesses more sustainable.

Objectives:

The stakeholders' primary objectives in seeking to promote more investment and increases in the numbers of visitors are to:

- Create jobs and stimulate new business formation. Young people on the island are leaving Cayman Brac to pursue educational opportunities and relatively few are returning due to a lack of employment opportunities.
- Promote investment that is targeted to investors that will seek to work collaboratively with local businesses to grow and diversify the product offering and the market base. There is a need to find the right balance between development and preserving the character of the island.
- Reduce seasonality. Most existing businesses struggle to achieve profitability with a five-month season, on a small island where most goods and services must be imported.
- Preserve their cultural and environmental heritage. This can be done by giving those resources greater economic value as visitor attractions and key components of the visitor experience.

<u>Cayman Brac Vision Statement:</u>

"To sustainably grow and diversify the Island's tourism industry in a manner that preserves and celebrates its cultural heritage, protects it unique environment, creates business and employment opportunities for residents and delivers memorable experiences to visitors."

Little Cayman

While participants in Little Cayman highlighted many of the same issues raised in Cayman Brac, the most significant challenges appeared to be centred on destination management, along with the need for growth in investment and number of visitors, to support improvements in the provision of basic services, increased access, better resource management, and strategies for reducing high operating costs.

Objectives:

Their primary objectives in seeking to promote more investment and increases in the numbers of visitors are to:

- Sustainably grow the number of visitors and visitor related services to support infrastructure and other basic services improvements that would make Little Cayman a more attractive place to live and visit, and to grow the local workforce and reduce the need to import labour.
- Improve destination management, including beach, road, marine resources, solid waste management, feral cats and mosquito control, to promote sustainable growth of tourism and of the local population.
- Promote investment that is targeted to investors that will seek to maintain a balance between growth **and preserving the unique character of the island**, which is a primary driver of visitor demand, and to grow and diversify the product offer and the market base, to support more convenient and affordable access.

Little Cayman Vision Statement:

"To sustainably grow and diversify the Island's tourism industry in a manner that preserves and celebrates the unique character of the island and its natural resources, enhances the business environment and quality of life for residents, and delivers a diverse range of high-quality visitor experiences."

Eastern Districts

The Eastern Districts are defined as the districts of Bodden Town, North Side and East End. While both stayover and cruise arrivals to Grand Cayman have been growing at above trend rates for the past several years, most of the increases in visitor arrivals and spending are being captured by the western districts. As a result, attractions and activities on the western side of the island are approaching capacity limits and are now faced with a variety of significant visitor management challenges, while the eastern half of the island, which offers a less congested, more diverse, and more authentic "Cayman" experience, is being underutilized. Efforts need to be made to strike a better balance, promote more diverse visitor experiences, generate economic benefits for more residents, and enhance Grand Cayman's competitive position.

Objectives:

Their primary objectives in seeking to promote more balanced growth are to:

- Sustainably grow the number of visitors and visitor spending in the East, to reduce growing pressure on western districts; offer a more diverse and more culturally authentic visitor experience – to attract more repeat visitors and younger demographic groups interested in cultural heritage and nature; generate employment and business development opportunities for eastern district residents; and reduce traffic and congestion in western districts.

- Enhance the visitor experience, through development of attractions and visitor services, including activities, attractions, dining options, events focused on Caymanian culture, and enhanced road safety and security. Customer service skills and other training are needed.

- Improve access to the East, through improvements to public transport and alternative approaches to local transportation.

- Improve awareness of the East, through targeted promotional campaigns for both cruise and stayover arrivals already coming to Grand Cayman, previous visitors and potential visitors looking for a more varied Caribbean and Cayman experience.

Eastern Districts Vision Statement:

"To promote more balanced growth on Grand Cayman, diversify the product offer,
and attract new markets, by improving access, awareness, and visitor services in the East,
and creating more economic opportunities for eastern district residents."

Western Districts

The Western Districts are defined as George Town and West Bay. Most of the investment in tourism-related visitor services and infrastructure is being made on the western half of Grand Cayman, including new construction and renovation of hotels, restaurants, shopping areas, the cruise port, roads, airport, etc.

The West also remains the core of the Cayman Islands' brand and image in both cruise and stayover markets. While the concentration of tourism-related activity in this area is resulting in higher levels of spending per visitor and economies of scale (e.g., new large, luxury hotels, larger cruise ships), it is also generating negative impacts, in terms of traffic, congestion, and the concentration of economic benefits into the hands of larger investors and operators. While more upscale and more concentrated development does have benefits to the national economy, action needs to be taken to reduce pressures on highly visited areas, diversify the product offering and increase the geographic spread of visitors, visitor spending and local economic benefits.

Objectives:

Primary objectives identified in seeking to promote more inclusive and better managed growth are to:

- More sustainably manage visitor flows in the West, particularly at the most visited sites, through development and implementation of a Visitor Management Plan.
- Enhance the visitor experience, through development of attractions and visitor services in less visited areas that offer more authentic Caymanian experiences and expressions of Caymankind.
- Reduce congestion, which impacts both the visitor experience and the quality of life of residents.
- Spread the benefits of tourism more broadly, by creating more employment opportunities for locals and raising awareness of career and business opportunities in the industry.
- Increase airlift and access to new markets, particularly in shoulder seasons, to support the growth of the room supply, where necessary, and reduce seasonality.

Western Districts Vision Statement:

"To promote more inclusive growth on Grand Cayman, better manage visitor flows,
diversify the product offering and attract new markets by improving airlift,
developing new visitor services and creating more economic opportunities for residents."

National Tourism Vision

On a national level, the plan analysis presents a diverse set of ideas, opinions, challenges, and opportunities between the three islands, and between different districts and communities. The following vision statement summarizes themes and aspirations shared by each of the previously presented vision statements.

National Tourism Plan Vision Statement:

The vision for the National Tourism Plan is to promote a sustainable, inclusive, consistently balanced, and vibrant tourism industry to diversify the Cayman Islands visitor experience, attract new markets, reduce seasonality, celebrate the islands' rich cultural heritage, protect its fragile environmental resources, and spread the benefits of tourism development broadly and equitably.

In short:

The Cayman Islands will protect our environment, celebrate our cultural heritage, while ensuring a vibrant tourism economy that benefits the people of the Cayman Islands.

GOALS & STRATEGIES

Introduction

Several issues and themes have emerged through the consultation and participatory planning process to guide the development and implementation of the National Tourism Plan. From those themes, the following Goals have been set:

Goal 1 - Protect, manage and enhance cultural and natural resources

Goal 2 - Enhance the business environment to support industry growth and investment

Goal 3 - Improve connectivity and tourism-related infrastructure

Goal 4 - Deliver outstanding visitor experiences

Goal 5 - Develop a highly skilled tourism workforce

Goal 6 - Build strong partnerships to sustainably manage, market and diversify tourism assets

The following section provides a summary description, rationale for each goal and a brief description of some of the key strategies and actions being proposed to achieve them. Upon approval of the NTP, detailed action plans that include implementation leads, timelines, and success indicators will be finalized.

Goal 1: Protect, manage and enhance cultural and natural resources

Growing environmental and cultural awareness – for both visitors and residents – is an important potential source of competitive advantage for the islands and a critical component of approaches for promoting more sustainable development and enhancing local quality of life; a potentially significant opportunity for product diversification and experience development; and a core asset of the Cayman Islands tourism industry that needs ongoing protection – including its coral reefs, world-famous beaches, and marine wildlife.

