



**A Strategy for the Sustainable Development of
The Eastern Districts Of Grand Cayman**

The following 'Go East' Strategy is an addendum to the National Tourism Management Plan 2009-2013; its aim is sustainable development of tourism in the Eastern Districts of Grand Cayman.



'GO EAST'
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Sustainable Development of
The Eastern Districts
Of Grand Cayman

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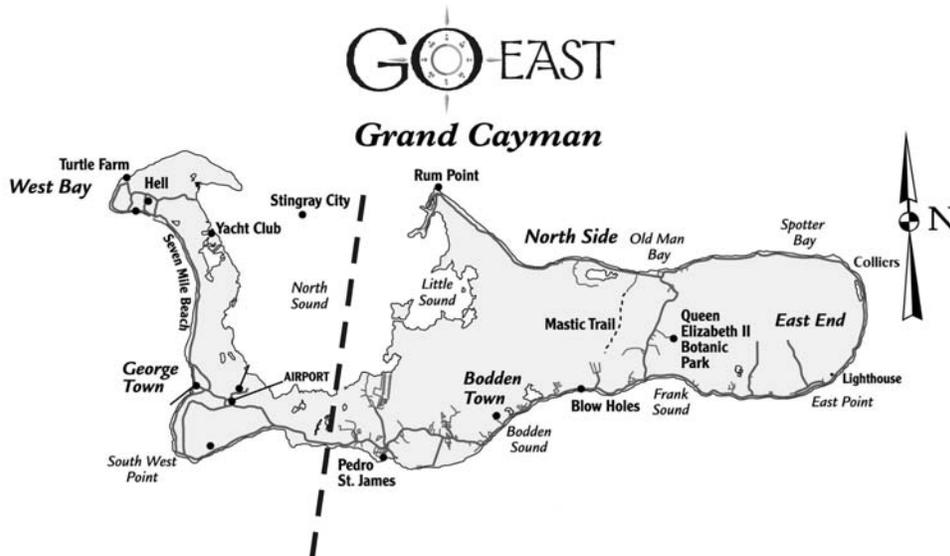
1. INTRODUCTION

Go East articulates and seeks to promote and preserve the distinctly Caymanian product that exists within Eastern districts of Bodden Town, East End and North Side and to develop a tourism model which benefits the inhabitants of these districts while also boosting the overall diversity of experiences offered by the destination. From a tourism perspective, the Eastern Districts are rich in cultural and ecological value but have remained relatively unknown by our visitors.

George Town and West Bay, in contrast, represent the core of the Cayman Islands tourism industry - with many attractions, the airport, seaport, all major hotels and most established restaurants being located there. The Sister Islands have long had a distinct voice in tourism promotions being renowned for their tranquillity, diving, nature and culture. However, outside of Rum Point/Cayman Kai and to a lesser extent various timeshare properties along the North Coast, the Eastern districts have not had any coherent tourism model. The consequences of the absences of a tourism model for the Eastern districts are both lesser economic advantages for the residents there as well as the unfortunate portrayal that all of Grand Cayman resembles the development along Seven Mile Beach. The Eastern districts complement the breadth of experiences available in Grand Cayman with much Caymanian architecture, natural environment and culture remaining intact and highly visible in these areas.

1.1 Background

The Eastern districts of the Cayman Islands comprise the three districts of Bodden Town, East End and North Side on Grand Cayman.



When launched in April 2006, the 'Go East' initiative of the Ministry of Tourism, Environment, Investment and Commerce (MoTEIC) aimed to stimulate sustainable tourism development in the Eastern districts. The broad objectives were to:

- Distribute the economic benefits of tourism across a wider geographical and socio-economic sector, at a scale and in a form which is appropriate to local residents;
- Embrace cultural and heritage tourism and put the spotlight on relevant attractions and activities¹;
- Improve the country's carrying capacity for tourism, including the better management of cruise tourism;
- Receive input from area residents on the various development and operational models which could be adopted;
- Identify ways to increase the level of Caymanian ownership of, and participation in, the tourism industry and then work with these partners to enhance their delivery of a truly 'Caymanian experience'; and
- Increase levels of local employment in the tourism industry, and by extension social improvements such as enhanced pride in the Cayman Islands history and heritage.

References were also made to the encouragement of sustainable development of local businesses, services and attractions; to give residents the opportunity to work closer to home; to ease congestion in west Grand Cayman; to support existing attractions in the East; to encourage scale-appropriate development²; to assist and support small businesses and entrepreneurs and to work alongside community members to develop and implement the initiative.

*"Go East is being steered with careful planning within the framework of the National Tourism Management Policy (NTMP), as well as various local laws, regulations and policies, and involves the private sector and a number of government departments and agencies, namely the Ministry of Tourism, Department of Tourism, the Cayman Islands Development Bank, the Department of the Environment and the Cayman Islands Investment Bureau (CIIB)."*³

1.2 A new approach to sustainable development

Over the last 18 months, the wider agenda has changed with the Government focusing closely on issues of sustainable development. A Sustainable Development Strategy is in preparation, the Conservation Law is passing through legislation, the NTMP has been updated and the Development Plan is being reviewed.

Hon. Minister of Tourism – Mr. Charles Clifford, Go East Forum, April 2006

"Sustainable Tourism is not a buzz word. It will be the focus of our policy and of our business development as we move forward."

¹ Go East endeavours to target five specific areas of tourism for development in these districts: nature based tourism; health and wellness tourism; adventure tourism; agri-tourism; and community based tourism to compliment other core areas such as diving, romance and families. These all serve to attract a discerning, socially responsible, higher spending visitor and strengthen the ties between visitors and their host communities.

² As featured in the deliberations of the 2002 Development Plan Review consultative teams.

³ CIIB website

Go East is now more than just a community development programme; it is a new, strategic initiative which seeks to encompass socio-economic, environmental, land use, heritage and cultural issues into a viable, sustainable economic development programme for the Eastern districts. If successful, it could become a model for development across the Cayman Islands. The business development programme is just the pre-cursor to a wider, more holistic approach to development.

This approach requires a broad vision and strategic objectives to be defined. The NTMP identifies this as a key issue: *“The proposed Go East initiative seeks to encourage new, appropriate development in the less developed parts of Grand Cayman. The initiative has popular support but the project needs leadership and further policy and procedure clarification, particularly in terms of the vision, objectives, desired planning controls and incentives.”*

Careful planning and implementation is needed to spread the benefits of tourism based on guidelines for environmental conservation, cultural preservation and community economic development.

This report seeks to address these issues and provide the appropriate vision and guidance for progressing the initiative.

1.3 Work to date

To date, the project has involved a number of tasks:

- The establishment of local Go East committees in each of the three Districts;
- Discussion forums in each of the three districts;
- Training for Go East Committee members;
- A business inventory of 136 businesses in the three districts;
- A survey of 1,279 residents with response rate of 7.2%;
- The identification of local needs in each district;
- A review of incentives to best serve business development by CIIB;
- A discussion document on tourism in the Eastern districts by the Cayman Islands Department of Tourism (DOT);
- A report by the Department of the Environment (DoE) on 'Setting the sustainability decision-making framework';
- Development criteria from DoT and DoE (see Appendices);
- Production of a Go East brochure;
- A report on the challenges facing businesses within each district; and
- Widespread consultation by the consultants.

2. THE EASTERN DISTRICTS

2.1 Physical form

The Eastern districts comprise around three quarters of the land mass of Grand Cayman, only a small proportion of which has been developed. Development is focused in Newlands, Savannah, Northward and Bodden Town. There are smaller foci along the coast at East End, Gun Bay, Colliers (the two main resorts), Old Man Bay, Hutland and Cayman Kai with sporadic development elsewhere.

The reef-fringed coastline including North Sound is very attractive with long stretches allocated as 'scenic coastline' in the Development Plan. Much of the interior is made up of mangrove/swamp vegetation to the west and woodland to the east. Large tracts are environmentally important and noted as such (Mastic Reserve, Salina Reserve). There are a number of ponds that are nominated animal sanctuaries.

2.2 Population and social services

At the last census (1999) the Eastern districts supported a population of 8,214 or 21.1% of the total population. This figure is likely to have grown to around 10,000 based on estimates for the Cayman Islands as a whole in 2007⁴. Bodden Town accommodated around 70% of the population of the Eastern districts in 1999 with East End housing 17% and North Side, 13%. As the fastest growing district, Bodden Town probably now houses an even larger proportion of the population.

The age distribution of residents in the Eastern districts was similar in 1999 to the rest of the country, although there were a slightly higher proportion of children under 14 and slightly less in the 30-49 years age group.

Significantly, the Eastern districts' population comprises a relatively high, although diminishing, proportion of Caymanians (1999 census):

- Bodden Town with 66% of its population Caymanian;
- North Side, 71% Caymanian; and
- East End, 75% Caymanian.

The national proportion was 53% in 1999.

Income levels per capita in the Eastern districts are just below the national average (1999) and, given the low population base, the overall contribution to national income is modest. There are reported to be pockets of poverty in North Side and East End. Business skills are also said to be limited along with resources for investment.

People in the Eastern districts spend slightly more time on unpaid child care and elderly care than in the rest of the country. Car ownership and internet connections were on a par with the rest of the country as were the age and construction of houses.

⁴ CIA World Fact Book

In terms of social infrastructure, the Eastern districts have good primary schools and a new secondary school is being built at Frank Sound. There are police stations in each District. Health services are limited although an ambulance station is now available at Frank Sound

Retailing is limited to the new Countryside Centre in Savannah, the Morrith's Centre at East End and a number of convenience stores and other services e.g. gas stations, hairdressing shops. The Countryside Centre at Savannah is seen as a model development. In the survey of residents, 85% of respondents in the Go East survey indicated that they spent less than 30% of household income in the Eastern Districts.

2.3 Business development

Business development in the Eastern districts is modest. In April 2006, the three District Committees identified the businesses operating in their districts⁵:

- Bodden Town, 73 businesses;
- North Side, 25 businesses; and
- East End, 38 businesses.

