



Destination Plan Arecibo & Camuy

Prepared by: **streetsense.**

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Foundation
for Puerto Rico

BOTTOM-UP
DESTINATION RECOVERY INITIATIVE

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This program is funded by the Economic Development Administration of the United States of America (EDA).



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Foundation for Puerto Rico is a 501(c)(3) nonprofit that seeks to unleash Puerto Rico's potential in the global economy, so more people can live, visit, work, and invest in our beautiful island. Our targeted economic development and resilience programs work hand in hand with our community partners, providing resources, training, funding, and networks that improve the local economy from within. We go from knowledge to action, combining innovative, data-driven thinking with strong field-based work across more than 32 communities. We've supported over 600 small businesses and collaborated with over 100 local and national NGOs.

Our Mission: Transform Puerto Rico into a thriving destination for the world.

Our Vision: A prosperous Puerto Rico that unleashes the talent, creativity and passion of its people.

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Cámara de Desarrollo Económico y Empresarial de Arecibo

Caribe Adventures Puerto Rico

Casa Trina Padilla de Sanz

Casa Ulanga

Ciudadanos del Karso

Comite Arecibeño por la Conservación de las Tortugas Marinas, Inc.

Consejo de Residentes, Urb. La Monserrate

Cueva Ventana

Destinos Turísticos Online

El Caldo

El Faro Bakery

Acknowledgements

Finca Espiral

Finca Pajuil

FuzionArte

Henna Rocks by Kimber

Instituto de Permacultura de
Puerto Rico

Área Local de Desarrollo Laboral
Norte Central

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Municipio de Camuy

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Oficina de Arte y Cultura de
Arecibo

Oficina de Turismo de Camuy

Oficina de Turismo de Arecibo

Olympic Steel Sound

Piratas Aliados Sirviendo en la
Emergencia (PASE)

Para La Naturaleza

Parque Nacional de las Cavernas
del Río Camuy

Playa Brava

Plaza Artesanal Rafael Hernández
Reyes en Camuy

Poke Sí LLC

Potrero y Cafetería Brisas del Mar

Proyecto Futuro

Puerto Rico Tourism Company
(PRTC)

Taller Azul

Taller Canuani

Traveléalo

Villa de la Central Los Caños en
Arecibo

Visit Rico

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This program is funded by
the Economic Development
Administration of the United
States of America (EDA).



Message from the Chairman of the Board



Jon Borshow, Founder, Chairman of the Board & CEO of Foundation for Puerto Rico

At Foundation for Puerto Rico, our motto is There is No Future in Rebuilding the Past. It means that our future growth and success will not come from our traditional economic activities but from new opportunities that emerge in a rapidly changing world. If we are to succeed, we need to develop the ability to examine our island's existing assets and capabilities, not in terms of how we may have used them in the past, but in how they can become the basis for powerful new possibilities in the future.

Our mission of transforming Puerto Rico into a destination for the world has been clear since the earliest days of our foundation. We had identified the visitor economy as the greatest opportunity for economic growth in the short to medium term, which became an even more urgent imperative following the devastating hurricanes Irma and Maria in 2017. In their immediate aftermath, the Bottom Up Destination Recovery Initiative was born with the goal of creating a sustainable economic recovery model that would help communities become more resilient. This involved the creation of new businesses and services around the development of the communities' potential as destinations for future economic growth.

After two successful pilots of the program in Orocovis and Punta Santiago, Humacao, the Bottom Up received an U.S. Economic Development Administration (EDA) grant that allowed FPR to scale the program across 12 additional municipalities. After living in the western part of the island, our Field Team

moved to Arecibo and Camuy and lived there for 6 months, getting to know the community and stakeholders of the region, and working closely with them to foster economic resiliency and development. During the second phase of the program, the Destination Planning Team co-created with the community a Destination Plan that included the latest tourism data, a list of the main assets, experiences and services that can be used to draw increased visitor flows to the destination, and a list of recommended community-led projects that would further enhance the inherent potential of the region, making it more attractive, resilient, and hospitable for visitors and residents alike. Today, this Destination Plan is a reality.

What we will present to you in the following pages is the result of an extended collaborative effort in which we have engaged local businesses, community members, nonprofits, municipal governments, and outside experts, like Streetsense. Since the beginning of our work in Arecibo and Camuy, Puerto Rico has faced new and ongoing challenges brought on by earthquakes, political disturbance, climate change, and now, a global pandemic. There is no simple way to prepare for this "new normal," and our current reality reinforces the importance of making community resilience our top priority.

The Destination Plan is a blueprint for action. While the physical distancing measures and restrictions associated with the COVID-19 pandemic may affect the implementation of some projects in the immediate short term,

the plan is a living document, one that can be modified, reprioritized, and adapted in real time, responding to the challenges and opportunities of the moment.

Now, more than ever, it is time to re-imagine our future and develop high impact economic development strategies to take Puerto Rico out of the downward economic spiral of the last decade. This will only be achievable if we become far more open to deep and broad collaborations between the government and the private sector, businesses and communities, and international and relief organizations.

Our local communities must have a clear long-term strategy that considers their common assets and determines how they can best leverage them to bring renewed economic activity and create new opportunities for their regions. Foundation for Puerto Rico is working to help communities achieve this with thoughtful strategies, so that they can design, develop, and scale models that, either independently or collectively, have a positive impact on the whole island. We can't wait to see how these plans will develop into an exciting reality in the near future.

Sincerely,



Jon Borshow

Chairman & Chief Executive Officer
Foundation for Puerto Rico

Message from the President



Annie Mayol, President & COO of Foundation for Puerto Rico.

Foundation for Puerto Rico (FPR) was established as a 501(c)(3) nonprofit organization in 2011 with the aim to create opportunities that drive socioeconomic development in the island, with a focus on the visitor economy. The aftermath of hurricanes Irma and Maria marked Puerto Rico's most critical moment of the last century. During that emergency, Foundation for Puerto Rico (FPR) redirected all its resources to facilitate immediate response and coordinate initiatives to aid communities island-wide. The situation underscored the need for a strong plan to better endure future natural disasters, the development of resilient infrastructure, and cohesive collaboration that would speed up recovery and growth in a sustainable fashion.

In January 2018, we launched the pilot for the Bottom Up Destination Recovery Initiative in Orocovis to aid communities, first with immediate relief efforts and by providing the necessary tools to be better prepared for the future. However, the work did not stop there. By the summer, the team was moving to Punta Santiago, Humacao, to expand the program's impact. After a second successful proof of concept, FPR secured a historic grant from the U.S. Economic Development Administration (EDA) to scale the Bottom Up to twelve additional municipalities, impacting in the process numerous communities island-wide.

