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Together for Tourism

Cayman Islands Tourism Association

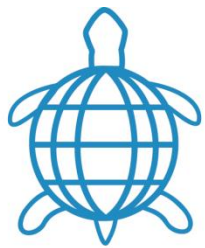
Chamber of Commerce Economic Forum

May 24th, 2018

Theresa Leacock-Broderick

President

Cayman Islands Tourism Association

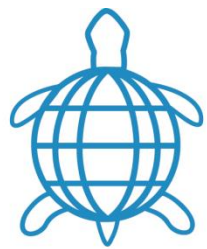


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Overview

- **Current state of the tourism industry by a few key indicators**
- **Current Critical Challenges for the industry**
- **Core essence for Cayman's sustainable tourism**

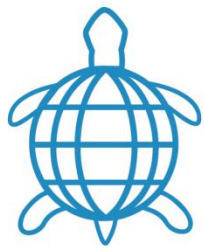


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Current State of Tourism

- Last year 2017 the Cayman Islands broke the 400,000 threshold with a total of 418,403 stayover visitors, an increase of 8.55% over 2016 after the previous 2 flat years
- Cayman continues this current year to break records in both stayover and cruise visitation. At the May 9th Cayman Islands Tourism Association AGM, The Hon. Minister for Tourism, Moses Kirkconnell shared the most recent year-to-date visitor statistics



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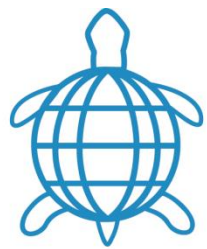
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Current State of Tourism

For January through April 2018

- Air arrivals are up 23,063, 15.36% over same period last year
- Cruise arrivals up 127,000, 18% over same last year
- The stayover visitor spend during these four months alone is estimated to be CI\$216.5M up CI\$29M over same period last year
- The cruise visitor spend over these four months, is estimated at CI\$82M up CI\$12.7M over same period last year.

These statistics indicated that Cayman islands Tourism is growing and at a significant pace considering that the regional average growth in stayover tourism for 2016 was 4.1% and an annual average of 3.1% for the preceding 10 years.

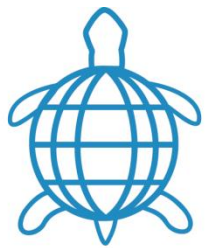


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Major Drivers for the Industry

- Increased Air Service
- Increasing Accommodations Capacity
 - New development projects will yield a 20% increase in tourist accommodations over the next 2-3 years
- Expansion of the Owen Roberts International Airport
- Planned development of the Cruise Ship Berthing



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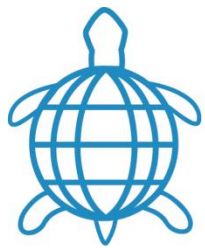
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Trickle-down Effect

On the frontline of tourism related businesses, we see small businesses and entrepreneurs entering the market, which is an important segment of the economy.

The industry growth in auxiliary services is particularly evident

- Watersports, private boat charters, marine-based activities & marine craft rentals.
- Smaller niche restaurants & food related experiences
- Health and wellness offerings
- Destination management services on the rise
- Individual taxi operators crossing over into offering more special interest tour oriented services.



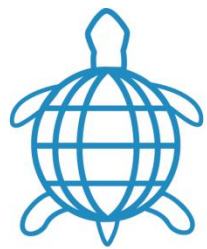
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Industry Growth

We can reasonably expect that Cayman's tourism industry will continue to grow, hopefully without any temporary disruption from nature or global events beyond our control.

We do face some challenges that we believe are time-sensitive if the Cayman Islands will continue, without set-backs to our reputation, to successfully provide a world-class experience and appeal to discerning travelers in the long term.

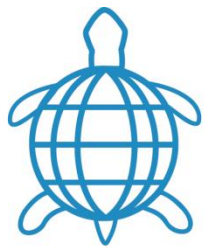


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Current Critical Challenges

The most critical challenge at this point in the short to medium term relates to ***managing*** the services and visitor experience that the growth and market maturity demands.