Out of the 136 businesses identified, the breakdown across sectors was as follows:

- Retail, 26.5%;
- Recreational services, 20.6%;
- Restaurants/bars, 19.9%;
- Agriculture/landscaping, 8.1%; and
- Tourist accommodations, 7.4%.

The lack of skilled staff and, in particular, the lack of skilled Caymanian staff to work in the tourism sector presents considerable challenges, nationally. Staff accommodation is also a major problem. These issues are, of course, highlighted in the Eastern districts where the population is small and the impact of immigrants is potentially more explicit.

Another local constraint on business is the cost involved in building in the Eastern districts. It has been reported that costs are significantly higher than in West Grand Cayman owing to transport and labour costs although land is considerably cheaper.

2.4 Physical infrastructure

In terms of infrastructure, the Eastern districts are still catching up with the rest of Grand Cayman:

- Piped water installations were completed in 2008;
- Waste water continues to be via septic tanks into deep wells;
- Telephone communication is available but there are some black spots for cell phones;
- The road network is limited to single carriageways of low capacity. This is not a problem within North Side and East End where traffic volumes are low but west of Bodden Town there is severe congestion during morning and evening

⁵ This list of businesses focused only on licensed businesses, although some committees were also able to identify several unlicensed (informal) businesses. DOT has prepared a list of businesses which is presented as Appendix I.

rush hours, constraining access for all in the Eastern districts, including potential visitors from the cruise ships and West Grand Cayman;

- A new east-west highway is planned. In the west, the aim is to relieve the congestion west of Bodden Town. To the east, a secure alternative route is seen to be important. The gazetted route is controversial as it cuts through sensitive areas and speculative sub-division is occurring along the route;
- Public transport is limited and considered unreliable and unattractive; and
- There are no cycling and very few walking trails.

Electrical power is available from the grid everywhere. A few properties have installed solar power technology;

These issues are cause for concern among some residents although, for a 'remote' area on a Caribbean island, the level of infrastructure is relatively very good.

2.5 Conservation and planning issues in the Eastern districts

There is a low level of development in the Eastern districts but it is growing relatively fast in Bodden Town and pressure will probably continue to extend eastwards driven by relative land values, subject to planning constraints.

The marine environment in the Eastern districts is sensitive and needs careful management. Marine conservation regulations are in place including the marine park off Rum Point. On land, the mangrove and identified sensitive sites need conservation and management but until the Conservation Law is enacted, there is no formal protection. Elsewhere, the 'rural' nature and open vistas of the landscape offer a contrast to West Grand Cayman and need to be cherished.

The current zonings in the Development Plan⁶ have been highlighted as an issue in the district consultations. At present, nearly 70% of the land area is Agricultural/Residential but there is still the right to develop one house/acre in this zone. Low Density Residential accounts for 20% of the land area (single family houses as well as apartment development of up to 16 units/acre). Less than 5% is allocated Public Open Space (Salina, Colliers, and Meagre Bay Pond). Around 2% is designated Medium Density Residential (apartments up to 20 units/acre). Hotel/Tourism and Beach Resort/Residential comprise around 1% each of the land area.

Hotel/Tourism Zones can include hotel, cottage colony development, detached and semi-detached houses and apartments. *"Development will be regulated to ensure that the needs of the tourist industry are met and that new buildings will in general be related to the needs of the industry."* Other specified aims are:

- To ensure that all development enhances the quality and character of visitor accommodation;
- To prevent the over-development of sites and *"to ensure that the scale and density of development are compatible with and sensitive to the physical characteristics of the site"*;
- To ensure waterfront developments are designed to avoid interference with natural coastal processes; and
- To ensure adequate allowance for public access to the sea.

⁶ Development and Planning Law (2005 Revision)

A Beach Resort zone is supposed *“to provide a transition zone between the Hotels/Tourism Zones and the Low Density Residential Zone.”* *“Development within this zone will generally have the appearance of residential development in scale and massing.”* Allowable development in this zone shall include detached and semi-detached houses and in suitable locations, guest houses, apartments, cottage colonies and other tourist related development. Specified aims include high standards of accommodation, amenities and open space.

Under current zonings, there is, in theory, scope for up to 14,800 hotel bedrooms or 5,700 apartments within the hotel/tourism zones. To put this in context, there are 2,100 hotel rooms and 1,970 condo rooms (for rent) along Seven Mile Beach.

The large tracts of undeveloped residential zoning, much on the coast, offer further scope for more tourism accommodation in the form of villas/guest houses, B&B and apartments. Such development, if widespread and ill-planned, also has the potential to impact on the quality of the natural environment of the Eastern districts, particularly the coastline.

3. TOURISM IN THE EASTERN DISTRICTS

Tourism has the potential to be the main driver of the economy in the Eastern districts. It is therefore important to understand the current parameters.

3.1 The scale and nature of tourism

There has been no detailed analysis of the size, nature and value of the existing tourism market in the Eastern districts. However, although the three districts account for only 18% of bedroom accommodation stock, the occupancy rates in all categories are notably higher than the national averages (15% higher in hotels, 7% in apartments for 2007) and so the Eastern districts probably account for over 20% of national stayover tourism⁷.

Most of the attractions in the Eastern districts rely on this local stayover market for the bulk of their business, supplemented by domestic tourism along with stayover visitors from West Grand Cayman and a few cruise visitors on day trips.

Again, there has been no formal analysis, but the evidence suggests that relatively few of the current cruise visitors venture east. Only 0.6% of respondents to the 2006 exit survey visited Blow Holes which would equate to around 10,000 cruise passengers. Pedro and the Botanic Park probably receive significantly less than 10,000 cruise visitors per annum. Consultations suggest that it takes too long to reach the attractions of the Eastern districts and they are of less appeal to the majority of cruise passengers than the water-based attractions in west Grand Cayman for which Cayman is renowned⁸. Rum Point has more appeal if accessed by boat but still attracts no more than 1-2% of cruise visitors.

The domestic market is increasingly important in both stayover and day visitor terms. More local residents own property in the Eastern districts, are taking short breaks and visiting to dive, eat out or attend events. This market can account for 10 - 30% of business for operators in the area.

In profile terms, those staying in guest houses (60% of the national stock) and smaller accommodations suggest a particular kind of visitor; those who are seeking a quieter, more natural experience including divers and others wanting a tranquil 'island experience' as well as domestic visitors. However, most of those staying at the larger resorts at Colliers are looking for traditional relaxation and the range of facilities on site. However, even in these resorts, there is a noted minority who are taking advantage of other activities in the area.

Eastern districts' stayover visitors include a relatively high proportion of repeat visitors and a significant number of guests who have visited Cayman before but who now want something a bit different. An analysis of the 2006 exit survey reveals (from a very small sample):

⁷ The length of stay at the main resorts in the Eastern districts is also notably higher than the national average.

⁸ The use of Spotts as a port does not seem to make a material difference as most shore excursions are pre-determined.

- Visitors with a very high average household income (58% over \$100,000); the national average was 42%;
- A high proportion (69%) aged over 45 years (55% nationally);
- A very high satisfaction rating with their visit (85% very satisfied compared with 84% nationally);
- A high proportion are very likely to return to the Cayman Islands (48%), 53% are repeat visitors ;
- Visitors are generally very satisfied with their visit; as elsewhere on the Islands, the complaints are to do with expense; and
- The average amount spent per party was US\$2,561 (noticeably higher at the big resorts), comparable with the national average.

3.2 The existing product offer

The Eastern Districts offer something special, something quite different to the traditional Seven Mile Beach offer. They offer a lower key, 'island-style' visitor experience with the inherent hospitality of Cayman yet still with easy access to essential services. Tourism is still, relatively, under-developed and a small increase in visitors would make a significant difference in business; the Eastern districts are in the early stages of the product life-cycle.

3.2.1 The marine environment and related activities

Like the rest of the Cayman Islands, the Eastern districts core product is water sports. The diving is excellent with capacity for growth; some say it is the best on Grand Cayman. In addition, there are some attractive beaches for casual swimming and good snorkelling. There is sailing and deep sea/reef fishing (Cayman Kai), excellent wind surfing at Morritts/Reef and a niche market in mangrove tours by boat and kayak. However, environmental conditions are very different to West Grand Cayman; the wind impacts on reliability of activities to a degree but more significantly, any mitigation (protective groynes, turtle grass removal etc) by potential developers will have serious impact on the environment.

3.2.2 The terrestrial environment and related activities

Inland, there is a network of attractive, unspoilt natural landscape areas that include the Mastic reserve and the QEII Botanical Park. The Salina reserve is not currently accessible but has significant potential, particularly as an extension of the blue iguana breeding programme with enhanced visitor facilities. Some farms are also accessible to the public, notably Willy's Farm at Hutland. These and other sites offer opportunities for trekking (Mastic Trail) and horse riding (Bodden Town), bird-watching (around the ponds e.g. Colliers, Malportas and Meagre Bay and elsewhere e.g. Governor Gore's Bird sanctuary) and appreciation of local flora and fauna. The National Trust offers walking tours of woodlands and bird/bat watching tours. As with the marine resource, there is significant conservation and management issues associated with tourism in these areas as identified in the NTMP.

3.2.3 The built environment

The Eastern districts display a wide mix of development type and quality including excellent examples of traditional Caymanian architecture and high end modern villas and condos mixed with some less attractive development. The National Trust does guided walks of historic Bodden Town from the newly restored Mission House.

3.2.4 Visitor accommodation

The vast majority of visitor accommodation in the Eastern districts is made up of Morritt's Tortuga (timeshare) and the Reef Resort (timeshare/condos) at Colliers in East End. The two resorts operate at occupancies well above the national average.

The other feature of local accommodation is the number of guest houses and second homes spread throughout the district but concentrated in Cayman Kai. Apartments are also concentrated in Cayman Kai. Many of these are high-end facilities.