The below strategies address the need for enhanced environmental protection, better management of environmental resources, and opportunities largely being missed to promote and celebrate Caymanian culture and natural resources beyond western Grand Cayman, in response to growing global demand for more authentic, cultural, natural and transformational experiences. Strategies supported by most planning participants included:

Strategies

1.1 Create or enhance tourism experiences that integrate heritage, arts, culture, and nature and are aligned with the National Cultural Heritage Policy.

With the growing demand for authentic cultural and natural experiences, there is an opportunity for the Cayman Islands to expand its visitor experience offerings to better incorporate its cultural and natural assets. Better mapping and promotion of cultural attractions like the National Museum and the Heritage Houses in the districts would help connect travellers to local heritage, arts, and cultural experiences.

1.2 Enhance interpretation of natural and cultural resources

Cultural heritage tourism and nature and adventure-oriented tourism are both large markets that the Cayman Islands can better penetrate by creating more heritage attractions and experiences. While guide training, discussed later in SG5.5, is a core component of enhanced interpretation, there is a need to create nature and culture-oriented experiences to be interpreted, and other tools, beyond guides, that can help bring those resources to life.

1.3 Develop, promote and enforce visitor codes of conduct for wildlife encounters

A key asset of the Cayman Islands is its outstanding marine wildlife and the opportunity for visitors to encounter these creatures up close. With this opportunity comes the risk that visitors' interactions with wildlife will have a considerable negative impact on the country's natural resources.

To mitigate this risk as much as possible, the Cayman Islands should establish and clearly communicate visitor codes of conduct for wildlife encounters. In addition to the site-specific recommendations described in the Visitor Management Strategy and in SG4.1, there are a variety of other actions recommended to enhance the visitor experience and protect the Cayman Islands' natural resources.

1.4 Revise and relaunch the Cayman Islands Environmental Programme for the Tourism Sector (CEPTS) as a new sustainable tourism certification scheme to help businesses understand and apply best practices in sustainable tourism management

Certification programmes are a valuable tool to create standards, guidelines, metrics, and codes of conduct for sustainable tourism management. They are also valuable tools for promoting nature-based attractions and sustainable visitor services by providing visitors with assurances that their activities will not negatively impact the natural environment.

CEPTS was initially launched in 2008 as a public-private partnership to improve environmental performance through environmental audits and the establishment of environmental management systems. It has since lost momentum but the CIDOT intends to relaunch the programme as a sustainable tourism certification scheme.

1.5 Obtain Blue Flag certification for prioritised Cayman beaches

The Blue Flag programme is one of the most widely recognized and respected certification schemes for public beach areas. Currently 46 countries have Blue Flag certified beaches and marinas. The certification is only awarded to sites that meet and maintain stringent environmental, educational, safety-related, and access-related criteria.

It is recommended that, if feasible, a strategy be pursued to obtain Blue Flag certification for beaches throughout the Cayman Islands, both as a tool for promotion and a strategy for enhancing the sustainability of these coastal resources.

1.6 Encourage sustainable design and construction of new tourism developments

A significant number of stakeholders on all three islands identified the need for more sustainable design and construction within the industry. There are currently relatively few regulations around sustainable design and construction, and many recent tourism-related developments have not met stakeholders' sustainability expectations.

There are several approaches and initiatives that can be pursued, including changes to building and zoning regulations, Leadership in Energy and Environmental Design (LEED) certification, the development of sustainable master plans for each island, encouraging or requiring turtle friendly lighting in all new developments located on turtle nesting beaches, training and education programmes, etc. The draft Development Plan for the Cayman Islands addresses these recommendations.

1.7 Establish Sustainable Development Plans for Priority Investment Areas

Sustainable development plans should be developed for priority investment areas (East End, North Side, Bodden Town, Cayman Brac, and Little Cayman) to ensure that as these destinations develop and attract further investments, they do so in a way that protects cultural and natural resources. The draft Development Plan refers.

Goal 2. Enhance the business environment to support industry growth and investment

The potential of the Cayman Islands tourism industry to deliver inclusive and sustainable industry growth relies, most importantly, on the capacity of the private sector and communities to invest, innovate, and market.

The government has a critical role to play in creating a business environment that more effectively supports investment and innovation in small and micro tourism-related businesses particularly in the Eastern Districts, including defining and enforcing regulations that are easy to understand and comply with; enhance the visitor experience; and improve destination sustainability and industry competitiveness; and create an organised, streamlined process for facilitating tourism-related investment and financing, This will be done by developing effective public-private sector partnerships to design and implement targeted marketing and promotion programmes aimed at reducing seasonality, diversifying the country's product offering and attracting new markets. The following strategies are recommended:

Strategies

2.1 Create greater efficiencies in government and increase responsiveness through the establishment of procedures that eliminate inconsistency and bureaucracy

Governments across the globe face the same challenges in attempting to clearly define rules and regulations that are effective, easy to understand, and coordinated. Inefficient or excessive government procedures are a burden for businesses to navigate and may deter business investment and start-up. By designing regulations and procedures with the "end user" in mind, the government can eliminate bureaucracy and encourage tourism sector growth. The Ministry with responsibility for commerce and investment has begun this process.

2.2 Implement recommended amendments to the Tourism Regulations (2002 Revision) and the Tourism Law (1995 revision) in support of the NTP

The CIDOT operates under Tourism Law (1995 Revision) and Tourism Regulations (2002 Revision). Efforts are now underway to enhance and streamline the regulatory environment including amendments to these existing tourism laws and regulations. The Department of Tourism anticipates that the new proposed amendments will be accepted by Cabinet in 2019.

2.3 Retain and expand existing source markets while proactively developing new ones

The Cayman Islands currently captures a significant portion of the cruise market and attracts affluent stayover visitors looking for world-class beaches and dive sites. There is an opportunity to expand these existing source markets and work to develop new ones. There were a variety of new markets discussed and explored during the strategy development process, including the Meetings, Incentives, Convention and Exhibition (MICE) market, cultural heritage tourism, health and wellness, nature and adventure-oriented travel, and special events. Additional geographic markets must be targeted for future business and creating marketing buoyancy.

An approach should be defined to prioritize the selection of new markets to be pursued, as well as a strategy for enhancing marketing efforts in segments that are the current focus of market development and promotion programmes, celebrating natural wildlife, flora, fauna and underwater experiences.

2.4 Implement programmes to attract more visitors in the low and shoulder seasons

Tourism industry growth and profitability are constrained, in the Cayman Islands and throughout the Caribbean, by the seasonal nature of leisure travel to the region. There is typically a low season from August to October when tourism businesses see a significant drop in business.

The shoulder seasons are those between the high and low seasons. Some tourists are willing to travel during shoulder seasons because prices tend to be lower and crowds are smaller. Encouraging tourists to visit during the shoulder season can reduce the impact of seasonality. Aggressive marketing and destination offers to increase visitation in these periods will reduce the impacts of seasonality and improving utilization rates were discussed during the planning process. These promotional campaigns should be continued by CIDOT.

2.5 Facilitate and attract development of small and micro tourism-related businesses, boutique hotels, vacation homes, and other non-traditional accommodations services in priority sustainable development areas

The growth in demand for alternative accommodations is an important source of competitive advantage for the Cayman Islands, given the Island's significant inventory of vacation homes and condominiums. The country has an opportunity to leverage this inventory to attract visitors looking for unique and distinctive accommodation.

However, there appears to be substantial unexploited potential for the development of small and micro tourism-related businesses, guest houses, boutique hotels and home sharing accommodation facilities especially in less-visited regions of the country. By developing Master Plans for the targeted sustainable development zones (East End, North Side, Bodden Town, Cayman Brac, and Little Cayman), creating investment incentives, concessions and providing financial and technical support

for the targeted sustainable development areas and proactively promoting investment opportunities, these areas can attract investors who share this vision of sustainable development in these priority zones. Special emphasis will initially be placed on facilitating tourism-related small and micro enterprise development within the Eastern Districts of Grand Cayman based on their tourism readiness.

