



National Tourism Plan 2024 Edition

CAYMAN ISLANDS
GRAND CAYMAN | CAYMAN BRAC | LITTLE CAYMAN

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.

This is the 2024 edition of the National Tourism Plan which is an annual document that is updated at the end of Q1 each year



Message from Hon. Kenneth Bryan Minister for Tourism and Ports

It is with great pleasure and optimism that I present to you the abridged National Tourism Plan for the Cayman Islands for 2024. This comprehensive document serves as a roadmap for the revival and prosperity of our beloved tourism industry.

As we emerge from the unprecedented challenges brought about by the global pandemic, it is imperative that we unite our efforts and focus on rebuilding a resilient and sustainable tourism sector. The Cayman Islands have long been celebrated for our pristine beaches, vibrant culture, and warm hospitality. Now, more than ever, we must leverage these strengths to chart a course towards a brighter future.

This National Tourism Plan is the culmination of extensive collaboration and consultation with stakeholders from across the islands. It outlines strategic initiatives aimed at enhancing visitor experiences, promoting environmental conservation, and fostering economic growth. From innovative marketing campaigns to investments in infrastructure and workforce development, each aspect of this plan is designed to propel us forward on the path to recovery and success.

However, our journey does not end here. It is essential that we remain adaptive and forward-thinking, continuously evolving to meet the changing needs and expectations of our visitors' travelers in a post-pandemic environment. By embracing innovation, sustainability, and the aspirations of our people, we can ensure that the Cayman Islands remain a premier destination for generations to come.

I extend my heartfelt gratitude to all those who have contributed to the development of this plan, and I call upon every stakeholder and resident to join us in its implementation.

Together, we will build a brighter, more prosperous future for the Cayman Islands and all who reside within our shores.

Hon. Kenneth Bryan, MP
Minister for Tourism and Ports



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

Since our establishment, the mission of the Cayman Islands Department of Tourism has been to attract and retain visitors to the Cayman Islands by developing and implementing sustainable policies and initiatives in collaboration with all stakeholders for the benefit of our people.

The United Nations World Tourism Organisation (UNWTO) defines sustainable tourism as having five unique pillars: tourism policy and governance; economic performance, employment opportunities, poverty reduction and social inclusion, and sustainability of natural and cultural environment.

Global disruptions can affect the economic vulnerability of our tourism, and we have all seen firsthand how quickly our visitation landscape can change. To future-proof our tourism product we need to focus on achieving UNWTO's goals.

The population of the Cayman Islands has grown significantly since the last version of our plan. This growing population, and a growing demand from visitors to choose Cayman as their warm weather destination of choice, presents our islands with an opportunity to ensure that we not only manage tourism well, but that we also manage it sustainably.

This National Tourism plan provides us with a roadmap to maximise and spread the benefits of tourism development across our three Cayman Islands, but a map is only useful if you follow the directions.

To be successful, this plan requires the full partnership, participation and collaboration of all our tourism stakeholders including hoteliers, restaurants, retail, ground transportation, tours and attractions to challenge how we've done business in the past and change how we do business moving forward.

We look forward to working together with the public and private sector and all the residents of the Cayman Islands to find common ground to build a stronger, better and more resilient tourism industry.

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

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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 (2019-2023) 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 finalise 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.

With the incoming government administration post 2021 national elections, the NTP has been updated to reflect the Cayman Islands Government (CIG) tourism industry priorities as reflected in Strategic Policy Statement (SPS) 2022-2024 Broad Outcome 10 - Improving our Tourism Industry, as a Product and Economic Driver reflected below.

Improve Tourism

Develop a sustainable National Tourism Plan

- a. Better use of data by policy makers to ensure a sustainable approach
- b. Revamp the National Tourism Plan

Expand & diversify our domestic tourism product

- a. Promote and grow sports and event tourism
- b. Diversify tourism product with greater eco-tourism focus
- c. Expand into emerging and secondary tourism markets
- d. Market to high net-worth visitors
- e. Expand Cayman Airways routes
- f. Promote Cayman Brac and Little Cayman
- g. Re-imagine cruise tourism
- h. Increase and improve infrastructure in the eastern districts

Modernise our travel and transport infrastructure

- a. Establish a public/private partnership to construct a new general aviation terminal
- b. Improve public transport through legislative and infrastructure reforms
- c. Improve ports of entry to enhance visitor experience

Encourage strong Caymanian participation in the industry

- a. Expand and enhance the current national tourism education strategy
- b. Promote greater Caymanian ownership of tourism-related businesses

Enhance quality and service delivery standards

- a. Enact a public transport code of conduct
- b. Create and execute a national beautification plan

It should be noted that the Strategic Policy Statement (SPS 2024-2026) Broad Outcome Two - Specific Outcome 7 - Improve our tourism, as an industry, product and economic driver for our islands - includes the following projects to be implemented by DOT, MOTP, CAACI and MFSC.

1. Promote and grow sports and event tourism
2. Expand into emerging and secondary tourism markets
3. Market to high-net worth visitors
4. Promote Cayman Brac and Little Cayman
5. Expand Cayman Airways routes
6. Diversify tourism product with greater eco-tourism focus
7. Reimagine cruise tourism
8. Safety regulatory oversight of the aerodromes to a credible level meeting internationally mandated standards supports the growing tourism sector
9. Gather the necessary information so that informed decisions can be made about moving or expanding the cargo port before it reaches its full capacity in 7-10 years
10. Attract new film production business to the Islands, leveraging growing external interest, and providing valuable economic impact
11. Create a fund for small/micro tourism business development.

Focus on Visitor Impact Management & Sustainable Development

As reflected in Broad Outcome 5 of the SPS 2022-2024 - Supporting Climate Change Resilience and Sustainable Development - and the establishment of the Ministry of Sustainability and Climate Resiliency (MSCR) on 26 April 2021, sustainable development is a current priority and by extension, sustainable tourism development. Utilising a multi-stakeholder and forward-focused approach, MSCR aims to deliver on the CIG's commitment to achieve environmental, social, and economic balance, with a view to maximise benefits across all three areas of this triple bottom line.

MSCR is responsible for the strategic development of programmes and policies that shall be guided by decision-making processes, to ensure the Cayman Islands is best placed to solve current challenges and meet the needs of the present, without compromising future generations.

Concentrated actions to transform environmental systems and build capacity to anticipate climate risks and hazards, absorb shocks and stresses, reshape and transform development pathways in the longer term are of paramount concern. These key actions include, and are not limited to, the review and update of the Cayman Islands' Climate Change Policy. The aim of the policy review shall be to utilise a risk assessment framework as a means of agreeing and prioritising mitigation and adaptation actions to protect the environment in respect to: innovation, biodiversity, food security, green technology, renewable energy and the further expansion of protected areas.

(Source: <https://www.gov.ky/sustainability/>)

Another key MSCR initiative is the ongoing update of the National Energy Policy (NEP) 2017-2037. The NEP seeks to establish a framework with which all stakeholders can identify, which sets the stage for the achievement of the territory's energy goals and considers the imperative need to reduce greenhouse gas emissions, thereby lowering the carbon footprint of the Cayman Islands. It focuses on renewable energy, energy conservation methods and the promotion of energy efficiency.

Visitor management and sustainable development are critical components of the National Tourism Plan as the tourism industry continues to recover from the impacts resulting from the COVID-19 pandemic and visitation levels increase. 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 National Tourism 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. In 2019 a National Tourism Plan spanning 2019-2023 was released. However, in 2020 another tourism strategic Plan "RB5 - The Road back to 500k Air Arrivals" was developed in response to the COVID-19 pandemic when our borders were temporarily closed in March 2020 to mitigate its spread amongst the population. RB5 paved the way for gradual tourism recovery through a phased reopening of domestic business with island-wide health protocols and sanitation guidelines were developed to guide businesses along with other recovery tools including business continuity planning, financial and technical support and direct assistance to displaced tourism employees through a Tourism stipend programme.

With the full reopening of our borders in November 2021, the Cayman Islands Department of Tourism looked towards 2024 with optimism, but caution as the global travel industry recovered from the impact of COVID-19. While the COVID-19 vaccine has positively created a way forward for the industry's recovery, the emergence and spread of new variants 4 years on from the initial pandemic means that we still live with a degree of uncertainty in the industry.

Globally, we have continued to notice drastic changes in customer behaviour, with the significant reduction in booking windows making it more difficult to estimate arrivals. However, CIDOT has positioned itself to ensure the destination can continue to capitalise on the reopening of the Cayman Islands, combined with over two years of pent-up demand in the key source markets.

The Travel Foundation's Recovery Planning handbook states that the recovery of tourist destinations may pose the following challenges to various extents:

- Maintaining liquidity and viability of tourism businesses, preventing closures
- Knock-on effects throughout tourism supply chains
- Limiting the loss of jobs and skills from the tourism sector
- Ensuring businesses can adapt to social distancing requirements e.g. hygiene equipment, online booking and ordering systems
- Significant overall decline in tourist visits
- Weak consumer confidence and desire to travel across domestic and international markets
- How to maximise demand in the domestic market
- Fall in demand for specific market segments and products e.g. business travel, cruises
- Lack of air capacity due to suspension of air routes

RB5 was developed to address many of these challenges that are affecting the Cayman Islands through 14 short-to medium term strategies from the June 2020 to October 2020/2023 season and which were each linked to relevant NTP goals.

While the Cayman Islands are a popular cruise and stayover tourist destination, there are several issues that need to be addressed, apart from tourism recovery. 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.

SPS 2022-2024 Broad outcome 10 - 1b) is to Revamp the National Tourism Plan. As The Cayman Islands recovers from the COVID-19 pandemic in this NTP document, and future national tourism development plans, this will also include the need to focus on high value, low volume tourism linked to sustainable development plans, to increase its destination competitiveness and bolster the luxury brand propositioning to meet desired tourism goals and strategies.

At the current visitor levels that the Cayman Islands handles in a normal year, 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 including beach erosion, 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 updated sustainable National Tourism Plan aims to address those challenges.

The COVID-19 pandemic has resulted in additional economic, environmental, and socio-cultural impacts and changing source market requirements in the Cayman Islands and other tourist destinations globally. Some trends that have been observed to varying degrees include:

- Increased domestic and regional travel (avoiding long-haul travel)
- Last-minute bookings (due to sensitivity to changes in the pandemic situation)
- Reduction in discretionary leisure spend
- Preference for outdoor activities
- Preference for private accommodation rentals
- Preference for active holidays
- Preference for healthy and nutritious food
- Preference for holistic wellness products

In response, the CIG has decided to continue to enhance tourism sustainability efforts. This includes a focus on quality over quantity, targeting visitors that can make a greater contribution to the economy, resulting in a high quality of life for the population. This requires facilitating the education and upskilling of tourism industry partners and stakeholders to provide a more diverse range of high quality and high value experiences, product and services.

