



MINISTRY OF
DISTRICT ADMINISTRATION,
TOURISM & TRANSPORT
CAYMAN ISLANDS GOVERNMENT

RB 5

THE ROAD BACK TO 500K AIR ARRIVALS

Strategic Tourism Plan



CAYMAN  ISLANDS
GRAND CAYMAN | CAYMAN BRAC | LITTLE CAYMAN



CAYMAN ISLANDS

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**MESSAGE FROM THE
HONOURABLE DEPUTY PREMIER & MINISTER FOR TOURISM
MOSES KIRKCONNELL, JP, MLA**

The success of the Cayman Islands tourism industry has led to an ever-increasing positive impact on the gross domestic product of our country, reinforcing that statistically tourism is the second pillar of the economy. While this dynamic industry is a key focus for the Cayman Islands Government, it is an undeniable fact that it is an industry that has its vulnerabilities, including bearing the brunt of a global health pandemic such as what we have faced with COVID-19. Though we have been in the fight along with our regional counterparts and those around the globe, it is with faith and confidence that we share our forward focus to a phased reintroduction of tourism – domestically and internationally—which is outlined in this document, aptly titled *The Road Back to 500K Air Arrivals (RB5)*.

During my time as the Minister of Tourism, we have celebrated tremendous milestones; I am especially proud of the team effort that has led to consistent record-breaking stayover arrivals, which in 2019 broke the 500,000 mark for the first time ever. This visitation benchmark for the country was a momentous occasion accomplished through the strategic efforts of our global Department of Tourism team, the fortitude of the Cayman Islands infrastructure, the partnership and commitment of all stakeholders in tourism and its support industries, and the support across government to ensure the benefits of tourism are felt throughout the economy.

However, with the closure of our borders in March, we were thrust into an unprecedented time where the record-breaking air arrivals and thriving cruise tourism came to a complete halt. The role of tourism in the Cayman Islands

became a key focus for the country as the Cayman Islands Government aggressively fought to suppress the potentially deadly and prolifically harmful impact of COVID-19. We were faced with making hard choices to protect the citizens and residents of our country, leading to job loss and economic hardship for thousands of people in the industry, but ultimately providing the Cayman Islands the necessary time, protocols, and guidelines to suppress the spread of the virus throughout our three island nation.

Through ongoing collaboration between our medical health professionals, my colleagues in government, and our committed stakeholders, the Ministry and Department of Tourism worked tirelessly throughout the shutdown to create a blueprint for recovery of the Cayman Islands tourism sector. This RB5 strategic document provides a comprehensive overview of the strategies put in place to sustain the industry while no tourism was allowed and the methodical ways in which we will transition through the short-, medium- and long-term recovery to come.

Since the beginning of June, we have implemented a phased reopening of domestic business with island-wide health protocols and sanitation guidelines developed to guide businesses. Throughout the community there is holistic health focused safety measures in every touchpoint of our lives which includes for those delivering the award-winning tourism experience the Cayman Islands is known for. I am confident that when we begin to welcome our international visitors, they will find that our approach to safeguarding the Caymanian community and in turn our valued guests, will demonstrate that it has been worth the wait.



**STRAN BODDEN,
CHIEF OFFICER, MINISTRY OF TOURISM**

Protecting the people of the Cayman Islands throughout the global pandemic response to COVID-19 has been the focal point of the Cayman Islands Government for several months. Through the implementation of strategic health and safety measures, the Cayman Islands was able to successfully suppress widespread community repercussions of the virus. These measures included the early closure of our borders to international travel which had an unavoidable economic impact to our tourism sector, a reality that was faced head on by the team at the Ministry of Tourism, the Department of Tourism and our government colleagues.

As our country continues to advance through the phases of reopening domestically, the Road Back to 500K Air Arrivals (RB5) plan will be a guide for our tourism sector to gradually bring back to life the amazing tourism sector. This document was not developed in isolation and I must commend the partnership of the Reopening of Borders Committee (RBC) entities involved in its creation, as the input from each area's remit is crucial to the safe reopening of our sector. Working in collaboration with our teams at the Ministry of District Administration, Tourism and Transport and the Cayman Islands Department of Tourism were the Office of the Governor, Civil Aviation Authority of the Cayman Islands, Cayman Islands Airports Authority, Cayman Airways Ltd., Port Authority of the Cayman Islands, Ministry of Employment and Border Control, Ministry of Health, Environment, Culture, and Housing, and Health Services Authority. The RB5 embodies the policies, protocols and processes that wholly address all steps required to resume our tourism activity with the best practices necessary for all persons who work in the industry and will once again travel to the Cayman Islands.

For the RB5 to be a success, the collaboration of the Cayman Islands government and private sector partners must continue through the reopening phases and all the adjustments to a new travel experience we must consider. I firmly believe that our tourism economy will once again thrive based on the comprehensive methodology of the RB5 plan.

**ROSA HARRIS,
DIRECTOR OF TOURISM**

The implementation of a robust global marketing and product development strategy for the sustainable success of tourism in the Cayman Islands is the key remit of the Department of Tourism. Throughout the COVID-19 response and its varying suppression levels which have protected the country since border closures in March, my team has continued this mission with focus.

Providing guidance, assistance, and travel industry research for businesses to safely move through the reopening phases, we must remain committed as an industry to implement the protocols necessary to ensure that the tourism workforce is confident they are in a safe and sanitary environment which will in turn demonstrate to our guests this same level of confidence throughout a stay in the Cayman Islands. All businesses must make the best choices for their staff and guests' wellness with full transparency so that our post-COVID-19 visitors experience the best of the Cayman Islands without hesitation.

Through the collaborative effort of government and private sector partners, I am positive that the RB5 plan addresses all areas necessary for our dynamic tourism sector to see a clear path ahead as we transition to a safe phased return of our successful tourism industry.

We are more than just an award-winning sun, sand, and sea destination in the Caribbean ~ we are the Cayman Islands. Guided by the RB5, I look forward to the journey ahead as we enter a new era of tourism prosperity for the Cayman Islands.





*The Road Back to 500K Air Arrivals
Strategic Tourism Plan*

FOREWORD

The Cayman Islands strategic recovery tourism plan - Road Back to 500K Air Arrivals (RB5) in response to the COVID-19 pandemic has been developed by the Ministry and Department of Tourism, in collaboration with consultants, and with contributions from tourism stakeholders and partners.

On Monday, 16 March 2020 the Cayman Islands Government announced that our country's air and seaports would close from Sunday 22 March, thereby closing our borders. This was followed by a country-wide lockdown and shelter-in-place regulations for all three islands (Grand Cayman, Cayman Brac and Little Cayman)

that became effective on Wednesday 25 March 2020. Partners in the tourism community have experienced devastating negative impacts from COVID-19 that have forced the closure of businesses, loss of livelihoods, restrictions on mobility and catastrophic economic repercussions which will take a minimum of 24 to 36 months to recover lost business

and momentum across the tourism industry. As the tourism industry recovers, it will provide a conduit to support other sectors of the economy, such as real estate, international trade relations and inward investment.

Rb5 seeks to reinvent the Cayman Islands Tourism Industry by focusing on the priorities of the National Tourism Plan (NTP) and is the road map for enhancing the recovery of the Cayman Islands tourism industry thereby ensuring the sustainability of the islands' human capital, cultural and natural assets during and after the COVID-19 pandemic. The recovery plan outlines the Cayman Islands tourism industry priorities to stabilise the

displaced tourism employees, businesses and offer a plan for the next two to three years predicated on the best available knowledge and information at the time of publishing. This plan is a dynamic document that requires flexibility as the Cayman Islands moves towards economic recovery, COVID-19 suppression level management and shaping a significantly transformed tourism industry that can cope and flourish in a COVID-19 era.

The Cayman Islands is no stranger to tourism and economic disruption due to natural disasters and global crises and has always managed its recovery with dedicated and thoughtful long-term strategies. Our tourism industry

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is resilient, and ready for the task of rebuilding and embracing innovation to catapult our destination back into the global travel and tourism market. The Cayman Islands has a strong repeat business pool and a strong brand quality level that will test the challenges of travel in attracting clientele back to our shores over other warm weather destinations.

As we methodically open our borders with a controlled, phased approach, this recovery plan provides best practices, new protocols and procedures, and includes key policy considerations to provide a roadmap for the Ministry of Tourism, tourism stakeholders and our people. It is critical that we prepare our partners for the reopening by servicing the domestic economy first, which will help prepare and enhance our local talent to welcome international travellers this fall.

The Cayman Islands tourism leadership will approach reopening in an informed, consultative, strategic manner which considers the health and safety first of our people and our visitors.

EXECUTIVE SUMMARY

The Cayman Islands achieved a significant milestone, driven by the vision of the Ministry of Tourism setting the goal to welcome 500,000 stayover visitors. In 2019, the Cayman Islands achieved this significant milestone as a result of a combined public and private sector collaboration. The Cayman Islands Department of Tourism as the destination's marketing arm responsible for global brand awareness and tourism business development transitioned its media and promotional activity to a digital agnostic and business intelligence first strategy. This pioneering marketing approach as a segue

Our main focus is the protection of our people and those who love to visit the Cayman Islands.

from traditional marketing tactics catapulted a record 502,739 stayover arrivals: the highest volume of any single year in our history. Tourism stayover arrivals for 2020 was on track to be up 25% in visitation prior to the onset of the COVID-19 pandemic worldwide. In quarter one of 2020, countries plummeted into economic recession due to the rapid global spread of COVID-19. The Ministry and Department of Tourism recognises that the road back to 2019 levels of 500,000+ air arrivals will be a challenging and long journey, and we remain cautiously optimistic because our industry is strong, and determined to do everything possible to secure the future of tourism across all three Cayman Islands.

This strategic tourism plan aims to provide a blueprint for transformation to rebuild. The Cayman Islands Ministry and Department of Tourism, along with other tourism industry stakeholders will use this plan as a guide to prepare for the opening of our borders to international travellers in the short to medium term. Our main focus is the protection of our people and those who love to visit the Cayman Islands.

The future success of tourism businesses and the essential teams that deliver Caymankind customer service requires resuscitation through financial support. The COVID-19 threat will add increased costs of operation to tourism partners and to guarantee each tourism business's survival with the utmost importance placed on our tourism industry, the GGT implementation is crucial for our future rebound.

New sanitation and COVID-19 control measures which have been developed by the Department of Tourism will become a way of life and doing business. The focus and priority are to continue to position the Cayman Islands as the leader in the Caribbean region by detailing precise and comprehensive actions with a focus on best practices and protocols, as well as training and business acumen cemented in a digital-first global marketing and advertising plan.

To ensure that the Cayman Islands rebounds in a meaningful, safe and deliberate way, engagement with tourism stakeholders and partners will be required. The Cayman Islands Government continues to focus on the safety, health and management of COVID-19 in the country, and ahead of international borders reopening, both the public and private sector will be required to collaborate and work as a team to deliver a complete approach so visitors can safely visit the Cayman Islands and our tourism labour force can safely serve and earn a living during the critical recovery phase. This initiative has seen engagement and broad collaboration of our tourism stakeholders such as international airlines, tour operators, online travel agencies and trade partners, and on-island tourism partners, including Cayman Airways, the Cayman Islands Government and official associations.

Understanding the strengths, weaknesses, opportunities and threats (SWOT) of the Cayman Islands as a tourism destination will enable us to understand what the Cayman Islands has always done well, what opportunities there are to rebound our sector and evaluate where weakness and threats need to be assessed and mitigated. The Cayman Islands is already a well-known destination in consumers' minds and has a high guest satisfaction rating. The country has a first-world infrastructure, has a strong brand awareness in the North American market and is regarded as a safe and trusted destination. It will be crucial to ensure that these positioning variables are maintained and enhanced through focusing on heightened sanitation efforts throughout the tourism sector and ensuring that these efforts are clearly communicated to the Cayman Islands visitor prior to travel and while in the Cayman Islands.

The Cayman Islands has always been known to attract a high net-worth clientele and value for money will be top of mind for all travellers post- COVID-19. Now more than ever in a very competitive marketplace the Cayman Islands must deliver vacation packages and deals that offer value for money. This can be achieved by working closely with tourism private sector partners to

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effectively and efficiently communicate the quality of our destination experience, along with instilling confidence in travel through the communication of protocols and new health practices that are exercised for our guests to feel safe. This amplifies the significance placed on human life and safety, as well as the celebration and joy of leisure travel to the Cayman Islands.

There will also be opportunity for additional exposure to other source markets during this time to raise the awareness in those markets; namely, the United Kingdom and Latin America. Partnerships with Cayman Airways and other regional airlines will present an opportunity to service markets such as Latin America.

The UN World Tourism Organization Priorities for Tourism Recovery (28 May 2020) recommends public-private collaboration as a priority for the efficient reopening of the tourism sector. These include:

- Establishing mechanisms for public-private collaboration in the definition and implementation of health-related protocols.
- Creating actionable and proportioned protocols in full coordination with the private sector and health authorities to ensure they are scientific, evidence-based and applicable.
- Sharing knowledge and good practices.
- Setting mechanisms to support the adaptation of companies, destinations and the training of their staff (financial and training).

Collaboration with all tourism partners in the Cayman Islands will be extremely important for the success of the Cayman Islands post COVID-19.

The Road Back to 500K Air Arrivals requires managing and mitigation of the threat to our tourism environment upon which businesses and jobs are reliant. Our government is committed to providing an accelerated (GGT) economic stimulus package which is necessary for survival and the rebounding of the Cayman Islands Tourism Industry. In preparing for the future and welcoming guests to return on holiday to the Cayman Islands, we have designed a recovery plan that addresses building structure resilience, protection of our people and culturally significant natural assets, while quantifying the importance of our industry through better macro-reporting instruments to better inform the government on tourism activity.

The programmes and initiatives outlined in this plan will address the following platforms and areas of significance in the tourism industry. Firstly, capacity

building of our people. We will introduce job placement, continued education and an employment training partnership programme. These programmes will support the retooling, upskilling and job placement success for those tourism employees that are impacted by COVID-19 and are forced to pivot to new job responsibilities in tourism.

Secondly, with the forced closure of our borders in March 2020, businesses carried a tremendous burden to wind down operations due to the border restrictions in place. The Cayman Islands Government has designed an immediate solution through a Government Guarantee Initiative (GGT) for tourism businesses. The GGT will provide business support and financial buoyancy to our tourism business community to strengthen our product offering and create a safety net to Caymanian owned businesses. The GGT will offer financial assistance to stimulate businesses and ignite operations now and over the recovery period. Additionally, the Ministry of Tourism will design concessions and offer them to tourism businesses through financial relief programmes in to alleviate the strain on tourism businesses over the next 12 – 24 months.

Thirdly, handling of guests. Operational activation of travel entry point protocols and the deployment of clear, concise communication messages make up the formula for welcoming visitors through our international airports in Grand Cayman and Cayman Brac. Additionally, a robust marketing strategy focusing on an affluent luxury traveller will be the key to our success in systematically attracting a customer that will appreciate the thought and caution placed on health measures. All actions around guest relations and business development are underpinned by a comprehensive and detailed communications strategy at all touch points throughout the visitor journey. The successful management by CIG of the COVID-19 crisis in the Cayman Islands, resulting in incredibly low infection and mortality rates, should be highlighted in all marketing efforts to boost visitor confidence in the safety and strength of our jurisdiction.

Finally, our visitors' travel intent is predominantly for leisure. It is incumbent on the Cayman Islands to configure a visitor management strategy that takes into consideration the impact and ongoing threat of COVID-19 whilst using the opportunity to create new Caymanian owned businesses. Over the next three to five years the medium-term strategy is to setup a mechanism, assign qualification criteria and implement a Visitor Experience

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Development Fund (VEDF) aimed at providing a portal to business funding and support tools for success in owning a tourism business. While focused on enhancing the visitor experience and creating more Caymanian owned and run tourism businesses; the VEDF is an incremental investment in addition to the government guaranteed stimulus initiative. The Cayman Islands Government is determined to create more opportunities for Caymanian Entrepreneurship as well as increasing the benefits Caymanians gain from the tourism industry through employment.

As we embrace a new normal, what has become clear is that new product provides a competitive advantage in winning new customers. Therefore, looking to the horizon and the major developments that were under way in the sector we look forward to onboarding of an

be important to align the strategy with the overall National Tourism Plan (NTP) to ensure that the goals and actions are achieved. The industry recovery strategy in conjunction with the (NTP) goals and actions, will provide guidance to our tourism partners on new COVID-19 sanitation and travel protocols, ports of entry protocols, business continuity plans, and best practices on operational guidelines. With the knowledge we have today, and the dedication to succeed for our country, the Cayman Islands will continue to position itself as a secure, safe, and desirable place to visit, live, grow and flourish.