Tourist accommodation (bedrooms) in the Cayman Islands by District

Location	Hotels	Condos/ Apartments	Guesthouses	Total bedrooms
North Side / Cayman Kai	0	186	184	370
East End	191*	158	54	403
Bodden Town	0	18	30	48
GO EAST TOTAL	191	362	268	821
Seven Mile Beach / West Bay / George Town / South Sound	1783	1496	51	3330
Sister Islands	138	113	91	342
CAYMAN ISLANDS TOTAL	2112	1971	410	4493

Source: DOT November 2007 available rooms including licensed and unlicensed properties

* The Reef Resort (124 bedrooms) is licensed as an 'Apartment' although offering a 'Hotel' service.

There are current proposals for additional accommodation including the Reef Resort (50 units under construction), 80 units at Morritt's in two five storey blocks and various condo/apartment schemes. There is concern about the height, scale and concentration of development at Colliers which is in contrast to the rest of the Eastern districts.

There are two other large speculative proposals in the Eastern districts including the 114 suite Mandarin Hotel and Spa at Little Point (planning application submitted - in Beach Resort zone) and the 'Islands Resort', at Spotter Bay (Hotel/Tourism Zone), a condotel scheme that is being heavily promoted but, at the time of writing, without consent. Another major project involves 45 high end residences at Beach Bay (Hotel/Tourism zone), which has approval.

3.2.5 Visitor attractions

There are a number of heritage and cultural attractions in the Eastern districts managed by different parties:

- Pedro St James (Government, TAB);
- QEII Botanic Gardens (Government, TAB);
- The Mission House, Bodden Town (NT);
- The Guard House, Bodden Town (NT);
- The Farmers' Market (Saturdays only) (Dept of Agriculture);
- Pirate's Caves, Bodden Town (Private);
- Wreck of the 10 Sails, East End and other maritime heritage (Govt); and
- Lighthouse Park, East End (NT).

The Old Savannah School House is due to be refurbished by the National Trust.

Various events, both formal and informal, take place in the Eastern districts including the East End Surf Challenge (2000 people), East End Food Fest, 'Gimistory' etc.

There are a number of bars and restaurants available for visitors, scattered around the coast but mainly at East End and Cayman Kai. The larger ones include the Lighthouse at Breakers, Portofino, Castro's at Royal Reef, Over the Edge, Kaibo Beach Club and Rum Point Restaurant. Some are more 'casual', including a number that open only at weekends.

3.3 Marketing Go East

Overall, the Eastern districts do not feature strongly as a destination in national, pre-visit marketing. Morritt's, The Reef, Cayman Villas, condo owners etc have their own individual pro-active promotions.

The DOT website currently features Go East on the homepage...

However, the Eastern districts do receive considerably more promotion in on-territory printed materials for day trips. For example:

- Local flyers for East End attractions are well distributed;
- The Cayman Activity guide has Go East as a 'Feature Tour' under sightseeing, featuring all the attractions;
- 'Key to Cayman' features trail riding in Bodden Town, Pedro, the Botanic Park, Iguanas, 'A birders' paradise', 'Hiking the Mastic Trail' and 'Around Grand Cayman'; and
- Cayman Airways' Horizons in-flight magazine featured, for example in the November edition, items on Pedro and the Blue Dragon Trail.

Go East on the website

EXPAND YOUR HORIZONS

Experience the Cayman Islands in a whole new light

It's our heart. Our soul. Our history. Remote yet not removed the Eastern districts of Grand Cayman offer so much more than sun. Heritage sites that connect us to our vibrant origins. Secluded, uncrowded beaches. Breathtaking natural attractions. Some of the best coral reefs in the Caribbean for diving and snorkelling. A world apart, yet so close.

History

Explore Bodden Town, our first capital. Revel in the spectacular view from the East End Lighthouse. Open the door into our past by visiting the Mission House, one of our oldest known dwellings. Step inside Pedro St. James, an authentic Caribbean great house and the symbolic birthplace of democracy in Cayman.

Heritage

Venture back in time at the Wreck of the Ten Sails site, where legend has it that one of the most famous events in our history occurred. Seek out the rare Cayman Blue Iguana at the Queen Elizabeth II Botanic Park. Connect with our pride. And our past.

Nature

Buildings of wattle and daub. Gardens that are an oasis for butterflies and birds. Uninhabited white sand beaches fronting clear turquoise waters. Flora and fauna you won't find anywhere else. Pure and natural. Rich in tradition.

The Eastern districts. Close to perfection, beyond the ordinary.

4. A STRATEGY FOR GO EAST

4.1 The national context

The Eastern districts' future is bound by the broader, national context i.e. economic, social, environmental and legal parameters. However, Go East offers the chance to review these parameters and how they might work towards a new set of development goals in the light of emerging policies. It offers a chance to re-consider the form and nature of the development imperative, to manage and conserve environmental resources for local and wider benefit, to address community/social aspirations and to establish legal and procedural mechanisms for decision-making.

In environmental terms, the future development of the Cayman Islands in all respects will be governed by the proposed new **National Sustainable Development Strategy** (NSDS) proposed to be formulated under the guidance of the Cabinet Office. While it is still in early stages of preparation, it is envisaged that it will cover four priority policy areas:

- Promotion of sustainable consumption and production;
- The development of climate change measures to secure energy needs while reducing dependency on fossil fuels and carbon emissions;
- The integration of land-use planning, biodiversity preservation, water resource and air quality conservation; and
- Addressing sustainable living in the widest sense through the integration of plans and programmes for healthy, safer living etc.

In terms of natural resource protection, the **Conservation Law** is due to be enacted. This will have a major bearing on the Eastern districts. The new law will provide a regulatory framework within which environmental matters will be managed in the future. The key elements of the proposed legislation are:

- The establishment of a National Conservation Council to administer the Law;
- Mechanisms for the designation and management of protected areas;
- Procedures for the nomination, designation and conservation of protected species;
- Statutory requirements for environmental impact assessments; and
- Establishment of a conservation fund to be used for the acquisition and management of protected areas and species.

Further control is provided by the **Development Plan** (1997). In 2002, there was a major consultation exercise which put forward some fundamental proposals for change relevant to the Eastern districts. The key points are summarised below.

2002 Strategic amendments to the Development Plan (relevant to Go East)

- Create a Protected Area System using a Conservation Zone and Land Acquisition overlay and a Special Planning Area for other areas of environmental significance;
- The requirement for environmental assessment for certain types/ locations of projects;
- Greater protection for remnant mangrove on the coast, beaches and coastlines;
- A new system of coastal setbacks;
- Control the removal of native primary vegetation;
- Create a Historic Overlay Zone covering all heritage sites;
- Define Cayman Style design principles and discourage standard franchise designs;
- Specify requirements for water infrastructure/conservation, waste-water management,

- notably for all buildings on the coast;
- Integration of road plans with the Development Plan;
 - Community Inclusive Tourism Planning to involve stakeholders in decision-making;
 - Create a Recreation Overlay for biking and hiking trails;
 - Change all existing Hotel/Tourism zones to a new Neighbourhood Hotel/Tourism Zone (maximum 3 storeys) outside 7MB;
 - Create a Nature Tourism Zone linked to the Conservation Zone;
 - Maintain the open character of Scenic Coastlines;
 - Maintain the natural/visual quality of individual areas;
 - Discourage franchise architecture and signage;
 - Require fees in lieu of Lands for Public Purpose and use for recreation areas;
 - Allow more commercial development and Community Cluster Zones;
 - Allow for home-based work;
 - Identification of marina locations and control of water activities.

The 2002 review process was not completed but many of the recommended amendments arrived at six years ago are considered still pertinent to the current review. The new Development Plan review also offers the opportunity to reflect the goals of the Go East strategy.

In economic development terms, the Eastern districts represent a large area of undeveloped land. The main drivers of economic development in the Eastern districts are tourism⁹, residential and associated service provision. Careful, integrated planning and management of tourism is required, based on the principles of sustainable development within the framework of the **NTMP** and the new Development Plan. The experience of past development in West Grand Cayman needs to be taken on board. (The focus of this report is tourism but the implications are much wider.)

NTMP policy objectives (2007)

1. Sustain the quality of the environmental product
2. Manage the visitor and their impacts
3. Provide a high quality, sustainable, Caymanian tourism product
4. Manage the Sister Islands as a destination for nature-based tourism
5. Develop a highly skilled Caymanian tourism workforce
6. Attract a more discerning and higher spending visitor
7. Research and monitor tourism more effectively
8. Organise tourism in the Cayman Islands more effectively

In business development terms, the Eastern districts have few local entrepreneurs. **CIIB** was established to encourage and support appropriate business development in the Cayman Islands. It provides free technical assistance to local entrepreneurs regarding the formation, management, financing and/or operation of a business enterprise in the Cayman Islands. Training assistance includes marketing advice, help on employment and IT issues etc through workshops, seminars, individual

⁹ The NTMP sets out the drivers of change on the national tourism sector and reflects on trends in the international and regional tourism markets. The situation in Go East is also dependent on these external factors. They directly influence those who may be deciding on a stayover holiday in the Eastern districts and indirectly those who might be visiting elsewhere in Grand Cayman but may wish to spend some time in the Eastern districts.

counselling and the facilitation of access to potential funding opportunities, including the Cayman Islands Development Bank (CIDB)¹⁰.

CIIB has no formal status in legislation and limited resources to cover the full range of support, guidance, monitoring and business policy advice services that such an agency should perform but has supplemented these with creative use of volunteers and external support (UCCI etc) to cope with increasing demand for their services.

CIDB focuses on sustainable funding and related advice particularly for the small indigenous business sector. Although funds are limited, the bank will assist those who have creative and workable ideas that can be translated into viable projects in any field of business. It can provide micro-business lines (<CI\$25,000) or small business loans (CI\$25,000-500,000).

The Ministry is currently preparing an incentives programme for Go East. Incentives could include:

- Technical assistance/business advice¹¹;
- Debt financing in conjunction with CIDB; and
- Duty waivers to help enhance the viability of appropriate ventures¹². The Hotels Aid and Customs Laws allow for duty waivers and other incentives for hotel developments.