In the following pages, you will witness the results of a multisectoral collaboration of individuals and entities in the north region, who placed their bets on creating sustainable economic growth in their communities.

We are proud to present the results of the Destination Planning process, as part of the Bottom Up program, in the region of Arecibo and Camuy.

By sharing the Destination Plan with local stakeholders, we hope to shed light on the importance of scaling the "Asset-Based Community Development" (ABCD) strategy to achieve an efficient long-term recovery for Puerto Rico.

As we continue to move forward with sustainable programs aimed at Puerto Rico's long-term social and economic growth, we are hopeful, and guided by a transformation that we can only accomplish through a multisectoral and collaborative effort across the public, private, and nonprofit sectors.

At FPR, our motto is: "there is no future in rebuilding the past". Every day we put those words into practice to create a more resilient, strong and diverse future for our Puerto Rican community, and finding opportunities to innovate no matter what adversity we face along the way.

Sincerely,

Annie Mayol
President & Chief Operating Officer
Foundation for Puerto Rico

Introduction

Foundation for Puerto Rico

Foundation for Puerto Rico (FPR) is a non-profit organization founded in 2011 with a 501(c)(3) public charity designation, that seeks to unleash the Island's full potential as an active participant in the world economy with sustainable programs that drive social and economic development. From knowledge to action, FPR's goal is to transform Puerto Rico into a thriving destination for the world. We want more people to visit, live, work, and invest in Puerto Rico, resulting in multi-million economic growth for Puerto Ricans and the diversity of communities in the island.

FPR leads its efforts with a focus on the visitor economy due to its short-term economic impact. Properly executed, a visitor economy strategy could significantly impact the economy of Puerto Rico and provide economic opportunities to many Puerto Ricans. FPR's vision is a prosperous Puerto Rico that unleashes the talent, creativity, and passion of its people. We want the island to become a unique, desired, and accessible destination that inspires millions of people from all over the world to visit. Puerto Rico has many assets and resources that allow the Island to create a wide network of authentic experiences. These range from its natural resources (that go way beyond sun and beaches), to its history, art, culture, and fine cuisine. They are all available in a compact and convenient destination, accessible both



Field team at the Arecibo Observatory (2019). Source: Foundation for Puerto Rico

in proximity and affordability, among other advantages.

In 2014, FPR began to work on making the visitor economy a priority to all stakeholders in Puerto Rico. This effort started by establishing a Visitor Economy Research Unit to help guide tourism policy discussion on the island. A series of research papers were published around various visitor economy topics, ranging from destination management, and the sharing economy, to national tourism statistics. FPR also conducted a series of events and workshops around the research and policy recommendations to promote dialogue among the various stakeholders of the tourism ecosystem.

After hurricanes Irma and Maria in 2017, FPR strengthened its efforts on the social and economic development of Puerto Rico, but also included a focus on resiliency and extended its impact to multiple communities across the island with programs like the Bottom Up Destination Recovery Initiative, Emprande 360°, and the Whole Community Resilience Planning.

Visitor Economy

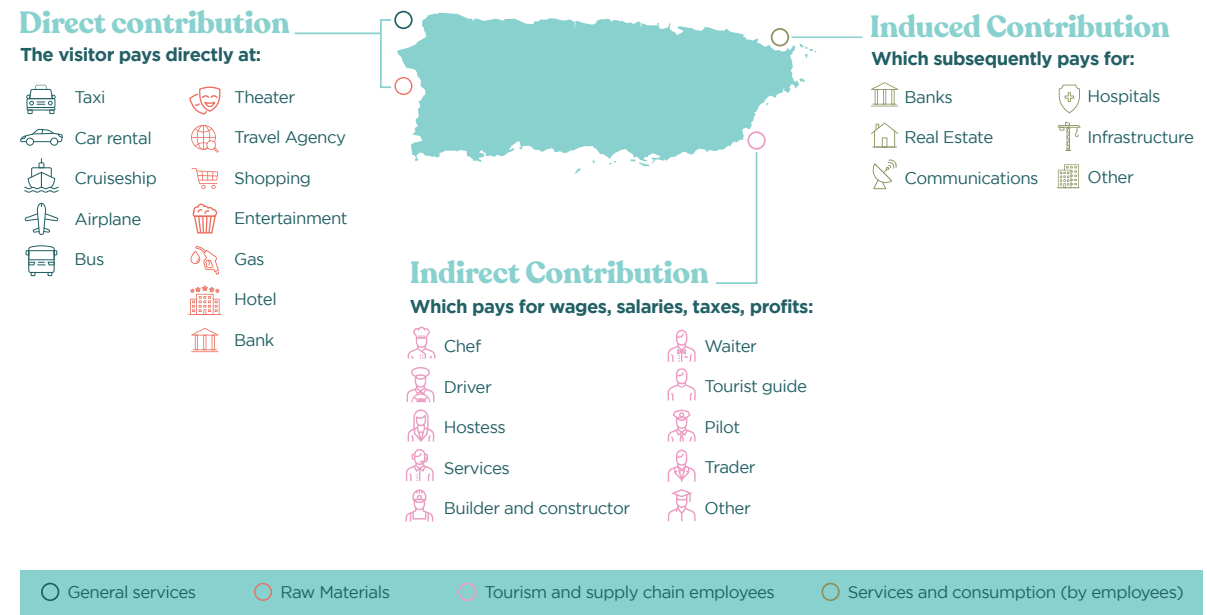
The term *tourism* is of common knowledge, as it is also known that in Puerto Rico this is a sector that has maintained a constant growth pattern even during the last years of recession. The visitor economy is a concept much broader than tourism. The World Travel and Tourism Council (WTTC) defines it as any direct, indirect, and induced economic activity resulting from visitors' interactions with their destination. This activity includes direct consumption of goods and services paid by people who visit a destination; activity generated indirectly from supply chains and services to the industry, construction, among others; and additional induced activity from what people who work, directly or indirectly, serving visitors spend in the local economy.

In other words, when the number of visitors increases, not only does their direct consumption increase (in hotels, restaurants, transportation, attractions, etc.), but the economic benefit of businesses and providers supporting the tourism sector throughout the entire supply chain, such as food, products, maintenance services, equipment, fuel, and general services also increases. Similarly, the economic activity generated by all the employees working in the sector, directly or indirectly, increases when they spend earned money back into the economy by acquiring goods and services.