The onset of COVID-19 spurred the closure of the Cayman Islands borders and shut down the tourism industry. The Cayman Islands Government has committed and rolled out support programming to provide financial relief to a cross section of our people and businesses. These include a grant and loan programme for micro and small businesses, \$3600 stipend over three months for displaced Caymanian tourism employees and the relaxation of tourism tax remittances over a six-month period for licensed short-term rental properties.

To further expand the tourism economic relief efforts offered by the government, a significant undertaking to fund a Government Guarantee Tourism (GGT) initiative is currently being designed with the local retail banks. Additionally, a national tourism training programme covering various tourism sub-sectors and job functions in partnership with WORC Department and the University College of the Cayman Islands - School of Hospitality Studies are now under configuration to be offered as opportunities for Caymanians to pivot to stayover tourism. These training programmes will address and aide the retooling and upskilling of Caymanians to be ready to take jobs in tourism previously held by work permit holders. To date the government has supported the economic recovery of our country through the following policy decisions.

The Cayman Islands Government is determined to create more opportunities for Caymanian Entrepreneurship as well as increasing the benefits Caymanians gain from the tourism industry through employment.

estimated 1,449 rooms including residences over the next 36 months.

As the Cayman Islands embraces a new comprehensive strategy and develops protocols that are aligned with global, regional, and local standards and best practices to reopen the destination in a safe and healthy manner; it will



Tourism Stipend Programs

Tourism Accommodation Tax Waiver

Ministry of Commerce Grant and Loan Programme

Proposed Government Guarantee Tourism Initiative

INTRODUCTION

After successive years of continued growth in air arrivals, the Cayman Islands attained a momentous milestone when we welcomed 502,739 stayover visitors in 2019. Within the first two months of 2020, strong air arrivals continued, prior to the decision to close our borders in March to mitigate the arrival and subsequent containment of community spread of the unwelcome visitor - COVID-19. Now, more than ever, the contribution that tourism makes to the social and economic fabric of the Cayman Islands is being much better understood as tourism-related activity was intentionally paused and is being resumed in phases. This underscores the fact that as one of the top pillars of the Cayman Islands' economy, the recovery of the Cayman Islands tourism industry from the socio-economic impact of the global COVID-19 pandemic is of utmost importance.

This Cayman Islands RB5 plan is designed to pave our way back along the road to rebuilding the tourism industry in a safe and sustainable manner so that we can build the momentum to gradually regain our source market share. The outcomes of stakeholder collaboration combined with extensive market research are the pillars of the Cayman Islands COVID-19 Tourism Strategy. The Department of Tourism team collaborated with well-known local economist Mr. Paul Byles, founder and director of FTS to craft this tourism recovery plan. It required a strategic shift from the previous focus on the longer-term National Tourism Plan (2019-2023) to specifically:

- Reinvent for Readiness: identify current stakeholder challenges and develop the best methodologies to reactivate the tourism sector in an effective and efficient return to a top pillar of the economy.
- Stimulate the Domestic Economy: identify strategies to positively impact the country through domestic tourism as the Cayman Islands transitions through the phases of the COVID-19 crisis to recovery.
- Regain Global Market Confidence and Market Share: extensive global marketing and promotions of the best practices and methodologies put in place to ensure the Cayman Islands tourism products and services are operating with the highest safety and sanitation

standards for accommodations, events, dive, tours and attractions, transportation, and culinary experiences.

- Bolster Future Tourism Sector Employment: this adaptation strategy will develop new definitions of roles within the industry, including the necessary retraining of tourism professionals to adapt to a new way of operating in the tourism market.

It should be noted that the UNWTO's "Global Guidelines to Restart Tourism" (28 May 2020) report highlights the following priorities for reopening the global tourism industry:

- Provide liquidity and protect jobs.
- Recover confidence through safety and security.
- Public-private collaboration for an efficient reopening.
- Open borders with responsibility.

The recovery of the Cayman Islands tourism industry from the socio-economic impact of the global COVID-19 pandemic is of utmost importance.

- Harmonize and coordinate protocols and procedures.
- Added value jobs through new technologies.
- Innovation and Sustainability as the new normal.

These priorities are part of the Cayman Islands blueprint for success as we work through the various phases of reopening our tourism industry. The multifaceted three-year strategic plan is intended to guide the country's tourism sector through these phases of economic recovery in the medium to long term.

Collaboration with key stakeholders in government and the tourism community to address the challenges currently facing the industry, as well as finding solutions for what lies ahead has underpinned the development of this strategy. The Department of Tourism (DOT) has conducted extensive stakeholder outreach and implemented programmes specific to industry needs in the early stages of this crisis. This includes:

- Sector surveys for domestic economy stakeholder feedback.
- Institution of online PRIDE training.

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- Meetings with the accommodation, dive, and attractions sectors.
- Meetings with the Cayman Islands Tourism Association and Chamber of Commerce.
- Collaborations with the Public Transportation Board and Hotel Licensing Board on recommendations to support the tourism industry.
- Development of a Needs registry for Caymanian tourism employees.
- Tourism Updates emailed to DOT database regularly; and
- Developing sanitation guidelines for the tourism sector to safely welcome visitors back.

In implementing this plan, the Government of the Cayman Islands will continue to engage with the sector to

ensure that the new policies and safety measures are in place to regain consumer confidence and reassure our guests when we are ready to welcome them back. Support from industry participants will be crucial to ensuring our progress along the Road Back to 500K Air Arrivals and meeting critical success factors.

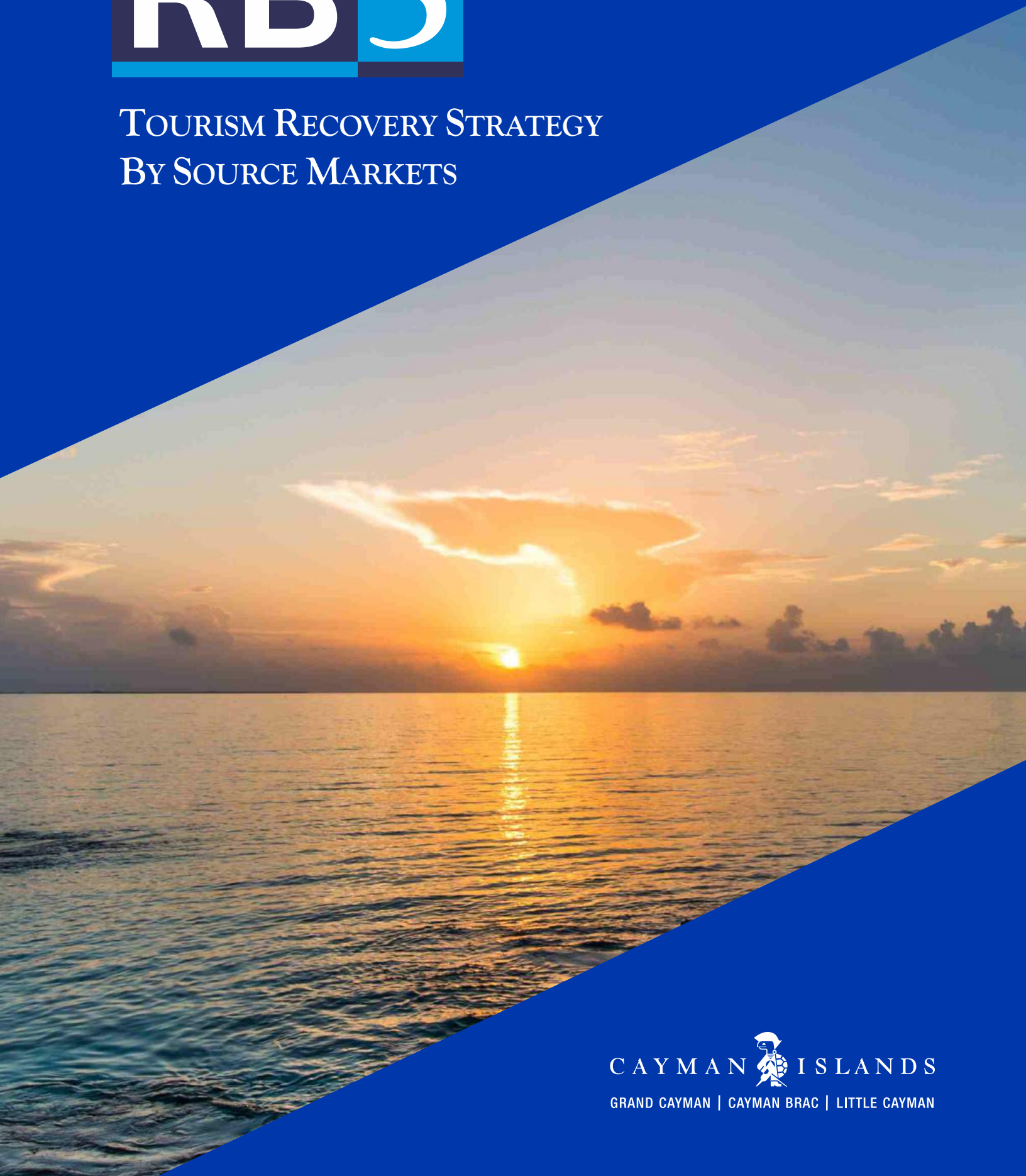
This plan represents our roadmap to success for all Caymanians, tourism industry stakeholders and partners. It can be used by all tourism industry stakeholders to guide the development and adaptation of their business continuity plans on their own path back to reimagining their product and service offerings in a post-COVID-19 world. The Cayman Islands Government will continue to provide a suite of tools and other forms of technical and financial support to tourism-related entities and employees as part of this tourism recovery strategy.



Pre-COVID-19 Direct Air Service to the Cayman Islands



TOURISM RECOVERY STRATEGY BY SOURCE MARKETS



TOURISM INDUSTRY RECOVERY STRATEGY

As the COVID-19 pandemic began to infiltrate our shores, the Cayman Islands Government implemented strong measures to suppress its spread, prioritizing the protection of our people and the visitors who were on island at the time. Guided by the medical advice from leading health practitioners, our country progressed through the varying suppression levels that required our community to diligently adopt new protocols, all to create the safest environment for us all. Now that the Cayman Islands has demonstrated successful suppression of the COVID-19 we must once again look to recover our tourism industry and we are committed to doing so responsibly.

Through in-depth reviews of all our source markets from which visitor originate, the Cayman Islands Government will assess the risk levels and ascertain the best health industry informed methodology that will create a safe atmosphere for our people now and our visitors when the time comes. We must proceed with caution and perform thorough risk assessments in all areas of travel, partnering with tourism partners to ensure the Cayman Islands creates the strongest and wisest strategy to bring tourism back. This will be a balanced decision informed by technical advice of the Cayman Islands Government health practitioners and global best practice.

As the Cayman Islands looks to recover the tourism industry, it will be important to understand the realities of our main visitation markets that serve the destination: the United States of America, the United Kingdom, Canada and Latin America. This section will seek to highlight these source markets and the potential opportunities for rebound.

UNITED STATES OF AMERICA

US Market Conditions

To stop the spread of the COVID-19 virus and subsequent strain on the hospitals, most of the US states instituted stay-at-home orders, and the closure of non-essential businesses. The US unemployment rate skyrocketed to levels not seen since the Great Depression. As of May, the US unemployment rate stood at 13.3%~slightly less than the previous month's all time high of 14.7%. It is important to note that the US unemployment rate prior to the COVID-19 pandemic was at 3.5% (February 2020). While many states are in various phases of "re-opening" the economy, there is widespread fear that the jobs will not be reinstated to the pre-pandemic levels for perhaps 2 to 3 years. The unemployed in the US topped 45 million since the pandemic began. This includes furloughed (temporarily unemployed) and permanent job losses.

As a result of the shutdown of the US economy, the National Bureau of Economic Research declared that economic activity in the US had peaked in February 2020, formally marking the start of a recession. First quarter US Gross Domestic Product (GDP) growth was pulled down to an annualized rate of -4.8% (relative to the Q4, 2019). Experts agree that second quarter outputs will plunge even further than Q1.

Wall Street

The arrival of the COVID-19 pandemic caused one of the largest drops of the market in its history. While much of that initial loss was recovered in May and June, the volatility of the markets continues with news of a potential

flare up of new COVID-19 cases and hospitalizations, especially in states that have restarted their economies and relaxed their stay at home orders.

US Consumer Sentiment/Confidence

Consumer confidence has taken a severe hit with the onset of the pandemic and the effects it has had on the economy. Historically, these indexes follow closely to the US consumer sentiment regarding leisure travel. The University of Michigan's consumer sentiment for the US rose to 78.9 in June 2020 from 72.3 in the previous month and above market expectations of 75, a preliminary estimate showed. There was an improvement in the outlook for personal finances and more favourable prospects for the national economy due to the reopening of the economy, with more consumers expecting declines in the jobless rate than at any other time in the history of the survey. Still, households did not expect the reestablishment of favourable economic conditions anytime soon. The gauge for current economic conditions increased to 87.8 from 82.3 in May, while the index of consumer expectations rose to 73.1 from 65.9. The median expected inflation rate during the year ahead eased to 3.0 percent from 3.2 percent in the previous month.

Similarly, the Conference Board Consumer Confidence Index also dropped to 85, which is the lowest point in nearly five years. Since the great recession of 2008, where the index plummeted to 25, US Consumer Confidence has grown, and, in 2019 had reached to just below 140, which was the highest point since 2001.

UNITED STATES OF AMERICA

The US Travel Consumer Sentiment

Since the pandemic has grown in the US, there have been several surveys taken, to determine the intent of the US consumer as it relates to travel. There are some themes and insights that have generally been consistent throughout most research. Here are some of the key findings: the US leisure traveller is likely to bounce back before the business traveller. Corporations are concerned about putting their employees at risk until a vaccine for COVID-19 is developed and in use in the US. Additionally, many have embraced the virtual office with video conferencing software.

Consumer surveys are indicating the US consumer will book domestic “drive to” destinations before they get on an aircraft to travel to a destination. However, all studies suggest that most Americans are suffering from 'cabin fever' and are desperate to get away from their homes for a vacation. This will be an opportunity for the Cayman Islands to be able to capitalise on once restrictions are lifted for international travel.

The high net worth consumers were not as affected by the downturn in the US economy as the lower to middle income Americans. Therefore, they will have a much higher propensity to travel for leisure purposes. All travellers however will have cleanliness and safety protocols at top of mind. With the luxury segment, there is an expectation that the amenities will be in place, but safety will be the priority.

MMGY Global, a leading agency that specialises in travel and tourism marketing recently released data from a study of over 1200 respondents to capture consumer attitudes toward travel. 40% of those surveyed stated that they were extremely likely to take a vacation within 6 months. This was an increase from 36% on 8 May 2020. 67% stated that they would travel by car for their next vacation with 32% stating that they would take a flight. 20% were willing to travel over 500 miles for their next vacation and 21% of the respondents would take an international flight in the next 6 months for their next vacation. 52% stated that COVID-19 would be the determining factor as to where they vacationed in the US and internationally.

Recent surveys from TripAdvisor also showed that 41% of consumers are optimistic about taking a trip or more trips than last year. 86% stated that cleanliness and sanitation are top of mind when booking a hotel. This figure further shows the importance of destinations being able to demonstrate health and safety standards as the highest priority for travellers when international travel returns.

US Strategy Overview

As the Cayman Islands moves through various phases of the road back to “normalcy”, advertising, public relations and sales strategies must be able to pivot with market conditions, the competitive landscape, and of course the sentiment of the various US consumer groups (Boomers, Millennials, X Gen). All of the studies, surveys, and our first party engagements with our trade partners (travel advisors, dive shops and the meeting and incentive planners and buyers) indicate that there is a high demand for travel as the US opens up the economy and lifts the stay at home measures that were in place to slow the spread of the COVID-19 virus. With unemployment at the highest levels since the great depression and the economy entering an official recession, the strategy is to focus on our demographic and geographic target markets that will likely produce a faster return on our investment. Research is indicating that the US consumer will likely travel to domestic destinations first before getting on an aircraft for an international destination. Those who intend to travel internationally will choose shorter flights to destinations that they trust which have clearly outlined protocols in place to keep their residents and visitors safe. It is known that the higher net worth consumers will likely be first to travel internationally including millennials that have less fear of contracting COVID-19. Knowing this allows a great competitive advantage for the Cayman Islands, given the trust that has been built over the years of being a safe, clean, and easy to get to destination that appeals to a luxury consumer.

The Cayman Islands source markets are the United States of America, the United Kingdom, Canada and Latin America.