There is now a Government commitment to prepare new primary legislation to supersede The Hotels Aid Law¹³, bringing it up to date and reflecting the wider aspirations of such incentives e.g. to support for more than just hotels. A new Law will enable special regulations, including any special provisions for Go East.

The Chamber of Commerce also provides advice and support to its members through such programmes as the Professional Development and Training Centre and its mentoring programme. Training services are also available through the DOT and others and most banks promote their advice and funds for small businesses.

4.2 Challenges and opportunities in the Eastern districts

The Go East initiative is set in this wider environmental, economic and business context. It seeks to encourage small, local businesses, (and others) using local employees, to look at scale- and design-appropriate, sustainable developments in a range of specific sectors including – but not limited to - tourist accommodation, restaurants, water sports and retail establishments.

As with the NTMP, the issues which this Go East Strategy has to address involve three questions related to:

- The market potential for growth;
- The Eastern districts' capacity to absorb additional development; and
- What do local residents want?

¹⁰ The Caribbean Technical Consulting Services can help on specialist requirements.

¹¹ CIIB has developed guides to act as 'roadmaps' for establishing businesses in the Cayman Islands. In support of the Go East Initiative, priority was given to developing guides for businesses in the tourism sector covering Tourism Accommodations, Taxi and Tour Operations, Restaurants and Water Sports.

¹² There is pressure to provide grants as part of the programme but this is still under review.

¹³ The Hotels Aid Law 1976 (1995 Revision)

4.2.1 Can the market drive further growth?

Go East must be market driven. Although tourism development in the Eastern districts is limited, there is evidence of the potential market from what has happened on the ground and international trends.

On the ground, the major investments at Morrith's and the Reef Resort - and their exceptional performance in occupancy terms and onward development plans - provide evidence of market demand in the area. The interest of others (including, but not limited to the proponents of the Mandarin Hotel and Islands Resort proposals) although not yet breaking ground, indicates that developers are looking at the area. At a smaller scale, there is further evidence of demand in the development and performance of smaller schemes (Turtle Nest Inn, Ocean Frontiers, various restaurants) and the growth in the number of guest houses.

However, it is difficult to measure potential demand for small scale new developments from within the community. To a large extent, this must be an act of faith based on the evidence on the ground, evidence of business approaches to banks and CIIB etc (which have been numerous) and identified aspirations¹⁴. The evidence suggests that demand of this sort exists but needs to be teased out and nurtured by supporting infrastructure and procedures, good information about the potential and the right business support.

International trends would also appear to lend support to the potential of 'island-style' products.

- Visitors are looking for new, different and distinctive experiences, to indulge special interests and have more active and enriching holidays¹⁵;
- There is a significant market segment who want tranquillity in a destination;
- Niche markets, including heritage and nature, are becoming important supplements to traditional source markets; and
- Visitors are becoming more environmentally aware; an increasing number are thinking about their carbon footprint and many are looking for the same ethic in their destinations.

Within Cayman, there is an internal driver in that there is a clear need to diversify the offer and the Eastern districts are in a position to offer a new product based on their natural beauty, heritage and tranquillity along with the primary advantages of Cayman (security, infrastructure, reliability, friendliness etc.)

The Eastern districts offer the opportunity to locals and other developers to enter the market at a lower cost than in West Grand Cayman. There is no certainty in the market potential but given the size of the country, growth is going to happen in the Eastern districts at some stage. The priority is to make sure that any new development is managed and controlled.

4.2.2 How much development can the Eastern districts take?

Physical conditions and current zonings currently offer plenty of physical scope for new development although there are environmental, infrastructure and perceptual constraints, mainly to do with accessibility.

¹⁴ The household survey identified that 37% of respondents had someone who was interested in starting a business.

¹⁵ Reinforced in the paper by Brian Mullis for DOT 'Sustainable tourism development and the Go East initiative', November 2006.

The NTMP states that there is scope for new development in the Eastern districts, confirmed in local consultations, with the proviso that the nature and scale of such development is well planned, is of high quality, is built in the context of a new environmental code, is designed with a distinctive Caymanian character of its own and sensitive to the environmental constraints of the site and its terrestrial and marine surroundings.

Although it will be important to enable development of sufficient scale to be viable and to stimulate interest in supporting services, it is imperative that development in the Eastern districts learns the lessons of Seven Mile Beach; that new development needs to be proportionate in design, scale and labour requirements. *“Roughly 99% of survey respondents expressed some concern that limits are needed on development.”*¹⁶

Ideally, it would be possible to set short term targets that allow phased development that can be monitored and controlled in line with community aspirations. Carrying capacity is going to change in response to the market, infrastructure provision, community development and the quality of development that comes forward. However, the current zoning system of the Development Plan does not allow such flexibility, unless moratoria are implemented on relevant land-uses as and when required.

4.2.3 What do local residents want from the new development?

From consultation with local interests, it is clear there is no rejection of development per se, or of larger projects per se. However, it is clear that locals are looking for business opportunities and jobs and for tourism to help support a range of services and infrastructure of benefit to them. Perhaps even more important, they are looking for more and better control over the form and nature of new development. There is a real concern about disenfranchisement from the decision-making process.

The survey of residents identified interest in setting up tourism and retail businesses, the need for more business guidance and development that was not wanted or needed. From this research, a set of initial recommendations was prepared by the District committees, including action on:

- Public education on the ‘Village Tourism’ concept;
- Workshops for small businesses;
- Reduction in business incorporation fees;
- Low-cost legal assistance;
- Assistance for farmers on agri-tourism;
- Investigation of co-op concepts;
- Support for marketing;
- Support for crafts;
- Promotion of tour packages to cruise lines;
- Controls on tourist numbers;
- Collection and analysis of local market information;
- Greater flexibility for licensing home-based businesses;
- Business incubation facility;
- Environmental improvements and maintenance, including public beaches;
- Establish a TIC;
- Improve Spott’s Bay dock and make better use of it;

¹⁶ Reported in Go East Action Plans.

- Enhanced safety; and
- Ensuring that future development is appropriate to each district.

4.3 Strengths, weaknesses, opportunities and threats

Given the situation described above, a SWOT analysis for development of the Eastern districts has been prepared.

Go East SWOT analysis

<p>Strengths</p> <ul style="list-style-type: none"> • The 'real' Cayman • Relaxed pace of life/ 'Island' appeal • Safe, clean and hassle-free destination • Friendliness of the people • Natural, distinctive, 'rural' product • Caymanian way of life • High performing visitor accommodation • Attractive coast • Excellent diving and range of water sports • Tranquillity • Lack of congestion • Local heritage and culture 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Remote • Lack of information • Limited amenities (shops, services) • Small pool of local labour • High development costs • Limited resources for local development • Limited know-how for local development • Infrastructure constraints • Congestion at peak times • Limited public transport • Limited access to local culture • Limited access to countryside
<p>Opportunities</p> <ul style="list-style-type: none"> • Government support for Go East • Changes in policy context • Business support initiatives • Local interest in tourism projects • Lifestyle business opportunities • Interest in distinctive cultures • Interest in environmental destinations • West Bay stayover/car hire market • Domestic market • Cruise market 	<p>Threats</p> <ul style="list-style-type: none"> • Environmental degradation • Poor quality development • Poor labour supply • Lack of local involvement • Deteriorating security • Lack of policy co-ordination • Lack of control in planning and conservation • Sale of land to foreign owners

4.4 The overall goal for Go East

Go East was created as an economic initiative for the people of the Eastern Districts, but has subsequently been developed, to be a sustainable development framework for the Eastern districts which embraces the triple bottom line of economic health, social responsibility and environmental protection, as a pilot for the whole country. Go East should also:

- Enable and encourage tourism (and other) development that reflects the economic and community needs and aspirations of local people;
- Enable and encourage the conservation of the local environment, heritage and culture for the benefit of local residents and visitors;
- Enable more local Caymanian businesses and workers to capitalise on the tourism driver through training, education and other incentives;
- Enhance the quality of life for residents;
- Involve the community and other stakeholders in the policy- and decision-making processes.

A Vision for Go East

"Go East is not only a development programme and catalyst for positive change in the

Eastern districts but also a pilot project for the whole country. It is a programme that helps create a community that is prosperous, sustainable and content in its physical, social and commercial environment. Change on the ground will reflect local and national aspirations for sustainable development, development in harmony with and respectful of the local environment, development that offers opportunities for local employees or businesses, development that contributes to and sustains the local community and quality of life.

“There will be change in the processes and procedures that control change enabling local people and relevant stakeholders to have a voice in the decisions that will impact in physical, cultural and community terms.

“In tourism terms, the initiative will stimulate the community to provide a unique experience and welcome for visitors who appreciate the local way of life and the special qualities of each individual district.”

4.5 Strategic objectives

The strategic objectives for Go East need to be read in the context of the overarching objectives of the emerging National Sustainable Development Strategy and the revised NTMP, ‘A new Focus’.

The strategic objectives for Go East are:

1. To raise awareness of the Eastern districts as a distinctive, alternative destination for visitors and of the Go East initiative as an opportunity for local businesses;
2. To develop the Eastern districts as a scale-appropriate, sustainable tourism destination, based on the area’s natural qualities;
3. To develop the Eastern districts as a network of sustainable local communities;
4. To support local businesses and residents in the development and improvement of facilities and services;
5. To provide and manage the infrastructure to support the above initiatives; and
6. To establish Go East structures, responsibilities and procedures.

5. ACTION PLAN

5.1 **Objective 1: Raise awareness of the Eastern districts as a distinctive, alternative destination for visitors and of the Go East initiative as an opportunity for local businesses**

This objective will be addressed by a set of actions on marketing and communication.

Marketing and information delivery internally and externally should be underscored by a strong brand policy. This should involve brand definition and then a campaign for spreading awareness of Go East.