The activity generated by the visitor economy contributes to many different sectors beyond tourism. Its impact has a multiplying effect with a large-scale potential, prompted by the visitor, that is distributed throughout

the entire economy and thus supports the creation of jobs, infrastructure development, and community development. It also offers an important platform for individuals, family groups, small businesses, and even communities embarking on different business activities such as cuisine, technology, lodging, etc., located in different regions of the island, and implemented according to an economic strategy that creates a large ecosystem.

When analyzing the visitor economy's ecosystem, we identified public and private organizations and individuals who play a key role in bringing about changes and defining strategies. We also identified those who interact with visitors on a daily basis, as well as those who offer services or products that make it possible for the visitor to enjoy our assets.



Source: Foundation for Puerto Rico

Bottom Up Destination Recovery Initiative

Since its beginning, FPR has proposed the visitor economy strategy for the social and economic development of Puerto Rico. After hurricanes Irma and Maria, this approach is more relevant than ever as many on the island continue to migrate to the U.S. mainland, resulting in a smaller tax base and diminishing demand for products and services. This has particularly affected many small towns in Puerto Rico, where local business owners rely heavily on community residents to sell their goods and services. As a result, these communities need an innovative and inclusive plan to bring in visitors to create new economic opportunities.

The Bottom Up Destination Recovery Initiative (Bottom Up) is precisely a short-term economic recovery strategy with a sustainable model, that supports communities in becoming more resilient and active resources in the process of creating tourism attractions and experiences. This community-based recovery program aims to strengthen local communities to spur their own recovery and build the social and physical infrastructures necessary for growth. With a focus on promoting collaborations among local key stakeholders and communities, the program proposes the combination of two municipalities into a region that can work together for the social and economic development of the destination. The goal is to help regions recover quicker by creating a Destination Plan to help increase local tourism offerings and aim for the extension of the

average length of stay. As a result, economic development in the communities is improved through better commercial operations, new businesses, job creation, workforce development, and a growing tax base. In this self-sustainable program, the community and local government in the region learn to maintain and further develop the program once the phases of resource identification, general guidelines, co-design, execution, and evaluation are completed by FPR.

The objectives of the Bottom Up are to help build up economic resiliency in communities outside the metropolitan area to promote recovery over the long term and local economic development through the visitor economy strategy.

The framework of the Bottom Up includes two phases with a duration of six months each. The first phase is focused on short-term recovery and includes support to infrastructure, capacity building for local businesses and organizations,

and efforts to strengthen collaborations among local stakeholders, while the second phase focuses on long-term planning and development.

During the first phase of the program, an operational Field Team relocates to the community to assess challenges and opportunities in local businesses, visit main assets and meet with organizations, coordinate workshops, and distribute product donations. With an emphasis on resiliency, the program stresses the importance of physical infrastructures for economic development. After Hurricane Maria, small businesses, the backbone of a local economy, were unable to jumpstart their operations given the challenges with electricity, telecommunications, clean water, and debris removal. Many businesses were unable to open during the evenings due to shortage of public lighting, and because they had no access to clean water for cooking or could not process credit cards because of lack of internet.



Visitor Economy
Focused



Asset
Based



Community
Driven



Resilient
Oriented



Action
Based

Source: Foundation for Puerto Rico

Therefore, the program provided quick investments (technical capacity and equipment) to mitigate potential future economic injury and faster up-time for businesses to withstand, recover, and avoid future shock to their economies. Water filters and cisterns, solar lamps and micro grids, satellite Wi-Fi antennas, among other equipment, were installed in businesses and institutions to improve the quality, durability, sustainability, and resiliency of local infrastructure to minimize business disruption during potential future disasters.

To accelerate growth, a community needs rapid development of new businesses and the expansion of existing ones. To do that, the program offers technical assistance to existing business owners and builds an environment of entrepreneurship among residents, to encourage them to think about business ideas and provide resources to enable the establishment of new businesses related to the visitor economy.

Given the program's asset and community-based approach, it is imperative to build capacity so that local organizations can work together on their own recovery and development strategy. Often, communities lack formal (or even informal) organizations with the ability to engage and partner with other stakeholders from all sectors to bring attention to the community and its needs. These organizations can be either the municipal government, a local NGO, or a private business. Having one or two anchoring organizations can enhance coordination among all local stakeholders (private and public) and link economic resources with

potential opportunities. This is especially important in the context of a small community, as many external factors directly and continuously influence the local economy. Having strong institutions that can coordinate development efforts is essential to a successful recovery strategy that is sustainable over the long-term. The Field Team builds a map of local key stakeholders, meets with them individually to assess their needs, coordinates multi-sectoral meetings to foster integration among local organizations, and provides capacity building through workshops on topics ranging from the process of registering as a non-profit organization to grant writing, fundraising, volunteer management and other key subjects.

With a visitor economy perspective, we make sure we get a clear picture of what unique experiences the region has to offer to the visitors. Given that the conditions and integration of the diverse visitor economy assets in the region is key to generate the necessary demand for visits, we identify the challenges, opportunities, and gaps in both the physical and operational status of assets for which we can recommend development strategies.

The second phase of the project seeks to create a community-led destination plan that can help bring more visitors in the short-term, ensure commitments from local stakeholders towards the implementation of the plan, and develop a sustainable, locally based governance around plan goals and objectives. The plan conveys a statement of purpose shared, and agreed upon, by a group of key stakeholders in the community and seeks to

define the ways to develop the destination over a given period. It also describes the roles and concrete actions to be carried out by the local key stakeholders in the short to long-term to increase tourism activity sustainably, aligned with the vision adopted by community residents themselves.

The FPR Team, alongside experts, leads a series of community meetings for the co-design of a destination plan that includes short, medium, and long-term projects for the development of the region. The strategies and projects recommended in the final document are based on a range of data collected, including qualitative input from the community as gathered via individual meetings with municipal and state-level stakeholders, through site visits, and global data analysis.

The Bottom Up Destination Recovery Initiative is currently in multiple communities and regions around the island to create a network of destinations developed from the bottom-up that can contribute significantly to the overall social and economic development plans of Puerto Rico.

Executive Summary

Introduction

Growing the visitor economy is a complex process, and achieving successful outcomes takes time, resources and local commitment. This plan offers a comprehensive blueprint for efforts driven by a diverse coalition of community stakeholders and island-wide partners to improve the visitor economy and grow visitation to the region from off-island visitors.