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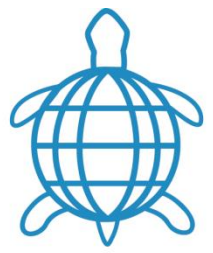
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The National Tourism Plan

DRAFT NATIONAL TOURISM PLAN

2018-2022 PRESENTATION





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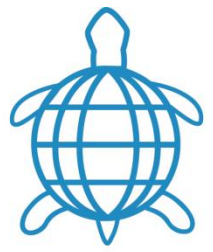
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National Tourism Plan

- *Extra Focus on Visitor Management Strategies*



CAYMAN ISLANDS
GRAND CAYMAN / CAYMAN BRAC / LITTLE CAYMAN



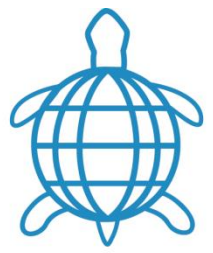
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Most Critical Challenges for Tourism

The National Tourism Plan

- Developed by the Ministry of Tourism
- This 5 year plan comprehensively addresses the industry's challenges and opportunities
- Draft Plan is in the revision stage following an extensive community input throughout all the districts and sister islands in March



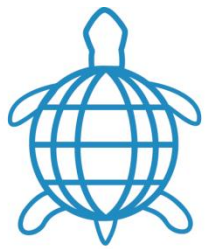
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Purpose of a National Tourism Plan

NATIONAL TOURISM PLAN PURPOSE

- To define, through a consensus-oriented process, a road map for enhancing the competitiveness of the Cayman Islands' tourism industry that will ensure the sustainability of our cultural and natural assets and maximize and spread the benefits of tourism development throughout the territory.

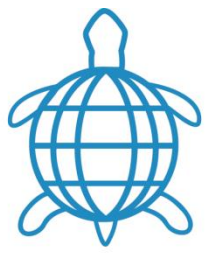


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Challenge of National Tourism Plan

- As comprehensive as this national policy plan is, the real challenge will be its execution as many critical pathways lie outside the auspices of the Ministry and Department of Tourism.
- The National Tourism Plan must be integrated with other national policies and legislation otherwise it is meaningless.

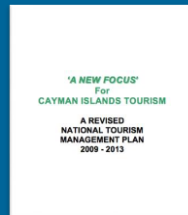


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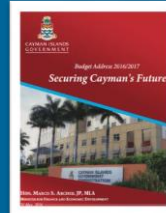
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Challenge of National Tourism Plan

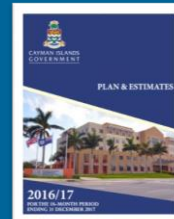
INTEGRATION WITH OTHER PLANS



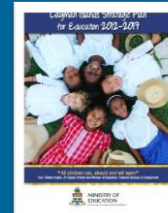
- 2009-2013
- National Tourism Management Plan



- Minister for Finance and Economic Development
- 2016/2017 Budget Policy



Minister for Finance and Economic Development
2016/2017 Budget Plan & Estimates



- Ministry of Education
2012-2017 Strategic Plan



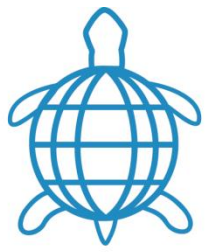
Ministry of Health & Culture Draft National Culture & Heritage Policy and Strategic Plan



- National Conservation Law



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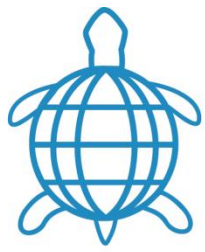


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Challenge of National Tourism Plan

It will be incumbent for all stakeholders to participate and politically hold the entire government accountable to stay on point.

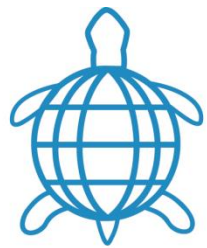


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Current Time Critical Challenges

- Some of the time critical concerns of tourism stakeholders and citizens in general revolve around safety and enforcement
- With the increase in number of visitors and residents alike, the risk of serious negative incidents and accidents also increases.
- Therefore preventative and response measures must also increase accordingly.