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	Safeguard Cultural & Natural Resources	Enhance Business Environment	Improve Connectivity & Infrastructure	Deliver Outstanding Visitor Experiences	Develop Tourism Workforce	Strengthen Partnerships
STRATEGIES	Sustainable Development Plans	Tourism Legislation & Regulations	Cayman Islands Cruise Strategy	Visitor Management Plan	Tourism Workforce Plan	Intra-governmental Coordination
	Sustainable Tourism Certification	Government Efficiencies & Service	Public Transport Strategy	Visitor Experience Development Grant Initiative	Tourism as a Career or Business	Public and Private Sector Collaboration
	Blue Flag Beach Certification	Diversify Accommodation	Cruise Tourism Infrastructure & Services	Credit Facility	Tourism Education	Inclusive Tourism Industry Zone Management
	Sustainable Construction & Design	Grow Source Market Arrivals	Cayman Brac Cruise Facility	Caymankind Ambassador Programme	Expanded PRIDE Training Programme	Public-Private Beach Management
	Visitor Codes of Conduct	Seasonality	ORIA Redevelopment Project	Vacation Rental Concierge Programme	Tour Guide Training and Certification	
	Enhanced Interpretation	Tourism Research & Information	Little Cayman Airport Redevelopment	Public Beach Vendors & Concessions	Tourism Public Sector Training & Development	
	Culture & Nature Experiences		Increase Airlift			
			Directional Signage			



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 optimise 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 organisational, 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.

Factors influencing Tourism Performance

The global travel industry is subject to a number of factors that influence its volatility. These include domestic and foreign policy issues, adverse weather, geopolitics, global economic constraints and pandemics. The charts below show the recovery time for the Cayman Islands Tourism Industry based on previous global threats/crises. The Cayman Islands is resilient and has an attractive tourism product that bounces back quickly despite the epidemics, pandemics, global terrorism threats and recessions experienced in our primary and secondary sources markets.

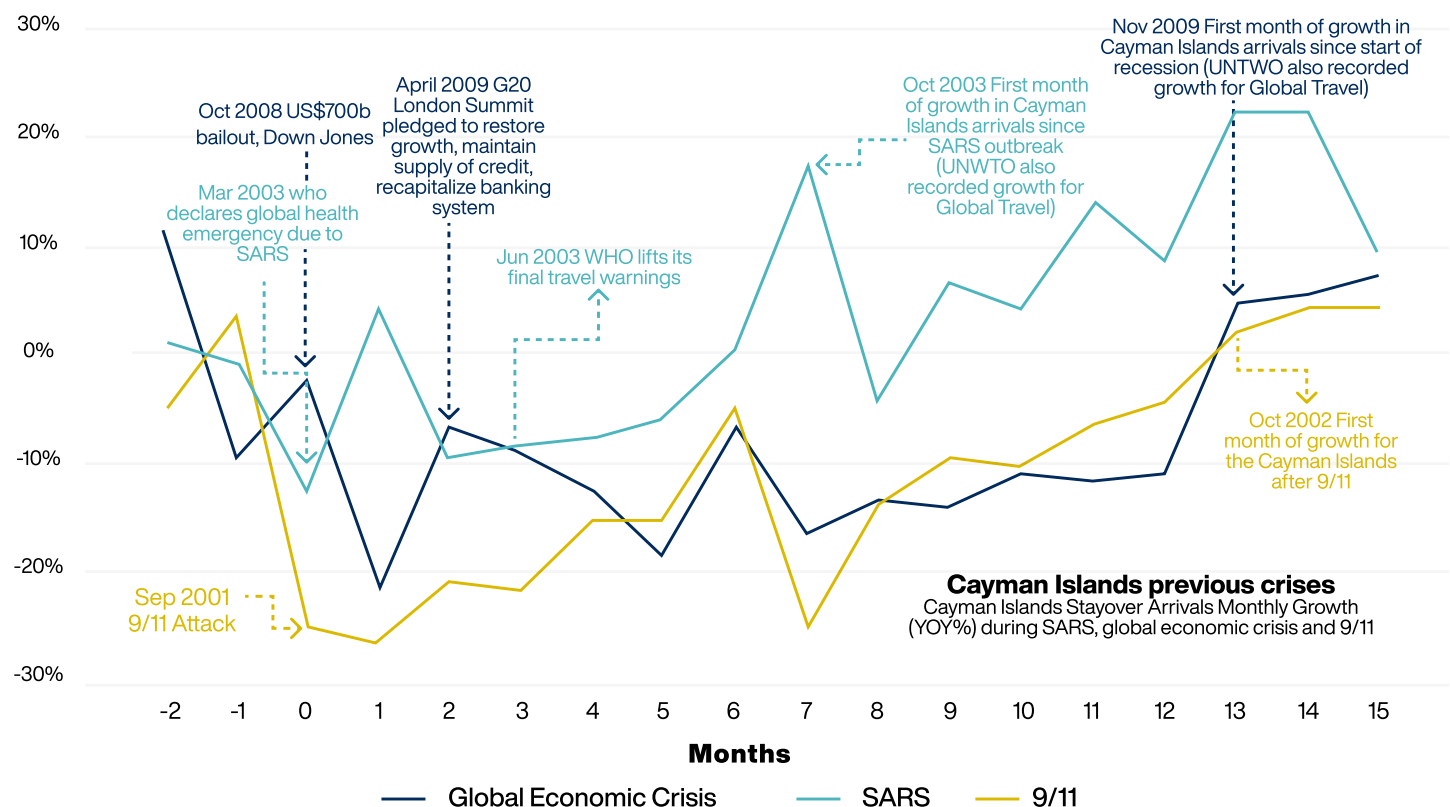


Fig 1: Comparison of Cayman Islands Tourism recovery time from 2008 Global Economic Crisis, SARS Global Health Emergency and 9/11 Terrorist Attacks

Return to Pre-crisis Level (Global Economic Crisis)

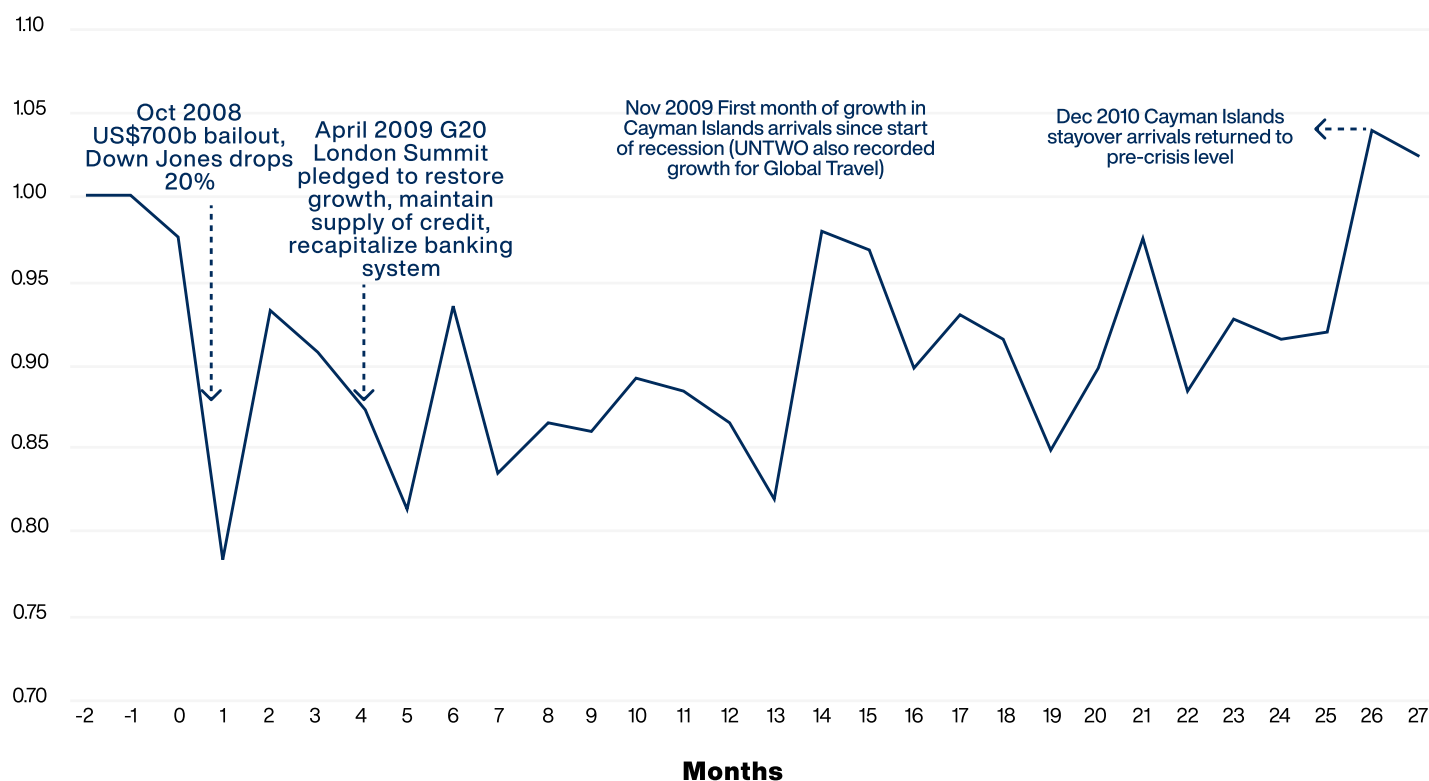


Fig 2: Cayman Islands Time to return to Pre-crisis Level from 2008 Global Economic Crisis

Return to Pre-crisis Level (9/11 and SARS)

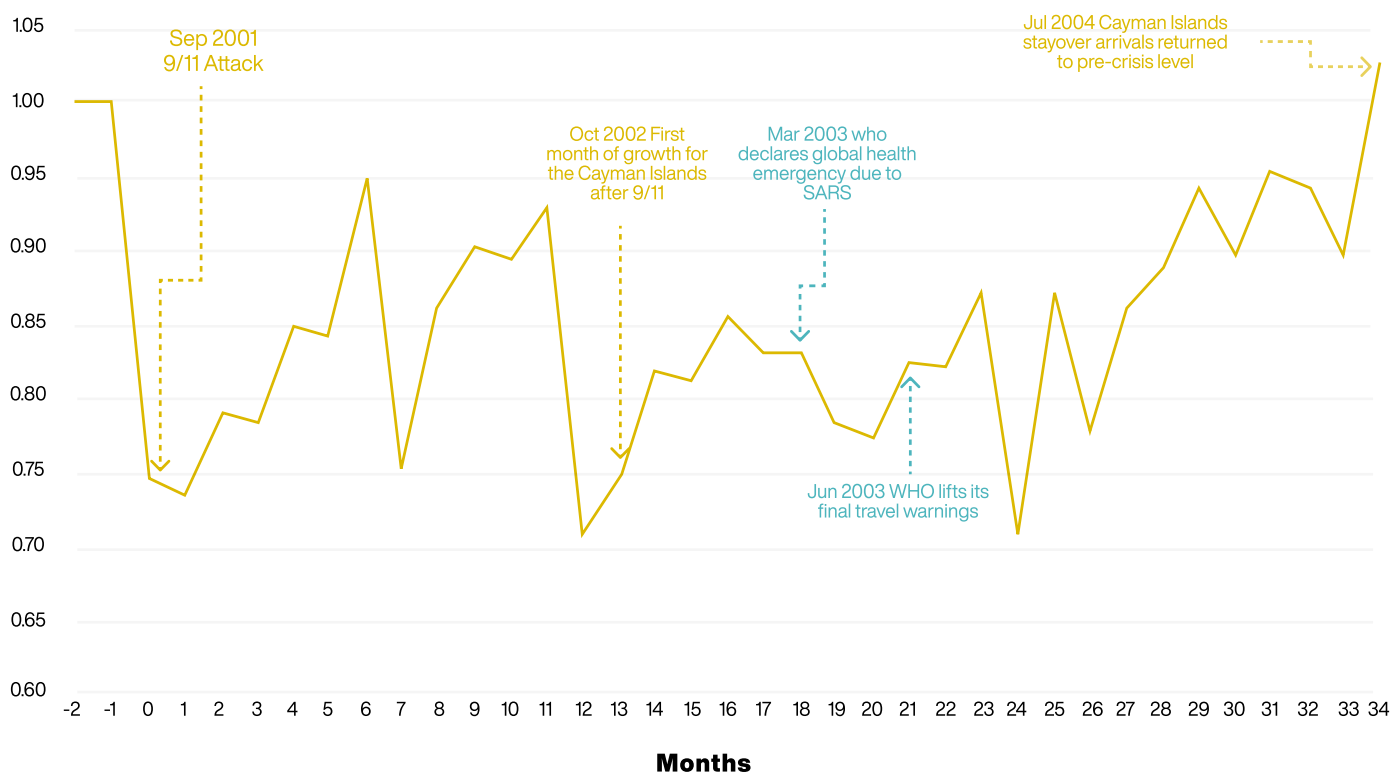


Fig 3: Cayman Islands Time to return to Pre-crisis Level from 9/11 and SARS

Resources have been identified and designed by the Director of Tourism, Rosa Harris with full responsibility for tourism strategic management for the Cayman Islands Tourism Sector. 23APRIL2024