In practice this means meeting communities where they are, not where we want them to be. This effort is not reliant on “big” projects that too frequently fail to address fundamental underlying challenges that have historically stunted the growth of the visitor economy. The assessment outlined here upends traditional planning processes by focusing on a mix of interventions that reflect our gap assessment, community consensus, the possibility of resource allocation, and the presence of potential stakeholder champions. This plan encourages stewardship of projects by and for local stakeholders and supports efforts by communities to get early experience on smaller projects while simultaneously supporting improvements in administrative structures that will help local areas be prepared to advance major initiatives over time.

The plan begins with a diagnostic of assets, market demand and visitor characteristics, and concludes with a set of interventions that accomplish two things over time. First, **grow demand from off-island visitors**, and second, **improve the supply of offerings and assets** to ensure that visitor expectations are met and exceeded. However, all of this occurs with a twist —ensuring the effort is bottom-up and informed by community input and engagement. A bottom-up approach recognizes the role that businesses, asset managers, and key tourism stakeholders play in successful destination tourism efforts. This is important because these are the individuals and organizations charged with and responsible for meeting visitor expectations day in and day out.

Highlights from Our Findings

Global Tourism Trends

The market analysis measured the offerings of each region (mobility, lodging and attractions) against **five major customer segments** (Families traveling with children, Gen Z, Millennials, Gen X, and Boomers) and their travel preferences.

- Group travel for volunteer work or educational learning may involve a variety of participants (young and old) and types of activities, including work in agriculture, health care, environmental conservation, education, etc.

- Eco-tourism and wellness travel are growing in popularity as climate change and global consciousness among travelers of all ages increases. In 2018, 68% of consumers actively sought out eco-friendly accommodations; up from 65% in 2017.¹
- Increasingly travelers are seeking authentic experiences. Gen Z travelers, aged approximately 18-23, tend to plan travel around highly localized festivals and events that enable a more immersive cultural experience.
- Social media is a monumental and growing influence on visitor decision making, particularly among Gen X, Millennial and Gen Z visitors.

Island-Wide Market Findings

- In 2019, over 8 million passengers traveled through Puerto Rico’s primary airport, Luis Muñoz Marín International Airport.
- 40% of in-bound travelers to the island arrive from the Northeastern Seaboard from states like New York, New Jersey and Boston, and 33% arrive from the Southern states like Texas and Georgia.²
- Visitors to Puerto Rico are likely to be younger, primarily white, likely to have higher educational attainments, and earn moderate household incomes.³

Regional Market Findings

- The North Region/Porta Atlántico competes directly with the San Juan Metropolitan area

¹ “Ecotourism Outlook 2018”. Leah Joyner, Qwynne Lackey, Dr. Kelly Bricker. University of Utah College of Health. 2018.

^{2,3} “Post-Maria Destination Attitudinal Study: Qualitative Analysis on the Traveler’s Perception”, February 2018.

and the West Region/Porta del Sol.

- North Region/Porta Atlántico can reasonably support approximately 328,100 annual person trips (assuming 6,562,000 total national person trips) and \$251 million in annual visitor spending (assuming \$5.02 billion total national visitor spending).⁴
- The top two types of travelers include budget travelers (over 6.93 million interested in Puerto Rico) and travelers that enjoy national parks (over 1.5 million interested in Puerto Rico).⁵

Physical Environment

The most significant gaps found in the physical environment are related to the shortage in **transit and mobility** options in the region.

- The region is located approximately 75-90 minutes drive from Metro San Juan and Luis Muñoz Marín International Airport via PR-2 and PR-22 and less than an hour's drive from Porta del Sol's Rafael Hernández Airport via PR-2 and PR-22, making it an ideal daytrip destination.
- PR-129 connects one of the region's most popular assets, Cavernas del Río Camuy, to the urban centers.
- As is the case with nearly every region in Puerto Rico, most visitors to Arecibo/Camuy arrive by automobile. Alternative modes of transit are unreliable or non-existent.
- A number of privately-operated tour bus operators serve the area, particularly to major assets such as Cueva del Indio, Cueva Ventana, and Arecibo Observatory (prior to the collapse of the radio telescope and main

visitor attraction in December 2020).

Public spaces are part of the basic infrastructure of destinations and support economic vibrancy and cities' growth by creating places to exchange of goods and services, cultural activity, and social interaction.

- Built-up areas like the urban centers and Faro de Arecibo have been retrofitted with ADA-accessibility features such as sidewalk ramps, wider sidewalks, and dedicated accessible parking spaces.
- The plazas in the region's urban centers are classically designed and encourage locals to linger and host cultural events. However, Plaza de Recreo de Arecibo suffers from significant deferred maintenance.
- Coastal and riverfront public spaces do not feature climate resiliency measures to mitigate impacts of flooding. Most of the surface covering these areas are impermeable and put the area at heightened risk during a 100-year flood event.

Business Environment & Destination Drivers

Assets

Our assessment found that the area's assets offer unique opportunities for outdoor adventures.

- Top-rated tourist assets in the region are centered around outdoor adventure and the theme of discovery, such as Cueva Ventana, Cueva del Indio, Faro de Arecibo, Cavernas del Río Camuy, and the Arecibo Observatory (prior to the collapse of the radio telescope). Three of these assets remain closed to the

public due to significant physical damage.

- Another key differentiating factor growing in popularity for the region of Arecibo/Camuy is waterfront dining —especially with ocean front offerings in Barrio Islote and river front businesses in the eastern section of the urban center of Arecibo.
- Despite the abundance of adventure tourism assets located farther inland, there is limited business activity following the closure of Cavernas del Río Camuy after the Hurricane that affected business sales.

Lodging

- The region has approximately 350 available rooms across formal and informal lodging options.⁶
- Most of this inventory is located near the urban centers, major highways, and along the coast. Inland inventory is extremely limited despite high visitor rates to major assets such as Cueva Ventana —with the exception of Villa de La Central Los Caños.
- Given that the region is a convenient day-trip destination from either Metro San Juan or the West region, the lodging supply will likely remain low in the near term due to limited demand for overnight stays. Therefore lodging is not recommended as a core area of investment.

Administrative Capacity

- Longstanding systemic challenges continue to prevent organizations from managing and maintaining the quality of many of the region's natural, cultural, and recreation assets —challenges that are not unique to this region.

⁴Streetsense, 2020 (based on Tourism Economics 2018 estimates for Puerto Rico)

⁵Streetsense, 2020 (based on Conversant Digital Media 2019 data for Puerto Rico)

⁶AirDNA Performance Data (Last scraped December 2018); Foundation for Puerto Rico Field Team Hotel Register

- There is municipal interest in advancing the visitor economy initiatives. However, there is a gap in tourism training and professional development opportunities for public sector leaders, particularly at the municipality level.