CANADA

As of Sunday, 14 June 2020, there were 98,787 cases of COVID-19 in Canada. There were over 8,146 deaths and more than 80% of the deaths in Canada have been in long term care homes. The Prime Minister and the Premiers of the Canadian provinces are working in consort and providing a united front – supporting the scientists and doctors in reminding Canadians to be prudent, avoid travel, and are very slowly beginning to ease restrictions. This united messaging makes a difference, as the Canadian population is listening. Canadians, are, for the most part taking the lockdown seriously. This is important information as Canadians understand the risks and are taking precautions to minimize their risk of obtaining and spreading the disease.

Canada Market Conditions

Official global travel health notices are in effect and Canadians are to avoid non-essential travel until further notice. The federal government in the country has mandated a 14-day self-isolation requirement for those who are eligible to enter Canada and individual provinces have implemented measures on travel between territories and provinces.

The Canada-U.S. border was closed on Friday 20 March 2020 to all non-essential travel (goods and services continue to pass through) and will remain closed until the current monthly extension of July 21. It is expected to be extended once again. Provinces and territories will make different decisions around when and how to loosen restrictions. Most provinces have implemented a framework to guide re-opening strategies catered to their individual circumstances. Since each province is starting from a different baseline to implement the re-opening of its local economy, the phases and stages are not congruent across jurisdictions. The City of Toronto has cancelled events with attendance of 250 to 25,000+ through July 31 and August 31, respectively.

Canada's Chief Public Health Officer recommended that masks/face coverings are worn when physical distancing guidelines cannot be met. The guidance is meant to supplement existing public health measures.

Economy

Earlier in the first quarter, the economy was dealing with two other negative impacts; rail blockages across the country were expected to take an economic toll and rapidly deteriorating conditions in its energy sector. A price war between Saudi Arabia and Russia sent the price of crude oil plunging.

COVID-19 delivered a huge blow to Canada's economy this spring as businesses across the country shut down as part of a broader effort to slow the spread of COVID-19. The Canadian economy is reeling from the impacts of COVID-19 on consumer and business spending. The plunge in activity reflects policymakers putting the economy on hold in to halt the virus. Many businesses are shut down temporarily, and some will not reopen. The near-term economic forecasts are based on what is still in

operation, and then adding on the impact of the severe drop in oil prices.

The economic lockdown, global recession, and oil shock threw the Canadian economy into recession. This has led to a strong and coordinated policy response. Central banks around the world have provided monetary stimulus and governments have deployed massive fiscal stimulus. Canada is no different. The Bank of Canada slashed its benchmark overnight rate to near zero; it boosted liquidity to relieve stress in the financial system; it also launched an asset-buying program; the federal regulator of the major chartered banks, OSFI, adjusted its capital requirement to allow banks to lend more to businesses and households. However, given the nature of the current health crisis, the most important policy tool is fiscal policy.

The federal and provincial governments correctly identified that the two issues most critical to address are the negative shock to personal income and the cash flow and balance sheet strains for businesses. Addressing these are key to tempering the economic decline and will help households and businesses survive until containment efforts can be relaxed.

A review of the health of Canada's financial system in the face of the current crisis, concluded that, despite widespread stresses, Canada's financial institutions are stable and have enough buffers to cope with losses in the worst-case economic scenario. Core inflation has declined, but remained between 1.6 and 2.0 %, only slightly below the Bank's target. The Canadian dollar appreciated several cents in May and currently stands at 0.75 US cents. The effects of the pandemic on the economy will likely endure until a vaccine is available and forecasters are still struggling to assess the degree of economic decline, because it is not clear when containment efforts can be relaxed and when a vaccine will be available.

The Conference Board of Canada and other major financial institutions are forecasting a GDP contraction between 4.3 and 7.1% in 2020 and a growth between 4.2 and 6.0% in 2021. The economy has lost almost 2 million jobs in April and the unemployment rate soared to 13%,

CANADA

compared to 7.8% in March of 2020. In May 2020 however, unemployment rose to 289,600, a sign that the worst of the labour market impacts from COVID-19 are now behind the country. According to the Conference Board of Canada, the labour recovery is expected to be quick once restrictions begin to ease with people being added back onto payrolls before the second half of the year.

Consumer Confidence

After posting the largest monthly decline ever recorded in March, then falling to its lowest level ever in April, the consumer confidence index is starting to move in a more positive direction. Overall, the national index score increased to 63.7 points in May. While still below March levels, consumer confidence rose in every region. While most Canadians are slightly more optimistic about the future this month, many still do not feel that this is a good time to make a major purchase.

According to the Conference Board of Canada's latest survey of business leaders, business confidence dropped to its lowest level on record. We are now in uncharted territory and it seems likely that business investment will be exceedingly weak for the foreseeable future - a leading indicator of business investment, fell from 86.0 to 43.8. Despite this fall, business leaders are expecting the economy, or their firms' fortunes, to improve over the next 6 months.

As Canada, and the rest of the world goes into uncharted territory, what is evident is that consumers are now more cautious in thinking about how they get from place to place and Canadian's spending and priorities, when it comes to travel, will be different.

Travel

Similar to the United States, domestic trips and visiting family and friends will be the first category of trips that are taken. According to a Skift article however, Canadians will be more cautious than their neighbours to the south when it comes to travel. Canadian travellers will avoid crowded destinations, cruises and areas hardest hit by COVID-19. The Conference Board of Canada's Spring survey revealed that 58% of travellers that were surveyed in March and 73% in April, responded that their trip is either delayed or cancelled for the summer.

Airline access continues to be a concern for the Canadian traveller and until airlines can determine schedules, there are concerns about booking due to fear of route elimination of changes to their booking. The ongoing US-Canada border closure also creates challenges for Canadians who often connect through the United States. Canadians have concerns about travel insurance and insurance companies continually are changing policies to limit or eliminate coverage for COVID-19.

Canadians want to feel secure on their vacation and if they cannot be confident with their travel insurance, it will be a major deterrent for travel.

For long haul travel, the uncertainty about how destinations are responding is playing into consumer decisions to delay travel plans, likely until 2021. Without knowing what the experience they can expect is, and in particular what conditions will be imposed on them from the time they arrive at the airport for departure to what interactions and experiences will be like when they arrive, there is resistance to make immediate decisions. Questions about quarantines, masks and line-ups are some of the things that concern Canadians.

According to Expedia, traveller needs span across five themes: health and safety, flexibility, value for money, and destination timing and guidance.

Canada Strategy Overview

According to Expedia, traveller needs span across five themes: health and safety, flexibility, value for money, and destination timing and guidance. These themes are relevant throughout North America, and source markets for the Cayman Islands.

The overall strategy of a destination on hygiene, cleaning and safety measures and efforts to support social distancing are at top of mind for the Canadian traveller. Destinations will have to actively demonstrate these measures to visitors. There also need to be flexibility with booking and ease of cancellation if persons get sick prior to their trip. There is a preference for refunds over credit with the Canadian traveller.

There is also a strong need for value for money. With persons being unsure about travel and how frequent they will do so; Canadian travellers want to make sure that they are getting the most out of their trip. The Canadian traveller will be seeking out the best deal and aligning those with hygiene and sanitation efforts that are being actively communicated by destinations. The more information that is available to the Canadian traveller about restrictions and health and safety policies in a destination, it will influence their decision to book once international travel resumes.

UNITED KINGDOM

Economy

According to the Office for National Statistics (ONS) the UK economy shrank by 20.4% in April - the largest monthly contraction on record - as the country spent its first full month in lockdown. That is three times greater than the decline seen during the whole of the 2008 to 2009 economic downturn. According to the Organisation for Economic Co-operation and Development (OECD), Britain's economy is likely to slump by 11.5% in 2020, slightly outstripping falls in countries such as Germany, France, Spain and Italy. If there were a second peak in the pandemic, the UK economy could contract by as much as 14%. It said that in what it called a "single-hit scenario", with no second peak, there could be contractions of 11.4% in France, 11.1% in Spain, 11.3% in Italy and 6.6% in Germany. The OECD found that the UK's largely service-based economy meant that it had been particularly badly hit by the government's lockdown restrictions.

To combat the "unprecedented" coronavirus-induced downturn, the Bank of England will pump an extra £100bn into the UK economy to provide some quantitative easing. The Bank's Monetary Policy Committee (MPC) also kept interest rates at a record low of 0.1%.

Inflation

A record fall in fuel prices, including petrol, pushed the UK's inflation rate down to 0.5% in May, the second full month of the coronavirus lockdown. According to the Office for National Statistics (ONS) Fuel prices declined by 16.7% during the month, dragging the Consumer Prices Index (CPI) to the lowest level since June 2016. Clothing and footwear prices also fell.

Unemployment

Overall, the official UK unemployment rate for the three months to April 2020 held steady at 3.9% as the massive state wage support in place stopped job losses. The slowdown in the UK economy is now visibly hitting the labour market, especially in terms of hours worked. The furlough scheme is working in suppressing unemployment and protecting livelihoods so far, the real test will be what happens when the government taxpayer wage support finishes and whether those jobs remain. It requires the government to inject as much confidence as possible, into the minds of employers facing uncertainty and declining bank balances.

Wealth Gap

The ongoing coronavirus pandemic is being accompanied by huge human toll - and an increasingly large economic downturn as large swathes of the global economy become unviable.

COVID-19 may have no respect for social, racial or professional boundaries, but even during a pandemic, the very rich are different. The more wealth, but also social power, you have, the more likely you are to be able to work from home, not work without fear of losing your home, get/hold on to exclusive childcare and seek early diagnosis and treatment. Apart from health concerns for themselves and their families, the vast majority of wealthy individuals own and/or operate a business, or at least hold a significant stake in a publicly owned business. While a few sectors are seeing demand skyrocket, many wealthy in the current economic downturn are looking to cope with large-scale shocks to their businesses. Like everyone, the personal wealth of very high net worth (VHNW) and ultra-high net worth (UHNW) individuals has been considerably impacted. According to *The Sunday Times* Rich List the UK's wealthiest men and women have seen a total £54bn wiped from their fortunes in the wake of the economic struggles caused by COVID-19. But whilst the very wealthy have lost money, they are still very wealthy and will still be able to enjoy their luxuries in life. It is however clear that the crisis is hitting many poorer areas hardest - with coastal towns and ex-industrial areas seeing particularly big increases in unemployment.

Trends

As a result of the continued spread of the virus, borders worldwide have been closed, quarantine measures put in place and daily flights drastically reduced - resulting in travel plans being put on pause for the foreseeable future. With summer approaching - a time when the masses would normally be jetting off on trips both near and far - stay home orders are still largely limiting many from leaving their homes, making the idea of jetting off on a two-week break seem like a distant reality. Despite suppressed demand, the British and Germans are desperate to travel, for most, long haul travel will be off the cards until the last quarter of the year.

Whilst travel is currently limited, online searches and bookings for Q4 2020 and 2021 are significant. Key take outs from the travel trade have been that the luxury market is more resilient than the mass market and that there are a few trends emerging.

Focus on Hygiene

An unsurprisingly result of the pandemic is a continued focus on hygiene and cleanliness. We've all become accustomed to carrying hand sanitizer with us wherever we go, washing our hands frequently and being careful of the surfaces we touch, and this trend will definitely be sticking around for some time and affecting the way the UK resident travels. People's attention to and

UNITED KINGDOM

demand for hygiene and cleanliness will increase. People will not change how they travel but will expect hotels and airlines and ground transportation to be increasing sanitation measures. Many luxury hotel brands are already rolling out new initiatives to increase cleanliness standards including a contactless service, guest service apps and new hygiene technology, which is very reassuring. Destinations that communicate this effectively will benefit.

Search for Sanctuary

In the modern world we live in, it is increasingly hard to truly get away from it all, switch off and enjoy a much-needed break. But as a result of the pandemic, the experts predict that many more travellers will actively seek out less crowded trips, searching for privacy and a greater sense of calm and peacefulness. Off-the-beaten track and natural destinations are sure to become even more in demand. The increased interest in villas, private dining and private excursion opportunities point to people wanting to keep within their family groups and get away from the crowds - privacy is the overarching trend as a result of this pandemic - with the outcome being that destinations, luxury hotels and restaurants will have to adapt to this demand although the luxury segment is perfectly positioned to satisfy these needs. Travellers will appreciate the importance of good health more than before, looking to travel to places where they can fully rejuvenate, which in turn will see a rise in wellness travel, with people wanting to stay in places where you can improve your mental and physical wellbeing.

Travel, but with purpose

It is likely that because of the pandemic, people will look for travel experiences to go a little deeper. Less trips

will be booked on the fly "just because", and more meaning will be put into the where, when and how of travel. Travellers will not take an intercontinental flight simply because of the lure of a beautiful hotel, the travel trend will be to travel for meaning. Simply put, "The new luxury is finding the answer to the question: what are you searching for when you travel?"

Connecting with Communities

In line with travelling with a greater sense of purpose and meaning, those looking to explore the world of luxury travel will also want to engage and connect with local communities. Everyone in the travel industry has been affected by COVID-19 and the repercussions from lack of tourism to areas who are wholly dependent on visitors is devastating. People will be keen to travel to these destinations to get involved in bringing a community back to life, and contributing to education, sustainability projects and local initiatives.

A Positive Outlook

Although it may take a little time, the luxury travel industry will bounce back post-pandemic, with the experts believing that if anything, it will benefit us all. Hotels will have to become more creative in terms of working around any restrictions that become the new norm as travellers will still expect to receive the same level of service and high-quality experience from before COVID-19. They will need to adapt and find different ways to surprise and delight guests. Travel agents will need to become more ambitious in how they design experiences. A new paradigm of luxury travel that is life-enriching and values-based is emerging. The good news is that it will contribute to the better world we have been imagining during this pandemic.

"The new luxury is finding the answer to the question: what are you searching for when you travel?"

LATIN AMERICA

In 2016, the Cayman Islands Department of Tourism re-entered the Latin American (LATAM) market as part of the strategy to diversify the current established markets and focus on emerging ones such as Argentina, Brazil and Europe.

As such, a new agency was hired to manage the PR, Trade and Advertising strategy for Argentina and Brazil. These two countries were selected because of their propensity to travel and the visitor profile was in alignment with that of the destination. In 2018 Mexico was added to the portfolio of countries where there is direct promotions and advertising for the destination.

The focus in LATAM is in alignment with the Strategic goal 2 of the National Tourism Plan i.e. – to enhance the business environment to support industry growth and investment. The objective is to retain and expand existing source markets while proactively developing new ones.

The investment in diversification to secondary markets will continue to be important as the COVID pandemic shows the risk of how markets can shift and negatively impact our local industry.

The impact of COVID-19 in Latin America

Governments in Latin America continue to navigate through the pandemic according to what they consider necessary, some easing the restrictions, others implementing economic measures to help businesses.

Brazil and Chile are receiving criticism over issues regarding the distribution of COVID-19-related data – the first has changed the way it counts the deaths, while the latter is not disclosing the number of recovered patients. While Brazil and Mexico are an immediate concern given the current state of those countries in monitoring, Argentina is positioned to be ideal as the first LATAM country we can focus on because of the strict protocols the Argentine Government established to counteract COVID-19.

Even with economic issues and a debt crisis, Argentine stocks are growing as reported in June. Stock are now up 64%, the most among the largest stock markets globally. This situation is luring investors even as Argentina's government scrambles to restructure around \$65 billion in foreign debt and forecasts called for the economy, mired in recession since 2018, to contract as much as 10% this year.

The political situation in Brazil is under scrutiny. The Federal Government has been accused of hiding COVID-19 data (delaying the release of information and changing the protocols to count deaths, to make them smaller). After general criticism, the Supreme Court commanded the Federal Government to go back to the former procedures.

Meanwhile, right-wing extremists and supporters of the current political leadership, have been accused by the Supreme Court for undertaking anti-democratic acts against the Republic. This has further progressed to the resignation of the Brazilian Ministers after a series of verbal attacks against the Supreme Court.

From an economic perspective a credit program for

micro, small and medium-sized businesses is in place, but business owners say they are not having access to it, which has led to a record number of bankruptcies as an economic effect of the pandemic. Government stated that other plans are being articulated to make the credit reach these companies. In the meantime, Brazil's central bank may be forced to cut interest rates much further to avoid potentially the biggest economic crash on record and low inflation.

Consumer Sentiment

The coronavirus pandemic is reshaping consumer habits in Latin America, sending droves of buyers online for the first time. Optimism for the future of digital sales comes with a caveat: Consumers may be buying more online, but they will struggle as the economic fallout from widespread lockdowns weighs on employment and salaries. The International Monetary Fund has warned that weakness going into the pandemic means Latin America may be in for a “lost decade.”