2.6 Enhance tourism research, statistics, and information availability

Market research, data and statistics are the foundation of effective marketing and investment promotion strategies. However, that foundation is only as sound as the underlying data, so it is important to take steps to improve data quality and data availability.

While CIDOT possesses significant in-house market research and analysis expertise, there are avenues that should be deepened to expand the breadth of those capabilities in support of new marketing and product development initiatives.

Goal 3. Improve connectivity and tourism-related infrastructure

All island destinations face access and infrastructure-related challenges: the cost of infrastructure, lack of critical mass to support infrastructure investments, fragility of marine and terrestrial resources and limited government resources. The smaller the island, population and tax base, the more significant those challenges become.

While the CIG continues to make significant investments in access-related infrastructure, including the modernization of ports of entry and roads, there are gaps that need to be addressed (particularly in the Sister Islands), a variety of environmental and visitor experience-related concerns, particularly in terms of port development, and issues to be addressed in terms of how public transportation is developed and managed. The following strategies have been proposed for inclusion in the NTP:

Strategies

3.1 Complete the modernization of the Owen Roberts International Airport

This airport is arguably the most critical component of the Cayman Islands' tourism-related infrastructure and as the destination's principle gateway, the first and last impression of the islands for most visitors, their first and last interaction with Caymanians, and a vital component of the overall visitor experience.

A detailed plan has been created and is now in the process of being implemented for expansion and modernization of the airport and runway. Stakeholders agreed that while that process should be completed and expedited where possible, additional changes should also be explored, for improving the functioning of temporary facilities and enhancing the visitor experience as physical improvements are completed. The Cayman Islands Airports Authority (CIAA) has been addressing this.

3.2 Determine the best path forward to ensure Little Cayman's airport meets regulatory standards

The airport on Little Cayman, Edward Bodden Airfield, consists of one runway and a small airplane hangar. It does not meet international regulations and operates under a waiver from the British government that limits the size and weight of planes flying in and out of the airport, which connect to Grand Cayman and Cayman Brac. The weight limit is particularly an issue for divers who often travel with a significant amount of diving gear. Steps have been taken to resolve this issue, but a solution has not yet been finalized.

3.3 Increase the number and frequency of flights arriving to Grand Cayman and Cayman Brac, including the facilitation of private jet arrivals

While stayover visitors (air arrivals) represent less than 25% of total visitor arrivals, they account for more than 75% of total visitor expenditures (2017).[2] This suggests that stayover visitors are a crucial part of the success of the tourism industry. Steps should be taken to encourage more visitors to arrive by air and stay over on the Sister Islands. There are approximately 116 flights each week into the Cayman Islands. Most flights are from the eastern half of the United States, but there are also flights from Canada, the UK, Jamaica, Cuba, and Honduras. Fuller utilization of the airport facilities with flights arriving in off peak times will help expand capacity and reduce congestion.

3.4 Enhance the governance of cruise tourism and upgrade related facilities and services to better manage its various aspects and impacts on the environment and stakeholders

According to the UNWTO, the goal of sustainable cruise tourism development should be "to achieve a balance of minimizing impacts to the point where they do not pose risks to local livelihoods or to natural capital, based on an assessment and characteristics specific to each destination."

[2] CIDOT Destination Snapshot 2017

Cruise passengers account for over 75% of visitors to the Cayman Islands. The current George Town port requires cruise ships to anchor off-shore at one of four deep-water anchorages and use tenders to transfer passengers to and from shore. Tendering is a less efficient and more expensive process and reduces passengers time on shore and passenger spending. It is anticipated that building a berthing facility, where cruise ships can anchor alongside a pier and passengers can disembark directly to shore, will increase visitor spending and help the Cayman Islands remain competitive as a cruise ship destination.

Steps have already been taken to complete this objective, including completing an Environmental Impact Assessment (EIA). The project is moving forward with the tendering of bids from persons interested in the design, build and financing of the project. The NTP should focus on supporting the actions and recommendations from the EIA to minimise the impact of the development of the new berthing facility. The development of a cruise tourism strategy is also recommended to enhance the management of cruise tourism and its social, economic and environmental impacts.

3.5 Determine the feasibility of improving the port in Cayman Brac to facilitate the arrival of cruise ships

There is currently a dock on Cayman Brac that receives cargo ships, but there is an opportunity to upgrade this to a port so that it can receive cruise ships and personal yachts. This could relieve some of the cruise ship traffic concentrated on Grand Cayman and spread the economic benefit of cruise tourism to Cayman Brac. Conducting a feasibility study on this subject should also evaluate the environmental, social, and economic effects of improving the ports to accept cruise ships.

3.6 Improve directional signage and streetscape beautification efforts in Grand Cayman and the Sister Islands

Improved directional signage is needed for tourism attractions on each island. Signage helps to ensure that visitors feel comfortable exploring the region on their own and provides a level of confidence that they can easily find attractions and navigate without getting lost. There is currently no consistent signage programme, particularly for less visited attractions, which limits the ability of visitors to explore the full breadth of attractions and visitor experiences available. The new Development Plan will address this issue.

Well-placed signage that has a consistent appearance throughout the islands and helps visitors access each tourism attraction will enhance the visitor experience, ensure people are comfortable accessing attractions, and may also help to attract passers-by find new, lesser known attractions as they travel throughout the islands.

3.7 Work closely with the Public Transportation Board and Unit to help inform public transportation policies and strategies to improve public transport for visitors

The public transportation system needs to be improved, in terms of clear and readily accessible fares, higher and more consistent customer service standards and practices, and a wider range of well-maintained vehicles (including those that can accommodate differently-abled passengers) and ensuring that all routes are consistently serviced. There is need for review of the legislation governing public transportation and a strategic plan to aid in this area.

Goal 4: Deliver outstanding visitor experiences

Over the past decade the Cayman Islands has experienced significant growth in tourist arrivals, spending and tourism-related investment. That growth has been uneven and created a variety of imbalances in terms of the visitor experience and the distribution of tourism-related income.

While the western half of Grand Cayman has grown significantly, the eastern half of the island and the Sister Islands have seen much more limited growth, and in some cases, declines in terms of the number of available hotel rooms and other visitor services.

This pattern of development has resulted in significant tourism-related economic growth in the west, but it has also produced increased strains on heavily visited attractions, infrastructure, the visitor experience, and relatively little investment and tourism-related economic activity in other parts of the islands.

Equally important, it has failed to address the need for diversification of the visitor experience, in the face of rapidly expanding global demand for more authentic culture, nature, transformational and activity-oriented pursuits, the potential for which lies largely in eastern Grand Cayman and the Sister Islands.

To begin to address these imbalances and related impacts, stakeholders have reached consensus on the need to pursue the following strategies:

Strategies

4.1 Implement a Visitor Management Plan (VMP) for heavily visited sites and immigration areas

Visitor impact management is a key aspect of destination management and is a shared responsibility of both public and private organizations. A clear Visitor Management Plan should be developed and agreed to by multiple stakeholders to ensure visitor impacts are appropriately and effectively mitigated and managed.

In the development of the Visitor Management Strategy, recommendations were drafted and reviewed by stakeholders and will be incorporated into the Action Plans to be finalized once the NTP is approved.

In addition to destination-level planning and coordination for visitor management, it is expected that individual attractions will take steps to implement site-specific visitor management initiatives. The Visitor Management Strategy refers.