Recommendations

The recommendations reflect a two-pronged strategy that aims to **grow demand** through marketing and promotion while simultaneously **improving supply** through investments and improvements to destination drivers and assets.

The projects are further split into three categories —projects that are region-specific, Porta Atlántico, and island-wide recommendations that address systemic challenges that are more conducive to efforts led by the island's public and private sector stakeholders and partners.

Region-Specific Strategies: Arecibo/Camuy

The region-specific recommendations for Arecibo and Camuy emphasize a set of investments that reflect the region's strategic position as an **easily accessible day trip destination for adventure seekers and nature-lovers that is rich in Puerto Rican history, architecture, culture, and scenic waterfront gastronomy experiences.**

Strategies to improve the supply of offerings through investments in a mix of business and

place-based assets, improvements in access and mobility, and capacity building as follows:

Enhancements at strategic and popular place-based assets that have competitive advantages.

- **Public Realm Investments in the Urban Center of Arecibo** to create a more welcoming and active 'downtown' experience.
- **Re-Open Parque Nacional de las Cavernas del Río Camuy** with enhanced visitor comfort and safety measures.
- **Enhance Property Adjacent to Cueva del Indio** by redesigning the land parcel to include a new parking lot and a flexible public space with performance and dining areas to enable local businesses to showcase local cuisine and art.
- **Support Expansion of Finca Pajuil** to offer more rooms for overnight visitors and more comfortable educational spaces.

Transportation access and mobility are the lynch pins of the drive to bring more visitors to the region and further enable the area to stand out among its competitors.

- **Improve Accessibility and Connectivity Between Playa Peñón Brusi and Playa Peñón Amador** by using public art, lighting and newly-designed public spaces.

Strategies to address administrative and regulatory issues. Major challenges exist with respect to the organizations, both public and

non-profit, that manage visitor assets. Limited resources to maintain assets in the conditions necessary to meet visitor expectations reflect the organizations' inability to build and maintain viable business plans and revenue-building strategies that ensure financial sustainability. A destination plan that does not recognize and address these systemic issues is not set up for success. Without the capacity and resources to improve and maintain assets over time, the plan cannot succeed.

- **Establish a coalition of adventure tourism assets in the North Region** to gather several organizations —small and large— that are currently or planning to be leaders of adventure tourism in the North Region.
- **Establish a Formal Waterfront Merchants' Association** to bring together a set of business owners within a unique geography to define and execute on a set of aligned priorities and goals through shared knowledge and information.

Porta Atlántico Recommendations

The Porta Atlántico recommendations emphasize a set of investments that address challenges shared across the municipalities representing the North region. Given the proximity of several key attractions and destinations in other nearby municipalities, it is important to tie together the growth and successes of Arecibo/Camuy with that of surrounding areas. As such, we have grouped the following investments into a section of the plan that can be developed in partnership with public, private and non-profit sector partners that function across Porta Atlántico.

Marketing, Events and Promotion

- **Build on the existing brand and marketing of the North Region** to include niche experiences and offerings such as agriculture tourism, voluntourism, and historic center revitalization.

Systems and Infrastructure enhancements

- **Create a regional waterfront resiliency and restoration program** that includes a suite of projects and policies that serve to protect the region's valuable natural resources even as tourism grows and strengthens.

Capacity Building

- **Expand the North Region voluntourism/group travel opportunities** through the assignment of a region-wide voluntourism coordinator and the expansion of existing

group lodging facilities such as Villa de la Central Los Caños.

- **Establish a safe coast pilot program** that educates visitors on the hazards present at each major coastal asset through signage, wayfinding, and online safety listings and offer rescue services in the case of emergency events.

Island-Wide Recommendations

There were numerous shared challenges identified during the planning process that reflect a set of structural and island-wide challenges that are best addressed at the highest levels of island governance. While the recommendations outlined here are replicated in each of the regional plans created through the Bottom Up Program, they continue to be refined and have evolved. We have grouped these investments into a section of the plan that can be developed in partnership with island-wide public, private and non-profit sector partners.

Asset Enhancements

Outside of San Juan, the conditions of many non-branded hotel operators reflect the challenges associated with lower revenue and deferred maintenance. Similar conditions may also be found with key plazas and public spaces across each municipality. Finding ways to finance capital improvements for private lodging and public amenities such as plazas is a significant island-wide need.

- **Establish a public activation program** to fund and provide technical assistance to local arts and culture groups/individuals to create, organize, and maintain art events and installations.
- **Small lodging financing fund** to enable small hotel operators and Airbnb operators to invest their assets.

Mobility Enhancements

Getting around the island can sometimes be a challenge given the inaccuracies in GPS and online mapping tools. Helping visitors find their way around helps raise awareness of assets and improves visitation.

- **Regional wayfinding, highway, and pedestrian signage** along the state highway and local roads.

Business Retention

Business retention focuses on efforts that ensure that local businesses have the know-how necessary to embrace online marketing, improve customer service and operations, and have the resources necessary to improve the look and feel of their businesses through façade improvements. Projects include:

- **Amplify the region's assets on online review sites** to raise businesses' visibility among the visitor population.
- **Develop grant programs for business operations and physical improvements** that help address operational challenges and ensure businesses have the resources to upgrade and improve.

- **Continue to support and grow customer service training** to improve the visitor's experience.

Capacity Building to support the fiscal sustainability of the organizations that manage and maintain key tourism-supporting assets. This includes:

- **Create a training and education program for municipality tourism directors/coordinators** to align local tourism efforts and equip municipality officials with the know-how to market, brand, and implement successful tourism efforts across the island.
- **Create a data co-operative for tourism assets** as a central data collection, storage, and distribution facility for tourism industry product and destination information from across various geographies.
- **Enable more assets to collect entrance fees** is an important fiscal sustainability strategy necessary that may be difficult to implement for organizations that do not have official non-profit status or lack the tools and know-how that go along with collecting fees.
- **Explore shared services among non-profit asset managers**, such as grant writing, administrative support, and co-location to aid in fiscal sustainability.

- **Explore fiscal sponsorship models** that enable organizations to apply for formal 501(c)(3) tax exemption status. This will enable organizations to apply for funding from foundations, grants, and government programs that were previously unavailable to them.

- **Technological tools** to enable sales and allow for the collection of entry fees.