In terms of travel, figures from Skyscanner show that compared to the highest point of 72%, global anxiety has dropped to 58%. The percentage of travellers that now view it as safe to travel internationally has doubled, but still only at 12%.

Trade Sentiment

In a global trade survey conducted by global travel marketing alliance Travel Consul, here is a summary of trade sentiment for tour operators and travel agencies in Brazil, Argentina, Columbia and Peru.

Marketing Strategy

Marketing and Promotions for this region will be developed around destination awareness to influence the final purchase decisions of the consumers for this region. Local audiences are experiencing an over exposure to messaging regarding COVID-19: appealing to “reinventions”, “reconnections”, “resilience”, or “transformations” would be positive.

LATIN AMERICA

Summary

The Cayman Islands are not only competing with other travel destinations but will compete with an entire variety of financial decisions that our stakeholders had to postpone (Real Estate, car industry, luxury consumer goods). The good news is that current consumer sentiment puts travel as the #1 consumption priority (non-food segment) post quarantine in some countries.

Between late 2020 and early 2021, destinations will not only belong to tourism but will be viewed under the scrutiny of health and safety. Latin American visitors will not be booking just a tranquil getaway; they will be looking for a safe environment for them and their beloved ones as a priority.

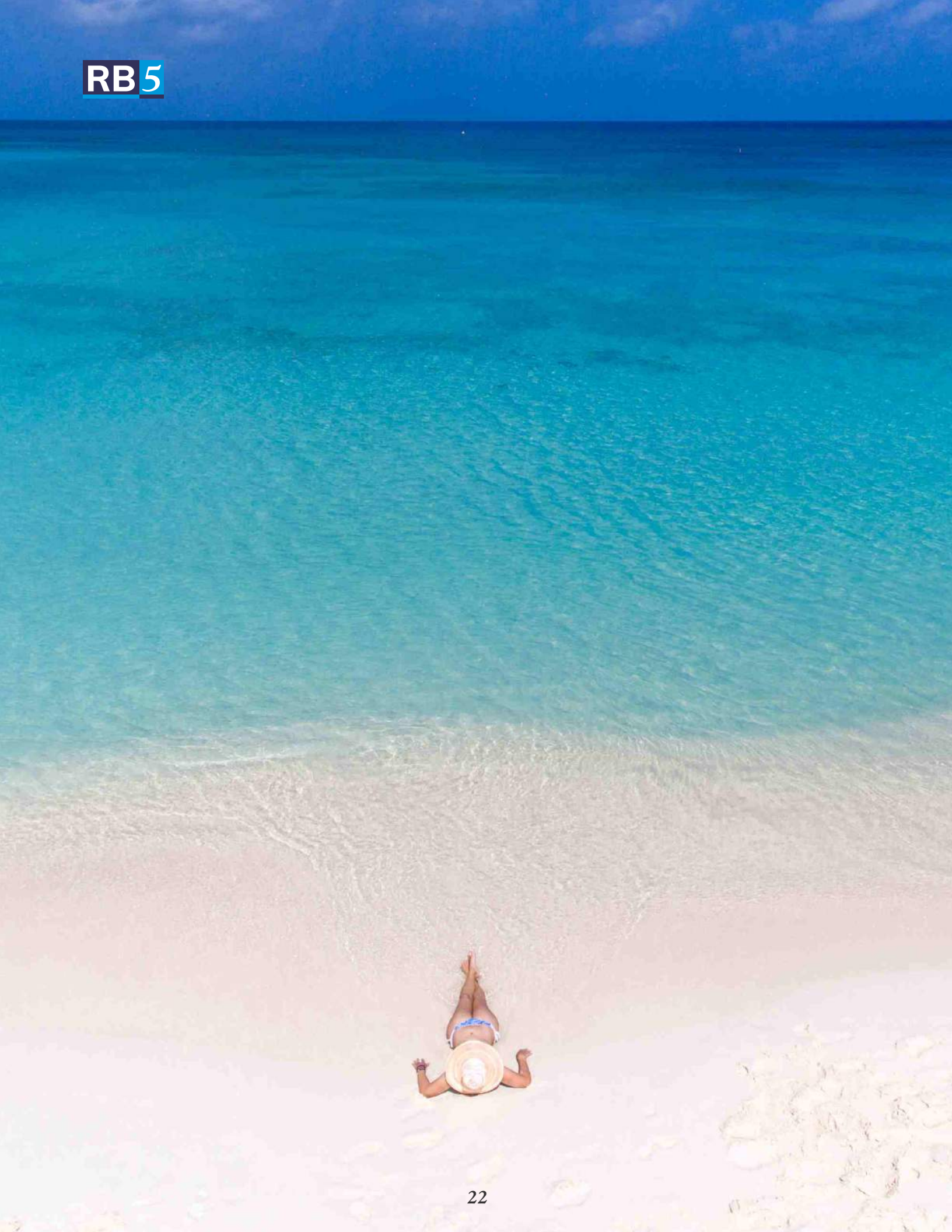
Our inspirational process must position the Cayman Islands not only ahead of other destinations, but ahead of other priorities, expenses and investments to appeal to Latin American travellers. The goal should be to prioritise economic stability, health and safety measures that are in place and continue to target affluent persons who want to travel.

The short-term strategy for Latin America would be to focus on Argentina which has maintained strict protocols for COVID-19 and focus on Mexico and Brazil in the medium term

with improvements in their health and safety protocols. There is unique opportunity to work with Cayman Airways for flights to and from Mexico as health and safety concerns are addressed in that country.

Our inspirational process must position the Cayman Islands not only ahead of other destinations, but ahead of other priorities, expenses and investments to appeal to Latin American travellers. The goal should be to prioritise economic stability, health and safety measures that are in place and continue to target affluent persons who want to travel.







REPRIORITISED - NATIONAL TOURISM GOALS & ACTIONS



REPRIORITISED NATIONAL TOURISM PLAN

GOALS & ACTIONS

"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" The NTP (2019 – 2023) is the official national strategic policy framework document which was prepared after wide consultation with the community as well as key stakeholder bodies such as the Cayman Islands Tourism Association (CITA). The NTP is centred on tourism sustainability principles. According to the UNWTO sustainable tourism development is:

"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"

"Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability. Thus, sustainable tourism should:

Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.

Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.

Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary.

Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them."

The NTP was designed with a level of flexibility to address the key current and foreseeable future challenges facing the Cayman Islands' tourism industry towards enhancing its sustainability and global competitiveness. It allows for an annual review of its implementation progress and adaptation based on dynamic conditions. The NTP was formally tabled in the Legislative Assembly by the Honourable Minister of Tourism in January 2020. Many of the recommendations are still significant and relevant to the world as it is today, but a key observation is that our tourism strategy has to refocused from being proactive to being reactive in the shorter-term, in order to sustain the tourism economy in the midst of the pandemic, before we can become proactive again.

This section now examines whether the recently agreed national Tourism Plan (2019-2023) which serves as the country's official tourism strategy, is fit for purpose as currently stated.

2.1 ASSESSMENT AND PROPOSED REVISION OF EXISTING NTP GOALS

In the original National Tourism Plan for the Cayman Islands, several goals were developed that were to lead decisions in the five years to 2023. These were:

- 1) Protect, manage and enhance cultural and natural resources
- 2) Enhance the business environment to support industry growth and investment
- 3) Improve connectivity and tourism-related infrastructure
- 4) Deliver outstanding visitor experiences
- 5) Develop a highly skilled tourism workforce
- 6) Build strong partnerships to sustainably manage, market and diversify tourism assets

The above goals are still relevant in today's marketplace and making progress towards each of the above goals will help sustain the Cayman Islands tourism sector going forward. Below all the goals are listed, assessed in relation to the new environment (including in some cases expected trends), and the resulting additional strategies are recommended to achieve each of the broader goals.

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

The NTP's first goal is still paramount to the Cayman Islands and, as such, all the original NTP recommendations still stand. In order to retain and rebuild our market share of visitors, the Government will place increased emphasis on enhancing our tourism experiences, relaunching our environmental programmes and encouraging and establishing sustainability across the board. Considering the possible exception of limited finances to pursue some of the initiatives, COVID-19 will not negatively impact upon any of these recommended strategies.

Original NTP recommendations:

- 1) Create or enhance tourism experiences that integrate heritage, arts, culture and nature and are aligned with the National Cultural Heritage Policy.
- 2) Enhance interpretation of natural and cultural resources.
- 3) Develop, promote and enforce visitor codes of conduct for wildlife encounters.
- 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.
- 5) Obtain Blue Flag certification for prioritised Cayman beaches.
- 6) Encourage sustainable design and construction of new tourism developments.
- 7) Establish sustainable development plans for priority investment areas.

Assessment:

Each of the above items remains even more important because the emphasis on culture and natural resources is essential to ensuring the highest quality experience for the visitor and guaranteeing that the natural resources remains for future generations of residents and tourists.

The distinction in quality will become more important with the likely increase in competition as destinations vie for post-COVID-19 dollars (including 'affluent dollars'). There are therefore no proposed adjustments to the various initiatives listed above.

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

While the broader goal has not changed, the position from which we are beginning has been altered significantly. We are no longer simply enhancing the business environment to support industry growth and investment. In many ways, we are rebuilding it.

A recent COVID-19 economic impact report, commissioned by the Cayman Islands Chamber of Commerce, projected that the tourism sector alone could lose as many as 4,383 jobs in 2020. Therefore, although many of the recommendations within the original NTP can still be actively pursued going forward, we must first seek to rebuild our business environment to stabilise the current situation.

Original Goal 2 NTP recommendations:

- 1) Create greater efficiencies in government and increase responsiveness through the establishment of procedures that eliminate inconsistency and bureaucracy.
- 2) Implement recommended amendments to the Tourism Regulations (2002 Revision) and the Tourism Law (1995 revision) in support of the NTP.
- 3) Retain and expand existing source markets while proactively developing new ones.
- 4) Implement programmes to attract more visitors in the low and shoulder seasons.
- 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.
- 6) Enhance tourism research, statistics and information availability.

Assessment:

In the current situation, with limited financial resources and a distinct competitive advantage in its primary markets, pursuing new markets in the short to medium term would not be the best use of the Ministry's tourism-related resources. Item (3) above should therefore be adjusted in the short to medium-term to focus primarily on existing (and primary) markets only.

There is significant economic fallout for many small businesses and some larger ones. The focus will now be on helping tourism enterprises to recover and survive when the country reopens. It will not be possible to save all businesses, but urgent efforts will be made to assess and provide support, where feasible. The nature of the support referred to in item (5) will be adjusted so that while focus remains on developing some new businesses there will be a concerted effort to support existing ones. A comprehensive support programme for tourism-related businesses will be established and rolled out in the short-term. This will draw on the recently introduced programs that the government has already announced. The approach to the support programme for tourism businesses will comprise the following:

Meet with tourism business stakeholders on challenges and develop new ideas for incentives and support. This exercise is currently being carried out as part of the operational strategy.

Help businesses to navigate the application process for the existing programmes.

Facilitate open discussion and information sharing with businesses about the new realities of the post-COVID tourism era.

In addition, globally, many businesses have transformed various aspects of their operations by doing more online. While the tourism sector may present relatively less opportunities in this area due to its personal service nature, there are many functions such as marketing, reservations and customer relations that can be carried out online by local businesses. These will improve efficiencies for local businesses and reduce costs and, if done effectively, assist in generating additional revenues.

Tourism research will become even more important because data on health, safety, traveller preferences and emerging travel trends relating to the new COVID-19 will be made readily accessible to the DOT to remain effective in executing its global strategy.

Also, the statistical data from the tourism satellite accounts which is currently being developed, is a key component of ensuring adequate statistics on the sector and this will also be crucial in terms of being able to measure progress of the tourism sector and enable more effective comparisons to our competitors.

New Goal 2 recommendations:

- 1) Adjust the global marketing focus to primary markets as a means of maximising limited financial resources more effectively in the short to medium term. This process has already started and will be continued over the medium term.
- 2) Develop a comprehensive support programme for all tourism businesses. This will include assisting tourism businesses in navigating the existing support package on offer from the government, identifying new incentives and means to support their immediate recovery and resilience and making them aware of the new market conditions and realities of the post-COVID-19 tourism era.
- 3) In 2017, after the hurricane season that devastated parts of the Caribbean, the World Travel and Tourism Council recommended an increase in duty-free exemptions on goods and reduce tourism costs as a short recovery and resilience strategy. As part of a comprehensive support programme for tourism businesses, the Cayman Islands government will consider reducing or waiving taxes and business fees temporarily over an 18 month to 2-year period and review the policy at the end of the period.
- 4) One example of immediate relief for accommodation businesses is providing a refund of tourist accommodation taxes (TAT), possibly for the period of March 2020, the month initially impacted by COVID-19. The CIG has since made a decision to waive the TAT effective 1 April through 30 September 2020. Other business fees and taxes applied to the sector under consideration for a relief package are:
 - a) Identify key strategic attractions and businesses in each subsector and carry out an urgent assessment of their operations. The aim of providing support is to stabilise their operations to survive until the country's border re-open and beyond. The government already has programmes in place to assist businesses generally but providing direct assistance to this subgroup is key to ensuring that there is stability and consistency in our product offering when borders open.

- b) Incorporate COVID-19 related information across all media platforms into the DOT's current data collection and analysis systems. Even in the absence of a fully functioning set of satellite accounts, having this type of information assessed on a regular basis will be an invaluable tool in the DOT's strategies especially in the short to medium term.
- c) Investigate the possibility of a DOT sponsored online tourism vendors/business portal
 - i) The purpose of the portal is to help local businesses, especially smaller ones with the least access to resources, to do more online, by providing a platform for online bookings, receipt of payments and other common functionality. Securing a local partner from the retail banking sector will be critical to the success of this initiative.

To advance on the road towards sustainable tourism development in the Cayman Islands in a strategic manner, the MDATT and DOT will be employing two specific tourism sustainability tools:

- 1) Travelife – an internationally recognized sustainability certification programme
- 2) Blue Flag - one of the world's most recognised voluntary eco-labels awarded to beaches, marinas, and sustainable boating tourism operators

Travelife can be used to improve the environmental, social and economic impacts of tourism in the Cayman Islands. Travelife sustainability standards and criteria fall into the following categories:

Sustainability management

- o Business policies
- o Legislation
- o Communicating Your Progress
- o Human and Financial Resources (Staff and Budget)

Environmental Management

- o Energy
- o Water
- o Solid Waste
- o Pollution and Erosion
- o Wildlife

People

- o Labour and Human Rights
- o Community Integration
- o Your Suppliers
- o Your Guests

The Travelife Standard covers every aspect of sustainability and is the only international label that asks hotels to specifically address important high-risk issues such as child safeguarding and animal welfare. It employs a low-cost, tailored approach that includes in-destination training, communications, hotel recruitment and annual planning. Travelife also has a travel trade membership programme that helps tour operators improve supply chain sustainability and identify sustainable accommodation options. This will present a valuable opportunity for Travelife Gold certified tourism accommodations and ground tour operators to reach new global source markets, including UK/Europe.

In order to qualify for The Blue Flag, a series of stringent environmental, educational, safety and accessibility criteria must be met and maintained.

2.1.3. Goal 3: Improve connectivity and tourism-related infrastructure

Goal 3 should be closely investigated in the aftermath of COVID-19 because the Cayman Islands will have to work even harder to attract international tourism, which is essential to the islands' economic recovery. Given the significant role that tourism plays in the Cayman Islands economy and employment, we must ensure that our tourism-related infrastructure is ready to attract a new wave of tourism. The Goal 3 recommendations in the original NTP are still relevant over the long term but several will need to be adjusted.

Original Goal 3 NTP recommendations:

- 1) Complete the modernization of the Owen Roberts International Airport.
- 2) Determine the best path forward to ensure Little Cayman's airport meets regulatory standards.
- 3) Increase the number and frequency of flights arriving to Grand Cayman and Cayman Brac, including the facilitation of private jet arrivals.
- 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.
- 5) Determine the feasibility of improving the port in Cayman Brac to facilitate the arrival of cruise ships.
- 6) Improve directional signage and streetscape beautification efforts in Grand Cayman and the Sister Islands.
- 7) Work closely with the Public Transportation Board and Unit to help inform public transportation.

Assessment:

(1), (2) and (3) - By all accounts, the expectations globally are that the travel experience from airport to airport will change drastically. The Cayman Islands has recently carried out significant upgrades to the Owen Roberts International Airport to improve passenger flows and visitors' experience but technological upgrades and investment at all airports is now needed.

These technological improvements are necessary not largely for efficiency and passenger flow reasons but for passenger safety and hygiene and, critically, protection of the local economy and jobs. A set of COVID-19 compliant airport operational protocols is now necessary and under development.