5.1.1 Branding 'Go East'

The current logo needs to become a well established device for signalling association with Go East. This is important as much of the marketing of the Eastern districts will be done by people other than DOT. More work is needed on clarifying the brand values behind the logo and how, and by whom, it should be applied.

Action point: Agree core brand values, a positioning statement and associated messages that define the brand.

Action point: Agree on a set of guidelines for using the Go East visual identity. This should include:

- Defining who can use the Go East visual identity;
- Defining a range of colours, tones and fonts etc that should be used by all partners in marketing materials and publicity that relates to Go East; and
- Defining how the visual identity will work with and not dominate other brand logos i.e. the brand will need to be applied as a stand alone brand on certain items and as a form of endorsement in others.

Action point: Prepare a technical advice note on how the logo should be used and by whom, including graphic and design details.

5.1.2 Raising the profile of the destination

The Eastern districts need a higher profile and a new image in order to attract more visitors. The approach here is not to establish a new and expensive separate promotion for Go East as a destination but to ensure that the area is far better promoted within existing destination marketing activity.

DOT is currently working on a new marketing programme to highlight the Eastern districts product, particularly in the UK and Europe. It is important that the promotion of the area picks up on the area's core brand values (tranquil, natural, 'island-style' with services) and reflects sustainability issues in terms of selection of sites, activities etc, uses authentic images, and is sensitive to needs and capacity at different times and in different locations.

In order to promote the Eastern districts to those already in Cayman, there needs to be readily available and good quality visitor information in and around the area.

A number of ideas have been put forward to promote the Eastern districts to visitors in Grand Cayman including a booth at the port managed by the Tourism Attractions Board and offering a 'Heritage passport', targeting rental car operators encouraging them to feature a new driving trail of the Eastern districts, encouraging more cruise operators to offer tours of the Eastern districts and better signposting.

NTMP Action point: Develop the domestic tourism campaign working with ... the media and local operators.

Action point: Raise the profile of the Eastern districts to potential stayover visitors and day visitors from West Grand Cayman through a twin promotional campaign that might incorporate:

- Evocative messages, backed with information, on what the area has to offer;
- Stayover opportunities that link accommodation with local activities etc;
- 'Explorer' opportunities for day visitors, including public transport;
- Raising the profile of Eastern districts through a variety of local outlets – hotels, condos, the dock, shops, garages, public venues.

Action point: Make available a set of high quality photographs and suitable text about the Eastern districts that can be used by different parties in various media.

Action point: Prepare and implement a network of road signs and community 'Welcome' signs that will provide directions, orientation and help promotion.

5.1.3 Raising the profile of the 'Go East' programme

It will be necessary to raise awareness of the programme amongst local residents and businesses.

Action point: Initiate pro-active promotional campaign of the Go East initiative including workshops on opportunities to make people aware of the new strategy and the opportunities offered.

Business advisory services are best delivered to entrepreneurs at their place of business and it will be vital for advisors to be 'out and about' but it will also be important to provide a base for officers, a point of call for local people and a visible 'face' for the programme.

Action point: Open CIIB district office in Bodden Town, offering a high profile focal point - and a resource centre for Go East.

5.2 Objective 2: Develop the Eastern districts as a scale-appropriate, sustainable tourism destination, based on the area's natural qualities

This objective involves developing a product that is in keeping with the local environment, local aspirations and market demand in the Eastern districts. There are firm views about the scale, nature and location of development; that any new development should be scale-appropriate and sustainable in all respects.

Recent consultations have emphasised the concerns in the 2002 planning review i.e.:

- Concern over the extent and location of the current zonings for Hotel/ Tourism and the permitted scale of development, particularly the height of buildings; and
- Concern over the quality of development (design, massing, landscape, open space, sustainability).

The criteria for tourism development in the Eastern districts are that any project should:

- Be located sensitively in respect of the local environment;
- Be designed to minimise impact with attention to clustering, massing and articulation;
- Not normally be more than three storeys;
- Respect views and public access to the coast;
- Be designed to reflect a local Cayman style in buildings and landscape;
- Involve activities appropriate to the tranquil natural environment of the Eastern districts;
- Reflect identified business opportunities and local needs; and
- Be constructed and managed to minimise environmental impact¹⁷.

5.2.1 Priority area: The Development Plan

The Development Plan is currently subject to a new review. Most, if not all, of the 2002 proposals referred to above (4.1) remain imperatives in the light of recent consultations. The proposed Conservation Law covers a number of the points e.g. the designation of Protected Areas and the institution of Environmental Impact Assessments. A number of the planning/conservation issues are highlighted again in the NTMP with related actions points. (These are referred to below in 5.5.1.)

More specifically, the NTMP states it is now necessary to review current planning commitments:

“Consideration should be given to the distinct areas that will require different forms of tourism development - and related planning proposals – including the Eastern districts, where new development of a suitable scale and style is to be promoted. The Go East initiative needs a cohesive, unified vision and planning guidelines as a matter of great urgency. There is a need to review capacities and develop guidelines e.g. promoting clusters to avoid contiguous ribbon development along the coast.”

NTMP Action point: Review need, capacities and commitments for tourism development and prepare Master Plans with development guidelines for ...the Eastern Districts ...and relevant sub-areas.

Action point: Review tourism planning policy under the auspices of the Development Plan Review. In particular, consider:

¹⁷ See Appendix II for broad tourism development criteria

- Change Hotel/Tourism Zones into Neighbourhood Tourism Zones within the Eastern districts, reducing overall capacity to realistic levels, using the most suitable existing H/T and B/R (Beach Resort/Residential Zone) locations, taking into consideration environmental and practical development constraints;
- Regulations within NTZs should include:
 - Allowance for hotels, condotels/timeshare, guest houses, restaurants and entertainment centres¹⁸;
 - Allowance for condos with at least 80% of units in rental pool i.e. restrict pure residential in NTZs;
 - Height restrictions of a maximum of 3 storeys¹⁹, subject to qualitative assessment of massing and permeability; and
 - Densities and lateral setbacks to be determined subject to qualitative assessment²⁰; coastal setbacks defined by location rather than land-use.
- Re-define and rationalise beach resort zoning;
 - Allow mix of residential, condos/apartments, guest houses, B&B as per existing regulations; and
 - Allow restaurants and cultural entertainment.
- Institute new regulations to enable B&B;
- Allocate sites for water sports access; and
- Review 'Land for Public Purpose (LPP)', particularly on the coast, in order to create more public open space, enhanced views and better landscaping within and between development schemes.

Action point: Require all applicants for financial incentives under the Go East programme to meet the development criteria.

A general issue is the need to encourage high quality schemes (and enhance existing facilities). Planning consents based purely on current zoning regulations do not encourage innovative or good design solutions. Good design should be enabled by a degree of flexibility on density etc and current planning legislation acknowledges this. The introduction of guidance on Cayman style design and materials is also important in this respect. The corollary of this is the need for qualitative decision-making. This can lead to some uncertainty for the applicant but this is a price worth paying. Decisions on the design of applications should be in the hands of professionals with clear terms of reference.

Action point: Establish a professional Design Board with clear terms of reference and guidance notes, reporting to the CPA.

5.2.2 Priority area: Identify and promote relevant tourism business opportunities.

Various project ideas that are perceived to fit within the overall vision have been raised by local community groups, entrepreneurs and Government agencies. We have reviewed these - and others – in the light of the criteria referred to above and would recommend the following:

¹⁸ This will require a new definition of the term 'hotel' e.g. range of facilities, management arrangements i.e. include condotel units available to rent for more than 300 days.

¹⁹ Some variation in height may be allowed across a site e.g. 3 habitable storeys above ground floor covered parking or other use, or a fourth floor within the roof space such that the overall height restriction is maintained.

²⁰ There is an opportunity to review current regulations that use Site Coverage measures rather than Floor Area Ratios that would enable more creative design solutions.

Tourist accommodation:

- Resort/spa or 'boutique hotels' (max 100-120 rooms) with mixed amenities (say, 3-4 projects);
- Small-scale cottage colony type resorts made up of guest houses, villas or similar (perhaps 10-30 units, manageable by small/family businesses);
- Individual B&B²¹, Guest House and farm accommodation; including
- Accommodation in all the above categories for those with disabilities.

Turtle Nest Inn, Bodden Town

The Turtle Nest Inn in Bodden Town shows the potential of scale-appropriate tourism development in the Go East area. It was voted Number 1 Hotel in the entire Caribbean by readers of the website, TripAdvisor.com.

"The owners of the Turtle Nest Inn, Gagnon and Alain Beiner, and all of the staff there, have worked hard to develop a small, quaint and attractive property which guests love to come back to time and time again. Guests enjoy the feeling of community they experience at Turtle Nest Inn and really appreciate that this feeling does not come at the expense of their idyllic Caribbean vacation, rather, it comes 'with' their idyllic Caribbean vacation. True Caymanian hospitality, delivered in a quiet and unassuming manner which is both reflective of the district and its people is what makes the Turtle Nest Inn so successful."

Guest house businesses

The growth of **Guest Houses** (and second homes) offers a good example of how relatively modest tourism development can, and has, created small business opportunities in the Eastern districts for local firms of landscape gardeners, pool maintenance and cleaning operators. Virtually all such businesses are Caymanian with Caymanian staff.

Tourism activities:

- Bars/restaurants;
- Deep sea and reef fishing (many locals own their own boats)
- Outdoor activities/tours e.g. nature/walking tours, riding, cycle hire, kayaking;
- General and specialist (nature etc) tours from West Grand Cayman;
- Access to natural and built heritage sites;
- Cultural, nature-based and water sports events e.g. walking festival;
- Agri-tourism opportunities (farm tours);
- Craftwork and sales; and
- Beach retail/concessions.

NTMP Action point: Pro-actively seek out and incentivise appropriate developers and site opportunities for high quality, scale-appropriate accommodation development, particularly for the Go East area

NTMP Action point: Investigate opportunities for indigenous, new high quality attractions and events and prepare feasibility studies.