According to the United Nations World Tourism Organisation (UNWTO) international tourism saw considerable recovery in 2023 to reach 87.9% of pre-pandemic levels. In 2023 the Americas witnessed a 90.4% recovery with strong demand from the United States, particularly for Caribbean destination's contributing to the region's arrival.

In 2023 as the last Caribbean destination to drop all visitation restrictions, the Cayman Islands witnessed an 85% recovery showing the resilience of the industry.

Tourism is an important part of the Cayman Islands economy as with 85% recovery, tourism accounted for a 4% growth in the economy of the Cayman Islands over the first 9-month of 2023.

In 2024, we see a commitment by the private sector to hospitality development with the addition of new rooms and the opening of VIDA Cayman Islands and Hotel Indigo. Achieving a major milestone in the Cayman Islands Room Stock of tourism accommodations of over 8000 rooms; a first in the history of the Cayman Islands.

The Cayman Islands Department of Tourism is committed to a managed tourism capacity starting at 500,000 and will develop systems to support and manage the flow of travel as well as enhance visitor experience.

Cayman Islands Tourism Trends & Statistics

Overnight Visitor Arrivals

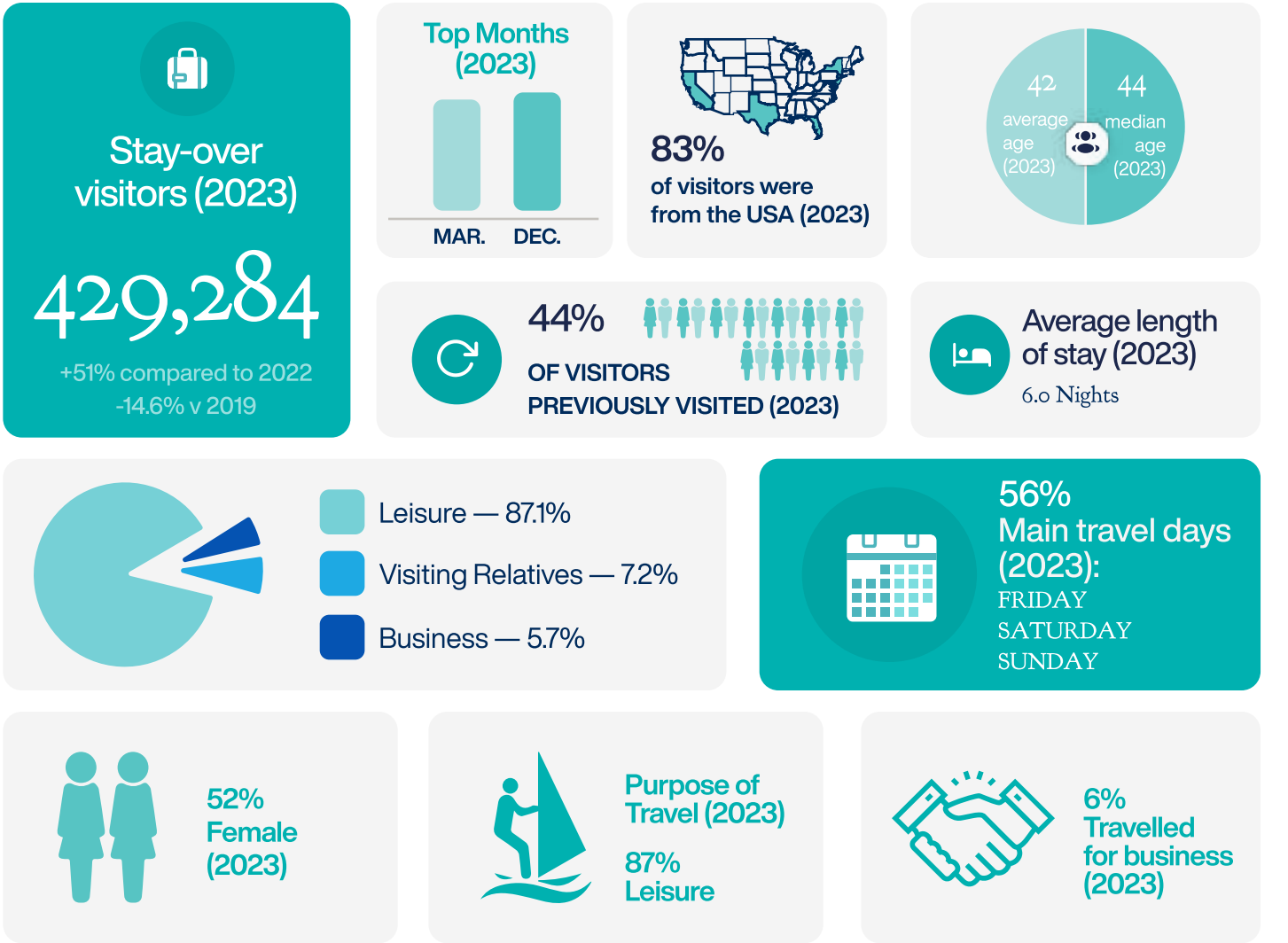
The Cayman Islands welcomed 502,739 stay-over visitors in 2019. This was a record number of visitors into the destination, and the first time that the Cayman Islands welcomed over 500,000 visitors. The destination also registered record arrivals for each of the last five years prior to 2019 and an annual growth of over 5% for three consecutive years, which is a first in recorded history. Stay-over visitation was a record high from 35 countries, including the USA, Canada, and the Republic of Ireland.

In 2020, the overnight visitation fell to 121,819 persons. Prior to the Cayman Islands Government restrictions on travel to the destination because of COVID-19 in March 2020, the record arrivals in 2019 continued in January and February 2020. The destination had the best start to a year, welcoming 93,558 overnight visitors between January and February.

In 2021, the total tourist visitation was 17,308 persons due to border closure because of COVID-19 pandemic. This represented an 86% decline when compared to 2020. Tourist visitation to the destination in 2021 was the lowest in recorded history. The top-performing months, November (2,022 visits) and December (7,637 visits), accounted for 56% of visitation in 2021. This performance followed the easing of border restrictions and the return of some airlines in November 2021. During 2021, 55.1% of visitation was from the US, the UK and Ireland accounted for 12.1%, and Canada was 10.4%.



CAYMAN ISLANDS STAY-OVER VISITORS IN 2023



Fast forward to 2023, the islands experienced a rejuvenation in stayover visitation, reaching a total of 429,284 persons, which is 85% of the level recorded in 2019. Visitation in 2023 was the third-highest visitation in a calendar year in recorded history. The United States continued to be the primary source of visitors, accounting for a substantial 82.8% of the total visitation, followed by Canada at 6.7%, and the UK and Ireland at 3.4%.

Chart: Overnight Visitor Arrivals 2000-2023
Source: Cayman Islands Customs and Border Control

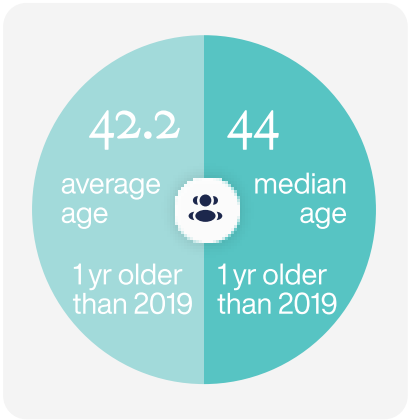
Overnight Visitor Demographics

Results from the most recent visitor exit survey demonstrate that the Cayman Islands is attracting a very affluent segment of international travellers, with more than 40% 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.

Household Income of Overnight Visitor Arrivals (USD)



Age of Overnight Visitors to the Cayman Islands (2023)



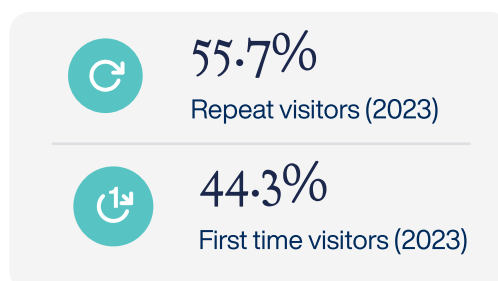
The average age of stay-over visitors in 2019 was 41.1 years old, in 2022 the average age was 42.1 years old and the median age was 44 years.

¹U.S. Census data

Age Group	2019	2020	2021	2022	2023
0-18	86,543	15,970	2,111	45,812	70,702
19-35	99,664	22,937	4,389	55,629	81,528
36-49	127,098	27,990	3,156	68,311	104,212
50-60	105,121	27,832	3,526	59,948	88,516
Over 60	84,313	27,090	4,126	54,574	84,326
Total	502,739	121,819	17,308	284,274	429,284

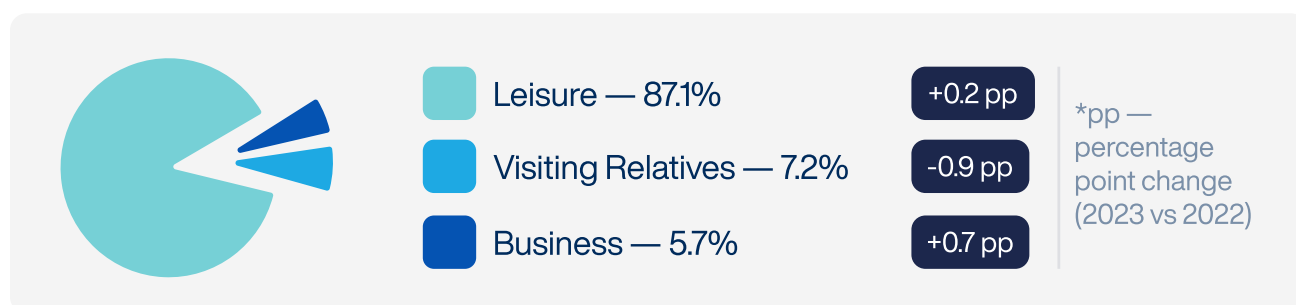
Source: Cayman Islands Customs and Border Control

In 2023, nearly half of the visitors to the Cayman Islands, 44.3% to be precise, were returning guests, showcasing a level of loyalty to the destination. On the other hand, the islands attracted a new audience as well, with 55.7% of visitors experiencing the Cayman Islands for the first time. When compared to the data from 2019, there was a slight decrease of 0.1 percentage points in repeat visitation during 2023, indicating a marginally stronger attraction of new visitors.