(4), (5) - The government advanced its decision to build a new cruise berthing facility on Grand Cayman, and this process was derailed by public opposition to the project, a legal hearing in which it lost, and then by the significant disruptions caused by COVID-19. As a result, the government publicly declared that the Grand Cayman project was no longer a priority on its agenda. Item (6) remains on the government's agenda over the longer term.

(7) - Public transportation is discussed in more detail in the Domestic Operational Strategy but this area has significant bearing on the tourism sector. Poor public transportation is mentioned in the NTP as a weakness and the lack of public transport is seen as one of the reasons for lower demand for attractions in the eastern part of the island. Public transport globally was a contributor to the spread of COVID-19 resulting in many countries shutting down their entire public transport system as part of their suppression efforts.

The Department of Tourism has published COVID-19 sanitation protocols which has addressed the public transport sector. On a macro level the Public Transport Board has done a significant amount of work in drafting a strategic plan for public transport. Whilst there may be many views on whether public transport remains an entrepreneurial opportunity versus a government run system, largely there have been a number of new initiatives that have benefited those that use the public transport sector on a daily basis. Here are some of the implemented initiatives from the five-year strategic plan which will continue to be deployed.

Development of a five (5) Year Strategic Plan (2019 – 2024) based on seven (7) strategic goals:

1. GOVERNANCE: to enhance the Public transport Unit with strengthened leadership and direction.
2. STRATEGIC & FUTURE PLANNING: development of a five-star, sustainable master public transport system.
3. EDUCATION & TRAINING: to promote Public Transport Unit as facilitators of excellent public transport service where users understand and are inspired to use the system frequently.
4. HUMAN & FINANCIAL RESOURCES: to ensure that Public Transport Unit is adequately staffed and resourced to meet increased customer and internal demands.
5. INTERNAL STAKEHOLDER ENGAGEMENT: to ensure that all relevant agencies are actively working together on a Master Transport Plan and to resolve public transport issues.
6. EXTERNAL COMMUNITY ENGAGEMENT: to make public transport easily accessible to visitors and residents.
7. INNOVATION: embrace advancing technologies to create an effective system.

An updated and recalculated new national taxi fare schedule implemented and currently being used
 Development and launch of the CIGO App for transparent, easy and convenient taxi fare calculation
 Developed and launched a new Public Transport Unit website to provide public transport information
 Researched and reconfigured routes, vehicle types and sustainable transport options based on demand for services in different geographic areas and expansion of night taxi services

New Goal 3 recommendations:

Improve the ease and experience of traveller arrivals and departures, through upgrades and additional investment in our technology at the airports, which will increase customer satisfaction and traveller safety. Improving the experience of traveller arrivals and departures through use of technology is now important for two reasons.

Firstly, the NTP already highlights that the arrival and departure experience was viewed as unsatisfactory by stayover visitors and as such adversely impacted the perception of the holiday experience.

Secondly, post-COVID-19 this is even more important as travellers of the future will expect increased digital and contactless technology. The UN International Civil Aviation Organization's (ICAO) new COVID-19 Aviation Recovery Task Force believes that a touchless or “low touch” airport experience with technologies such as biometrics and automated gates will become the norm. Contactless, self-service technologies at every step will facilitate a more efficient passenger flow, while ensuring a social distancing-friendly passenger experience using secure biometrics and passenger mobile devices.

While this will require additional capital expenditure by the government it should be regarded as an essential investment given the expected significant change to global travel which is already beginning to unfold. The Cayman Islands must start looking at ways that we can quickly and cost-effectively implement technology that will increase our attractiveness, customer satisfaction and safety. Other countries are looking into this issue and there are likely many potential vendors offering solutions. It is recommended that the technology options are examined to determine budgetary implications and feasibility as a matter of urgency.

Prepare COVID-19 **airport transportation protocols to protect travellers**. The protocols for all local transportation are already being developed as part of the domestic operational strategy, but airport specific protocols are needed in preparation for the reopening of our borders.

Prepare COVID-19 operational protocols for all three airports in the country.

2.1.4. Goal 4: Deliver outstanding visitor experiences

Goal 4 clearly remains relevant irrespective of the circumstances. As with any tourism destination, delivering an outstanding visitor experiences is arguably the most important and all-encompassing goal alongside ensuring that the sector fully benefits its citizens.

Original Goal 4 NTP recommendations

- 1) Implement a Visitor Management Plan (VMP) for heavily visited sites and immigration areas.
- 2) Establish a Public-Private Visitor Experience Development Fund (VEDF) to assist Caymanian entrepreneurs, businesses, communities and NGOs to develop new visitor experiences.
- 3) Created a credit facility to enhance access to credit for small businesses and entrepreneurs interested in developing or enhancing visitor experiences. The Cayman Islands Government has committed to design a Government Guarantee Tourism (GGT) initiative by partnering with local retail banks to offer a bank loan solution.
- 4) Upgrade public beaches and organize vendors/concessionaires to offer a world-class beach experience.
- 5) Develop a Caymankind Ambassador Programme to identify and recognize individuals and experiences that provide the opportunity for visitor to interact with Caymanians and celebrate Cayman culture.
- 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 home renters, property managers, and tourism enterprises to enhance the information and services available to vacation home renters. COVID-10 Safety and Sanitation Guidelines apply to all short-term rental accommodation.
- 7) Continue to conduct tourism awareness campaigns to communicate the importance of tourism and of delivering Caymankind hospitality.

Assessment

COVID-19 has impacted operational procedures and one of those relates to managing crowds. Social distancing will require even more effective visitor management strategies aimed not solely at raising the quality of a visitor's experience caused by overcrowding, but to address serious health and safety concerns. Accelerated implementation of the recommended Visitor Management Plan in each of the key attractions (Cayman Turtle Centre, Stingray City and Seven Mile Beach in particular) is now being reviewed.

Several tourism businesses have already been closed, creating gaps in the market and the VEDF is being examined at this stage. The government has recently introduced funding to assist micro and small businesses because of the pandemic, and the Ministry of Tourism is launching the Government Guarantee Tourism (GGT) Initiative to assist tourism business owners with bank loans.

All the other Goal 4 recommendations remain relevant in the current environment and over the medium to long term. One additional consideration which impacts the overall quality of the experience of our visitors is their experience at our ports. A visitor's experience is impacted significantly by their interaction with private sector partners and the various attractions. But interactions at all the country's ports also impact a visitor's experience and importantly, represents the first and last impression on the visitor. Given the expected increase in procedures at the ports due to safety protocols and the likely increased risk of frustration among travellers, quality service and courtesy at the ports will become even more important. Additional training will be carried out with all staff at the country's ports which incorporates service into the safety procedures where possible, without impacting the border control's important vigilance and enforcement functions.

New Goal 4 recommendations:

- 1) Establish formal Visitor Management Plans for Stingray City, Seven Mile Beach and the Cayman Turtle Centre. A review of UNESCO's world heritage sustainable tourism toolkit makes it clear that visitor management is not solely to improve the visitor experience but also to protect the natural and cultural assets for future generations of tourists and residents. This means that even if large crowds are not expected in the short to medium term, effective management of visitor flows will better protect the country's natural assets while raising the quality of their visit at a time when competition across the region will be heightened.
- 2) The Ministry will establish a steering committee of public and private sector partners to develop a term of reference and business plan for a VEDF. As one of the world's most successful international financial services centres, the Cayman Islands has a clear advantage in its access to finance and legal professionals capable of furthering the VEDF initiative.

2.1.5. Goal 5: Develop a highly skilled tourism workforce

One of the key goals for the Ministry of Tourism post-COVID-19 will be the re-development of a highly skilled tourism workforce, with the priority of attracting Caymanians. This goal is longer term and ongoing. But the pandemic's impact has resulted in significant unemployment in the industry and the challenge now requires a 4-step approach to addressing the job market:

- 1) collecting data on the unemployed
- 2) carry out inventory of skillsets of the unemployed
- 3) devising support for businesses looking to rehire externally as the need arises, and
- 4) devise a job training and repurposing strategy for unemployed Caymanians

A full exercise involving these 4-steps has been carried out and the strategy is included in a separate domestic operational and jobs strategy provided to the Ministry of Tourism. For the purpose of this exercise to review the overarching NTP goals and strategies, an assessment is provided below.

Original Goal 5 NTP recommendations:

Develop a National Tourism Workforce Development Plan.

Position the industry as an attractive career and employment choice for Caymanians.

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

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

Develop and deliver tour guide training and certification programme.

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

Assessment:

All of the recommended strategies remain relevant and are necessary for the long-term success of the tourism industry.

- 1) With many unemployed and the possibility of a large number of jobs becoming available once the industry resumes with international visitors, there is now an opportunity to provide vocational training relating to the tourism sectors to prepare Caymanians for tourism jobs. This training is in place, and the programme is accelerated in preparation for September/October of 2020. The country has been working on initiatives such as the School of Hospitality Studies for a number of years to advance workforce development planning within the sector, but COVID-19 has changed the situation in a number of important ways:
 - a) Many Caymanians who have previously worked in other sectors have lost their jobs and tourism job opportunities that arise when our borders open represents a solution and a path to address their unemployment.
 - b) Between now and the end of 2020, many hotels will likely have the capacity to participate in apprenticeship and vocational training and this is an opportune time for the Ministry of Tourism to collaborate with partners on an accelerated vocational training programme for tourism.
 - c) The long observed/apparent aversion by some Caymanians to working in tourism and hospitality jobs may be addressed partly by the more urgent need to have a job. Therefore, participation rates in the vocational training program is likely to be higher than previously seen.
- 2) The above programme offers the added benefit of partially addressing the large number of unemployed persons between now and October 2020. Thousands of unemployed Caymanians stipends during this critical period and can receive training through the PRIDE programmes.

This recommendation relates to a long-standing challenge to making the tourism industry attractive to Caymanians. However, a unique opportunity has been presented due to the current situation. While business closures will reduce the number of available jobs in the short term, there will be a larger number and more varied options of job opportunities available once economic activity resumes. An initiative will be developed to attract Caymanians and convert job seekers into the tourism work force.

Additional certifications of various businesses and attractions are being reviewed to address safety and health concerns. For example, the Caribbean Hotel and Tourism Organization (CTO) recommends the development of COVID-19 Operation certification/licensing programmes for the tourism sector and this can be achieved by utilising the recognition programme, already being developed by CARPHA, CHTA, CTO. In addition, training of employees will be required as part of the operational certification process and certain employees must be knowledgeable and prepared to implement the new safety procedures.

- 3) Training is now needed for many individuals to upskill and retool to pivot either within the tourism industry (e.g. switching from water sports to working in a hotel or restaurant) or to work in another industry (e.g. switching from working as a bookkeeper in a hotel to working for an accounting or business consultancy firm).

New Goal 5 recommendations:

- 1) Establish an accelerated vocational training program within the School of Hospitality Studies in partnership with UCCI, the Ministry of Tourism hotels and other tourism businesses.
- 2) Create a 3 to 6-month promotional campaign to reintroduce tourism as a career option for Caymanians.
- 3) Establish a COVID-19 operational certification program for tourism businesses
- 4) Identify local industry training partners to develop and execute COVID-19 safety employee training programs

The MDATT has partnered with UCCI to develop a multi-tiered retooling and upskilling training programme geared towards:

- Increasing the number of Caymanians employed in the tourism industry
- Providing a range of critical skills and work-based learning opportunities needed in the various sub-sectors tailored for different academic levels, including computer literacy, numeracy, communication, customer service, foreign language, water sports and core hospitality skills
- Encouraging further innovative partnerships with the private sector and local, regional and international training institutions to provide training in the requisite subject areas

The programme will provide more defined tourism career paths for young Caymanians via an expanded UCCI Hospitality Studies programme (certificate, diploma, degree levels), online training, mentorship, tourism scholarships and on-the-job training industry partnerships. Unemployed tourism sector workers due to the impact of COVID-19, will have the opportunity to be trained to work in other areas of tourism to fill vacancies anticipated with the reopening of our borders for leisure travel and the departure of work permit holders. It will be aligned and adjusted to meet future tourism human capital needs in the short, medium and long term in collaboration with the initiatives being implemented by sister government agencies responsible for talent management.

It should be noted that the MDATT has partnered with tertiary level training institutions such as Johnson and Wales University, Cornell University, George Washington University and Culinary Institute of America are long-term initiatives for having a presence on island for world-class hospitality training institutions. CIDOT is also currently exploring training opportunities through its membership in regional and international tourism organizations including the Caribbean Tourism Organization, Florida Caribbean Cruise Association and the Global Sustainable Tourism Council in different areas of tourism sustainability. Additionally, whilst pursuing Travelife and Blue Flag sustainability certification for tourist accommodations, tour operators, attractions, beaches and marinas, training will be provided to the participating operators. These initiatives can be done virtually and will be critical as we continue to implement the NTP whilst also addressing the impact of COVID-19 on the travel and tourism industries.

In order to attract and retain workers in the tourism industry, the CIG will consider and simultaneously engage with the private sector to encourage the provision of attractive and fair compensation and working conditions in tandem with changes in the cost of living in comparison with other sectors of the economy.

2.1.6 Goal 6: strong partnerships to sustainably manage, market and diversify assets.

Managing and marketing our tourism assets in the wake of COVID-19 is an essential process that must be given paramount importance. The Ministry of Tourism will stimulate the creation of public-private sector collaborations, to establish and drive forward the destination's brand. Marketing forms the backbone of a successful strategy and the Ministry will invest in marketing at all stages of the project, to create a sustainable tourism sector.

Original Goal 6 NTP recommendations

- 1) Improve Intergovernmental Tourism Coordination and NTP Implementation.
- 2) Increase public-private sector communication and coordination.
- 3) Decentralise tourism management and marketing through public-private partnerships at the local/destination level.
- 4) Develop a more effective public beach management and concession system.

Assessment

All the above recommendations remain relevant and the long-term strategies have not been impacted by the pandemic.

In relation to tourism management, the NTP recommends both destination management and visitor management as key components of a successful tourism strategy for the Cayman Islands and both are mentioned in the set of recommended strategies in section 3.5 dealing with the post COVID-19 global operational strategy. The tables below provide a list of all the recommended strategies to realign the NTP.

SUMMARY OF RECOMMENDED STRATEGIES AND TIMELINES TO REALIGN THE NATIONAL TOURISM PLAN (NTP) - SHORT TERM

Short Term Strategies (June to Sept 2020)		Relevant NTP Goal
1	Develop a comprehensive financial support programme for all tourism businesses. The Government is pursuing a Government Guarantee Tourism (GGT) initiative to aide in the survival of tourism businesses over the next 24 months.	Goal 2
2	Identify key strategic attractions and businesses in each subsector and carry out an urgent assessment of their operations and devise solutions	Goal 2
3	Incorporate regular COVID related information monitoring across all media platforms into the DOT's current data collection and analysis systems	Goal 2
4	Prepare COVID-19 airport transport protocols to protect travellers.	Goal 3
5	Prepare COVID-19 operational protocols for all three airports in the country.	Goal 3
6	Establish a COVID-19 operational program for tourism businesses.	Goal 5
7	Identify local tourism industry training partners to develop and execute COVID-19 safety employee training programs.	Goal 5
8	Establish an accelerated vocational training programme within the School of Hospitality Studies in partnership with UCCI, the Ministry of Tourism, hotels and other tourism businesses.	Goal 5

SUMMARY OF RECOMMENDED STRATEGIES AND TIMELINES TO REALIGN THE NATIONAL TOURISM PLAN (NTP) – MEDIUM TERM

Medium Term Strategies (Oct 2020 - 2022/23 season)		Relevant NTP Goal
9	Investigate the possibility of a DOT sponsored online tourism vendors/business portal.	Goal 2
10	Improve the ease and experience of traveller arrivals and departures, through upgrades and additional investment in technology at our airports, which will increase customer satisfaction and traveller safety.	Goal 3
11	Establish formal Visitor Management Plans for Stingray City, Seven Mile Beach and the Cayman Turtle Centre.	Goal 4
12	Establish a steering committee of public and private sector partners to develop a term of reference and a business plan for a Visitor Experience Development Fund (VEDF).	Goal 4
13	Create a 3 to 6-month promotional initiative to reintroduce tourism as a career option for Caymanians	Goal 5
14	Adjust the global marketing focus to primary markets only as a means of maximising limited financial resources more effectively in the short to medium term.	Goal 2

The CIG is fully committed to providing training and resources to Caymanians, technical and financial support to tourism businesses and working with stakeholders and private sector to achieve its strategic goal of rebuilding Cayman's tourism sector as a matter of national importance.