Action point: Review, prioritise and promote development opportunities to potential entrepreneurs, at home and abroad, but starting with local businesses before pursuing foreign partners. This should involve a proactive process, to identify and target developers for key projects e.g. resort and commercial developments. (The District Committees have a role to identify potential, local entrepreneurs.)

²¹ DOT and Planning need to define regulations for the operation of B&B accommodation.

5.2.3 Priority area: Sustainable building and operational management

Any commitment to sustainable development involves consideration of building codes and operational management at the business (and domestic) level. At present, there are no regulations or incentives related to environmental conservation by individuals or businesses²². While environmental consciousness is growing within the tourism industry, the full consequences of the global and local situation are not well understood by most operators. The NTMP refers to the fact that tourism is under the spotlight in environmental terms and, for a number of reasons, it is imperative that new tourism (and other) facilities are developed and managed responsibly.

In management terms, the Cayman Islands Environmental Project for the Tourism Sector (CEPTS) is being developed as a public-private sector partnership to promote improved environmental performance in the Cayman Islands' tourism sector. Phase I of the programme has been initiated as a pilot project and is aimed at conducting environmental audits and establishing environmental management systems for the tourist accommodation sector, as well as the main public sector organizations involved in executing this phase, namely DOT and DOE²³. Phase I will also involve guiding interested pilot properties through Green Globe (or similar) certification and exploring the possibilities of destination certification for Little Cayman.

CEPTS audit

Among other things, the audits will review occupancy, water consumption, wastewater generation, and electricity consumption data for a baseline period, and compare the property's environmental performance with industry benchmarks established through recognised environmental certification programmes like Green Globe 21. Specific actions that can be taken to improve the property's environmental performance will then be identified and recommended and improvements monitored.

Through CEPTS, the DOE and DOT will collaborate on the formulation and implementation of policies and incentives designed to encourage new and existing tourist accommodation properties to adopt environmental management practices which will hopefully be translated into a healthier environment as well as cost savings for these businesses.

NTMP Action point: Encourage tourism operators to adopt enhanced environmental management systems and promote environmental messages to guests. Require operators to submit their environmental policy as part of the licensing applications.
NTMP Action Point: Support local agricultural and other relevant produce initiatives and help promote links with the tourism sector.

In development terms, Phase II of CEPTS will include the review of the existing development control and site design regulations with a view to incorporating environmental policies for the tourism sector. The aim should be to amend the building code to require more responsible construction methods and materials. The Cayman Islands may choose to develop their own sustainable building code but it may be more appropriate, in the short-term at least, to make use of an existing scheme such as LEED.

Some individuals, including the proposed Cayman Dive Shop in East End, are already looking to build responsibly, and gain accreditation through LEED.

²² The utility companies offer advice on economising.

²³ Later phases will involve other tourism-related sectors/businesses, such as attractions, restaurants, tour operators and watersports operators.

LEED (Leadership in Energy and Environmental Design)

LEED provides rating systems for new construction and renovation projects. Certification provides recognition of a commitment to environmental issues supports marketing and provides a mechanism for third party validation and a means of qualification for any government initiative. Accreditation is based on a scoring system with marks for:

- Site sustainability (site location, transportation, storm water design etc);
- Water efficiency;
- Energy and atmosphere;
- Materials and resources;
- Indoor environmental quality; and
- Innovation and design.

NTMP Action point: Institute an environmental building code within local building regulations.
NTMP Action point: Consider fiscal incentives for 'greening' visitor accommodation along with appropriate advisory services.
NTMP Action point: Pursue enhanced access to sustainable energy sources.

Action point: Introduce new building code regulations that reflect sustainable environmental policies (based on LEED or similar programme).

Action point: Require all applicants to the HLB to provide an Environmental Management Plan.

Action point: Require all applicants for financial incentives under the Go East programme to provide an environmental building statement and management plan, linked to LEED, Green Globe or similar.

Action point: Draw up a list of environmental products e.g. bio-fuels, solar panels/equipment, wind turbines etc that will be eligible for duty waivers.

Action point: Investigate opportunity for properties generating their own power to trade energy with the national grid.

Cayman Dive Lodge Case Study

The proposal to redevelop the Cayman Dive Lodge at East End was presented to the East End Go East Committee. The developers set out their physical proposals along with arrangements for local contracting (food, entertainment etc) and staff employment policies.

The building will be green certified (LEED), comprising 50 condos/80 hotel rooms all of which will be in rental pool plus bar, spa, fitness centre and restaurant. Staff is encouraged to live locally and rent from locals. The aim is to seek appropriate accreditation for operations as well (Green Globe or other).

5.3 Objective 3: Develop the Eastern districts as a network of sustainable local communities

Go East is more than a tourism development programme. This objective involves developing and improving quality of life in local communities and sustaining local interest in local developments.

5.3.1 Priority area: Provision of social facilities

Local residents are keen to preserve and improve their quality of life through economic security (ideally access to local jobs), access to affordable housing, the provision of appropriate cultural and social facilities and improved environmental conditions.

In terms of social facilities, a number of needs have been raised in consultation:

- Day care facilities;
- Family leisure facilities (cinema, bowling);
- Sports facilities;
- Health facilities; and
- Libraries.

Action point: Prepare needs analysis for identified social services in the Eastern districts.

5.3.2 Priority area: Provision of local commercial facilities

Again, a number of needs and opportunities have been identified:

- The creation of small mixed use commercial development zones (shops and offices with residential) within the main settlements;
- Roadside retail/local food stalls;
- Home-working, including B&B;
- Low cost housing for residents and temporary staff;
- Other residential property (villas, apartments/condos);
- Incubator units for small businesses e.g. garages, IT services etc;
- Agriculture/local produce;
- Transport services.

Action point: Review current planning zones and regulations to facilitate appropriate small-scale (but high quality) commercial opportunities.

Action point: Review, prioritise and promote local development opportunities to potential entrepreneurs. This should be a proactive process, to identify and target developers. (The District Committees have a role to identify potential, local entrepreneurs.)

5.3.3 Priority area: Provision of cultural facilities

Consultation has revealed interest in various cultural activities as a social way of celebrating the distinctiveness of the area and of retaining more time and leisure spend in the local economy. Local needs include:

- Development of local cultural resources and access to outreach programmes e.g. 'cultural animators';
- Training for crafts and provision of a craft market;
- Provision of allotments, development of culinary skills and local recipes;

- Conservation activities; and
- Local museums.

NTMP Action point: Support the National Cultural Foundation in their efforts to:

- Promote exploration, understanding and appreciation of Caymanian history, heritage, culture and the arts;
- Introduce and implement an integrated, enhanced arts curriculum in all schools supported by suitably trained teachers;
- Provide more opportunities for further education in the arts and culture e.g. through the work of the National Museum and National Gallery.

NTMP Action point: Identify opportunities for developing and marketing cultural resources to visitors e.g.:

- Encourage the showcasing of Caymanian culture (and cultures within Cayman) through competitions, exhibitions, performances and events;
- Encourage the private tourism sector to sponsor Caymanian art and culture e.g. public art, local drama;
- Support physical outlets/craft markets and other artistic events/festivals in the districts, in hotels, attractions, at special events, and promote as an arts and crafts trail;

Cayman Craft Development Centre

There is a proposal for a **Cayman Craft Development Centre** to be constructed in the Eastern Districts. The purpose of the Centre would be two fold:

- To provide training for Caymanians in the field of art and craft; and
- To allow mass production of art and craft and to supply the Cayman Craft Market.

It is envisaged that the Centre would be designed as an old Caymanian style building, constructed out of wood, in order to reduce the capital investment and fitted out accordingly.

The Centre would utilize a combination of local and Caribbean trainers. The Caribbean trainers would be responsible for teaching Caymanians new types of craft and helping to produce the craft needed for the Cayman Craft Market.

Models of similar craft centres exist in a number of Eastern Caribbean countries (Dominica, Barbados, and St Kitts).

Action point: Prepare needs analysis for cultural services in the Eastern districts including training and lifelong learning.

Action point: Encourage more participation by local producers, users and suppliers (e.g. farmers, catering outlets and retailers) in food/produce schemes within the Eastern districts and the Cayman Islands as a whole.

Action point: Prepare feasibility study for Cayman Craft Development Centre.

5.3.4 Priority area: Local environmental improvements

There is concern at the state of some parts of the Eastern districts which have not been restored post Ivan. There is also considerable community interest in enhancing the quality of the local environment in particular areas. The quality of the local environment also impacts on the visitor experience.

Bodden Town public beach

The Government has recently acquired land adjacent to the public beach in Bodden Town to enable a wider range of activities. Similar acquisitions are programmed for East End and North Side in 2008.

Environmental improvements and ongoing management/maintenance is needed within settlements, notably Bodden Town and East End. Amongst other things, consideration could be given to:

- Encouraging owners to tidy up damage, to decorate and landscape plots²⁴;
- Traffic management;
- Public realm improvements including sidewalks, crossings, seats, hard and soft landscaping, lighting, public open space etc;
- Public beaches, docks (with pumping stations) and bathrooms; and
- Visitor facilities including parking areas, tourist information and local signage.

NTMP Action point: Establish joint forum to:

- Prepare environmental audits for all local centres;
- Prepare plans based on local design guidelines; and
- Initiate implementation of improvements.

NTMP Action point: Prepare environmental enhancement/visitor management plans for all public beaches and other major attractions.

Action point: Support local communities to prepare plans and implement environmental improvements.

5.3.5 Maintaining local community interests

There is increasing concern in the Eastern districts about foreign ownership of land and businesses. However, that land is being sold by local residents. Whilst there may be understandable reasons, loss of land ownership equates with losing control. More positively, there may be scope to encourage sales of long leases rather than the freehold offering opportunities to retain a degree of control and a share in development benefits.

Action point: Review options for alternative land ownership forms.