Leisure travelers formed the bulk of stayover visitation, comprising 87.1% of the total. They were followed by individuals visiting relatives, who accounted for 7.2%, and business travelers, who made up 5.7% of the stayover visitation.

Reasons for visit - 2023 vs 2022



Persons visiting the destination stayed on average 6 nights in 2023. This was 2 nights lower than the 8 nights recorded in 2022 and a return to 2019 level.



Average length of stay (2023)

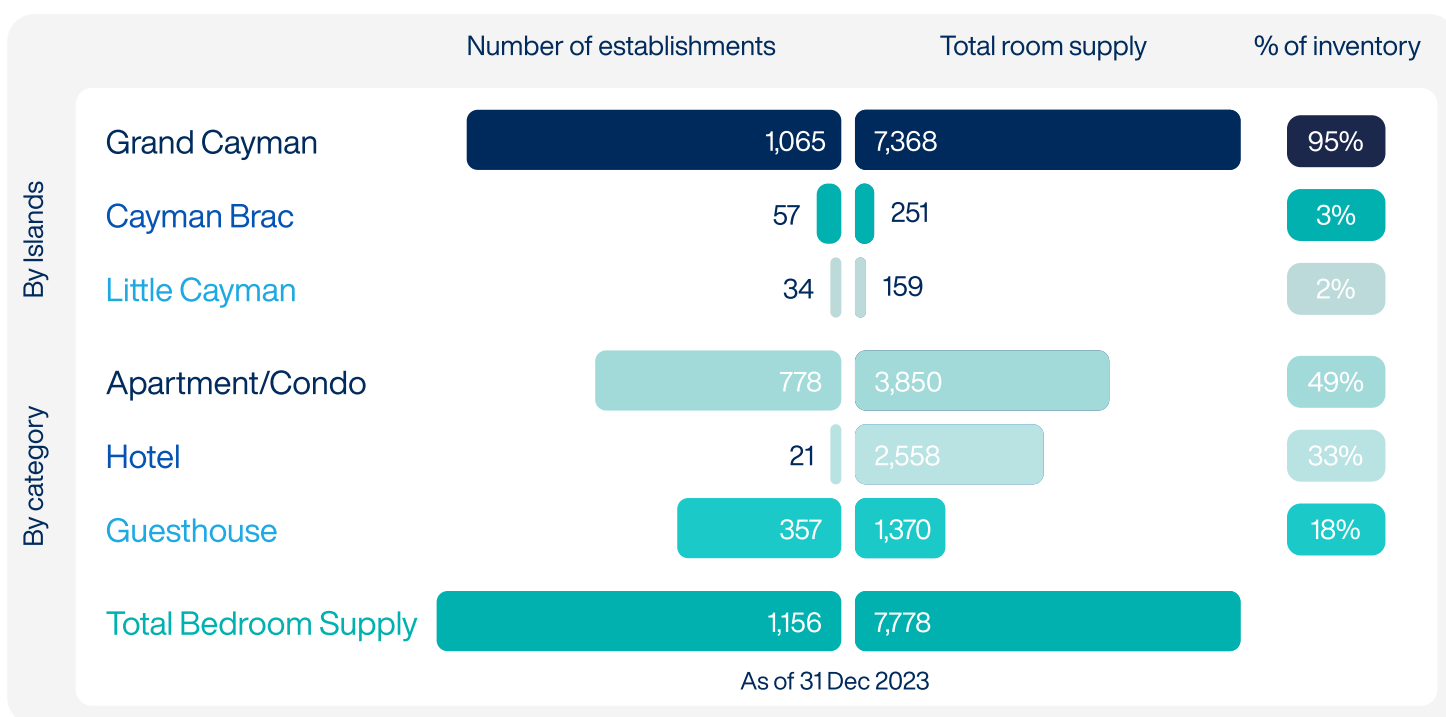
6.0 Nights

2 Nights lower than
2022

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 33/67 between hotels vs. condos and villas/guest houses (Dec 2023). The composition and geographic distribution of the room supply presents a range of potential challenges and opportunities, discussed in more detail below. The total room stock was 7,778 bedrooms in 1,156 tourism establishments.

Of the total bedroom supply, 7,368 (95%) was in Grand Cayman, 3% in Cayman Brac and 2% in Little Cayman.

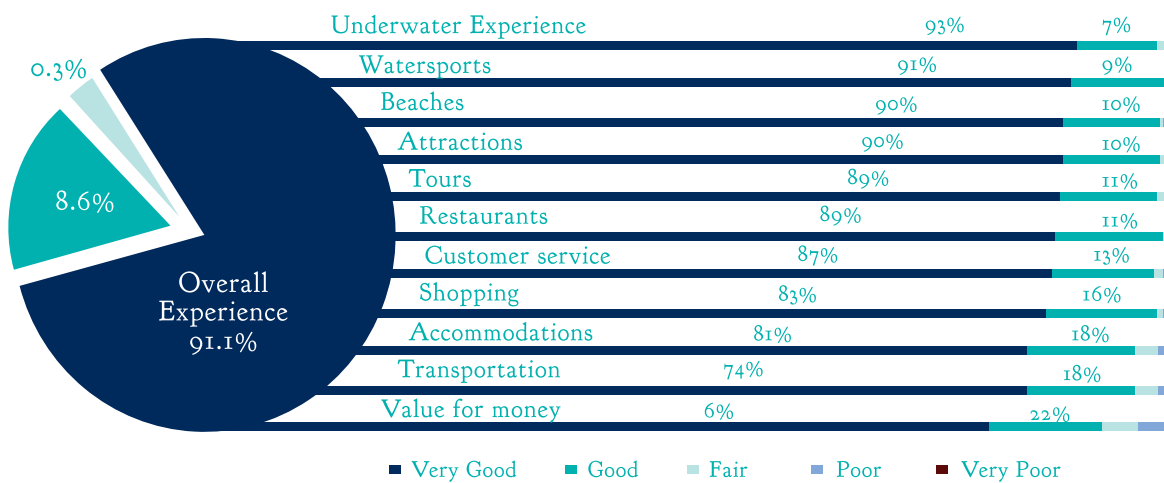


Bedrooms by District

District	Hotel	Apartment	Guest House	Total
West Bay	495	823	179	1,497
North Side	79	304	485	868
George Town	1,531	2,244	283	4,058
East End	301	239	134	674
Bodden Town	0	113	157	270
Cayman Brac	85	64	99	248
Little Cayman	67	48	48	163
Total	2,558	3,835	1,385	7,778

Visitor Satisfaction

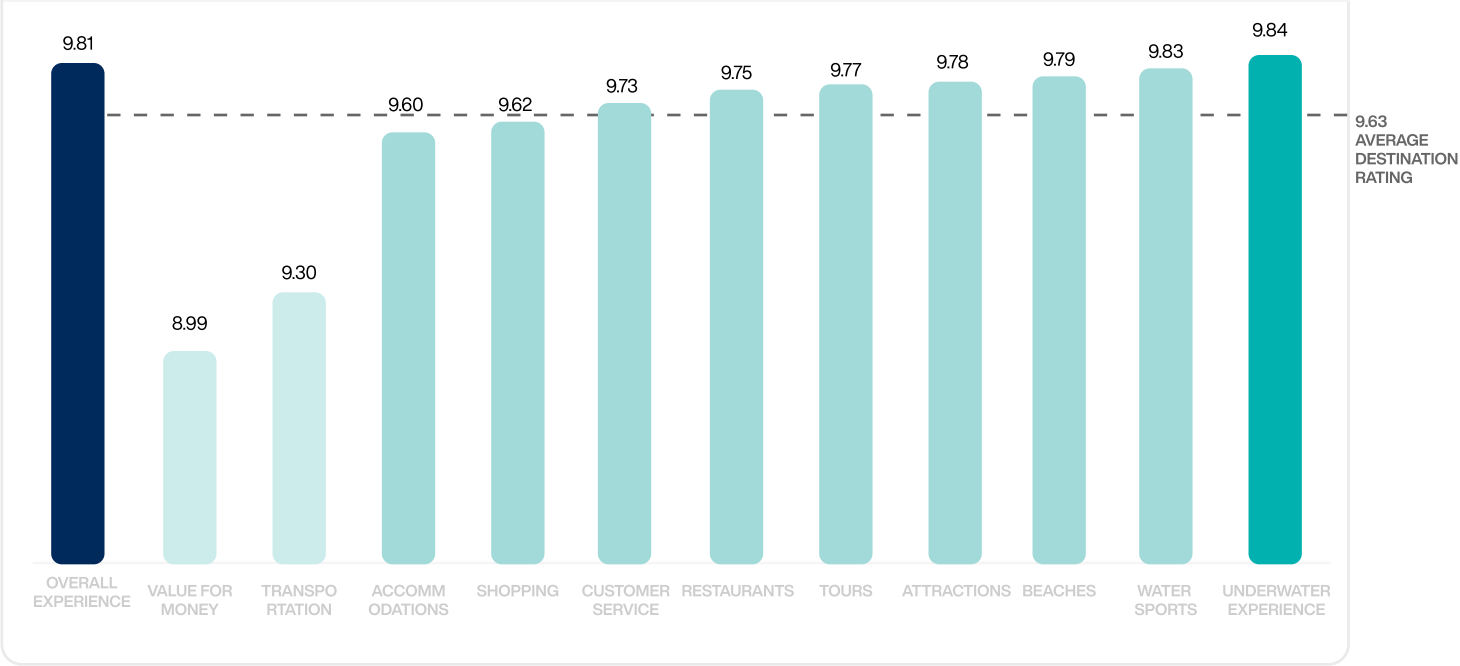
The key metric in gauging levels of satisfaction with the Cayman Islands visitor experience are the ratings of various components of that experience highlighted in the annual visitor exit survey. As seen in the chart below, in 2019, stay-over visitors rated the destination on various aspects of their experience while in the destination. 99.7% of respondents stated that their overall experience was “Very Good” or “Good”. Underwater experience received the highest mean score (9.84 out of 10). 93% of respondents rated their underwater experience as “Very Good” and 7% thought it was “Good”. The three lowest-rated experiences were Value for Money, Transportation and Accommodations. Each of these areas are a primary focus of the NTP.



The average rating for the destination based on the selected experiences was 9.63/10. Seven out of the 11 experiences were above the average destination rating. Value for Money, Transportation, Accommodations, and shopping were below the average destination rating of 9.63.