RB5

TRAVEL & SANITATION PROTOCOLS



TRAVEL & SANITATION PROTOCOLS

This section aims to highlight the measures that have been put in place with regards to sanitation protocols that have been adopted in the Cayman Islands. Areas of discussion will highlight the overall Cayman Islands Government health and safety regulations and the other main points below:

1. The development of industry sanitation guidelines.
2. Specific business continuity plans for Cayman Islands Airports.
3. Sanitation plans that have been implemented with major airlines.

Cayman Islands Government Health and Safety Regulations

On Sunday, 22 March 2020, the Cayman Islands Government closed its international borders in response to the global pandemic, COVID-19. The National Emergency Operation Centre (NEOC) was activated on March 19th and all communications from the Cayman Islands Government transitioned into a single voice of the Government: The Joint Communications Service (JCS). This has allowed all official communications with regards to the fight of COVID-19 and the steps that are being taken to combat this disease from one source for the government.

All official policies, shelter in place orders and suppression levels for the country are being reviewed by the Ministry of Health through the Chief Medical Officer, Dr. John Lee. In addition to this advice, the Cayman Islands continues to check specific guidelines from the Centres for Disease Control (CDC) in the USA, Public Health England (PHE) and the World Health Organisation (WHO). With the insights of these various entities the Cayman Islands has developed and implemented suppression levels and has put into place protocols to safely guide the Cayman Islands people

(explore.gov.ky). All protocols and policy decisions are regulated through the Public Health Law and Regulations (2020) for the Cayman Islands.

Industry Sanitation Guidelines

As borders closed, it was important for the Cayman Islands to assess the industry needs and work collaboratively with the private sector. A series of focus groups were hosted with various sectors of the economy to gain a better understanding of how the Government could assist tourism businesses during this crisis.

Focus groups were held with various tourism sectors, namely, retail, tour operators, restaurants, tourism accommodations, attractions, car rental businesses and water sports/dive operators. All information gathered from these reports were compiled and used to draft guidelines and policies aimed at aiding businesses to rebuild their business plan with sanitation, health and safety at top of mind.

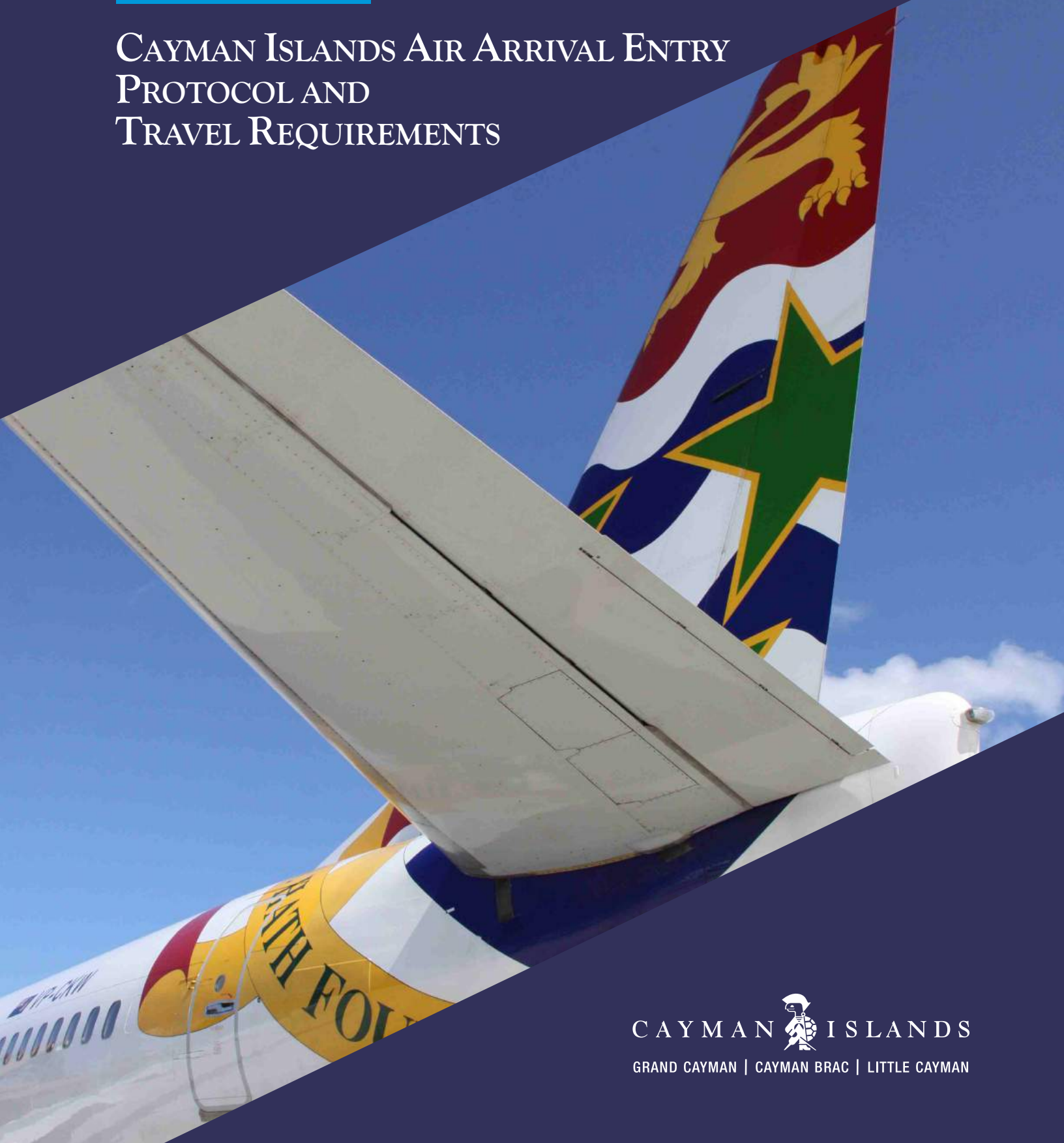
All sanitation guidelines for various tourism operators and businesses can be found at:

<https://www.visitcaymanislands.com/en-us/ourcayman/sanitation-guidelines>



RB5

CAYMAN ISLANDS AIR ARRIVAL ENTRY PROTOCOL AND TRAVEL REQUIREMENTS



CAYMAN ISLANDS AIR ARRIVAL ENTRY PROTOCOL AND TRAVEL REQUIREMENTS

As the Cayman Islands prepares to welcome back tourism, sanitation plans for various tourism businesses will be important however, a review of ports of entry protocols will be required. This section of the report will highlight point of entry requirements for the Cayman Islands.

Cayman Islands Airports Authority

The Cayman Islands Airport Authority (CIAA) is the statutory authority that owns and operates airport facilities in the Cayman Islands. Below is the outline of procedures that are currently in effect at Owen Roberts International Airport (ORIA) on Grand Cayman and

Charles Kirkconnell International Airport in Cayman Brac. To welcome visitors back to the Cayman Islands we aim to implement protocols with safety and sanitation as a priority to ease any anxiety through the visitor journey.

COVID-19 procedures at ORIA & CKIA

- 6ft distance markers at check in lines.
- Plexiglass guard at Customs + Immigration desks.
- Revised station layout to meet distance guidelines.
- Seats are blocked in lounge to meet distance guidelines.
- Only passengers allowed in terminal (No visitors allowed).
- Hand disinfecting stations throughout the terminal.
- Masks are mandatory.
- Staff sanitize hands and wear masks.
- Security Checkpoint Bins are sanitized before each use at security screening.
- Public Health checks temperature of arriving passengers on repatriation flights.
- Plexi glass installed at airline check-in counter.
- Negotiations with airlines are ongoing to adjust arrival times to reduce congestion.
- Heightened sanitization of washrooms and high touch common areas
- Children's play area is closed until all restrictions are lifted.
- All Airport Food & Beverage and Retail Concessionaires have implemented COVID-19 mitigation measures.
- Health and Safety Signage to be installed for border relaxation and international travel opening.
- Ongoing communication plan for the general public and facility PSA reminder through airport public announcement system.

Further to the preventative and safety measures that are being adopted by the CIAA in the Cayman Islands, it is also important to understand the safety and sanitation measures that are being put in place at international airports.

National Flag Carrier, Cayman Airways Ltd.

As the national flag carrier of the Cayman Islands, pre-COVID-19 Cayman Airways accounted for 38% of air seat capacity market share. The Ministry of Tourism will maximize the airlines capabilities by developing new routes both regionally and internationally to lead the

COVID-19 recovery strategy. ORIA airport is now modernized with a significantly increased footprint at both the terminal and currently underway runway extension; this combination positions our international airport as an attractive Caribbean hub.



CONCLUSION

The Cayman Islands offers a holistic experience from international business services, investment opportunities through real estate and an exceptional array of recreational leisure activities for which both pillars of our economy—Financial Services and Tourism—complement one another in offering a total package. During these challenging times of the COVID-19 pandemic, the Cayman Islands Government has continued to put its people first by creating support for the resuscitation of the economy through sound business practices, implementation of telecommunications improvements, and other services that are necessary to restore the country to its full operating capacity thus improving and supporting Caymanian families and our residents.

Our Cayman Islands Brand is reflective of the people of our islands: hard working, humble and committed to providing top-notch customer service in all areas of business. While there was less of an impact on our financial services sector in comparison to the tourism sector, it is through a committed partnership amongst these areas to use what we have learned in our respective industries during this pandemic that both pillars will resurge stronger than before and attract new visitors—for business, leisure or bleisure—when our borders reopen.

The RB5 plan reaffirms our award-winning positioning of our three island paradise as a safe, diverse and welcoming destination for our visitors and residents, attributes that have been earned by the warm hospitality of our Caymanian people and reinforced through exceptional offerings, stakeholders, and tourism business infrastructure. Supporting and ensuring the health of our tourism industry as it returns to its previously robust and successful operation is our top priority. To do this successfully, we have invested in our Caymanian tourism employees who faced economic hardships during the pandemic by implementing financial assistance stipends, retraining tools, and must now turn our focus to how these initiatives will positively become part of the revived tourism industry. Our efforts to solidify the future of the Cayman Islands tourism industry through financial support to existing tourism partners, new job creation, and the landscape to create new Cayman entrepreneurs and tourism businesses means we will have our people return to the forefront of the hospitality industry, sharing our cultural and environmental heritage while growing sustainably and diversifying our tourism product.

Over the next two to three years, the Ministry and Department of Tourism in collaboration with tourism partners will work towards a phased recovery of air arrivals

while offering a “new norm” of safety and sanitation protocols with sensitivity to the changed era of travel. The Cayman Islands will continue to be positioned as casual luxury destination and bolster our unique destination attributes to meet the tourism National Tourism Plan goals. The focus will be enhancing our visitor experience on all levels that assist the visitor to reconnect with their passion for travel.

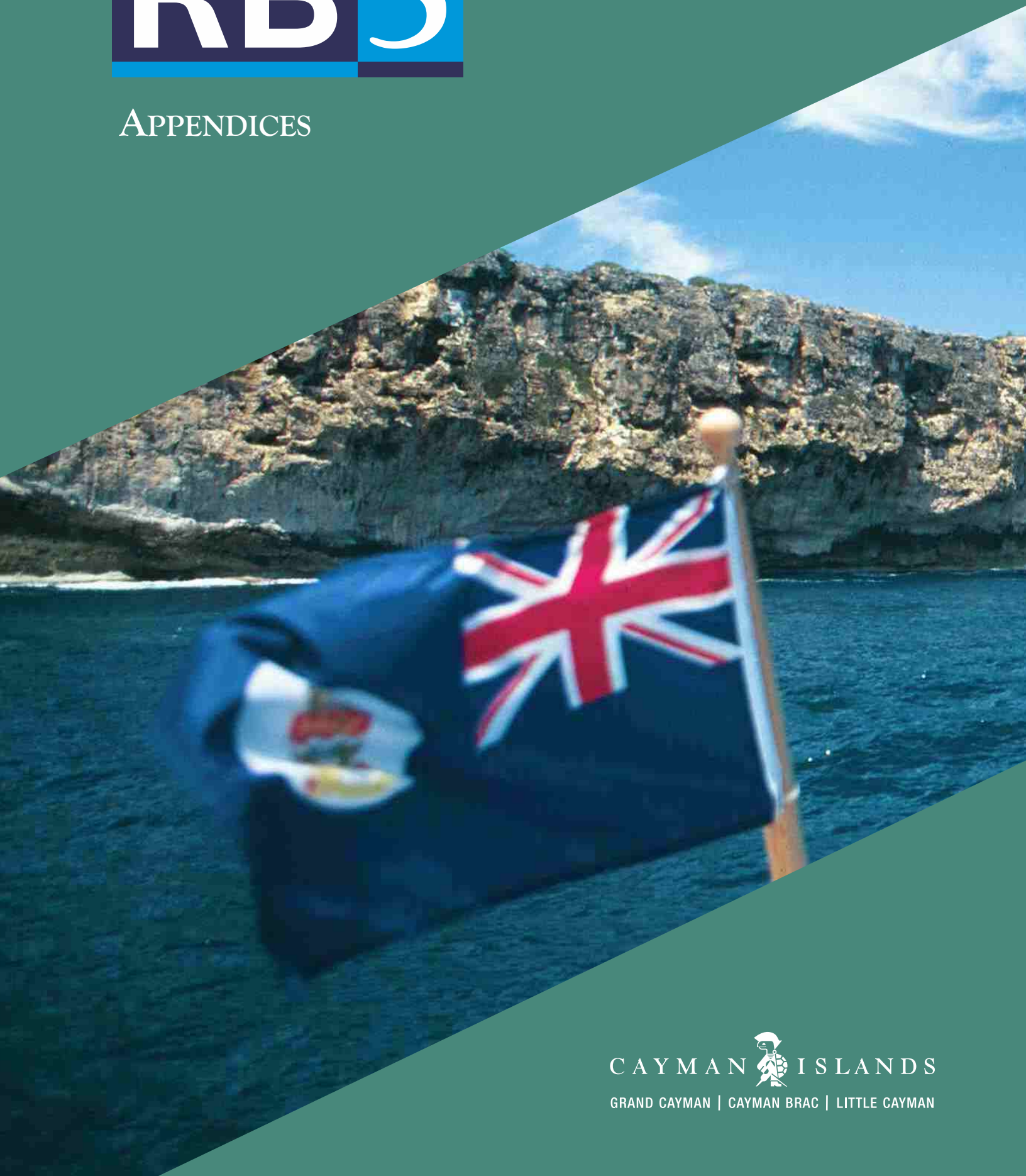
The Cayman Islands is an attractive destination for investments and with the services offered, this strength will continue to develop all three islands. The destination's quality and confidence provide the environment for quality work opportunities for Caymanians in the tourism sector, and because of this our people will benefit from continued training, education, financial stability through better paying jobs. The COVID-19 pandemic has provided us an opportunity to rebuild a resilient and sustainable tourism sector while working alongside industry stakeholders to reinvent tourism. This is the time to drive innovation, capitalize on our assets and re-enter the travel marketplace as the top Caribbean destination to visit.

The Ministry of Tourism strives to create long-term resilience and this plan has been designed to deliver an organised road map to recovery. Our aim is to protect our people and environment, celebrate our cultural heritage, while ensuring a vibrant tourism economy that benefits the people of the Cayman Islands.





APPENDICES



APPENDICES

Appendix One: Airline Carrier Protocols with Service to the Cayman Islands

In order to manage the number of COVID-19 related cases in the Cayman Islands, once borders re-open, the Cayman Islands will work with the various airlines that serve the destination on their sanitation protocols. Below outlines, per airline, what protocols will be put in place pre, during and post flight to the Cayman Islands.

AIR CANADA

CHECK-IN

Health screening questions and pre-flight infrared temperature checks for customers, as well as the disinfection of frequently touched areas such as check-in counters and kiosks are just some of the measures implemented for your safety.

1. As a preventative measure, your **temperature** will be taken without contact.
2. For the safety of everyone, our **check-in kiosks** are regularly cleaned.
3. For your safety, all customers are required to wear protective **face coverings**.
4. **Hand sanitizer** dispensers have been placed around the airport for your personal use.
5. All of our **check-in counters** are thoroughly sanitized throughout the day.
6. All of our employees wear **face coverings**, with other **optional PPE** (personal protective equipment) items available such as **gloves**.
7. We'll ask you a few **health questions** before you board to make sure you're safe to fly.

BOARDING/ GATE AREA

Ongoing cleaning of our gate areas, regular health screening questions for all customers, as well as mandatory face coverings for all employees and customers are steps designed to protect you, and everyone on board.