4.2 Establish a Public-Private Visitor Experience Development Fund (VEDF) to assist Caymanian entrepreneurs, businesses, communities and NGOs to develop new visitor experiences

Providing more innovative and diverse experiences to visitors was highlighted throughout the planning process as a high priority. Developing new approaches to experience development requires risk taking, know-how, marketing support and in many cases, financing support.

There are a variety of approaches that can be pursued to promote development of new visitor experiences, entrepreneurship, and innovation. The initial approach proposed for the NTP is the development of a Visitor Experience Development Fund (VEDF) that could potentially provide grants, financing, business planning and development services and marketing support.

4.3 Create a Credit Facility to enhance access to credit for small businesses and entrepreneurs interested in developing or enhancing visitor experiences

Another approach for promoting product innovation is to increase the availability and affordability of debt financing for a wider range of entrepreneurs seeking to develop new visitor experiences. Project financing of tourism-related small businesses is typically very challenging without significant collateral in the Caribbean and other regions as financing costs tend to be relatively high and financial institutions very risk-averse.

One proven approach is the creation of financing programmes or funds that are backed by government, and/or the private sector, that make financing available at affordable rates and terms long enough to allow businesses to become established and known. The financing facility could also provide technical assistance and work with CIDOT to provide marketing support to new businesses funded through the programme.

4.4 Upgrade public beaches and organize vendors/concessionaires to offer a world-class beach experience

Public beaches beyond Seven Mile Beach are important assets for both residents and visitors, and a potentially powerful tool for promoting more visitation and visitor spending throughout the islands. In addition to the formulation of a management and concessions policy, identifying opportunities for upgrading beach facilities and services, promoting wider awareness and use of public beaches and creating visitor spending opportunities near those beaches and in nearby communities would be impactful.

4.5 Develop a Caymankind Ambassador Programme to identify and recognize individuals and experiences that provide the opportunity for visitors to interact with Caymanians and celebrate Cayman culture

Caymanian culture is one of the Islands' most valuable and underutilized tourism assets. Other islands in the Caribbean and in other world regions have developed programmes that can be modelled for development of the proposed Caymankind Ambassador Programme, including Jamaica and the Bahamas. Developing a formal, well-marketed programme around Caymankind culture will help visitors distinguish the Cayman Islands from other Caribbean destinations.

4.6 Launch a Vacation Rental Concierge Programme to facilitate linkages between vacation home renters, property managers, and tourism enterprises to enhance the information and services available to vacation home renters

The growing demand for alternative accommodations, like AirBnB, Homeaway etc., combined with the Cayman Islands' significant stock of vacation homes, apartments, condos, guest houses, etc., have created significant opportunities to attract these types of visitors in increasingly greater numbers.

Through targeted strategies aimed at the home sharing and vacation home community, there is an opportunity to increase awareness of these accommodation offerings, create linkages for their guests to the plethora of visitor experiences available during their stay and to grow these markets significantly in the near to medium term.

4.7 Conduct tourism awareness campaigns to communicate the importance of tourism and of delivering Caymankind hospitality

As discussed above, the warm and welcoming nature and natural spirit of hospitality that characterizes Caymanian culture is a vital and often over-looked resource and potentially important source of competitive advantage.

Stakeholders universally agreed that in combination with programmes that help promote the spread of economic benefits to residents throughout the islands, additional efforts should be made to strengthen that cultural offering, by highlighting the importance of tourism as a driver of economic growth and development. New tourism awareness programmes linked to the existing Caymankind programme are recommended.

Goal 5: Develop a highly skilled tourism workforce and maximize the percentage of Caymanians working in the industry

As industry and government well know, professional, personalised service is and always has been one of the keys to successful tourism development. While Caymanians are typically welcoming and hospitable people, a variety of factors have constrained the development of a highly skilled Caymanian tourism workforce. They include 1) a relatively small population, 2) the Cayman Islands' world famous financial services sector, which is viewed by a significant segment of the population as a more prestigious and more lucrative career option, 3) a view, primarily among older generations in the Cayman Islands and throughout the Caribbean, that equates service (at least to some degree) with servitude, and 4) relatively low levels of unemployment ([i]3.4% as at Spring 2018).

Because of these factors and the lack of development of visitor experiences focused on authentic Caymanian culture, there is a significant segment of visitors who have very limited interaction with locals while on island. While several effective programmes have been implemented, the potential for growing the number of nationals employed in the industry is constrained by the small population and very low levels of unemployment. Most stakeholders engaged in the planning process agreed that more should and could be done to increase the number of Caymanians employed in the industry. Recommended strategies include:

Strategies

5.1 Develop a National Tourism Workforce Development Plan

The first step in defining a strategy for "where we want to be" is to understand "where we are now." For workforce development that means understanding the current needs and demands of employers, potential barriers to entry, training needs, supply constraints and other variables. The proposed process for creation of a National Tourism Workforce Plan begins with this type of assessment and concludes with a participatory planning process and strategy based upon the results of that assessment.

5.2 Position the industry as an attractive career and employment choice for young people and adults

The tourism industry faces significant competition from the financial services industry and a view, primarily among older generations, of tourism as a less attractive career option than other industries for school leavers and others seeking employment opportunities. Addressing these challenges will require a concerted effort on the part of government and industry to promote the image of the tourism industry and career opportunities within it.

5.3 Expand and improve the delivery of tourism education to ensure it meets industry needs

While the Cayman Islands have a variety of successful tourism-related education and training programmes already in place, including those offered by the University College of the Cayman Islands' School of Hospitality Studies and CIDOT, there is room to expand those offerings and tailor them more specifically to the needs of potential employers. This could include evening/night classes to accommodate day workers. In addition to carrying out SG5.1, it is important to engage the tourism industry in the development of tourism education programmes to ensure that the programmes meet the needs and expectations of employers.

5.4 Ensure all employees in the tourism industry participate in the PRIDE training programme to establish a culture of service excellence throughout the Cayman Islands

The CIDOT PRIDE (Personal Responsibility in Delivering Excellence) programme currently trains employees in the tourism industry in customer service principles and increasing historical and cultural awareness of the Cayman Islands. It is a government-funded programme intended to enhance the competitiveness of the Cayman Islands as a destination by ensuring employees in the tourism industry can deliver an outstanding level of service. It is, in the view of most stakeholders, a success story that should be built upon and expanded in attempting to increase the number of Caymanians employed in the industry, and the levels of visitor services provided.

5.5 Develop and deliver tour guide training and certification programme

Tour guides play a key role in the visitor experience. They are not only responsible for delivering information about the destination, but they also must entertain visitors, keep them comfortable and satisfied, and monitor their behaviour. Tour guides are often one of the few locals with whom visitors interact closely, so tour guides become representatives for the entire destination. Because of the significant role tour guides have in the visitor experience, it is important that they are well-trained for their role. Furthermore, one of the keys to expanding the visitor experience is enhanced interpretation of cultural and natural assets.

The core of this strategy is guide training, focused on Caymanian history and culture, traditional ways of life, cuisine, music, art, dance, festivals, wildlife, maritime traditions and marine life.

5.6 Provide training and professional development opportunities to public sector destination management and marketing staff

Destination management and marketing are complex and rapidly evolving endeavours, requiring constant updating of online and offline skills and tools for potential visitor engagement. Ongoing training and education are needed to keep pace with emerging trends and to maintain and enhance the Cayman Islands' competitive position.