² Score is based on a 0 (Poor) to 10 (Very good) rating

Stay - Over Visitors Rating of the Destination, 2019





**CRUISE
PASSENGERS
(2023)**

1,270,981



SHIP CALLS

407



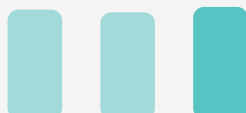
**Main travel days
(2023):**

WEDNESDAY
THURSDAY



**41% USED A
CARNIVAL
CORPORATION
SHIP (2023)**

Top Months



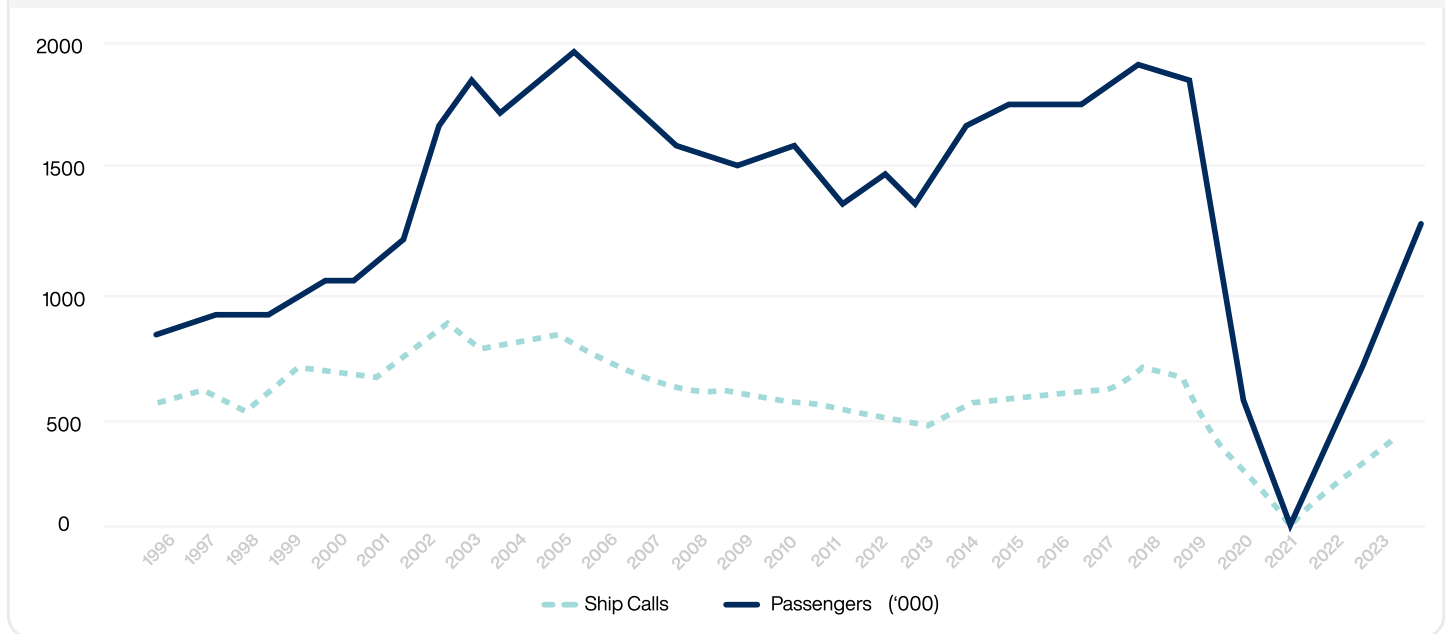
JAN. MAR. DEC.

**63% OF VISITORS
SURVEYED REPORTED (2019)**

HHI OVER \$100K
(HOUSEHOLD INCOME)

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 1.8 million in 2019, the number of cruise ship calls has increased by only 13.8%, from 528 to 601. There were no cruise calls to the destination from 16 March 2020 until cruise ship calls resumed in March 2022.

Cruise Ship Passengers Arrivals and Calls (1996 - 2023)



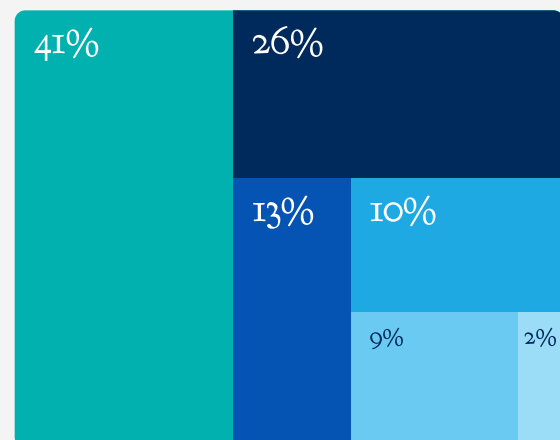
Source: Cayman Islands Government Compendium of Statistics and Port Authority of the Cayman Islands.

Cruise calls resumed in March 2022 after a pause on cruise tourism since March 2020 due to the COVID-19 pandemic. The Cayman Islands welcomed 743,394 cruise passengers between March and December 2022. Passenger arrivals in 2022 was 40.1% of pre-pandemic levels.

In 2023, the destination received 1,270,981 cruise passengers. This figure represents a decrease of 560,030 individuals, or 30.6%, compared to the cruise passenger arrivals during the same period in 2019.

Cruise passenger arrivals by cruise corporation (2023)

- Carnival Corporation
- Royal Caribbean
- Disney Cruise Lines
- MSC Cruises
- Norwegian Cruise Line
- Other



Source: Cayman Islands Government Compendium of Statistics and Port Authority of the Cayman Islands.

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 impact 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 added value

Cruise Tourism Industry P.E.S.T.L.E Analysis

Political	• Ongoing political debate on cruise tourism in Cayman Islands • People-led decision in 2020: No cruise berthing, continuation under current administration elected in 2021, and possibility of change depending on 2025 general election outcome • Focus on delivering quality experiences over quantity of cruise guests • Visitor Experience Development Grant Initiative (VEDGI) which offers financial and business development support for activities which expand the diversity of tourism experiences available • Productive relationship between Cayman Islands Government and cruise lines • Cruise lines highly susceptible to geopolitics and government policies
Economic	• Economic conditions influence businesses in all sectors • Current government administration made strategic shift towards quality over quantity in cruise tourism • Factors influencing cruise tourism bottom line: number and frequency of cruise ship calls, size and capacity of cruise ships, cruise passenger spend on shore • Government reaffirmed support for cruise tourism with a strategic focus on: • the development of highly skilled Caymanian workforce • the growth of tourism businesses and job opportunities • investing in national attractions and cruise port infrastructure • Cruise industry has significant economic multiplier effect with benefits to various businesses and residents and stimulates economic growth and prosperity • Global economic environment has an impact on pricing and consumer spending • Cruise sector buoyed by value for money proposition in current rising cost environment
Social	• Social factors significantly influence Cayman Islands tourism – this key economic pillar has a daily impact on residents • Tourism offers diverse employment opportunities which is essential for authentic products and services. • Tourism offers a range of career opportunities at all levels; there is a need for continued education and promotion of these opportunities to attract talent • Imminent minimum wage review critical for livable wages

Cruise Tourism Industry P.E.S.T.L.E Analysis

Social	• Cruise tourism activity is largely centralised on Grand Cayman which poses challenges with congestion in George Town and Seven Mile Beach • George Town Revitalisation Project includes pedestrianisation designed to ease congestion • Investment in expanding and diversifying tourism experiences encourages activity beyond saturated areas • Development of services and infrastructure in local communities supports community tourism and employment opportunities • Developing community tourism, showcasing local culture, and encouraging the growth of heritage tourism has the potential to positively shift perceptions of cruise industry within local community
Technological	• Technology advances rapidly, disrupting industries • Travel and tourism industry has experienced sweeping transformation • Technological changes impact cruise tourism end to end • B2B and B2C booking platforms • Cruise guest's use of technology for research and sharing experiences • Border control officers managing immigration process electronically • Access to internet connectivity/Wi-Fi zones • Introduction of liquified natural gas-powered cruise ships • Increased influence of technological changes before, during, and after cruise vacation
Legal	• Governmental laws significantly impact cruise tourism industry • Legislation and regulations around the environment underpin cruise ship operations • Proposed marine protected and port anchorage area legislation in Cayman Islands is a possible conflict with the optimal operation of cruise ships in primary port area • Long-standing prohibition on gambling and alcohol sales affects cruise lines' revenue • Local laws influence disembarkation, immigration clearance, and head tax scheme for cruise guests • Legislation in Cayman Islands requires provisions for safety of all involved in delivering experiences • Designating jobs as eligible for Caymanians only is a consideration for lawmakers in cruise tourism industry
Environmental	• Pollution from cruise ships and passengers a significant environmental factor • Cruise industry making technological advances for environmental responsibility • Reduced fossil fuel usage • Introduction of LNG-powered cruise ships • The Cayman Islands needs a mitigation plan for marine, air, and noise pollution • Cruise tourism sector viability and sustainability should be supported by a national waste management programme



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. **Localised Destination Management & Marketing** – There are no local destination management organisations (DMOs), except for the Cayman Islands Tourism Association and Sister Islands Tourism Association, 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 and this is being implemented in 2024. Other opportunities to enhance the visitor experience, including the introduction of beach facilities are being explored.
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.
5. **Reimagine Cruise Tourism** – as stated in SPS 2024-2026 Broad Outcome 2 - Specific Outcome 7.7. The development of a new cruise tourism strategy is a priority for CIG. This entails development of a new vision for sustainable cruise tourism with 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. The Cayman Islands cruise strategy has been developed by the Ministry of Tourism & Ports as a draft. This process was informed through consultation and input from industry stakeholder partners.

Public Infrastructure

6. **Cruise Sector Management and Benefits** – The Cayman Islands' cruise strategy aims to bolster the sustainability and development of its cruise tourism sector through a multifaceted approach. This entails broadening the mandate and governance of the Land and Sea Co-op to empower private sector involvement, diversifying visitor experiences beyond traditional attractions like Seven Mile Beach, and implementing strategic policies to foster industry growth while addressing environmental and community concerns.

Collaboration among stakeholders, comprehensive assessment of cruise assets, support for small businesses, and adherence to core values such as collaboration, innovation, and authenticity are pivotal aspects of the strategy. By prioritising these efforts, the Cayman Islands seek to optimise cruise ship visits and expand on the islands that benefit, stimulate economic prosperity, and deliver exceptional, culturally-rich experiences for visitors while safeguarding the destination's natural and cultural resources.

The CTO Sustainable Tourism Policy Development Framework (2020) highlights three aspects of cruise tourism that Caribbean destinations should address:

- i. **Cruise Ship Capacity:** Considerations must go into the capacity demands placed on destinations by the new generation of mega cruise ships in the Caribbean. In this regard, specific attention must be placed on cruise ship infrastructure and the need to address crowding, traffic and flow management issues as well as carrying capacity limits that may occur when cruise ships are in port.
- ii. **Cruise Passenger Spending:** Focus must be placed on accessing the purchasing power of cruise passengers and crew to the greatest extent possible.
- iii. **Marine Pollution:** The illegal dumping and discharge of waste in Caribbean waters by cruise ships need to be addressed and monitored. This has caused further environmental concerns relating to compliance with the Convention for the Prevention of Pollution from Ships (MARPOL Convention) on Marine Pollution, and the need to ensure that systems are in place to ensure the prevention of waste being dumped by cruise ship (and other marine transport) in the region's marine environment.