Systems and Infrastructure enhancements that, while outside of the scope of this study, address the deficiency in electrical service, waste management, and water quality are critical to the long-term sustainability of island-wide economic development efforts.

Early Stage Recommendations

The following recommendations were presented to the Destination Planning Team by local community stakeholders through the Nido Cultural Process. Although these strategies present opportunities to attract new visitors and leverage new spending in the region, they are early ideas that will require significant support and reinvention following the impacts of COVID-19.

- **Create Museo de Historia Natural de Puerto Rico** in the Arecibo urban center to develop it as an anchor "must see" destination for the region, with educational exhibits, interactive learning and cultural programming and events.
- **Enhance Visitor Journey at Cascada La Planta** by improving parking lots, installing gateway signage and creating various visitor amenities.

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Objectives:

What Are We Here to Do?

What Are We Here to Do?

Our Challenge

For years, typical Puerto Rican tourism emphasized “sand and sun” —a strategic position that did little to differentiate the island’s offerings from similar beach destinations. Despite the unique history, culture, people, and ease of access that sets the island apart from its competitors. Today tourism represents only 7% of the Gross Domestic Product (GDP) for the island, far below the 15% average for other Caribbean nations.⁷ In the aftermath of Hurricane Maria, the situation is increasingly dire. Significant population loss has further affected many local businesses. With fewer residents spending money, local businesses continue to suffer and are challenged in their recovery from the worst natural disaster the island has ever seen. As island leaders look to the future, many have recognized the value in utilizing the “Visitor Economy” as an economic development tool that will enable spending growth from off-island visitors, counteract population loss, and leverage the island’s underdeveloped natural assets. To this end, how do we accelerate growth in the visitor economy? **How can we be intentional about ensuring that local businesses and residents benefit as more and more visitors come and enjoy this beautiful island?**

Tourism lags behind other Caribbean islands and visitor destinations for a variety of reasons. Foundation for Puerto Rico (FPR) posits that low visitor expenditures are driven by two main factors —a relatively short length of stay and a large diaspora segment that stays with friends and family, rather than spending dollars on lodging or food in the way that a typical off-island visitor might. This means that in order to grow the visitor economy, we must first understand with much greater precision what the off-island visitor wants and needs. By meeting or exceeding the expectation of the visitor, we will ensure longer stays and higher consumer expenditures. **Yet we can’t lose focus —we must also be proactive to ensure that businesses and residents also participate in and benefit from growth in the visitor economy.**

Implications of COVID-19 on the Plan

The COVID-19 pandemic presents an unprecedented crisis for the tourism industry not only in Puerto Rico but across the United States and the world. This crisis, which has quickly developed into a severe global economic downturn, will have long-lasting consequences. This includes plummeting tourist arrivals and tourism spending that are not likely to return to pre-crisis levels until 2024.⁸

In March 2020, under an executive order, Puerto Rico entered an emergency lockdown and curfew —one of the earliest across the

United States and its territories. Although the island planned to re-open to off-island travelers in mid-July 2020, four months after the lockdown, the government postponed its plans and issued a travel advisory encouraging only essential travel with strict testing and quarantine requirements for any traveler entering the island.

Owing to these restrictions, annual domestic passenger traffic at the Luis Muñoz Marín International Airport fell by 75.9% as of June 2020 (Year to Year).⁹ And between March 2020-July 2020, there were over 113 cruise ship cancellations in Puerto Rican ports amounting to “approximately 334,000 passengers and economic losses of more than \$37 million in Puerto Rico”.¹⁰ Compounded by reputational damage to the industry from a number of COVID-19 outbreaks on cruise ships early on in the pandemic, the industry has had to pay off refunds for cancellations and have incurred costs associated with docking ships at ports where ships are quarantined. If these trends continue thru the end of 2020, inbound traffic by cruise lines to Puerto Rico and the Caribbean in general will also be sluggish for a few years following the pandemic.

Although hotel bookings were running above 2019 levels in the early months of 2020, they declined sharply in March and forecasts from early in the pandemic predicted continued losses through the rest of the year.¹¹ This was, however, estimated prior to a fuller understanding of methods and rates of transmission and likely did not

⁷ “Puerto Rico’s Visitor Economy, Highlights”. Foundation for Puerto Rico. April 2019.

⁸ “International tourist numbers could fall 60-80% in 2020, UNWTO reports,” World Tourism Organization, May 7, 2020, [unwto.org](https://www.unwto.org/en/press/news/05-07-2020).

⁹ “ASUR Announces Total Passenger Traffic for June 2020”, PRNewswire, July 6, 2020

¹⁰ Puerto Rico Tourism Company, 2020 (as reported in Global Press Journal, June 21, 2020. “Coronavirus Devastates Puerto Rico’s Tourism Industry”)

¹¹ Tourism Economics, March 2020.

account for another surge of transmissions in the Summer/Fall of 2020 that have, in fact, occurred in many of Puerto Rico's traveler origin markets such as Texas, Florida, and Georgia.

Unsurprisingly, across various sentiment surveys, consumers have indicated heightened fear and continued wariness around long-distance travel, in particular, beyond 2 hours. Given that Puerto Rico is geographically isolated and will require mainland United States and international travelers to arrive either by ship or airplane, the island will need to significantly raise its messaging efforts around health and safety to alleviate worries amongst these travelers or re-focus its marketing efforts to domestic and diaspora tourists. The Destination Marketing Organization (DMO), also known as Discover Puerto Rico, has begun these efforts by revising its organization's off-island promotional messaging to reflect the changes in mandates and safety measures and creating a simple webpage summarizing the [travel advisory on its main website](#) for tourism suppliers and travelers to easily refer to. In addition, the Puerto Rico Tourism Company (PRTC) is certifying hotels that comply with new health and safety guidelines and providing seals of certification to alleviate any fears amongst travelers.

At the same time, the government of Puerto Rico has also had to deal with residents' concerns over the small share of travelers who have continued to enter the island during the pandemic, flouting rules and

restrictions, and therefore placing the health and safety of residents at risk. This [rising dissent against off-island travelers](#) has been problematic for the state as it navigates reopening plans and delicately balances economic concerns against that of local sentiment. When the time arrives for the island to fully reopen to travelers, the island will need to properly educate those arriving in Puerto Rico on how to be good travelers. Even in non-pandemic circumstances, travelers must be reminded to respect local environments, cultures, rules, and practices. With COVID-19, this also means reminding

travelers about mask-wearing requirements, social distancing measures, curfews, and hygiene/sanitation practices.