1. For your safety, we're asking all customers to wear protective **face coverings**.
2. All of our **gate counters** are cleaned regularly for your convenience.
3. All of our employees wear **face coverings**, with other optional PPE items available such as **gloves**.
4. As a precaution, you may be asked a few **health-related questions** before boarding.

ON-BOARD/ AIRCRAFT

All high-touch areas are sanitized with a hospital-grade disinfectant before every flight and each time an aircraft overnights it receives a thorough cleaning. Along with the implementation of Air Canada CleanCare+, these on-board services have been changed or suspended:

Cabin grooming standards have been augmented.

1. HEPA filtration systems capture 99.9% of airborne particles and continually refresh cabin air.
2. Blocking adjacent seats in Economy Class to encourage on-board distancing will continue until June 30, 2020.
3. Complimentary customer care kits will be provided and include a 30 ml hand sanitizer, 2 antiseptic wipes, a mask, gloves, and a water bottle all in a bag that doubles as a disposable waste bag.

Appendix One: Airline Carrier Protocols with Service to the Cayman Islands

CAYMAN AIRWAYS

CHECK-IN	<ul style="list-style-type: none"> CAL airport staff will be wearing Personal Protective Equipment (PPE) for the check-in and boarding process, and check-in counters will be sanitized frequently during the check-in process
BOARDING/ GATE AREA	<ul style="list-style-type: none"> All passengers must be wearing their own face mask, which they must wear from check-in and through the duration of the flight. Social distancing rules will be enforced for the boarding process (6-foot spacing between each passenger)
ON-BOARD/ AIRCRAFT	<ul style="list-style-type: none"> Middle seats will be left empty No Business Class seats will be sold or assigned

AMERICAN AIRLINES

CHECK-IN	<p>Enhanced cleaning - Cleaning and sanitizing kiosks, ticket counters, passenger service counters and baggage service offices.</p> <p>Plexiglass shields - <i>Installing commercial-grade shields at ticket counters.</i></p> <p>Ticket counters - <i>Locating agents at alternating workstations and turning off some kiosks to create more space.</i></p> <p>Our team members - Face coverings are required for all team members, and when local orders require it, we're checking temperatures.</p> <p>Creating space - Encouraging physical distancing throughout the check-in and security areas.</p> <p>Hand sanitizing stations - Adding dispensers before security areas in select locations.</p> <p>**American Airlines said it will deny boarding to customers who don't comply with its existing mandatory mask policy, and "may also deny future travel for customers who refuse to wear a face covering." American did not provide much additional detail but said it would communicate further specifics to team members this week and that the amended policy was effective June 16.</p>
BOARDING/ GATE AREA	<p>Expanded cleaning - Cleaning and sanitizing the gate and seating area more frequently.</p> <p>Creating space - Encouraging physical distancing at the gate and while boarding the plane.</p> <p>Boarding pass scanning - You can now scan your mobile or printed boarding pass to limit physical interactions.</p> <p>Face coverings - A face covering is required while flying on American, except for very young children or anyone with a condition that prevents them from wearing one. Be sure your face covering is on before you board the plane.</p>
ON-BOARD/ AIRCRAFT	<p>Limiting flight loads to prevent completely full flights and requiring face coverings to be worn on every flight, according to its website. If a flight is filling up, American will notify passengers, typically by email, and offer the option to change to an alternate flight free of charge.</p> <p>Electrostatic spraying - <i>Expanded use of an EPA-approved, hospital-grade disinfectant that kills 99.9% of viruses and bacteria and lasts up to 7 days.</i></p> <p>High-touch and public areas - Deep cleaning tray tables, seatbelt buckles, armrests, window shades, seatback screens, doors and overhead bin handles.</p> <p>Hand sanitizers - <i>Wipes or gels will be available on most international flights and some domestic flights over 900 miles.</i></p> <p>Face coverings - For your well-being and those seated near you, a face covering is required during flight, but you can remove it to eat or drink.</p>

Appendix One: Airline Carrier Protocols with Service to the Cayman Islands

DELTA

CHECK-IN	<ul style="list-style-type: none"> All customers must wear a mask or face covering, and extra masks and Care Kits will be available at check-in if you need one. All our employees wear masks or face coverings. Kiosks are being wiped down and sanitized frequently throughout the day. For a touchless check-in experience, download the Fly Delta app. Check-in counters are being wiped down and sanitized frequently throughout the day. Hand sanitizer dispensers have been added near high-traffic and high-touch locations throughout the airport. Plexiglass shields have been added to all Delta counters that are staffed with an agent throughout the airport and are in place systemwide.
BOARDING/ GATE AREA	<ul style="list-style-type: none"> Electrostatic spraying with high-grade disinfectant is used to sanitize our gate areas and jet bridges; the sprayers disperse the disinfectant in a fine mist which clings to surfaces throughout the entire area. Cleaning supplies have been added at the counter for agents to spot clean as they see fit. Plexiglass shields have been added at all Delta counters throughout airports systemwide. Gate counters are being wiped down frequently throughout the day. BOARDING PROCESS - To minimize your contact with other customers, boarding will occur from back to front, with those customers seated at the back of the aircraft boarding first. Boarding is now limited to 10 customers at a time.
ON-BOARD/ AIRCRAFT	<ul style="list-style-type: none"> All customers must wear a mask or face covering. All our employees wear masks or face coverings. To give you more space, select seats have been temporarily blocked across all cabins on all aircraft, and the total number of customers per flight has been reduced. Through September 30, 2020 An extensive checklist is followed to ensure everything meets our elevated standards. If an aircraft doesn't pass our spot check before you board, our teams can hold the flight and call back the cleaning crew. Electrostatic spraying with high-grade disinfectant is used to safely sanitize all our aircraft before every flight; the sprayers disperse the disinfectant in a fine mist throughout the entire cabin. Lavatories are cleaned during flight and extensively cleaned and sanitized after every flight. All overhead bin handles are sanitized before every flight. All our aircraft are ventilated with fresh, outside air, or air that is recirculated through high-grade HEPA filters, which extract more than 99.99% of particles, including viruses.
QUARANTINE	<ul style="list-style-type: none"> To allow for greater space when deplaning, our flight attendants will cue customers to exit the aircraft.

Appendix One: Airline Carrier Protocols with Service to the Cayman Islands

JETBLUE

CHECK-IN	All customers are now required to wear a face covering over their nose & mouth throughout their journey, including during check-in, boarding, while in flight and deplaning.
BOARDING/ GATE AREA	We have temporarily suspended our normal group boarding procedures. Most customers will now board our planes from the back to the front.
ON-BOARD/ AIRCRAFT	<ul style="list-style-type: none"> • We are limiting the number of seats for sale on JetBlue flights, allowing us to provide additional space between individuals who are not traveling together (thru July 31). Middle seats are blocked for purchase on our larger aircraft, and most aisle seats are blocked for purchase on our smaller aircraft. Our crewmembers are proactively reviewing seat assignments to help ensure as much personal space as possible. • Adjusting on board service including pre-sealed snack and beverage bags in Core, and pre-packaged fresh meals in Mint • Increased aircraft cleaning before every flight and overnight, including surfaces that are touched most like tray tables • We are conducting deep cleans of our aircraft each night and are applying a hospital-grade disinfectant called Sani-Cide EX3 that is effective against the coronavirus. Our tray tables and lavatories are disinfected before every flight, and we are also focused on other high touch areas such as seat covers, armrests and seatbelts during overnight cleanings. • Using electrostatic sprayers to disinfect the inside of our aircraft. For enhanced disinfecting, we are using electrostatic sprayers in our aircraft cabins during overnight deep cleanings. These devices apply an electric charge to the disinfectant, which allows it to fully coat and cling to surfaces inside our aircraft that may be otherwise hard to reach by hand with traditional aerosol or pump sprays. • Filtering cabin air through hospital-grade HEPA air filters with cabin air completely changing about every three minutes. All of our aircraft are equipped with hospital-grade HEPA air filters. All recirculated air is passed through these filters before re-entering the cabin or being mixed with fresh air. HEPA filters remove 99.97% or more of particles, bacteria and viruses. All of the air in the cabin is completely changed about every three minutes with approximately 50% fresh air and 50% HEPA filtered air.

Appendix One: Airline Carrier Protocols with Service to the Cayman Islands

SOUTHWEST AIRLINES

CHECK-IN	<ul style="list-style-type: none"> • Hand sanitizer is available at the check-in kiosks, ticket counters, and gates. Wipes will be available for Customers onboard. • We're cleaning the ticket counters, gates, and baggage claim areas multiple times a day. • We're posting airport signage and floor markers to encourage physical distancing in gate areas. • Plexiglas® is being installed at ticketing and gate counters, and baggage service offices. • Our Customer-facing Employees are required to wear masks or face coverings.
BOARDING/ GATE AREA	<ul style="list-style-type: none"> • Customers will be required to wear a face covering in order to board the plane. • Boarding in groups of 10 to allow for physical distancing on only one side of the boarding poles. • Family boarding is not changing, but we will encourage families to respect the personal space of others during boarding. • Middle seats open through at least September 30 to provide Customers more personal space onboard. <ul style="list-style-type: none"> ▪ Customers can pick their seat—if you're traveling together, you're welcome to sit together.
ON-BOARD/ AIRCRAFT	<ul style="list-style-type: none"> • Customers and all employees are required to wear a face covering • Both an electrostatic disinfectant and an anti-microbial spray are applied on every surface of the aircraft, killing viruses on contact and forming an anti-microbial coating or shield for 30 days. • Sani-Cide EX3, a broad-spectrum disinfectant, will be used to clean commonly used areas (onboard lavatories, tray tables, armrests, seat belts, flight attendant call buttons, and overhead bin handles) before every flight. • We deep clean each plane from nose to tail for nearly 6-7 hours every night. • Every aircraft is equipped with a sophisticated air recirculation system that introduces fresh air into the cabin every second while inflight, resulting in a complete exchange of cabin air every two to three minutes.

Appendix One: Airline Carrier Protocols with Service to the Cayman Islands

UNITED AIRLINES

CHECK-IN	<ul style="list-style-type: none"> • Adding a step to the check-in process that requires you to acknowledge you don't have symptoms for COVID-19 and agree to follow our policies. • Minimizing contact between our agents and customers by creating a 6-foot rule at ticket counters. • Rolling out a touchless check-in process at select airports • Introducing touchless check-in for customers with bags • Installing sneeze guards at check-in and gate <p>** United Airlines on Monday June 15, 2020 said that starting on June 18, passengers who do not comply with its mandatory mask policy when onboard a United flight will be placed on an internal travel restriction list and will lose their travel privileges “for a duration of time to be determined pending a comprehensive incident review,” the airline stated.</p>
BOARDING/ GATE AREA	<ul style="list-style-type: none"> • Boarding fewer customers at a time and, after pre-boarding, boarding from the back of the plane to the front to promote social distancing • Allowing customers to self-scan boarding passes
ON-BOARD/ AIRCRAFT	<ul style="list-style-type: none"> • Requiring all customers and employees to wear a face covering and providing disposable face coverings for customers who need them • Providing individual hand sanitizer wipes for customers • Disinfecting high-touch areas, like tray tables and armrests, before boarding • Not limiting seats/capacity but notifying passengers when a flight is booked 70%+. Allowing to rebook new flights. • Aiming to give more personal space on board when possible, including: <ul style="list-style-type: none"> Limiting middle seat selection Moving customers seated closely together De-planing in groups of five rows at a time to reduce crowding • Using electrostatic spraying to disinfect aircraft, to be completed on all domestic flights by mid-June • Using state-of-the-art, hospital-grade, high-efficiency (HEPA) filters to circulate air and remove 99.97% of airborne particles. The cabin recirculated air is exchanged every 2-3 minutes

Appendix One: Airline Carrier Protocols with Service to the Cayman Islands

CHECK-IN	<p>Your check in experience will be close to what you're used to: at the kiosk or the check-in counter. We'll be wiping surfaces between guests, you'll have more room as you wait in line, and we'll let you handle your own bags. But even though we'll be wearing masks, we'll be smiling and greeting you just like before.</p>
BOARDING/ GATE AREA	<p>For the safety of all our guests and crew, we have enhanced our screening at boarding. We'll ask health questions required by Transport Canada, take your temperature without contact and ensure that you have your own mask to wear on your flight.</p> <p>Transport Canada requires that all travellers over 2 years old, wear a face covering. You'll need to bring a face mask or scarf with you to wear throughout your travel journey.</p>
ON-BOARD/ AIRCRAFT	<p>We're giving you more space on your journey. We're limiting seats on board to ensure you and our WestJetters can continue to fly safely. Families travelling together, can sit together.</p> <p>Upon boarding - We'll give you a sanitization wipe for your hands or any surface you wish to wipe down, for your peace of mind.</p> <p>Aircraft fogging - We've implemented a new cleaning procedure calling fogging. The entire aircraft interior is completely disinfected using a hydrogen peroxide-based solution cleaner. All WestJet 737 and Q400 aircraft are cleaned as part of their overnight cleaning and sanitization regimen.</p> <p>HEPA filters - All WestJet aircraft are equipped with an industry-leading air circulation system containing a HEPA filter, similar to what's used in hospitals. Not only do these filters introduce fresh air into the cabin every 2 to 3 minutes, but they also capture and filter 99.99% of all airborne particles so you can breathe a little easier.</p>

Appendix Two: Nonstop Service Gateway Airport Protocols

FORT LAUDERDALE	
https://www.broward.org/airport/passengers/flights/advisories/pages/default.aspx	
PASSENGERS	FACE COVERINGS: All individuals visiting, traveling through public areas of the airport's terminals and the RCC are required to wear an appropriate face covering or mask to protect the wellbeing of fellow passengers, visitors, and airport employees.
EMPLOYEES	FACE COVERINGS: All individuals working in public areas of the airport's terminals and the RCC are required to wear an appropriate face covering or mask to protect the wellbeing of fellow passengers, visitors, and airport employees. Broward County requires face coverings for employees who provide an essential service to the public. Additionally, the U.S. Customs and Border Protection and Transportation Security Administration also require their employees to wear face coverings and are encouraging travellers to do the same.
AIRPORT	<p>PROTECTIVE SHIELDS: Acrylic (plastic) safety barriers are being installed at airline ticket counters, gate areas, and the RCC counters as part of a range of social distancing measures.</p> <p>DEEP CLEANING: Enhanced sanitization efforts with deep cleaning equipment and fogging systems continue throughout the airport to ensure a safe, secure, and clean facility for the traveling public and employees. Hand sanitizer units are available in various areas of the airport, particularly near restrooms and the security checkpoints.</p> <p>SOCIAL DISTANCING SIGNAGE: We're adding reminders at check-in counters, security checkpoints, and gate waiting areas for passengers to safely practice social distancing and maintain a six-foot distance from each other whenever possible during travel, especially during queueing.</p> <p>Limited dining and retail outlets</p>
QUARANTINE	As of late March 2020, all passengers arriving from the north-eastern United States (New York, New Jersey, and Connecticut) are required to self-quarantine for 14 days from the time of entry into Florida or the duration of the individual's presence in Florida, whichever is shorter, to help prevent the spread of COVID-19 per the Florida Governor's Executive Order. Florida Department of Health representatives will screen arriving passengers with a questionnaire and collect contact information in the event a follow-up is required. The Florida National Guard and Broward Sheriff's Office will assist with the operation. (Updated: June 11, 2020)

Appendix Two: Nonstop Service Gateway Airport Protocols

TAMPA	
https://www.tampaairport.com/tpa-ready	
PASSENGERS	Not required. All passengers and guests should wear face masks while at the Airport in any capacity.
EMPLOYEES	All employees are required to wear face masks.
AIRPORT	<ul style="list-style-type: none"> • PLASTIC SHIELDS: Plastic or acrylic shields have been installed in key high-traffic areas, including ticket counters, TSA security checkpoints, boarding gate and concessions counters. • SOCIAL DISTANCING MARKERS: Thousands of ground markings and signs are in place to give guidance on six-foot distancing at ticket counters, boarding gates, shuttles, SkyConnect, concessions counters, US Customs, and other common areas. • REDUCED SEATING: Seating has been reduced, blocked off or spaced apart in places like gate areas, dining areas, workstations and Main Terminal greeting sections to promote distancing. • CLEANING AND SANITATION: TPA has employed additional cleaning staff, using cutting-edge disinfection applications and products on surfaces, hand rails and elevator buttons, and adding more hand sanitizers throughout the Airport.
QUARANTINE	Visitors from outbreak hot spots, such as New York State, Connecticut and New Jersey, are required by the state of Florida to self-quarantine for 14 days. For the latest details contact the Florida Department of Health .
ATLANTA	
https://www.atl.com/COVID19/	
PASSENGERS	Face masks are not required by the airport but encouraged. However, many airlines are requiring passengers to wear masks while on the aircraft.
EMPLOYEES	All employees who interact with the public on a daily basis or those who work in public spaces are required to wear a face mask. <ul style="list-style-type: none"> • Increased frequency of cleaning of public areas • Use of environmentally friendly cleaning and disinfectant in public areas • Additional education and training of employees • Signage to provide guidance and education to passengers and employees • Public messages on digital displays and CNN monitors • Daily coordination with public health, CDC, and other agencies for updates, additional guidance, and instructions
AIRPORT	Plexiglass partitions are installed in the areas including, but not limited to: Domestic Security Checkpoints, Ticket Counters, Food and Beverage Counter Areas
QUARANTINE	None