Further, the draft Cayman Islands Cruise Tourism Strategy (2024) highlights the following additional public infrastructure aspect to be addressed:

- i. **Technological Innovations:** The travel and tourism industry has seen sweeping transformation. In cruise tourism, technological changes have impacted the sector end to end. The destination must explore opportunities for significant technological upgrades in onshore services as well as port infrastructure to improve the visitor experience.
-
7. **Public Transportation** – Governments must work on aspects such as road safety, public transport and road conditions with considerations for building in Climate Variability and Climate Change (CVC) adaptation measures. 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. 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. Developing a more efficient public transport system is part of the need to “improve infrastructure in the Eastern Districts” (SPS 2024-2026 Broad Outcome 3 – 1.6)
 8. **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. The latest Airport Redevelopment plan will examine issues to be addressed at all three airports in the Cayman Islands.

9. **Sewage System beyond Seven Mile Beach** – The Department of Environment identified the lack of a sewage 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.
10. **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.
11. **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. The CIG is working on an energy policy which will address renewable energy issues and opportunities.
12. **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.
13. **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 is currently seeking to address congestion issues through the George Town Revitalisation Project (GTRP). GTRP is using better traffic flow designs, building wider roads, implementing pedestrian-friendly pathways, and improving public transportation systems. Additionally, GTRP is prioritising mixed-use developments to reduce need for commutes thereby reducing traffic congestion. GTRP is also optimising parking availability through parking management initiatives. The Cayman Islands George Town Revitalisation Project is working towards mitigating congestion issues in the area and creating a more efficient, vibrant, walkable, and sustainable urban environment.

14. **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. While there are some areas with designated bike lanes or shared pathways, particularly in tourist areas or along certain roads, this existing bike lane system is not extensive. These lanes are often separate from the main road and designated for cyclists, pedestrians, and sometimes other non-motorised vehicles like scooters. The current and ongoing efforts to improve cycling infrastructure and promote biking will hopefully sufficiently address this issue as many lower wage workers use bicycles as a primary mode of transport and some local residents, tourists and cyclists also use bicycles as a form of recreation, exercise or for training.

Attractions & Events

15. **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.
16. **Interpretation and Codes of Conduct at Wildlife Encounter Attractions** – Cayman’s main attractions – the Cayman Turtle Centre, Stingray City and Dolphin Discovery experiences – 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.
17. **Tourism Attractions in the East are underutilised** – The Cayman Islands National Attractions Authority (CINAA / formerly Tourism Attraction Board (TAB) – 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.
18. **Heritage Assets, Museums and Public Parks are underutilised** – 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 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.
19. **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 operationalisation of the National Sports Centre can assist in sports tourism development. SPS 2022-2024 Broad Outcomes 10-2 a) Promote and grow sports and events tourism, 2 b), Diversify tourism product with greater eco-tourism focus and 2 f) Promote Cayman Brac and Little Cayman provide further direction.

Accommodations

20. **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 potentially the collection of accommodation taxes.
21. **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 discussing the finalisation of a National Development Plan which once completed can also guide tourism development.

Services & Retail

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 Specialised 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 National Trust and attraction level. The National Trust also introduced a programme to train young tour guides.
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 i immersive experiences that provide visitors the opportunity to interact with and meet Caymanians. Incentives to encourage the offering of these types of experiences will be offered in the future. e.g. Visitor Experience Development Grant Initiative (VEDGI)

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.). Organisations including the Department of Tourism, UCCI, School of Hospitality Studies (SHS), Workforce Opportunities and Residency Cayman (WORC), Connect by Nova and Inspire Cayman have partnered to provide technical, vocational and soft skills training for tourism industry workers/potential tourism industry workers through various programmes.
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 organisational 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. CIG as well as private sector companies have been organising periodic hospitality sector job fairs to highlight the range of available positions and the required skill sets.
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 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.
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. Physical infrastructure advancements should address this issue.
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.

Significant erosion is taking place due to wave action, climate change and close structures to the coastal boundary. All public beaches are now managed through the Public Lands Commission and the beach vendor policy proposes to manage vendors and beach goer balance.

34. **Maintaining and Celebrating Cayman Culture** – Caymanians are proud of their cultural heritage and worry that tourism and commercialisation 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** – Recognising 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. SPS 2022-2024 Broad Outcome 10-2 e) speaks to “Expand Cayman Airways routes”. Post COVID-19 the destination continues to expand business development opportunities to provide a year-round air-seat capacity that will support the flattening of seasonality.
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 evaluated based on the traditional TSA modelling and Oxford Model.
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 is part of an overall cruise sector strategy which is linked to SPS 2024-2026 Broad Outcome 2 - 7.7, “Reimagine cruise tourism”. The popularity of the Cayman Islands and its geographic positioning in the northwest Caribbean, relative to other destinations within cruise itineraries, means that many cruise ships from Caribbean-based cruise lines tend to desire a call to the destination during the same days of the week, during the same months of the year. The high-volume demand on cruise ship call required active itinerary management. This results in knock on pressures from peak visitation days that leads to a strong need for capacity and visitor flow management within the destination. Through the coordinated implementation of strategies such as the advanced planning and coordination of cruise line bookings, the use of legal and regulatory measures that will guide the number of ships or

passengers in port, and incentivising off-peak visits, the destination will enhance the management of cruise calls and ultimately foster a sustainable and enjoyable destination for both visitors and residents.

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. **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. Increasing markets throughout the year, whereby the Cayman Islands diversifies its visitor profile, will support flattening of seasonality impacts.
41. **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.
42. **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.
43. **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. Broad Outcome 10 (2 f) focuses on "Promote Cayman Brac and Little Cayman" which combined with more airlift to and accommodation options in the Sister Islands, will increase domestic multi-island vacation opportunities.
44. **Cayman Brac and Eastern Districts Lack Their Own Identity** – Without a localised DMO or other mechanisms to bring tourism stakeholders together to promote the East and Cayman Brac, both destinations lack their own identity. SPS 2022-2024 Broad Outcome 10 (2 f) speaks to promoting Cayman Brac and Little Cayman which will promote their unique sense of place.

Visitor Experience

45. **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), and the proposed Airport Redevelopment Plan, this issue is being addressed by the Cayman Islands Airport Authority (CIAA) who have engaged an agency to manage its scheduling of flight into and out of the destination. The goal is to de-peak the arrivals during the hours of 11am to 3pm. Additionally, CIAA is working with the Cayman Islands Department of Tourism to attract long haul carriers in order to attain more global aviation seats into the destination outside of peak hours. This strategy to grow visitation and diversify markets will support an enhanced visitor experience and while actively winning new business for the Cayman Islands.
46. **Overnight Visitors Lose the Feeling of the Cayman Islands offering a premium experience when Cruise Ship Passengers Arrive** – The Cayman Islands, a multi-island destination, is being promoted as an elevated casual luxury destination, which offers a premium hassle-free experience that is of the highest standard in the Caribbean which 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 on Grand Cayman – the only island of the three that currently engages in cruise tourism.

Predominately the tourism activity, economic and flow, is being captured by the western districts of Grand Cayman. As a result, many key 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 underutilised.

Each island, Grand Cayman, Cayman Brac, and Little Cayman, brings its own unique charm and attractions, enhancing the overall experience. The sister islands, Cayman Brac and Little Cayman, have a smaller footprint than Grand Cayman and so these islands offer a sense of tranquillity with their serene landscapes, secluded beaches, vibrant culture, and intimate atmosphere. Cayman Brac and Little Cayman can provide visitors with an opportunity to discover more of the destination and enjoy notable variety to their Cayman Islands experience.

Efforts need to be made to strike a better balance, promote more diverse visitor experiences, encourage multi-island exploration, generate economic benefits for residents of all three islands, and enhance the destination’s competitive position.

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 capitalise 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 organisation. 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 vision of the Draft National Climate Change Policy (<https://www.gov.ky/climatechangepolicy>) is “A climate-resilient Cayman Islands that promotes and sustains vibrant communities, a thriving natural environment and a robust economy, where people can live their best lives now and for future generations.” Its goals are:

- a. Reduce The Cayman Islands’ vulnerability and enhance our resiliency to climate change (adaptation).
- b. Promote sustainable low and zero carbon economic activity (mitigation).
- c. Establish a governance framework for climate action that is future-focused, fair to all, accountable and transparent.

The policy incorporates the following strategy groups:

- Strategies Supporting Interwoven Equity
- Strategies Supporting a Robust Economy
- Strategies Supporting a Liveable Built Environment
- Strategies Supporting Healthy & Resilient Communities
- Strategies Supporting Resilient Infrastructure Networks
- Strategies Supporting Harmony With nature
- Strategies Supporting Integration and Collaboration

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 Plan.
- 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.

It should be noted that the Cayman Islands Government has strategically partnered with the Commonwealth Enterprise and Investment Council to establish a fund that will focus on business and technologies that deliver climate mitigation and adaptation. The fund will “enable financial support for green private sector enterprises and initiatives within the Cayman Islands, contributing to our cleaner, greener future and facilitating further protection of our pristine natural assets”

Overtourism

With the growing number of visitor arrivals to the region, attention should be given to the demand particularly during peak periods, for the use of key natural and cultural attractions and sites. Carrying capacity studies must factor as a resource management and monitoring strategy to avoid “Overtourism” and the eventual degradation of resources, and also to support responsible use. (Ref: CTO Sustainable Tourism Policy Development Framework 2020)

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 Optimisation 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 optimising 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>).
- The Cayman Islands Coast Guard has a duty, “in the event of a spill of oil or other hazardous chemical in the territorial sea, provide assistance to the department responsible for the environment by providing maritime transportation to, and collecting samples of the oil or chemical for assessment by, that department” Ref: [Cayman Islands Coast Guard Act, 2021 \(gov.ky\)](#)

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 Sand 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.

Additionally, the Wildlife Interaction Zones (WIZ), requires adherence to specific guidelines regarding the marine life. Ref: [WIZ-NS-zones-2018-maps.pdf \(doe.ky\)](#)

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. It is anticipated that it will be updated to guide the development of the Cayman Islands in the future.



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 prioritise 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.

Cayman Brac Vision Statement:

“To sustainably grow and diversify the Island's tourism industry in a manner that preserves and celebrates its cultural heritage, protects its 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 St

“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 underutilised. 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 finalised.

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

“Around the world, in countries at all development levels, many millions of jobs and businesses are dependent on a strong and thriving tourism sector. Tourism has also been a driving force in protecting natural and cultural heritage, preserving them for future generations to enjoy”

Mr. Zurab Pololikashvili, Secretary General, UNWTO

The CIG SPS 2022-2024 Broad Outcome 10-2. (b) states “Diversify tourism product with greater ecotourism focus”. The International Ecotourism Society (TIES), defines ecotourism as “responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education” of staff and guests. “Ecotourism is about uniting conservation, communities, and sustainable travel. This means that those who implement, participate in and market ecotourism activities should adopt the following ecotourism principles:

- Minimise physical, social, behavioral, and psychological impacts.
- Build environmental and cultural awareness and respect.
- Provide positive experiences for both visitors and hosts.
- Provide direct financial benefits for conservation.
- Generate financial benefits for both local people and private industry.
- Deliver memorable interpretative experiences to visitors that help raise sensitivity to host countries’ political, environmental, and social climates.
- Design, construct and operate low-impact facilities.

(Ref: TIES, 2015)

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. These opportunities can stimulate job creation and entrepreneurship opportunities. 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.

Cultural Heritage & Authenticity: Culture and heritage are essential facets of a destination's authenticity and thus uniqueness. Cultural heritage assets as part of the tourism product allows differentiation and enhances the diversity of the tourism product offerings. However, it is important that these assets are sustainably managed and conserved.