The market assessment was conducted and presented in the first quarter of 2020 at the onset of the pandemic. Hence, the snapshot of the island's travel volume, typical visitor profiles, and competitive positioning is largely based on data from the island's peak recovery phases following Hurricanes Irma and Maria. To account for the long-term shift in traveler preferences, global customer segment descriptions have



Locals rally against off-island travelers entering Puerto Rico during the pandemic for fear of increasing infection rates. Source: Getty Images

been modified to include recent industry findings and several recommendations in the Destination Plan feature additional COVID-19 recovery measures that must be considered in implementation. Despite much uncertainty over the speed and shape of economic recovery, many of the recommendations made in the Destination Plan remain relevant. They are, in fact, central to the nation's rebuilding following the pandemic.

Growing demand through marketing and promotion (albeit with a new focus on health and safety) will continue to be important for the island and its various regions, as well as improving supply through investments in existing assets that drive visitors and that leverage each region's competitive edge. Most importantly, the pandemic has accelerated the need for tourism-serving businesses to move to digital marketing, sell products/services online, and to revisit business models that can sustain operations during various crises. The plan's recommendations to retain and grow local businesses and to build adaptive capacity of organizations/individuals managing tourism assets will be even more important following the pandemic and should be prioritized moving forward.

As the world economy continues to evolve, the Destination Plan should serve as a living document that continues to guide forthcoming investments as Federal, National, and philanthropic aid become available across the island and region.

Our Goal: A Blueprint for Action Rooted in Community Input

In the end, this effort is not about turning Puerto Rico into a destination that looks and feels like every other beach destination, but rather relies on special elements of the place—the DNA of Place—that make each region unique and worthy of visitation by someone seeking a memorable experience that only Puerto Rico can offer.

The Destination Plans provide a clear and easy-to-read blueprint for action that is rooted in a candid assessment of the condition and quality of the region's tourism-supported assets and overall business environment, **an understanding of tourism trends and visitor expectations**, and **community feedback and input**.

In practice, that means that the priority projects outlined in these plans often focus on improvements at high-value locations that offer significant opportunities to change visitor perceptions whit large, and clearly visible "wins" that help residents and business owners gain the confidence they need to work together and build the credibility necessary to tackle more sophisticated projects.

We must not underestimate the catalytic power of "easy" wins. In a place mired by bureaucratic and institutional challenges, and still recovering from the worst natural disaster the island has seen, easy wins are frequently

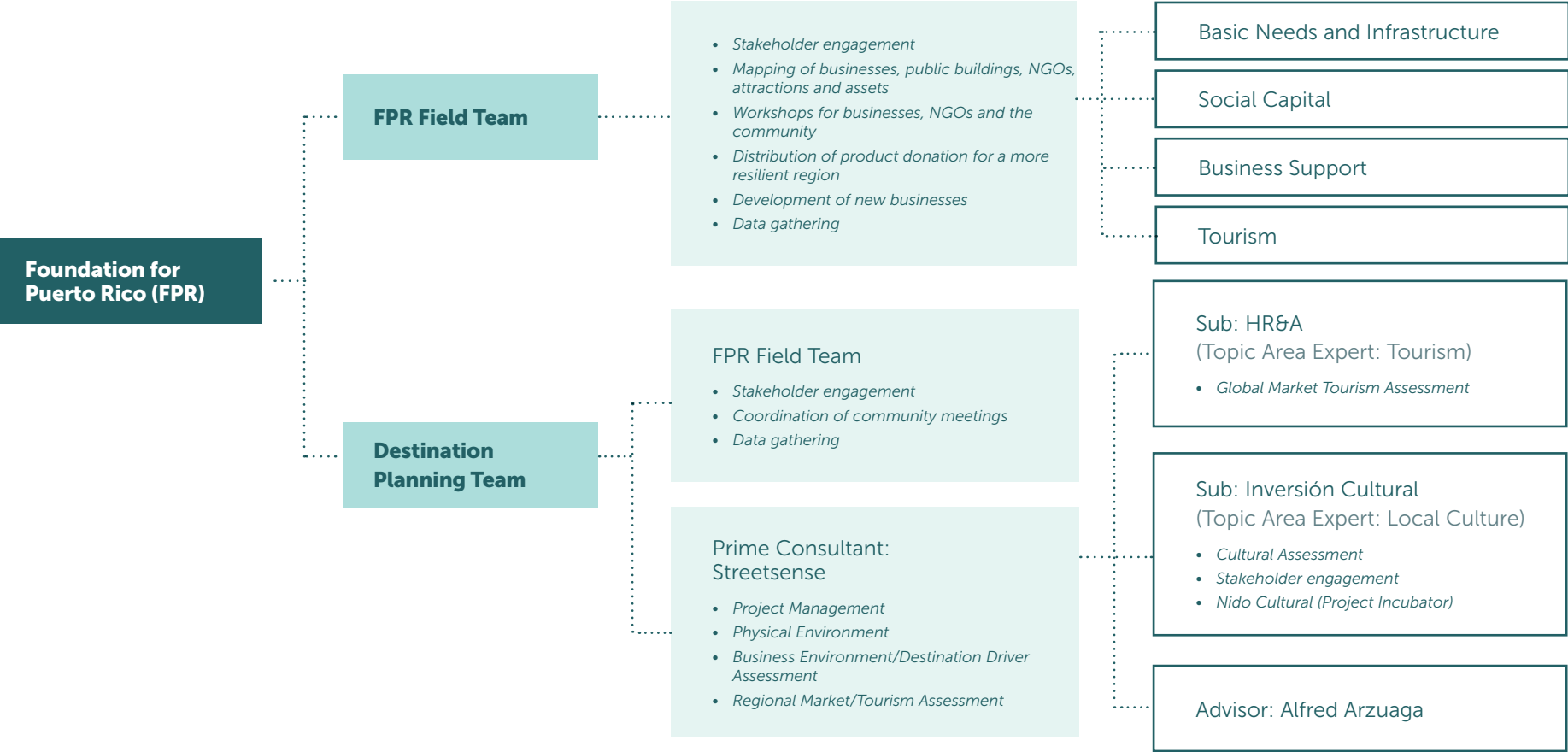
not as easy as they seem. They require the know-how and leadership of local champions, as well as community consensus and merchant engagement; ingredients too often in short supply.


As these plans are reviewed and adopted by community stakeholders, we want communities to view these as living documents that provide a strong framework for action with clear starting points but are by no means "set in stone." Great plans evolve overtime as partners offer feedback and insight, projects are further refined, and mid-course corrections are inevitably made. At the end of the day, active collaboration among community members towards project implementation—even if the project outcomes are different than what is outlined here— would be an incredibly successful outcome.