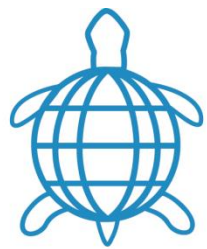


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Current Time Critical Challenges

- Prevention calls for
 - higher regulatory standards in some areas
 - More efficient and effective enforcement
- These are necessary measures
 - to ensure safety
 - to maintain the quality of service or experience
 - to protect and preserve our natural resources

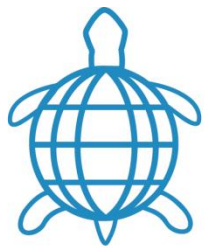


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Current Time Critical Challenges

- This applies most critically right now to
 - all marine based activities and marine craft
 - the use and maintenance of public lands and beaches, the most urgent being SM Public Beach
 - preservation of Cayman's seas and marine life

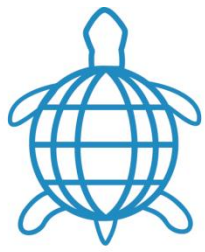


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Current Time Critical Challenges

- Crime Prevention, Road & Marine safety and Emergency Medical Response Services

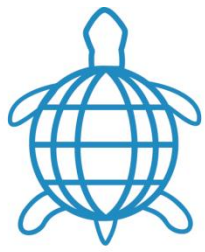


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Current Time Critical Challenges

- Crime Prevention, Road & Marine safety and Emergency Medical Response Services
- Public Transportation and Taxi services

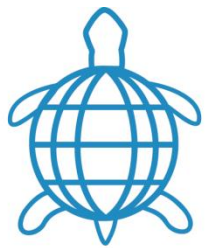


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Current Time Critical Challenges

- Crime Prevention, Road & Marine safety and Emergency Medical Response Services
- Public Transportation and Taxi services
- Work Force

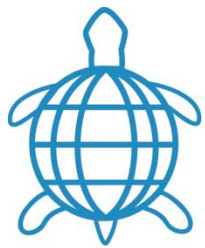


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Current Time Critical Challenges

- Crime Prevention, Road & Marine safety and Emergency Medical Response Services
- Public Transportation and Taxi services
- Work Force development and deployment
- Legislation that impacts the business environment

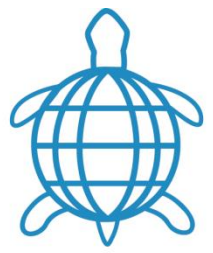


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Current Time Critical Challenges

- Crime Prevention, Road & Marine safety and Emergency Medical Response Services
- Public Transportation and Taxi services
- Work Force development and deployment
- Legislation that impacts the business environment
- Balance between Stayover and Cruise Tourism

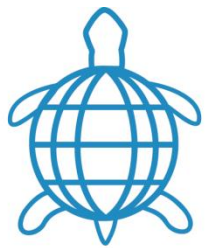


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Opportunities for Sustainable Growth

Appropriate solutions to these current critical challenges translates to opportunities that improve the industry and create sustainable growth.



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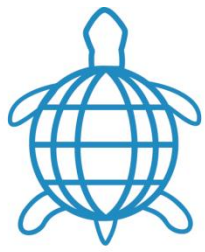
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Core essence of sustainable tourism

As I see it

There are four pillars to Cayman's tourism success that are timeless and will always be relevant

- ❖ Service environment
- ❖ Built environment
- ❖ Natural environment
- ❖ Social environment

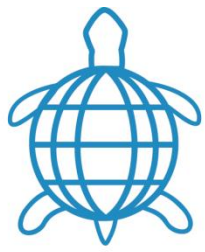


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Core essence of sustainable tourism

- ❖ **Service environment** - auxiliary services such as culinary, transportation, watersports