Goal 6. Build strong partnerships to sustainably manage, market and diversify tourism assets

Tourism is a dynamic, rapidly changing industry. As summarized in the Situation Analysis, a variety of economic, political, demographic, and environmental factors are driving that change, including increased access to new destinations, the development of the "experience" and "sharing" economies and growing environmental awareness and concerns over climate change. The most important factor, however, is undoubtedly the revolution in information technology and the dominant role the internet now plays in planning, booking, promoting, and rating destinations and travel experiences.

That revolution has completely reshaped and fragmented the global travel industry, and magnified the challenges to destination development, management, and promotion. Success in the 21st century will require a more integrated approach within government, and between the public and private sectors, and communities, to define and implement programmes to improve access, enhance the visitor experience, support cultural and environmental sustainability and promote industry growth. In response to that new reality, stakeholders have proposed the following strategies:

Strategies

6.1 Improve Intergovernmental Tourism Coordination and NTP Implementation

Tourism is an interwoven industry impacted by the policies of a variety of government ministries, including public works, ports, aviation, culture, public safety, environment, health, sanitation, education and finance. The objective of this strategy is to engage Ministers and technical staff from across the Cayman Islands government on a formal basis, to define and implement government policy that more effectively supports sustainable tourism development and oversees the NTP implementation.

6.2 Increase public-private sector communication and coordination

The foundation of strong public-private sector partnership is effective communication. Government agencies need to understand industry points of view on a range of issues, including regulation, promotion, infrastructure, etc., to define policies and programmes that are responsive, effective, and that will be broadly supported.

By the same token, the industry needs to understand and be provided with opportunities to offer input into the policy formulation process as policies and programmes are being debated and defined. While there are mechanisms in place to facilitate public-private dialogue, most stakeholders agreed that more needs to be done to strengthen that dialogue. The same technologies and collaborative approaches driving the development of the global travel industry can also be used to increase public-private sector communication and coordination.

The development of an industry-focused website to keep tourism stakeholders, partners and the general public abreast of tourism industry news, information and initiatives is also recommended.

6.3 Decentralise tourism management and marketing through public-private partnerships at the local/destination level

The need for more effective communication and collaboration within and between the three islands was highlighted by stakeholders as one of the most important goals of the NTP. Stakeholders in the Sister Islands and the eastern half of Grand Cayman expressed the view that central government needed to devote more effort to working with local stakeholders to define and implement programmes that are more supportive of local development objectives.

However, government stakeholders highlighted the lack of organization at the local level, which complicates the participatory planning process and efforts to promote more decentralized destination management. Improving public-private partnerships at the local level will help resolve some of these challenges so that tourism management can shift to a more decentralised model. Proposed regional tourism committees with membership bodies of tourism stakeholders can be established through Local Tourism Committees (LTCs) including Seven Mile Beach, West Bay, George Town, Bodden Town, East End, North Side, Cayman Brac and Little Cayman.

MEASURING IMPACT & PROGRESS

It is recommended that a CIDOT point person and budget be allocated for each LTC who will serve as the committee secretariat convening meetings, developing meeting agendas, distributing meeting minutes, and managing committee budget allocations. The LTCs will work together to develop and implement annual product development and marketing plans for their respective destinations using the NTP framework to guide action planning and reporting.

6.4. Develop a more effective public beach management & concession system

Public beaches are an important asset for both residents and visitors. They can also be a powerful tool for promoting more visitation and visitor spending throughout the islands. They offer an opportunity to spread tourism to less-visited areas and concession permits give residents some economic benefits. However, realizing these benefits requires effective management.

Public beach management was identified as a critical objective by public and private sector stakeholders alike. While some progress has already been made, additional efforts are needed to improve the visitor experience, for both residents and visitors, and promote the development of public beaches as important tourist attractions and drivers of visitor spending throughout the islands.

The NTP proposes to revise the current concession system for public beaches to include the requirement of a management association made up of the vendors holding concession permits. This management association will establish and enforce the rules and regulations of the public beach concession system in collaboration with government authorities.

Key Performance Indicators

The goals of the National Tourism Plan are aligned to promote a more sustainable, inclusive, better managed, balanced and vibrant tourism industry that helps to diversify the Cayman Islands visitor experience, attract new markets, reduce seasonality, celebrate the islands' rich cultural heritage, protect its fragile environmental resources, and spread the benefits of tourism development broadly and equitably.

How do we know that the Cayman Islands' tourism industry is "more sustainable and inclusive?" How do we know that we're adequately "celebrating the islands' rich cultural heritage?" Do actions to "protect its fragile environmental resources" do enough? To answer questions like these, the final step in the planning process is to define indicators for measuring the success of the NTP in achieving its vision.

Indicators are an important feedback mechanism that add accountability to the National Tourism Plan. They will also help guide the attainment of the NTP Vision by providing a consistent basis from which to monitor change and progress. Indicators can also be useful in showing the current state of the industry and emerging issues and/or stresses on the system. Additionally, they help to measure the impacts of tourism, both positive and negative, and how they can be more effectively managed. Ultimately, consistent indicator measurement and monitoring allows for continuous improvement.[3]

In selecting indicators, five criteria should be considered: relevance, feasibility, credibility, clarity, and comparability. Relevant indicators will provide useful information that is helpful in decision-making. An important consideration is the feasibility of obtaining data for the indicator, particularly if it would require setting up new workflows or monitoring systems. Not only does the indicator data need to be obtainable, but it also needs to be credible. It must come from a reputable, objective source.

Clarity is also an important consideration as users of indicators may not be experts on every indicator. Complicated units of measurement may be misleading, so indicators should be simple and easy for everyone to understand.

[3] UNWTO and UNEP, "Making Tourism More Sustainable" (2005); UNWTO "Indicators of Sustainable Development for Tourism Destinations: A Guidebook" (2004).

The final criterion is comparability. Indicators should be comparable over time and across regions. If an indicator cannot be benchmarked against itself, it cannot fulfil its purpose of measuring progress.[4] These criteria will all be considered in the development of the NTP indicators.

There are two types of indicators: output indicators and outcome indicators. Output indicators measure whether the intended actions were completed, and outcome indicators measure the results of those actions. When the NTP Action Plan is finalised, output indicators will be concurrently developed to measure the completion of those actions. This clear framework ensures accountability and motivates stakeholders to carry out the actions, which in turn advances the NTP toward achieving its objectives. These indicators will be finalized once the Action Plan is finalized after approval of the NTP.
Though similar to output indicators, outcome indicators measure the results or impact of actions rather than the completion of actions themselves. In the case of the NTP, the outcome indicators provide a complementary perspective from which to view progress in achieving the NTP Vision. These indicators tie directly to the NTP Vision whereas the action plan outcome indicators tie to the strategic goals and objectives.

The following list of outcome indicators could be used to measure the success of the NTP implementation. These indicators were selected and developed based on studies and reports from the UNWTO, UN Environment Programme (UNEP), and International Union for the Conservation of Nature (IUCN) in conjunction with stakeholder input.

Outcome Indicators to Measure NTP Implementation Success

Destination Marketing and Management

- Plans and budget allocations for tourism
- Number of public policies to support the development of sustainable tourism
- Residents' satisfaction level with tourism (e.g. via perception surveys)
- Number of daily flights/seats, in high and low/shoulder seasons, and number of markets and destinations (within the three islands) served
- Number of visitors using public transportation on Grand Cayman
- Increases in CIDOT marketing budget and amount dedicated to Sister Islands promotion
- Level of visitor satisfaction (e.g. via exit surveys)
- Peak day passengers disembarked from cruise ships; total number (on board); ratio of passengers discharged to local population
- Total number of visitors per square km in key sites
- Number of different sites receiving tours
- Delivery of upgraded ORIA
- Advancement of MDATT cruise terminal project

Economic Impact

- Total visitor spending
- Direct contribution of tourism industry to GDP
- Average expenditure per visitor (stayover and cruise)
- Average length of stay
- Number of people employed in the tourism industry (Caymanian and non-Caymanians)
- Direct foreign and local investment
- Tourism contribution to tax revenue
- Visitor arrivals by month (distribution throughout the year)

[4] UNWTO "Indicators of Sustainable Development for Tourism Destinations: A Guidebook" (2004).