In order that the authenticity and integrity of cultural heritage assets are preserved, measures should be in place to ensure responsible use. In the case of tangible heritage assets, these can include implementing standards for site management, establishing carrying capacity limits, developing rules/guidelines for visitors, and having user-generated fees instated if none exists, which can be used for further upkeep of the site(s).

In the case of intangible heritage assets such as diverse art forms and traditions, it is important to support skills preservation and enhancement, without compromising originality and integrity. Relevant issues include staged authenticity/cultural misrepresentation, which has implications for the dilution and/or modification of the culture. Equally relevant is the question of cultural appropriation where cultural elements are copied and used outside of their original cultural context particularly for profit. To mitigate these potential pitfalls, strategies for safeguarding and promoting cultural heritage need to be complementary. (Ref: CTO Sustainable Tourism Policy Development Framework 2020)

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 terrestrial and marine wildlife and the opportunity for visitors to encounter these creatures up close as part of our ecotourism experiences. 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. SPS 2022-2024 Broad Outcome 10-2 b) speaks to "Diversify the tourism product with greater eco-tourism focus" which will be impacted by how wildlife encounters are regulated.

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 with a new sustainable tourism certification scheme (e.g. Travelife) initially focusing on tourist accommodations. This will be a part of a Sustainability Roadmap for the Cayman Islands which will require stakeholder buy-in and participation on a voluntary basis. Ref: <https://travelifestaybetter.com/>

1.5 Obtain Blue Flag certification for prioritised Cayman beaches

The Blue Flag programme is one of the most widely recognised 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. Sea water quality and beach erosion would need to be addressed as these issues will impact the attainment of Blue Flag Certification for beaches.

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 CIG SPS 2022-2024 Broad Outcome 10-4. (b) states “Promote greater Caymanian ownership of tourism-related industries”. 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.

The Cayman Islands Government has put measures in place to assist locally owned business to stay afloat during the COVID-19 pandemic including a government-guaranteed loan facility, water sports business grants, access to technical support from the Centre for Business Development and a tourism stipend programme for displaced tourism employees. A tourism business incubator programme would provide ongoing technical, mentorship and financial support to promote greater Caymanian ownership of tourism-related businesses. This could support the introduction of a Visitor Experience Development Grant Initiative (VEDGI) that will provide some financial support for Caymanians desirous of offering authentic visitor experiences that are in keeping with current and foreseeable demand and in alignment with the destination brand and positioning.

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 soon.

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

The CIG SPS 2022-2024 Broad Outcome 10-2. (c) states:

- (c) Expand into emerging and secondary tourism markets
- (d) Market to high-net-worth visitors
- (e) Expand Cayman Airways routes
- (f) Promote Cayman Brac and Little Cayman

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. In the recovery of stayover tourism coming out of the COVID-19 pandemic, our priority is on quality over quantity to refocus our target of high-net worth visitors. There is an opportunity to expand these existing source markets and work to develop new ones and to develop more Cayman Airways routes. 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 prioritise 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. This can provide greater leverage for the promotion of Cayman Brac and Little Cayman as lesser-known destinations that offer serene settings and unique cultural and natural heritage experiences plus a glimpse of what traditional life in the Cayman Islands was like.

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

This strategy also supports the achievement of SPS Broad Outcome 10 - 4 (b) Promote greater Caymanian ownership of tourism-related businesses. 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 Caymanian owned 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

This strategy supports SPS Broad Outcome 10 - 1(a) - Better use of data by policy makers to ensure a sustainable approach. 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, product development and sustainability initiatives. Monitoring of key data and trends is also important for adapting sustainable destination management approaches towards achieving targeted outcomes based on current and foreseeable circumstances.

As the COVID-19 pandemic has shown, there is also a need for futureproofing to ensure that the tourism industry remains as prepared and resilient as possible even when it is difficult to predict a major globally impactful event.

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 modernisation 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 modernisation of the airport and runway. SPS Broad Outcome 10 - 3 (a) supports this strategy and speaks to "Establish a public-private partnership to construct a new general aviation terminal" and 3 (c) to "Improve ports of entry to enhance the visitor experience". Due to anticipated increases in stayover arrivals in the medium to long term and the need to provide more efficient and high-quality visitor experiences in general aviation and private terminals, public/private partnerships to construct such facilities will be established. These terminals will include goods and services that meet or exceeds the needs and expectations of our target markets including luxury and differently abled travellers and families. 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.

The Cayman Islands Airports Authority (CIAA) is in the process of planning the long-term sustainable development of Owen Roberts International Airport (ORIA) on Grand Cayman, Charles Kirkconnell International Airport on Cayman Brac and Edward Bodden Airfield on Little Cayman. The Airport Redevelopment Plan is in its earliest stage.

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 finalised.

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

SPS 2022-2024 Broad Outcome 10-2 e) speaks to Expand Cayman Airways Routes. While stayover visitors (air arrivals) represent less than 25% of total visitor arrivals, they account for nearly 80% of total visitor expenditures (2019). 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 over 100 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, Panama, Cuba, and Honduras. Fuller utilisation 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 minimising 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.”

Cruise passengers account for over 75% of visitors to the Cayman Islands.

SPS 2022-2024 Broad Outcome 10-2 g) is “Reimagine cruise tourism” and 3 c) is to “Improve ports of entry to enhance the visitor experience”. The development of a medium term cruise tourism strategy is also recommended to enhance the management of cruise tourism and its social, economic and environmental impacts. This is ongoing. The cruise industry is an economic driver for specific Caymanian Owned Businesses in Watersports, Retail, Transport, and Attractions. It is imperative to reshape the current approach to focus on quality, sustainably manage capacity, traveler traffic flow, and impact, as well as design new and innovative destination experiences. Cruise tourism will be reimaged to ensure that the Cayman Islands can better manage cruise ship call schedules and capacity impacts to prevent overtourism, attract more high spending cruise passengers, create greater socio-economic benefits for local goods and services providers and minimise any potential negative environmental impacts from cruise ship pollution and marine biodiversity 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. 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.

In an effort to prevent overtourism in the Western districts and disperse visitation to the Eastern districts, the general infrastructure such as roads, utilities, internet access, clean public restrooms with facilities for families and differently abled persons, rest stops, attractions and fuel/electric charging stations will be increased and improved.

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 sheltered bus stops with information about bus schedules, 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. Furthermore, as transport is a major player in cruise tourism and has a significant impact domestically on the local population. MOTP has combined the strategic goal of the Public Transport Board (PTB) to integrate existing infrastructure with advancing technology to create an effective National Public Transport System, review capacity for each transport group based on tourism recovery projections, and guide the PTB forward in the development of enhanced sectoral strategies to improve overall service of the public transport operators

There is also need for review of the legislation governing public transportation and a strategic plan to aid in this area, including enacting a public transport code of conduct for drivers and passengers. SPS 2022/2024 Broad outcome 10 - 3 (b) - Improve public transport through legislative and infrastructure reforms and 5 (a) - Enact a public transport code of conduct refer.

It should be noted that in 2023 the public transport portfolio was transferred from the Ministry of Tourism to the Ministry of Planning, Agriculture, Housing and Infrastructure (PAHI).

Goal 4: Deliver outstanding visitor experiences

As recommended in the CTO Sustainable Tourism Policy Development Framework (2020), the following should be considered to enhance the visitor experience:

Product Development and Rejuvenation: Product development, rejuvenation, and enhancement to add to the destination offerings, must be ongoing particularly at the local and community levels. This allows destinations to not only develop and maintain a competitive advantage but also to build competitive leadership capitalising on the creativity and innovation of local community stakeholders. Experiences sought at the destination, even for repeat visitors including cruise passengers, changes. The improvement and enhancement of the tourism product, allow additional opportunities for visitor expenditure on different and varied experiences that contribute to maintaining the uniqueness and appeal of the destination while meeting the changing visitor demands, tastes and preferences.

Product Diversity: Diversification of the Caribbean tourism industry from the over-dependence on sun, sea and sand tourism has long been identified as a regional priority. This corresponds to the changing consumer demand and motivation factors, with today's travellers seeking authentic experiences that allow them to engage and interact directly with the people and places they visit.

This presents an opportunity for the region to decentralise and transform the tourism industry with more dynamic people-centred and experiential product offerings. The experiential tourism market is vast, which leaves ample opportunity for regional destinations to offer a plethora of experiences, incorporating initiatives to develop and promote community-based tourism, rural tourism, agro-tourism, adventure tourism and other niche market segments that offer value and also benefit the local community. Regional tourism stakeholders need to adapt to and prepare to meet these new market demands, in order to maintain competitiveness.

Product Standards, Quality & Service Excellence: Tourism is, by its very nature, people-centred, and is primarily driven by international source markets demands, therefore, meeting internationally recognised levels of quality is required. Individual business initiatives complemented with Government's continued support to ensure quality and service excellence is a key consideration. It is now accepted that the quality of service a destination delivers is one of its most important promotional tools. In fact, technology has facilitated a shift to user-generated PR, which has become the most sought after, influential and 'credible' source for product information and reviews. Word-of-mouth endorsements, customer referrals and peer-to-peer reviews are some of the most effective ways of marketing. Positive word-of-mouth recommendations flows freely if the product, service or experience exceeds expectations.

Over the past decade, with the exception of the years affected by the COVID-19 pandemic, 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 organisations. 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 finalised 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 Ministry of Tourism Visitor Experience Development Grant Initiative (VEDGI) to assist Caymanian entrepreneurs, businesses, communities and NGOs to develop new visitor experiences

Providing more innovative, authentic and diverse experiences to visitors was highlighted throughout the planning process as a high priority. According to American Express Travel's 2023 Global Travel Trends Report (Ref: 2023 Global Travel Trends Report ([americanexpress.com](https://www.americanexpress.com)), survey respondents:

1. Want to discover lesser-known destinations and hidden gems, while helping to support local communities
 - 88% agree that dining and shopping at local small businesses brings a more authentic experience while traveling
 - 83% want to shop at small businesses when traveling to a new location
 - 51% value financially supporting local businesses while traveling
 - 85% want to visit a place where they can truly experience the local culture
 - 58% value learning about different cultures while on vacation
 - 78% are “very” or “somewhat” interested in going on vacation in 2023 that supports local communities
 - 69% agree that they would be willing to spend more on a vacation if they knew it supports the local community.
2. Are choosing their next travel destination based on what they’ll eat - from top restaurants to local favourites, to cooking classes
 - 81% agree that trying local foods and cuisines is the part of traveling they look forward to most
 - 79% like to explore new food options they’ve never had before when traveling
 - 72% are looking to travel internationally to experience cuisines from other cultures
 - 46% would sign up for cooking classes to engage in the culture of the destination
 - 37% planned an entire trip around visiting a specific restaurant
 - 35% typically book travel destinations based on popular restaurants located there
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3. Want to relax and unplug from busy lives - and are gravitating toward destinations and resorts that will help them decompress and feel healthier
 - 88% plan to spend the same or more on wellness vacations this year, compared to previous years
 - 73% are planning vacations to better their mental, physical and emotional health in 2023
 - 69% are seeking destinations that are surrounded by nature, to focus on mental clarity
 - 60% want to travel to gain new experiences, 57% to escape from their normal routine and 45% to spend time with people
 - 57% plan to take extended vacations to focus on their wellness
 - 43% have selected a hotel/accommodations based on the spa and wellness amenities
 - 39% plan to explore hiking/beach trails, 34% to visit private beaches and 33% to get a massage/ facial
 - 70% like to buy new clothes or accessories from local shops or vendors while traveling
 - 77% prefer to stay in hotels, 34% in vacation rentals and 33% with friends/family
 - 76% of Gen-Z and Millennials care more about creating a travel experience that best fits their expectations than about the cost - compared to 74% of respondents overall
 - 65% of Gen-Z and Millennials would pay more for luxury customised itineraries that feature different destinations - compared to 59% of respondent overall

Developing new approaches to experience development requires risk taking, know-how, marketing support and in many cases, financing support. Adopting a community-based tourism approach can help communities in various Districts that are interested in tourism to plan how they would like to participate in creating and/or supporting more authentic and memorable visitor experiences based on demand, community assets and local knowledge for their socio-economic benefit.