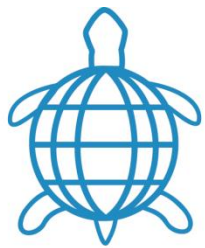


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Core essence of sustainable tourism

- ❖ **Service environment** - auxiliary services such as culinary, transportation, watersports
- ❖ **Built environment** - brick & mortar of hotels and infrastructure such as airports and roads

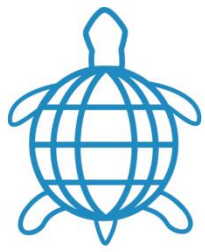


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Core essence of sustainable tourism

- ❖ **Service environment** - auxiliary services such as culinary, transportation, watersports
- ❖ **Built environment** - brick & mortar of hotels and infrastructure such as airports and roads
- ❖ **Natural environment** - natural resources such clean beaches, pristine waters, coral reefs, marine life and terrestrial habitats

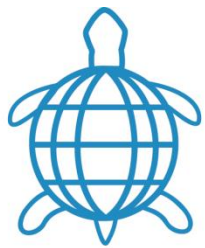


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Core essence of sustainable tourism

- ❖ **Service environment** - auxiliary services such as culinary, transportation, watersports
- ❖ **Built environment** - brick & mortar of hotels and infrastructure such as airports and roads
- ❖ **Natural environment** - natural resources such clean beaches, pristine waters, coral reefs, marine life and terrestrial habitats
- ❖ **Social environment** - all that relates to who we are culturally and our values - it's how we treat others, our friendliness, our respect for others and for private property, privacy, and personal safety – *it's the very fabric of our society.*

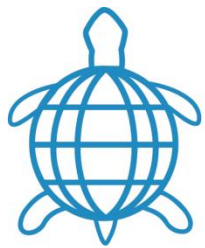


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Core essence of sustainable tourism

- ❖ Service environment
- ❖ Built environment

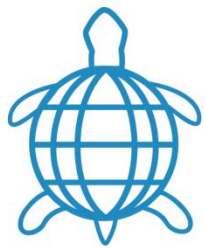


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Core essence of sustainable tourism

- ❖ Service environment
- ❖ Built environment
- ❖ **Natural environment**
- ❖ **Social environment**

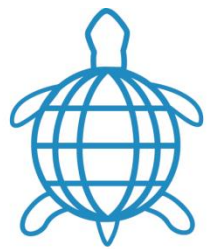


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Essence of the Cayman Islands Brand

CAYMANKIND



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Essence of the Cayman Islands Brand

Cayman is wonderful place to live and to vacation ...

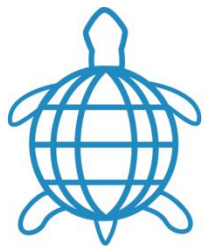
Shared space & shared experiences amongst residents & visitors alike

What's good for tourism is generally also good for residents -

excellent air service, good roads and civic infrastructure, good medical care, great restaurants and entertainment, glorious weather and natural beauty -

As we envision what a viable tourism industry looks like 10, 20 or 50 years from now, let us not ever overlook or take for granted

the safety & well-being of residents and visitors alike
and our genuinely friendly, caring community.



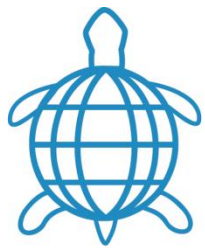
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Essence of the Cayman Islands Brand

CAYMANKIND

- it encapsulates our genuine care and friendliness and our genuine desire to share our island home & culture with others
- it is a core competitive advantage
- we must nurture it so that it continues to be “our way of being” into the future.



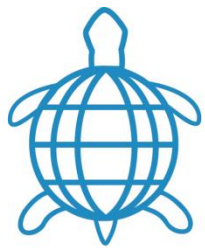
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Thank You

I hope that what I have shared provokes you

- To dig deeper in discussion
- To demand better regulations & enforcement services and greater integration amongst our government authorities, departments and agencies.
- Encourages recommitment by each and every one of us here today to continue collaborating and contributing *within* and *across* our respective industries for the betterment of the Cayman Islands.



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Thank You

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