- Average cruise ship duration of stay in port
- Number of businesses (including souvenir shops) promoting and selling Cayman made products
- Tourism Satellite Accounting

Sociocultural Impact

- Number of cultural activities/events and level of visitor participation
- Level of awareness of local values and cultural heritage
- Number of local businesses related to local culture (handicrafts, music, gastronomy, etc.)
- Number of guides trained in interpretation
- Number and quality of infrastructure stimulated by tourism
- Percentage of residents using visitor-related infrastructure
- Contribution of tourism to the preservation of cultural assets
- Percentage of residents satisfied with the development of tourism (disaggregated by destination)
- Ratio of visitors to locals (average and peak period/days)

Environmental Impact

- Type and extent of protected areas, percentage of protected areas and creation of new areas
- Percentage of tourism-related businesses with adequate environmental management resources
- Behaviours and attitudes of visitors and locals regarding environmental practices
- Funds generated by tourism dedicated for the protection of the environment
- Waste volume produced by the destination (tons per month)
- Number and scale of waste reduction, reuse and recycling activities
- Level of funding generated to monitor and manage marine protected areas
- Level of funding or investment generated to improve management and interpretation of land-based protected areas and nature-oriented attractions
- Total energy consumption; percent from renewable sources
- Water management initiatives at tourism-related facilities
- Percentage of tourism establishments (or accommodation) on sewage treatment system(s)
- No. of tourism-related entities with environmental management systems and certification

Performance Monitoring Plan

During completion of the Action Plan, a detailed Performance Monitoring Plan will be finalized to measure impacts, outcomes, and NTP implementation progress, including key indicators, timelines, milestones, and other metrics.

Implementation Steering Committee

After completion and ratification of the National Tourism Plan 2019 - 2023, an Implementation Steering Committee will be convened and meet on a regular basis to discuss progress in implementation of the NTP, review changes in market conditions and the competitive environment, and where needed, propose course corrections that may be required to keep the implementation process on track or that have the potential to improve outcomes.

Annex A: Executive Summary: Cayman Islands Visitor Management Strategy

I. OBJECTIVE

Cayman Islands' tourist attractions and activities are one of the main factors driving tourists to choose this British Overseas Territory as their travel destination. Maintaining the integrity of tourist attractions in the Cayman Islands is essential for the long-term sustainability of its tourism sector.

The Cayman Islands Department of Tourism (CIDOT) recognizes this priority and commissioned the development of a national visitor management strategy in support of the new National Tourism Plan. The aim of CIDOT is to establish a sustainable approach for improving the way visitors enjoy the special qualities of key tourist attractions while maintaining the long-term integrity of these key attractions and overall environment.

II. METHODOLOGY

The draft Visitor Management Strategy was developed over a four-month period: September to December 2016 through a participatory planning process outlined below.

Step 1: Baseline Research

A rapid baseline assessment was conducted for 14 important tourist attractions and sites that were identified by CIDOT. These attractions and sites span Grand Cayman, Cayman Brac and Little Cayman. The list consisted of a mix of attractions which receive high levels of visitation and are experiencing visitor management bottlenecks, as well as attractions that are less visited but important for tourism product diversification.

The research illuminated visitor numbers, management structure, issues, impacts and strategies already employed at each of the 14 tourist attractions and sites. Additionally, an online visitor perception assessment was conducted for these attractions and sites. The content of reviews posted on two of the travel industry's largest travel websites, TripAdvisor and Cruise Critic were analysed to glean insights about the level of visitor satisfaction and identify visitor management issues flagged by visitors.

Step 2: Stakeholder Consultation

From October 24-28, 2016, the project team visited the Cayman Islands to conduct stakeholder focus group meetings and a series of individual interviews to gather attraction managers' and stakeholders' views of the current issues, challenges, and solutions for visitor management at key attractions, as well as to validate the list of sites analysed. During the October 2016 visit, over 20 stakeholders were consulted to inform the Visitor Management Strategy.

Step 3: Plan Development and Validation

Following initial stakeholder consultation, the project team drafted the Visitor Management Strategy. The Strategy was reviewed and commented on by CIDOT, and CIDOT comments were incorporated into the draft. In tandem, the project team presented the draft Visitor Management Strategy to stakeholders, in public meetings held on all three islands from December 5-9, 2016 and stakeholders participated in the public meetings to develop key inputs for the national tourism plan and to validate key elements of the proposed Visitor Management Strategy. Based on the feedback obtained at public meetings, the project team prepared a final draft of the Visitor Management Strategy.

III. SITUATION ANALYSIS

A. Priority Tourist Attractions

1. The CIDOT Visitor Exit Survey revealed that the three most popular tourist attractions for stayover visitors in order of importance for Grand Cayman were Stingray City (marine), Rum Point (coastal/marine), and Camana Bay (shopping and entertainment). The Trip Advisor ranking of "things to do" also identified Stingray City as the top attraction in Grand Cayman.

2. Visitors' motives and length of stay are factors that influence the demand for attractions. In 2016, the Cayman Islands received over 2 million international arrivals. Twenty percent of total visitors, i.e. 385,451 persons, arrived by air and stayed an average of 6.17 days. While the numbers for stayover visitors have improved year-over-year for the past five years, a very small increase was recorded between 2015 and 2016 at less than 1 percent.[3]

3. The findings for Little Cayman and Cayman Brac also provided interesting insights. While local tourism leaders and stakeholders identified diving as the predominant recreational activity for stayover visitors in the Sister Islands, the Visitor Exit Survey results indicated that the most popular attractions on the Sister Islands were not dive sites, but rather terrestrial nature and cultural heritage sites. The Booby Pond Nature Reserve (nature) was the most popular attraction in Little Cayman, and the Bluff & Caves tied with the Lighthouse (nature and cultural heritage man-made) for the top spot in Cayman Brac.

4. To understand fully visitor demand for attractions in Cayman Islands, we need to take a closer look at cruise visitors. In 2016, 85 percent of total visitors, i.e.1,711,849, arrived by sea primarily on cruise ships.[4] Ninety-four percent, i.e. 1.45 million, of these cruise passengers disembarked and spent an average of four hours in Grand Cayman.[5] Belize and Grand Cayman are two remaining cruise ports of call in the Western Caribbean (excludes private cruise destinations) that do not have cruise ship berthing facilities. The tendering process does limit the time that cruise passengers and crew have in port, which in turn influences their selection of activities and attractions. Research indicated that 57 percent of cruise visitors who disembarked, purchased a tour/shore excursion. The most popular shore excursions were marine based followed by historical/cultural shore excursions.

5. Many of Grand Cayman's coastal and marine attractions can be classified as wildlife tourist attractions (WTA). Well managed WTAs have the potential to secure long-term conservation of wildlife and their habitats through the conservation efforts of volunteers and operators, the creation of socio-economic incentives for preservation and tourist education which may increase philanthropic support for preservation.[7] WTAs in Grand Cayman are diverse. For instance, Stingray City and the Sandbar can be classified as a wildlife interaction attraction, Dolphin Discovery as a captive interaction attraction and Cayman Turtle Centre as a wildlife attraction. All these WTAs trade-off values of conservation, animal welfare, visitor satisfaction and profitability.