Appendix Two: Nonstop Service Gateway Airport Protocols

WASHINGTON/DULLES (IAD)

<https://www.flydulles.com/iad/dulles-international-airport-update-covid-19-coronavirus>

PASSENGERS	In accordance with Virginia Gov. Ralph Northam's mandate that protective face coverings be worn in public spaces, face coverings are required for everyone at Reagan National and Dulles International airports as of Friday, May 29, 2020.
EMPLOYEES	All airport employees, contractors and tenants have been required to wear face coverings while inside the airport since May 18.
AIRPORT	<ul style="list-style-type: none"> Increased sanitation of high-touch areas at the airport, like handrails, escalators, elevator buttons, restrooms and the AeroTrain, as well as the use of self-drying disinfecting spray on Mobile Lounges. Installed floor decals to encourage social distancing. Implemented economy parking rates at parking garages within walking distance to the terminal, eliminating shuttle buses for social distancing purposes. Rearranged seating near food options to encourage social distancing. Posted educational messaging about tips for healthy travel on overhead announcements, terminal monitors and signage. Installed Plexiglas barriers in areas where staff and customers interact by airlines and TSA As of May 29, face coverings are required for everyone at Dulles International Airport, per Gov. Ralph Northam's mandate. Children under age 10 and people with medical conditions which prevent the wearing of face coverings are exempt.
QUARANTINE	None. Virginia currently does not have any quarantine requirements upon arrival from travel within the US

CHARLOTTE

<https://cltairport.mediaroom.com/Covid19Update17>

PASSENGERS	Face masks/coverings not required, but recommended since all airlines that serve CLT require face masks/coverings
EMPLOYEES	The Aviation Department has required its employees to wear a face covering at work. Many of our partners – from the airlines to the concessionaires – are recommending or requiring their employees do the same.
AIRPORT	Other safety enhancements aimed at our customers include screens at ticket counters, boarding counters and other locations such as our customer service counters and parking toll plaza cashier areas have been or are in the process of being installed. Also, housekeeping and Airport staff vigilantly continue to clean the terminal regularly each day and conduct nightly deep cleanings at the terminal and our busses.
QUARANTINE	None

Appendix Two: Nonstop Service Gateway Airport Protocols

NEW YORK/NEWARK (JFK, LGA, EWR)

<https://www.panynj.gov/port-authority/en/alerts/coronavirus-updates.html>

PASSENGERS	A face covering is required for any person entering all airport areas, including all associated facilities including Airport Buses and the AirTrain.
EMPLOYEES	Face covering required
AIRPORT	<ul style="list-style-type: none"> We have increased the frequency of cleaning, sanitizing and disinfecting in all areas of the terminal including touchpoints such as escalator rails, elevator buttons, seating, iPads, and payment systems. Plexiglass shields have been positioned strategically throughout our facilities including but not limited to airport check-in counters, TSA security checkpoints, Customs and Border Protection, retail, food and beverage concessions, AirTrain, Welcome Centers, Taxi stands and other high traffic areas.
QUARANTINE	None

BOSTON

<http://www.massport.com/logan-airport/covid-19/>

PASSENGERS	To keep everyone safe, we are complying with the Commonwealth's order requiring all passengers to wear face coverings while inside our facilities.
EMPLOYEES	To keep everyone safe, we are complying with the Commonwealth's order requiring all employees to wear face coverings while inside our facilities.
AIRPORT	<ul style="list-style-type: none"> Seating within the gate area has been blocked off to allow for social distancing. There are areas set aside for families to sit together. Signage has been added throughout our facilities to remind passengers and employees to wash their hands regularly, practice social distancing and wear a face covering inside the airport. At our airports, restrooms are cleaned and touch points are disinfected throughout the day: <ul style="list-style-type: none"> Deep cleanings are performed nightly. Additional hand sanitizer dispensers, many touchless, have been installed for passengers and employees. Enhanced measures are being implemented in security checkpoint areas, and inspection stations are being cleaned throughout the day, and/or after each flight operation. Massport buses are being cleaned nightly with disinfectant. During the day while the buses are in operation, drivers wipe down high-touch areas such as seats, grab bars and luggage racks. <p>All passengers entering MA, including through Logan Airport, are asked to self-quarantine for 14 days as a precautionary measure.</p>

Appendix Two: Nonstop Service Gateway Airport Protocols

MIAMI INTERNATIONAL AIRPORT http://www.miami-airport.com/COVID_19.asp	
PASSENGERS	Requiring all passengers and visitors at MIA to wear facial coverings, as stated in Miami-Dade County Executive Order 23-20 .
EMPLOYEES	Requiring employees at MIA to wear facial coverings, as stated in Miami-Dade County Executive Order 23-20 .
AIRPORT	<ul style="list-style-type: none"> Installing protective plexiglass screens in key areas such as check-in counters, boarding gates, information counters and Transportation and Security Administration (TSA) checkpoint queue lines. Coordinating with janitorial partners to ensure that high traffic areas including restrooms, TSA checkpoints, international arrivals and employee areas have been deep cleaned and are frequently maintained while following best practices. Adding additional hand sanitizing stations throughout the terminals and near information counters, as well as key employee operating areas. Dining and retail locations are restricted to 50% capacity and social distancing measures have been implemented. Making sure high “touch-point” areas such as kiosks, handrails and elevator buttons are cleansed frequently with hospital grade disinfectant.
QUARANTINE	<ul style="list-style-type: none"> Travelers from the New York Tri-State area are directed to self-quarantine for 14 days upon arrival at MIA, per an executive order by the State of Florida. Travelers from Louisiana are directed to self-quarantine for 14 days upon arrival at MIA, per an executive order by the State of Florida.

HOUSTON https://www.fly2houston.com/flysafe/	
PASSENGERS	Recommended, but not required
EMPLOYEES	All Houston Airport employees are required to wear facial coverings.
AIRPORT	<ul style="list-style-type: none"> Additional hand sanitizer stations Ground markings for social distancing Increased air filter replacements Crowd control sensors/monitoring Public announcement reminders Increased Cleanings at high touchpoints and restrooms Signage and digital displays Safety shields at information booths* UV disinfectant cuff on escalator rails
QUARANTINE	None

Appendix Two: Nonstop Service Gateway Airport Protocols

DENVER	
https://www.flydenver.com/traveler_services/alerts	
PASSENGERS	Denver International Airport (DEN) requires all visitors and passengers to wear face coverings while at the airport until further notice. Passengers without face covering may purchase our vending machines that sell face masks as well as sanitizing wipes.
EMPLOYEES	All employees at DEN are required to do the same.
AIRPORT	<ul style="list-style-type: none"> • Installed new hand sanitizer dispensers in prioritized areas throughout the airport and additional dispensers are on order. • Disabled the air hand dryers in the restrooms to reduce the spread of germs. Passengers may utilize paper towels. • Added sanitary wipe dispensers at each gate to allow passengers to sanitize their seat on the plane. • Increased the frequency and intensity of efforts to disinfect restrooms and other public areas with cleaning agents intended to kill germs. • Continued to clean and sanitize the trains to the gates daily and will continue to do so with an even stronger focus to kill germs.
QUARANTINE	None

DALLAS	
https://www.dfwairport.com/covid19/index.php	
PASSENGERS	Not required. In an effort to create a safe, secure and traveller ready environment, DFW Airport is strongly encouraging all visitors to wear a face covering at all times when at our airport.
EMPLOYEES	All DFW Airport employees are required to wear face coverings when interfacing with customers at parking plazas and terminals.
AIRPORT	<ul style="list-style-type: none"> • A dedicated Strike Cleaning Team, consisting of 165 dedicated members, who in addition to our custodial contractors focus on increased cleaning frequencies of touch points in all five terminals • Smart Restroom implementation throughout the terminals offering a touchless experience that includes auto soap dispensers, single-touch paper towel dispensers and auto faucets • Plexiglass shields have been installed at most TSA security checkpoints and CBP document inspection locations, and are being installed throughout terminals in areas where employees will have direct interactions with customers • Graphics and signage are being installed throughout the terminals to encourage and aid in social distancing protocols
	None

Appendix Two: Nonstop Service Gateway Airport Protocols

DETROIT	
https://www.metroairport.com/about-dtw/covid-19-information	
PASSENGERS	In accordance with Governor Whitmer's Executive Order, face coverings are required in DTW's terminals and must be worn by passengers, unless they cannot be medically tolerated.
EMPLOYEES	Face coverings are required in DTW's terminals and must be worn by employees unless they cannot be medically tolerated.
AIRPORT	<p>The following programs and services are temporarily suspended:</p> <ul style="list-style-type: none"> • Tram service in the McNamara Terminal • All Delta Sky Clubs, except for the Delta Sky Club located in the McNamara Terminal across from Gate A38 • Airport Ambassador volunteer program • DTW Destination Pass • Valet service at the McNamara Terminal • Playport in the North Terminal • Ground transportation options may be limited. <p>Increasing the frequency of cleaning in the McNamara Terminal and North Terminal, concentrating on "touch points," such as doorknobs, water fountains, handrails and toilet seats.</p> <p>Adding hand sanitizing stations in areas that passengers and airport employees can easily access throughout the terminals.</p>
QUARANTINE	None

MINNEAPOLIS	
https://www.mspairport.com/msp-airport-takes-steps-minimize-risk-covid-19-virus	
PASSENGERS	Recommended
	Unclear
EMPLOYEES	<p>We have ramped up cleaning and disinfecting procedures for MSP touchpoints throughout Terminals 1 and 2. Our cleaning partner has established a formal COVID-19 response team and microbial remediation plan and is disinfecting touchpoints throughout public spaces. Enhanced focus areas include high-use restrooms, terminal seating, public handrails and food courts.</p> <p>In addition, our cleaning partner is conducting extra disinfection of public spaces throughout MSP, and we've placed hand sanitizers in many high-traffic locations throughout our terminals.</p>
AIRPORT	
QUARANTINE	None

Appendix Two: Nonstop Service Gateway Airport Protocols

PHILADELPHIA	
https://www.phl.org/newsroom/face-coverings	
PASSENGERS	Required
EMPLOYEES	Required
AIRPORT	<p>Additionally, PHL has stepped up its cleaning and disinfecting procedures to include the use of Envirox Critical Care, a highly potent disinfectant formulated for critical disease transfer points. The chemical is known for its low toxicity and 24-hour residual bacterial killing abilities. We are using this chemical on handrails for steps, escalators and moving sidewalks, as well as elevators, handles, buttons, floors and restrooms.</p> <p>In order to reduce the number of passengers touching common areas, we have proactively installed motion sensor activated technology throughout public areas, including doors, faucets, soap dispensers, flush valves, paper towel dispensers and doors. Each terminal is stocked with hand sanitizer dispensers, and most of our 50 water bottle filling stations are hands free.</p>
QUARANTINE	None





































TORONTO	
https://www.torontopearson.com/en/notices/coronavirus	
PASSENGERS	Required
EMPLOYEES	Required
AIRPORT	<ul style="list-style-type: none"> • Temperature checks • additional cleaning staff hours • Additional hand sanitizer stations at key terminal locations, access points and other heavily travelled areas • Use of disinfectant wipes and solutions for escalator, moving sidewalk, stairwell and baggage cart handrails and handles • Regular disinfecting of all hard surfaces • Enhanced disinfection of terminal washrooms • Regular disinfection of passenger processing kiosks
QUARANTINE	Government of Canada put in place an emergency order under the Quarantine Act. It requires all travellers arriving in Canada to isolate or quarantine (self-isolate) for 14 days upon arrival. Its purpose is to slow the spread of COVID-19 in Canada. Failure to comply with this order is an offence under the Quarantine Act.

Appendix Three: Cayman Islands Tourism Product Developments

Developments	Rooms	Location	Estimated Completion
The Cottages	10 Individual Cottages	East End GCM	Complete
Rum Point Club Residences https://www.rumpointclubresidences.com/	36 units	North Side, GCM	Complete
Kailani, Grand Cayman (NCB Group) https://rcbgrouphy/wp-content/uploads/2018/01/Luxury-Condo-Hotel-Overview.pdf	80 (1, 2 & 3 bedroom suites)	Almond Tree Site, North Church St. GCM (Broke Ground)	TBO
Revive (Healing Resort and Spa)	28 Bungalows	Mariners Cove, Prospect, Shoreline Cliff, GCM	TBD
Grand Hyatt Grand Cayman Hotel & Residences http://grandhyattgrandcaymanresidences.com/sevenmilebeach/	351 (including 167 residences)	Pageant Beach George Town, GCM	TBD
St. James Point, Mandarin Oriental Hotel	100 hotel rooms 89 residences	Beach Bay - Bodden Town, GCM	2022
Eco-Resort at Barefoot Beach	89 Cottages	Barefoot Beach East End, GCM	TBD
Cayman Enterprise City Zone	TBD	South Sound, GCM	TBD
Dart Realty Ltd. 5 Star Property	190 (proposed)	West Bay, GCM	TBD
Ironwood Resort with 18 hole Championship Course	82 golf course rooms and 20 beach bungalows (Frank Sound beach front real estate) and Club House with F&B facilities	North Side, GCM	TBD



AIRPORT COVID-19 REQUIREMENTS

AIRPORT	Mask Required (Passengers)	Mask Required (All Employees)	Enhanced Airport Sanitation	Self-Quarantine
Atlanta				
Boston				 Recommended 14 days on arrival
Charlotte		Some 	Details are vague	
Dallas				
Denver				
Detroit				
Ft. Lauderdale				 For arrivals from Tri-State area
Houston				
Miami				 For arrivals from Tri-State area & Louisiana
Minneapolis				
New York/Newark				
Philadelphia				
Tampa				
Toronto				
Washington Dulles				



*The Road Back to 500K Arrivals
Strategic Tourism Plan*

ABBREVIATIONS

CAL	Cayman Airways Limited
CARPHA	Caribbean Public Health Agency
CDC	Centres for Disease Control
CEPTS	Cayman Islands Environmental Programme for the Tourism Sector
CHTA	Caribbean Hotel & Tourism Association
CIAA	Cayman Islands Airports Authority
CIDOT	Cayman Islands Department of Tourism
CIG	Cayman Islands Government
CIGO	CI:GO Taxi Fare App
CITA	Cayman Islands Tourism Association
CLT	Charlotte/Douglas International Airport
COVID-19	2019 Novel Coronavirus
CPI	Consumer Price Index
CTO	Caribbean Tourism Organization
DEN	Denver International Airport
DFW	Dallas/Fort Worth International Airport
DOT	Department of Tourism
DTW	Detroit Metropolitan Wayne County Airport
EPA	Environmental Protection Agency
EWR	Liberty International Airport, Newark, New Jersey
GDP	Gross Domestic Product
GGT	Government Guarantee Tourism initiative
HEPA	High Efficiency Particulate Air
ICAO	International Civil Aviation Organization
JCS	Joint Communications Service
JFK	John F. Kennedy International Airport
LATAM	Latin American
LGA	LaGuardia Airport
MDATT	Ministry of District Administration, Tourism, & Transport
MIA	Miami International Airport
MPC	Monetary Policy Committee
NEOC	National Emergency Operation Centre
NTP	National Tourism Plan
OECD	Organisation for Economic Co-operation and Development
ONS	Office for National Statistics
ORIA	Owen Roberts International Airport
PHE	Public Health England
PHL	Philadelphia International Airport
PRIDE	Personal Responsibility In Delivering Excellence
RB5	Road Back to 500,000 Air Arrivals
SWOT	Strengths, Weaknesses, Opportunities and Threats
TSA	Transportation Security Administration
UCCI	University College of the Cayman Islands
UHNW	Ultra-High Net Worth
UK	United Kingdom
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
US	United States
VEDF	Visitor Experience Development Fund
VHNW	Very High Net Worth
WHO	World Health Organisation
WORC	Workforce Opportunities & Residency Cayman





RB5



CAYMAN  ISLANDS
GRAND CAYMAN | CAYMAN BRAC | LITTLE CAYMAN