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 to encourage “greater Caymanian ownership of tourism-related businesses (SPS 2022-2024 Broad Outcome 10-4 (b)). After further discussions, the VEDF will take the form of a Visitor Experience Development Grand Initiative (VEDGI) based on available funding. Its purpose will be to encourage entrepreneurship in new and diverse experiences that also target high end visitors.

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 Caymanian entrepreneurs seeking to develop new visitor experiences. These could include the establishment of businesses at historical sites in the Eastern districts. 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 Caymanian-owned businesses funded through the programme. These approaches would support SPS 2022 - 2024 Broad Outcome 10-4 (b) Promote greater Caymanian ownership of tourism-related businesses and SPS 2024 - 2026 Broad Outcome Two/Specific Outcome 7/Project 11 focuses on creating a fund for small/micro tourism businesses development.

4.4 Upgrade and maintain community and urban public recreational spaces and public beaches to offer a world-class beach experience

Broad Outcomes 10-2 h) Increase and improve infrastructure in the Eastern districts and 5b) Create and execute a national beautification plan refer. Implementing initiatives such as the George Town Revitalisation Project, the Calisthenics Park at Seven Mile Public Beach, the Waterfront Tourism Experience Project and the national beautification plan for communities create an aesthetically attractive environment for residents and visitors to enjoy a range of leisure activities. Including accessibility features such as mobility mats for wheelchair users, aids for hearing or visually impaired or persons on the autism spectrum should also be a priority.

Additionally, 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 (including basic and iconic signage), promoting wider awareness and use of public beaches and creating visitor spending opportunities near those beaches and in nearby communities would be impactful. The expansion of fish fry experiences in Bodden Town and other areas will be encouraged.

4.5 Develop a Caymankind Ambassador Programme to identify and recognise 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 underutilised 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 characterises 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. CIDOT will be partnering with The Chamber of Commerce to develop a Tourism Awareness campaign.

4.8 Promote and grow sports and event tourism

Broad Outcome 10 2 a) Promote and grow sports and event tourism.

Sports and other types of events including cultural events, destination weddings, health and wellness retreats, family reunions and corporate meetings and conferences can attract lucrative group bookings. These events can make a significant economic contribution through airline bookings, ground transport, and the supply of a host of goods and services that can benefit local entrepreneurs. High profile sports training camps and events such as sailing, yacht regattas, golf, swimming, surfing, basketball, boxing, rugby, football, cricket and volleyball tournaments as well as marathons can also attract group bookings with competitors, management and coaching staff and supporters travelling to the Cayman Islands. This can create a multiplier effect in the economy that can benefit local businesses and the community who will be able to participate as spectators in a wider range of leisure activities as a result.

4.9 Support the development of the Cayman Islands film industry

SPS 2024 - 2026 Broad Outcome Two/Specific Outcome 7/Project 10 seeks to Attract new screen production business to the islands, leveraging growing external interest and providing valuable economic impact. The Cayman Islands can be promoted as a prime location for film, television, music videos, photoshoots and advertising productions. Several competitive advantages are offered such as proximity to major gateway cities in the USA with easy access to other key cities such as Toronto and London, a range of settings from rustic to luxury lifestyles, and high-quality accommodations and experiences on all three islands. According to American Express Travel's 2023 Global Travel Trends Report (Ref: 2023 Global Travel Trends Report (americanexpress.com)), the survey respondents:

- Are flocking to places that captivate them onscreen, with travel inspiration found anywhere from smartphones and binge worthy TV series
- 64% have been inspired to travel to a destination after seeing it featured on a TV show, news source or movie.
- 61% have been inspired to visit specific restaurants or stores after seeing them in a TV show or movie
- 44% get most of their inspiration for where to dine and what to eat from TV shows

Goal 5: Develop a highly skilled tourism workforce and maximise 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 (8.5 % for Caymanian labour force Ref: Cayman Islands 2021 Census Report).

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

SPS Broad Outcome 10 - 4 (a) seeks to “expand and enhance the current national tourism education strategy.”

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.

The Ministry with responsibility for Tourism wishes to expand the pillars of the tourism education strategy through its scholarships programme, the School of Hospitality Studies, professional development training and partnerships to attract highly recognised global hospitality leaders who wish to have their institution flagship in the Cayman Islands to offer world class hospitality training education centres. Additionally, apart from tourism career and job fairs, opportunities for participation in internship and mentorship programmes and on the job training in the industry will be created.

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

SPS Broad Outcome 10 - 4 (a) seeks to expand and enhance the current national tourism education strategy.” 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 (SHS) 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. Based on feedback from tourism industry partners and their employment needs, the School of Hospitality studies certificate level programme will be expanded to the diploma level. Additionally, as a priority, the Waterfront Tourism Experience Project will provide opportunities for UCCI and SHS students to receive further practical hospitality training at the proposed restaurant facility. This will enhance their readiness for entry into the tourism industry workforce.

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

The private sector partners in the Cayman Islands tourism industry provide quality visitor experiences and customer service that wins accolades every year. Providing top notch service has solidified the Cayman Islands as the destination of choice globally. The Cayman Islands Department of Tourism (CIDOT) designs and leads the tourism industry strategic planning, global marketing, research, and business intelligence reporting on behalf of the destination. Additionally, on a macro level the CIDOT coordinates tourism education and workforce training programmes as well as product enhancement projects for the natural and built environment. CIDOT attracts visitors to our shores, private sector partners host our guests with an expansive offering of tourism activities and as a nation we reap the benefits of economic stimulation for making lives better in the Cayman Islands and the Cayman Islands Government uses the various tourism fees and taxes to reinvest in the country.

CIDOT works with partners to maximise our presence and resources in our established source markets, this collaboration is even more crucial when developing new markets as it allows us to enhance our presence at tourism trade shows and provides partners with the opportunity for direct interaction in the market with potential customers and suppliers. Private sector collaboration and marketing activity spending supports with funding in-market initiatives, increases the investment of dollars in the global marketplace to increase awareness of the Cayman Islands to convert prospects to visitors.

Tourism partners provide business intelligence on the shifts in the marketplace and factors impacting tourism in the islands. This allows the Department of Tourism to review the destination global marketing plan and adjust as needed. CIDOT collects information from partners on the localized elements of conducting business in the Cayman Islands. Partners provide insights on infrastructure, human resources, supporting government agencies that are a core support to their operations; CIDOT takes this information and facilitates solutions, provides information, and connects partners with entities that can solve the issues identified. Partners support strategic tourism planning and decision making through participating in CIDOT'S workshops, association meetings, public consultations, and engagements annually.

Partners are also a source of market intelligence for CIDOT, and information sharing allows for both private and public sectors to better maximise our resources geographically. The sharing of information also builds for stronger relationships and synergy on strategic approach. CIDOT provides quarterly updates to partners via Cayman Islands Tourism Association as well as regular newsletter updates, statistics, and white papers like the NTP.

CIDOT also supports partners by providing a robust calendar of free training throughout the year in the areas of customer service, digital marketing, and public relations. CIDOT provides additional resources and advice to partners who are looking to maximise the attractiveness of their properties or location to potential visitors.

Through the various tourism associations that make up the tourism private sector members; CIDOT supports, facilitates and fosters deep working relationships to achieve the strategic objectives and goals outlined in the NTP.

Tourism is a dynamic, rapidly changing industry. As summarised 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 organisation at the local level, which complicates the participatory planning process and efforts to promote more decentralised 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.

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, realising 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.



GOALS & STRATEGIES

Key Performance Indicators

It is important to note that the National Tourism Plan is a living document updated annually. Therefore, resources and programming will be assigned based on the Cayman Islands budget allocated to the Ministry and Department of Tourism. Given the short to medium term view of the action items within the plan, the Ministry and Department of Tourism team may be consulted to provide progress update reports on what items have been achieved and others that may be prioritised each year based on the Cayman Islands Government's approval of human and fiscal support to National Tourism Plan.

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. 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.

These indicators will be finalised once the Action Plan is finalised 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)
- Average cruise ship duration of stay in port
- Number of businesses (including souvenir shops) promoting and selling Cayman made products
- Tourism Satellite Accounting

⁴UNWTO and UNEP, "Making Tourism More Sustainable" (2005); UNWTO "Indicators of Sustainable Development for Tourism Destinations: A Guidebook" (2004).

⁵UNWTO "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. 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.

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 finalised 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 (2024 Edition), 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) recognises 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 minimise 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 summarised 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.

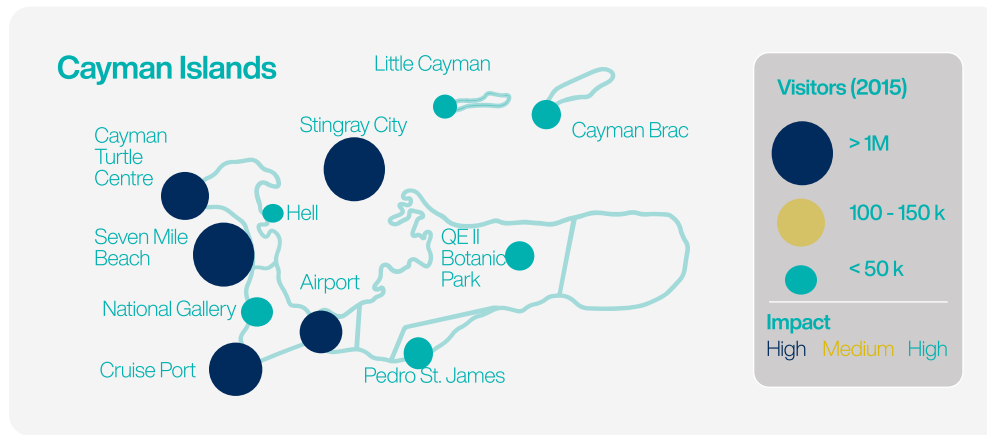
IV. MAIN FINDINGS

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 Prioritisation 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 maximising 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
CINAA	Cayman Islands National Attractions Authority
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
MOTP	Ministry of Tourism and Transport
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
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

The Ministry and Department with responsibility for Tourism would like to thank all the tourism partners and members of the public that participated in the workshops, meetings, interviews and surveys that contributed to the development of the National Tourism Plan and Visitor Management Strategy. Special appreciation is extended to representatives of:

- 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 organisations 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.

Source: Economics and Statistics Office



CAYMAN ISLANDS
GRAND CAYMAN | CAYMAN BRAC | LITTLE CAYMAN