B. Management of Tourist Attractions and Sites

1. The results of a destination sustainability assessment conducted in 2015 by the Cayman Islands Department of Tourism, in partnership with the Global Sustainable Tourism Council (GSTC), indicated that the Cayman Islands does not have an official inventory and classification of tourism attractions. This is a critical first step required for improved management of tourism attractions. Furthermore, there was no centralised mechanism to provide attractions managers with guidance on visitor management planning and good practices.

2. Visitor impact monitoring was quite lacking across all categories of attractions--nature, culture, purpose-built and events. It is important to note that while key government agencies, such as the Department of Environment, do conduct some monitoring it is often limited to protected areas. While some attraction managers were educating visitors about how best to minimize their footprint when visiting attractions, most attraction managers were not engaging tour operators and tour guides to help minimise the environmental footprint of visitors and enhance the quality of interpretation offered. Tour operators and tour guides play a critical role in helping to decrease the footprint of visitors at attractions since they

spend the most time in direct contact with visitors, thereby shaping their understanding of and behaviour at attractions.

C. Visitor Satisfaction

1. Visitor feedback was analysed for a subset of the highly-visited tourist attractions and sites. The analysis was based on a random sample of 60 most recent reviews found on TripAdvisor. Key findings are summarized below.

   - **Stingray City and Sandbar**: 10 percent of visitors mentioned 'overcrowding' in their reviews for Stingray City; 5 percent felt that the experience at Stingray City is overpriced, 3 percent stated that the stingrays are docile and nearly 2 percent noted that there was limited supervision in the water. These percentages become significant as the volume of visitors to Stingray City indicated that it is Cayman Islands' most visited tourism attraction. It is estimated that Stingray City receives over 1 million visitors a year.[11]

   - **George Town Harbour and Cruise Port:** 17 percent of visitors mentioned 'overcrowding' in their reviews of the cruise port, and 13 percent noted that the harbour and George Town felt inauthentic. It is estimated that about 1.6 million cruise visitors and crew pass through the George Town Cruise Port on an annual basis. [12]
   - **Seven Mile Beach**: 10 percent of visitors mentioned how crowded Seven Mile Beach can be in their reviews and another 3% mentioned unmanaged vendors. It is estimated that Seven Mile Beach receives over 1 million visitors a year, so these percentages become quite significant given its status as one of the main attractions for the destination. [13]

   - **Cayman Turtle Centre**: 10 percent of visitors commented that there is 'overcrowding of people' occurring, nearly 7 percent opined that the experience was overpriced, 5 percent noted poor customer service, 3 percent commented that the facilities were dilapidated, and nearly 2 percent noted that there is overcrowding of turtles. Cayman Turtle Centre receives about 300,000 visitors per year.[14]

2. Visitor feedback was also collected for a subset of lesser visited attractions. Although the feedback available on the lesser visited attractions was sparse, key findings are outlined below.

   - **Hell**: 35 percent of visitors said that there wasn't much to do at this attraction.

   - **Queen Elizabeth II Botanic Park**: Nearly 7 percent of visitors said that there wasn't much to do at this attraction.]

   - **Pedro St. James National Historic Site**: 7 percent of visitors said that there wasn't much to do at this attraction.

IV. MAIN FINDINGS

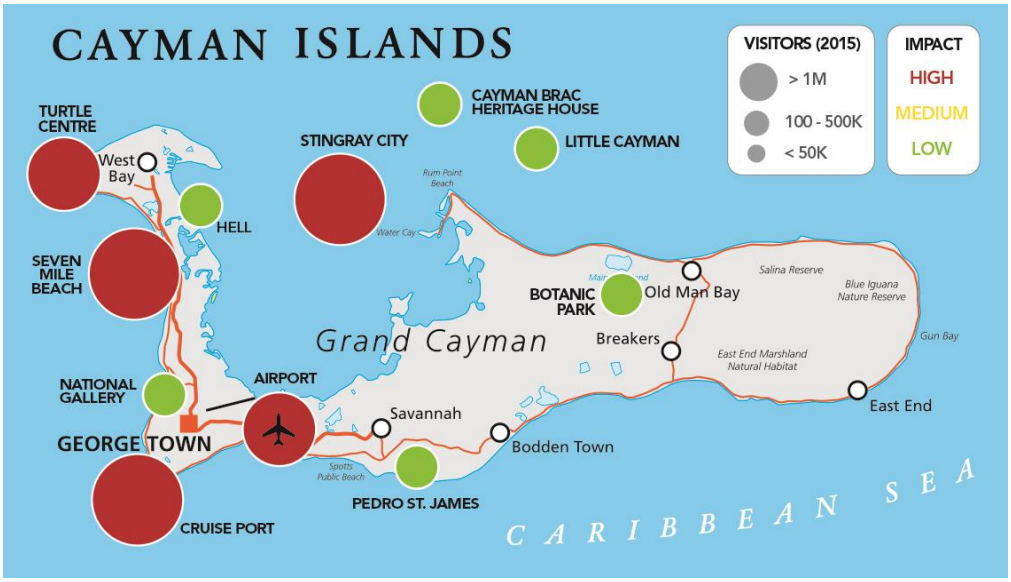
A. High Priority Tourist Attractions

1. The most popular recreational activities and attractions are located in coastal and marine ecosystems making the Cayman Islands primarily a 'sun, sea, sand' destination.

2. The over-reliance on coastal and marine attractions is presenting considerable stress to a few key attractions, such as Stringray City, Seven Mile Beach and Cayman Turtle Centre.

   The spatial distribution of impacts from visitation in Grand Cayman are highly concentrated in the western districts of George Town and West Bay. The districts of Bodden Town, North Side and East End are receiving lower levels of visitation and hence less pressure on tourist attractions. Figure 1 illustrates the intensity of the visitor footprint at the 14 tourist attractions and sites covered in the rapid assessment.

Figure 1: Annual Visitation at Key Tourist Attractions in Grand Cayman



3. The convergence of stayover and cruise visitors at popular coastal and marine attractions, such as the most visited tourist attraction--Stingray City and Sandbar, does present unique challenges from the perspectives of environmental impacts and visitor experience.

4. While a few tourist attractions and sites are receiving the majority of visitors, lesser visited attractions and sites, mostly located in the eastern region, are experiencing challenges that stem from product under-development, under-visitation, and under-marketing. Therefore, rather than address these in the Visitor Management Strategy, analysis of these attractions is primarily included in the overarching Cayman Islands National Tourism Plan document, which addresses topics such as product differentiation and development and destination marketing to increase the competitiveness of the Cayman Islands and ensure inclusive development and broad distribution of economic benefits.

5. There is sustained wildlife interaction occurring in many coastal and marine attractions in Grand Cayman. Research indicates that wildlife interaction does impact the long-term health of animals, and often these animal welfare effects are unrecognisable to the tourists. WTAs require additional management attention to balance conservation, animal welfare, visitor satisfaction and economic goals.

B. Management of Tourist Attractions and Sites & Visitor Satisfaction

1. There are many systemic gaps in tourism attractions management, and corresponding site and destination-level risks, occurring in Cayman Islands.

2. Some visitor feedback gleaned from the largest travel website, TripAdvisor, flagged visitor management issues such as overcrowding, poor customer service, and limited supervision.

3. Visitor exit surveys indicated that stayover visitors were very satisfied with attractions, particularly beaches, water sports and underwater experiences.

4. Visitor surveys indicated that cruise visitors were also very satisfied with guided tours, historic sites/museums and the variety of things to see and do.