There is also concern about the growth of foreign business ownership (and particular concern about the idea of state aid for foreign investment). At present, any business should have a majority Caymanian ownership (60%) or a Local Company Control Licence (LCCL) which is awarded if the entrepreneur can show that attempts have been made to attract local partnership without success. Clearly, it is important to give priority to local business participation but the skills, enterprise and/or resources are not always available. Flexibility needs to be retained to enable identified needs to be met, from different sources. It may be appropriate to vary the required local ownership proportion depending on the nature of the project. However, if foreign partners are required, the priority should be on knowledge transfer across the partnership.

Action point: Review requirements for local ownership of businesses trading in the Cayman Islands to enable sufficient flexibility to meet identified needs. This review should also include consideration of community obligations upon foreign owned businesses.

²⁴ There is scope to work with local communities by subsidising or match-funding initiatives for painting, landscaping, historic building restoration, heritage interpretation etc and sponsoring 'Beautification' or 'In Bloom' competitions. In the recent past, the Government supported the purchase of trees for planting by local residents in Bodden Town.

5.4 Objective 4: Support local businesses and residents in the development and improvement of facilities and services

This objective involves creating the right context and support for various tourism and related enterprises in the Eastern districts to prosper.

5.4.1 Priority area: Business support

The focus for support in Go East is the small, Caymanian business, employing mostly Caymanians, with an interest in one of the priority sectors and a project that will have a negligible environmental impact and respect the existing character of the district²⁵. Most new businesses that meet these criteria would appreciate and benefit from assistance (business support, advice), as confirmed in the surveys.

Small, local businesses²⁶ should have priority but assistance should not necessarily be limited to that group. There are priority projects that will require the involvement of larger businesses.

CIIB should be the first point of call and will need to build their support network through new partnership arrangements and other means. CIIB will also need to finalise the draft policy for investment promotion in the Cayman Islands covering, for example, the business definitions, business incentives, business census and statistics etc.

Defining businesses

<p>There is no universally accepted, formal or legal definition of businesses in the Cayman Islands. It will be important to clarify definitions of businesses for policy formulation, regulatory purposes and for ongoing monitoring i.e. tracking businesses. In the latter context, there is also no monitoring of business licences; this vital information on the existing supply of existing or planned businesses is not available to susceptible new business ventures. Access to such a database would also provide a source of new clients for CIIB.</p>
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Action point: Co-ordinate business support, advice, training and subsequent monitoring for businesses and individual entrepreneurs in the Eastern districts.

Action point: Review Government regulations with a view to reducing red-tape for small, local businesses.

Action point: Formalise policy, procedures and roles for investment promotion in appropriate legislation including:

- **Access to relevant data e.g. data and trends on tourism and other businesses in Cayman Islands and Eastern districts; and**
- **A review of incentives and access to finance and eligibility criteria (see below).**

Action point: Review resources for CIIB in the light of this strategy.

²⁵ The nature of the business is as important, if not more so, than the scale of the business in Go East.

²⁶ And groups of small businesses that might work co-operatively e.g. B&Bs, farmers.

5.4.2 Priority area: Access to capital

Access to capital is a major constraint for many small, Caymanian businesses, particularly new start-ups. In many cases, the need is for relatively small amounts of capital (micro-finance) but at present, access is restricted for those without adequate business plans and/or collateral. There is an immediate need to facilitate access to funds; failure to do so will mean development is more reliant on foreign investment.

CIDB has limited resources and does not have a formal mandate to provide any special assistance to small businesses by way of discounted finance. Indeed, commercial banks may be better placed to assist with potentially more risky propositions although traditionally, support for small businesses has not always been forthcoming.

CIIB is well placed to advise and assist such businesses and act as a gateway to funding by others. CIIB is also in a position to promote the idea of small business support amongst local banks. (They already provide links for small businesses to local 'Angel Investors'.)

In parallel, there is the chance to investigate the establishment of a new more flexible micro-finance institution to support small local businesses. This could be under the auspices of CIDB or established as a new partner organisation to CIIB. This could be linked to an Investment Club or Fund to enable Caymanians to invest - or support investment - in local business ventures, including Go East.

Action point: Marshall and review all current debt financing programmes and incentive opportunities to create an integrated, flexible, transparent set of options and procedures, for all appropriate projects in the Eastern districts and elsewhere.

No development strategy should be based solely on financial incentives but inclusion of such assistance can be important. As stated above, a programme of Government financial incentives for Go East is in preparation.

In some cases, it is not just the financial incentive that is important but the red-tape involved in so many licenses can be daunting for new businesses.

Action point: Incorporate or amend incentive-related legislation (e.g. Hotels Aid and Customs Laws), as required, with regulations that relate to different sectors and areas, notably the Eastern districts, and eligibility criteria.

There is also a requirement to support or incentivise local social or community initiatives e.g. environmental improvements.

Action point: Marshall and review opportunities for public sector support for community projects.

5.4.3 Priority area: Other support

A high priority should be given to raising the awareness of local enterprises of special training opportunities e.g. local familiarisation, environmental management, disabled access and others.

Action point: Promote all opportunities for enhancing business and customer services.

5.5 Objective 5: Provide and manage the infrastructure to support the above initiatives

There are natural areas, public beaches, attractions and other key sites, owned and managed by the public sector that provide important attractions in the area. Transport and public utilities are crucial for business and community development. These facilities represent crucial infrastructure for small tourism and other businesses and their maintenance is a significant public commitment. This objective involves providing and managing the appropriate infrastructure to enable businesses and communities to flourish.

5.5.1 Priority area: Conservation and management of environmental areas

The sustainable management of land and marine resources is important not only in international and national terms but also as a core resource for local tourism and the quality of life of residents. Small-scale visitor accommodation and other facilities in rural/remote areas rely on the quality of the local environment as a driver of visits; they are rarely destinations in their own right.

An over-riding priority is the conservation of environmentally sensitive areas but there is also concern about unprotected areas e.g. the ad hoc development across the large swathes of the (agricultural) landscape, the loss of indigenous plants and animals in unprotected areas and the loss of heritage sites. The Conservation Law has provisions for the protection of sensitive areas and endangered species but there are broader concerns about public respect for nature and the environment in general.

The NTMP refers to many of these concerns and the importance of the natural and built landscape as a tourism resource and a contributor to the quality of life. It also refers to the opportunities to encourage access where appropriate via trails (walking, cycling and/or riding) making use of existing public access routes and selected new acquisitions or land swaps.

NTMP Action point: Embed the requirement for EIAs within the Development Plan and Conservation Law for major projects, including the need for consultation with DOT.

NTMP Action point: Embed a national system of protected areas for sensitive environmental areas within the legislative framework (Conservation Law, Development Plan)

NTMP Action point: Co-ordinate support and prepare action plan to deal with the issues of beach erosion.

NTMP Action point: Devise and agree methods for measuring:

- Numbers of divers at different sites;
- Environmental impacts of diving/water sports;
- Other environmental impacts including fishing; and
- Diver motivations and satisfaction levels.

NTMP Action point: Develop a marine tourism management plan to cover all relevant sites and issues, incorporating the visitor management plan for Stingray City/Sandbar.

NTMP Action point: Institute new regulations to list and protect buildings and neighbourhoods of special interest.

NTMP Action point: Develop a formal design guide for the Cayman Islands which will act as a reference point for all new development, including tourism development.

NTMP Action point: Develop a network of trails and cycle ways throughout the Cayman Islands.

Action point: Ensure the key recommendations of the NTMP are actioned and embedded in relevant legislation.

Action point: Review controls and promotional programmes to encourage a better appreciation of, and a commitment to, the conservation of local natural resources outside and beyond specifically protected areas and species.

The issue of scattered development across agricultural and residential zones and the desire to see more rational, sustainable clustering of development – particularly along the coast - will require radical action. The Development Plan currently allows the Government to co-ordinate sub-divisions which would appear the most viable option²⁷.

Action point: Review strategic approach to plot sub-divisions to encourage more sustainable clustered development in agricultural and low-density residential areas.

5.5.2 Priority area: Enhanced transport

A major priority for tourism and local residents is transport. There is a need for enhanced public transport along with cycle lanes on the main roads to meet environmental concerns and local demand. Public bus services have proved particularly difficult in the Eastern districts owing to the scale of the market.

There is also a need for selected road improvements (new links and refurbishments), subject to environmental assessment.

The gazetted line of the east-west corridor impacts on the Salina Reserve.

There is also a need for better traffic management in the main communities of the Eastern districts.

NTMP Action point: Develop a network of trails and cycle ways throughout the Cayman Islands.

NTMP Action point: Review public transport opportunities for internal travel by visitors as well as residents.

NTMP Action point: Improve tourist road signage on Grand Cayman.

Action point: Investigate opportunities to provide enhanced public bus²⁸ and ferry²⁹ services to the Eastern districts e.g.:

- New service agreement with provider(s);
- Increasing the promotion of services;
- Reviewing timetabling; and
- Ensuring that the operation of bus service(s) is environmentally sound.

Action point: Review alignment of east-west road corridor to avoid environmentally sensitive areas.

Action point: Institute traffic management at key points, notably Bodden Town.

5.5.3 Priority area: Enhanced public utilities and services

Safe, sustainable and consistent public utilities are essential for the local community and to attract new development.

²⁷ Second schedule, Part VII

²⁸ To key settlements and attractions

²⁹ To Rum Point and, possibly, Newlands

Action point: Expedite piped water supplies and effective waste water treatment to the Eastern districts.

Action point: Encourage best conservation practices for energy, water, solid waste and waste water management.

Action point: Monitor the need and provision of community services such as police and health services in the light of residential and tourism development.

5.5.4 Priority area: Improved attractions and interpretation

Existing heritage/nature attractions like Pedro and QEII Botanic Gardens need to be regularly enhanced and upgraded as cultural assets for the community and as tourist attractions that will help draw visitors to the Eastern districts³⁰. The priorities are:

- Botanic gardens and the Blue Iguana site;
- Pedro St James;
- Guard House Park;
- Lighthouse;
- Wreck of 10 sails;
- Mission house as focal point/TIC/park/crafts; and
- Farmers market.