5. The subjective visitor feedback does not recognise the systemic risks identified from the more objective destination assessment of attractions which involved local expert opinion from local tourism leaders representing government and private sector.

V. RECOMMENDATIONS

The proposed recommendations for enhancing visitor management are tailored to address the national level priority issues identified from the situation analysis. It is important to note that in addition to national level recommendations the comprehensive Cayman Island Visitor Management Strategy outlines a host of recommended actions for high priority visitor attractions and sites that are experiencing pressures from over-crowding e.g. enhancing public transportation to less visited attractions.

RECOMMENDATION 1: NATIONAL PRIORITIZATION AND IMPLEMENTATION

One of the recurring themes that emerged from the analysis of visitor management issues was the lack of planning and coordination for the sustainable management of attractions, including visitor management issues at tourist attractions and sites throughout the nation.

The establishment of a Visitor Management Sub-committee, as an official sub-committee of a National Tourism Council, is recommended. This Sub-committee should include representatives from high priority attractions or sites, as well as other Caymanian stakeholders with visitor management responsibility, including, but not limited to CIDOT, tour operators, Port Authority, CITA, Department of Environment *et al*. It could also serve as an advisory body to a CIDOT program on visitor management issues.

RECOMMENDATION 2: CIDOT VISITOR MANAGEMENT PROGRAM

It is recommended that CIDOT establishes a formal visitor management program. It is recommended that the CIDOT visitor management program employs a designated staff person responsible for national visitor management planning, monitoring, and coordination for the Cayman Islands. This CIDOT staff person would also serve as a liaison with each tourist attraction's Visitor Management Team, and with the national Visitor Management Sub-committee (both discussed below).

RECOMMENDATION 3: VISITOR MANAGEMENT TEAM FOR EACH PRIORITY ATTRACTION AND SITE

Formation of a visitor management team for each key tourist attraction and site of the Cayman Islands is recommended. The visitor management team would be responsible for visitor management planning, monitoring and reporting to the CIDOT visitor management lead and to the Destination Visitor Management Sub-committee, about visitor management issues and progress at the respective attraction or site.

An effective visitor management approach for a destination involves a mix of coordinated action both at the destination-level, to ensure well-functioning visitor flows and management throughout the destination, as well as at the individual attraction or site level. The proposed mechanisms at the destination level include a visitor management program embedded within CIDOT, dedicated full-time to visitor management issues, as well as a Visitor Management Sub-Committee of the National Tourism Council, which would meet to coordinate across sector on targeted issues of visitor management on a less frequent basis (for example, quarterly).

Recommendation 4: Development of a National Inventory of Attractions and Sites

Several stakeholders reported the lack of diversity of tourism attractions in the Cayman Islands as a major destination-wide visitor management issue. As a result, the vast majority of visitors trample through just a few main attractions, which experience severe stress, while several other promising attractions are underdeveloped or under visited. The creation and maintenance of a national inventory of attractions and sites, in collaboration with attraction managers who themselves are focused on visitor management issues at each site, is a necessary step toward developing a coordinated visitor management approach that spreads visitors--and the economic benefits they bring--more evenly and sustainably throughout the Cayman Islands.

Recommendation 5: Visitor Management Planning

Working in collaboration with stakeholders across sectors, the national-level visitor management institutions would be charged with implementing the national visitor management initiatives proposed in the Visitor Management Strategy, as well as updating and implementing the Strategy on a regular basis going forward.

Recommendation 6: Visitor Management Monitoring

Development of monitoring indicators for visitor management and measuring progress along those indicators is recommended as an actionable approach to achieving success. Monitoring will help to track changes occurring over time and help to inform decision-making.

Recommendation 7: Product Development Reinforcing Visitor Management Planning

The National Tourism Plan works hand in glove with the Visitor Management Strategy, of which it is a part. The product development recommendations of the overall National Tourism Plan, including diversifying the Cayman tourism product, and developing marketing strategies consistent with that overall approach, are designed to achieve visitor management outcomes as well as positive economic returns for the Cayman Islands. Additional flagship initiatives can be coordinated by the destination-level visitor management institutions, as needed on an ongoing basis to achieve visitor management goals of maximizing the visitor experience, resident convenience and benefits, and overall preservation of attractions and the environment at large.

Annex B: Destination Performance Reports

Destination performance statistics and reports can be accessed via the Department of Tourism's statistics web portal: https://www.visitcaymanislands.com/en-us/statistics/reports

Annex C: Acronyms

CI	**Cayman Islands**
CIAA	**Cayman Islands Airports Authority**
CIDOT	**Cayman Islands Department of Tourism**
CIG	**Cayman Islands Government**
CITA	**Cayman Islands Tourism Association**
CTO	**Caribbean Tourism Organization**
DEH	**Department of Environmental Health**
DMO	**Destination Management Organization**
DOE	**Department of Environment**
DOT	**Department of Tourism**
EIA	**Environmental Impact Assessment**
FDI	**Foreign Direct Investment**
GDP	**Gross Domestic Product**
GSTC	**Global Sustainable Tourism Council**
HECH	**Ministry of Health, Environment Culture and Housing**
IUCN	**International Union for the Conservation of Nature**
JMU	**RCIPS Joint marine Unit**
KPI	**Key Performance Indicator**
LEED	**Leadership in Energy and Environmental Design**
LTC	**Local Tourism Committee**
MDATT	**Ministry of District Administration, Tourism and Transport**
MICE	**Meetings, Incentives, Conventions, Exhibitions**
MRCU	**Mosquito Research and Control Unit**
NTP	**National Tourism Plan**
ORIA	**Owen Roberts International Airport**
PACI	**Port Authority of the Cayman Islands**
PRIDE	**Personal Responsibility in Delivering Excellence**
RCIPS	**Royal Cayman Islands Police Service**
SG	**Strategic Goal**
SHS	**School of Hospitality Studies**
SITA	**Sister Islands Tourism Association**
SWOT	**Strengths, Weaknesses, Opportunities, Threats**
TSA	**Tourism Satellite Account**
UCCI	**University College of the Cayman Islands**
UNEP	**United Nations Environment Programme**
UNWTO	**World Tourism Organization**
VECF	**Visitor Experience Challenge Fund**
VMP	**Visitor Management Plan**
VMS	**Visitor Management Strategy**
WORC	**Workforce Opportunities and Residency Cayman**
WTA	**Wildlife Tourist Attractions**
WTTC	**World Travel and Tourism Council**

Annex D: Acknowledgements

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- Cayman Islands Tourism Association
- Sister Islands Tourism Association
- Tourism Attractions Board
- Cayman Turtle Centre
- Ministry of District Administration, Tourism and Transport
- National Museum
- National Gallery
- Tourism industry sub-sectors including:
    - Accommodation
    - Food and Beverage
    - Attractions
    - Water sports
    - Transportation
    - Tourism Services
    - Travel Trade
    - Adventure tourism
- Government and non-government organizations including:
    - Cabinet Office
    - Cayman Airways Limited
    - Cayman Islands Airports Authority
    - Department of Environment
    - Ministry of Health and Culture
    - National Trust
    - National Workforce Development Agency
    - Port Authority of the Cayman Islands
    - University College of the Cayman Islands/School of Hospitality Studies
    - Workforce Opportunities and Residency Cayman
- The Public

Thanks are also extended to Solimar International and the George Washington University which spearheaded and guided the process and provided technical advice.

[1] Source: Economics and Statistics Office



CAYMAN ISLANDS

GRAND CAYMAN | CAYMAN BRAC | LITTLE CAYMAN