NTMP Action point: Institute visitor audits at all attractions, including public beaches. Specific attention should be paid to staff training, retailing and the opportunity for the sale of local produce, interpretation of local heritage, provision for those with disabilities etc.

Action point: Capitalise on and support existing heritage based attractions in the Eastern districts as focal points for community and tourism reasons.

There are various opportunities for improving the interpretation of the landscape, wildlife and historic and cultural heritage of the Eastern districts, and to use this to strengthen the visitor experience and length of stay. It is important that interpretation includes messages about the sustainability objectives of the area.

Interpretation of local heritage is another area that is of direct benefit to local residents - including local school children through educational facilities and services, and visitors. Local community projects could include:

- Interpretation panels;
- Self-guided trail leaflets with way marks;
- Development of the Maritime Heritage Trail including the underwater options;
- Traditional events; and
- Guided tours of the area.

NTMP Action point: Draw up a comprehensive interpretation strategy (built, natural and maritime heritage and local culture) for the Cayman Islands which will identify the main themes, key sites and areas of interest and how best to present those stories.

Action point: Support local communities to get appropriate training and provide local interpretation of their culture and heritage.

³⁰ Investment decisions should be based on national and local cultural parameters before financial performance.

5.6 Objective 6: Establish Go East structures, responsibilities and procedures

This objective involves a new approach to implementation in order:

- To co-ordinate the planning and approval of appropriate facilities and management of services (prior to development approval); and
- To enable local control over development and involvement in business development.

5.6.1 Priority area: Establishing the legal status of Go East

This Go East strategy, subject to Ministerial approval from MoTEIC, should be put before the Cabinet for their consideration and approval. This is important as the programme is a cross-ministerial initiative.

The document should then become a formal 'Material Consideration' in Government decision-making including decisions by the CPA. This is in accordance with Article 5 of the Development and Planning Law (2005 Revision) and is akin to the procedures established for the Aggregates Policy.

On approval, the Strategy should be adopted by all relevant departments prior to being incorporated into succeeding legal and policy documents such as the Development Plan, currently under review.

Action point: Approve the Go East Strategy document and formalise as a 'Material Consideration' prior to incorporation into relevant legislation.

5.6.2 Priority area: Overall responsibility

Although this is a Strategy that cuts across a number of departments and agencies, overall responsibility will remain with MoTEIC given its remit across four of the key driver/responsibilities.

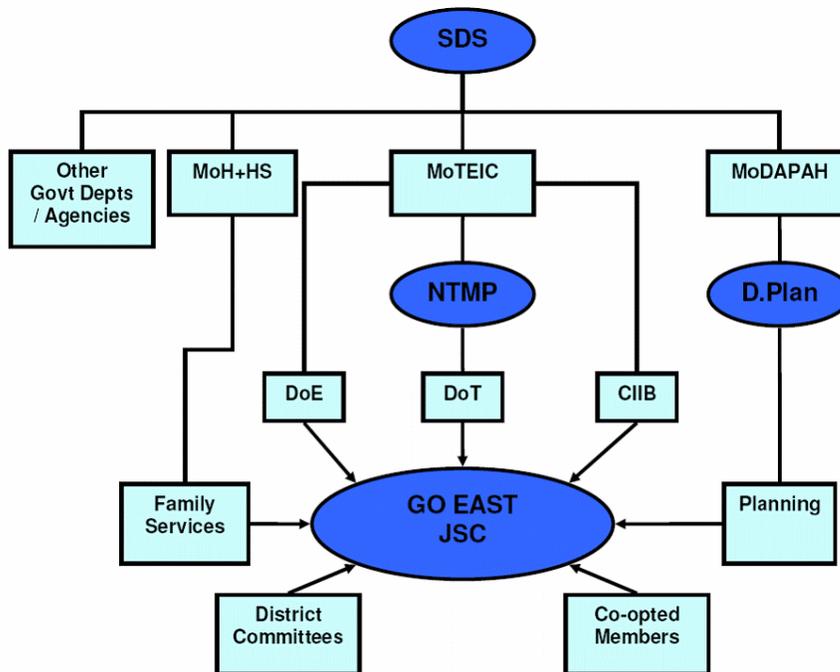
Departmental responsibility will lie with DOT for policy formulation, advised by DOE (linked with NTMP and NSDS) and CIIB will have responsibility for technical assistance particularly in the area of investment/development policy.

These bodies will report to a Go East Joint Strategic Committee (JSC) made up of representatives of:

- DOT;
- DOE;
- CIIB;
- Health and Human Services;
- Planning;
- District Committee representative(s); and
- Co-opted parties as appropriate e.g. National Trust, Chamber of Commerce, private sector tourism interests.

The district committees will act as a central point within each of the Eastern districts to provide additional feedback and input into the policy development process and project vetting. These committees will provide for greater participation of district residents in this process, help to coordinate activities within the districts, and help to disseminate information to district residents.

The figure below illustrates the various departmental and policy relationships for Go East/JSC.



The terms of reference for the JSC should include:

- Policy (delegated to DoT);
- Procedures and technical assistance (delegated to CIIB);
- Co-ordination of activities and events to support business development;
- Review of all proposals i.e. 'applications in principle' against set criteria. These will include, but not be limited to:
 - Development scale and form;
 - Environmental impact of development, construction and operations (Appendix I);
 - Tourism development and management criteria (Appendix II);
 - Economic/employment impact; and
 - Community impact.
- Recommendations on granting assistance;
- Monitoring and reviewing priorities.

The main role of the JSC will be the strategic vetting of all initiatives in the Eastern districts.

There is a concern that many important ancillary issues are left unresolved when major development decisions are made. The ambition is to have these issues resolved at an early stage and their resolution will impact on any decision by the JSC to grant an approval in principle.

Developers may therefore be required to sign a Memorandum of Understanding prior to any agreement in principle, covering key issues which may not be covered by legal regulations. These may include, subject to nature and scale of the project:

- Staff requirements (number and % Caymanian);
- Staff training proposals;
- Knowledge transfer initiatives;
- Staff accommodation proposals;
- Building and service contract tendering protocols;
- Sourcing of food and other local supplies;
- An obligatory contribution to local community development;

NTMP Action point: Coordinate agencies to ensure an integrated, consistent approach to the development and management of tourism i.e. planning in its broadest sense.

Action point: Constitute the JSC as the official agency for the implementation of the Go East Strategy with clear terms of reference.

Action point: DOT should appoint/allocate an executive officer to co-ordinate and monitor the Go East strategy.

5.6.3 Priority area: Strategic decision-making process

All initiatives in the Eastern districts that require authorisation from a governmental or quasi governmental agency will require applicants give notice of 21 business days by submitting their proposals to the JSC. Applications will involve submitting prescribed details on a number of key factors (ownership, scale of project, etc). These applications will be processed and monitored by CIIB with the JSC's advice being provided to the applicant and relevant authority within 21 business days.

If the project is deemed to require an Environmental/Social Impact Assessment under the proposed National Conservation Law, then the JSC is required to be a body consulted under that process. An Environmental/Social Impact Assessment might be triggered for example if the project

- Has the potential to have a significant adverse effect on the environment generally (natural or built); or
- Has the potential to have a significant adverse effect on the social fabric of the area.³¹

All applications will be considered/vetted by the JSC with the aim of deciding whether the initiative meets the goals of Go East. Initiatives will be circulated around JSC members prior to the validation meeting. This will give the opportunity for wider consultation, particularly by the District committees. Presentations and/or site visits may be appropriate as part of the consideration process.

In time, initiatives may become categorised with prescribed parameters which, if met, would go through 'on the nod'.

The issues that the JSC may identify will need to be addressed by the applicant when seeking approval in principle.

³¹ EIA/SIA terms should be in accordance with those set out in the draft Conservation Law (Article 35 – 37).

If the JSC offers advice to the relevant regulatory authorities that an initiative is approved in principle, is that the initiative has received 'Approval in Principle', applicants will be signposted to the relevant regulatory authorities e.g. planning, DOE, licensing boards etc. Each initiative will need to satisfy the relevant regulations in the usual way; while 'Approval in Principle' should be a material consideration by regulatory authorities it does not infer overall consent.

Business and/or financial support will be predicated on the project gaining approval in principle. (The incentives programme and criteria are attached as Appendix III)

Appropriate sanctions and/or compensation will have to be paid for any infringement of the Memorandum of Agreement.

The JSC will meet once a month, subject to level of applications.

Action point: Approve the proposed decision-making process and related criteria.

5.6.4 Priority area: Monitoring

Monitoring the success of the Go East Policy, especially as a test case for a new sustainable development framework, will be essential. This will involve monitoring environmental, social and economic conditions using selected indicators based on established baselines and agreed targets for policies and actions. This will involve assessing conditions, e.g. to determine levels of tourism and impact and evaluating, reviewing and modifying policies accordingly.

Relevant, measurable and clear indicators will need to be selected and reviewed at appropriate intervals. These might include³²:

- Economic viability;
- Local prosperity;
- Employment quality;
- Social equality;
- Visitor numbers;
- Visitor fulfilment;
- Local control;
- Community well-being;
- Cultural richness;
- Physical integrity;
- Biological diversity;
- Resource efficiency; and
- Environmental purity.

NTMP Action point: Gather, analyse and present relevant tourism data on a regular basis.

Action point: Prepare set of indicators and relevant surveys (of visitors, residents, businesses and the physical environment) for monitoring the success of the Go East policy on a regular basis.

5.6.5 Resources

³² From UNEP and WTO (2005), *Making Tourism More Sustainable: A Guide for Policy Makers*

To support the initiative, the Government has made additional resources available to CIIB for training and policy development and to CIDB for additional loan funds.

On the marketing side, there is a new emphasis on promoting the full diversity of the Cayman Islands including the Eastern districts allied to the increased resources being devoted to Canadian and European markets, which have significant interest in alternative tourism products.

Go East is listed as a strategic and budgetary priority for DOT and CIIB.

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