Our Team

In partnership with FPR, the Destination Planning Team worked closely with Field Teams based in each region to **a) conduct primary and secondary research** to assess and understand existing condition, and **b) create a Destination Plan** in collaboration with local stakeholders that builds upon existing assets and magnifies the authentic qualities of the region. Consisting of prime consultant

Streetsense and sub-consultants HR&A, Inversión Cultural, and independent advisor Alfred Arzuaga, the Destination Planning Team brings together leading national and international practitioners with a proven record managing large-scale projects in cultural, community, economic, and tourism development.





Methodology:

How Did We Do It?

Methodology:

How Did We Do It?

The Destination Planning Process led by Foundation for Puerto Rico (FPR) aims to develop several community driven action plans to grow the visitor economy within six regions throughout the island.

In evaluating the potential to grow the visitor economy in Arecibo and Camuy, the Destination Planning Team set out to conduct a **gap assessment** that offered insight into how well the **supply** of assets and offerings met the visitor's **demand**. A set of simple research questions guided our analysis.

Supply

- What tourism-supporting assets currently exist within the region, and what is their current condition?
- How are existing assets rated and reviewed by visitors, and what is the general level of awareness of these assets?

Demand

- What are the characteristics of the potential visitor to the region?
- What do today's visitors want and need? What are their preferences when they travel?
- What other competing destinations are better positioned to meet their needs rather than this region?

Gap Assessment

- How well do the offerings and assets meet or exceed the expectations of visitors?

The gap assessment then provided a framework for identifying a short list of meaningful investments in tourism-supporting assets that are necessary to improve the visitor's experience. Projects were selected and assessed against the following criteria:

- Ability to result in tangible physical improvements to unique assets.
- Ability to address fundamental organizational, operational, and financial obstacles.
- Ability to raise awareness of offerings and drive visitation.
- Complexity and risk within reason.
- Alignment with guiding principles.

The Destination Planning effort occurred in three parts as follows:

Part 1

Field Team Outreach

Part 2

Diagnostic

Part 3

Project Recommendations



Part 1: Field Team Outreach

A local Field Team, led by FPR, was embedded into the community for a six-month period, during which they were living, eating, and spending every day amongst the locals. The team was charged with preparing an asset list and a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis, while engaging local businesses, residents, and managers of cultural and natural assets. Their work included formal Business and Cultural surveys, targeted stakeholder interviews with public, private, and non-profit sector leaders, and general community outreach. The information was cataloged, recorded, and used as a baseline for the Destination Planning Team's assessment and gap analysis.

Stakeholder Engagement

Central to the success of the Destination Planning effort is community input and buy-in. To ensure recommendations and strategies that are driven not only by market trends and forces but reflective of community needs and demands, the FPR Field and Destination Planning Teams conducted several public engagement efforts between January 2020 and October 2020 to gather stakeholder input on existing challenges/issues facing the tourism economy in each region and to identify and refine key opportunities for improvement.

Stakeholder Engagement

Site Visit/1-on-1 Interviews

January 2020

During a two-day site visit to the region, the Destination Planning Team, with the support of FPR Field Teams, conducted in-person interviews with multi-sector stakeholders with various influences on the regional tourism economy. Interviews explored key challenges and opportunities to attract visitors to each region, managing/maintaining existing tourism assets and businesses, and expanding offerings to the visitor.

- Non-profit/grassroots/community group leaders
- Business owners
- Asset managers
- Public municipal agencies

El Nido Cultural

February – April 2020

An open call-for-ideas process was established and managed by Inversion Cultural to solicit grassroots projects that may be further developed to support the expansion and enhancement of tourism offerings. A digital application intake form was set up (and marketed via various social media platforms and through press releases) and complemented by 1-on-1 technical assistance to enable a diverse range of stakeholders to submit robust ideas to the open call.

Selected participants received group and individual support to develop their project sheet ideas. A virtual event was held in April where the participants presented their final project sheets.

- Non-profit/grassroots/community group leaders

Individual Meetings

August 2020

Several individual meetings were held with local key stakeholders to discuss and validate the information presented in the first draft of the Destination Plan, emphasizing on the projects outlined in the document. The draft was shared beforehand with participants and input was gathered via email, phone calls and virtual meetings.

- Residents
- Business owners
- Non-profit/grassroots/community group leaders
- Asset managers
- Entrepreneurs
- Public municipal agencies

Community Meeting #1

February 2020

A town hall-style meeting was held for a large and diverse group of stakeholders to introduce the overall Destination Planning project, including key team members and timelines. Nido Cultural call-for-project was presented as well as deliverables from the first phase of the Bottom Up Program. This event also served as a networking space for stakeholders across the region.

- Residents
- Business owners
- Public municipal agencies
- Non-profit/grassroots/community group leaders
- Entrepreneurs
- Asset managers

Community Meeting #2

June 2020

An interactive meeting was held to engage with previously-identified and new community stakeholders interested in developing the Destination Plan. The meeting included presenting key findings from the Destination Planning Team's comprehensive market assessment of the tourism economy and assets in the region. This event was the first to be held through a virtual platform due to the COVID-19 restrictions. Comments, project ideas, suggestions, and other feedback for the destination planning process were received through chat, surveys, polls, and audio features.

- Residents
- Business owners
- Non-profit/grassroots/ community group leaders
- Public municipal agencies

Community Meeting #3

October 2020

A meeting was held to present the second draft of the Destination Plans to the communities and key stakeholders in the region. The meeting marks the beginning of the implementation process for recommended projects identified in the plan —including building a coalition and convening the necessary actors who manage and control key properties and assets.

- Residents
- Public agencies
- Non-profit/grassroots/community group leaders
- Business owners
- Property owners

Note: Stakeholder engagement efforts moved to digital platforms to adhere to island-wide lockdowns from March 2020.

Prior to each engagement activity, the FPR staff and field teams led outreach efforts to ensure well-participated community meetings and in-person interviews. The teams distributed fliers (in print and digital) primarily via existing community anchors and local groups and non-profits, and directly to key community leaders with existing local networks. Throughout August and October 2020, FPR held individual meetings and phone calls with key stakeholders to validate both the first and the second drafts of the plan. Due to COVID-19, the original timeline and community engagement strategies were modified to adapt to the new restrictions and limitations in place.

Part 2: Diagnostic

The Destination Planning Team utilized the Commercial DNA (C-DNA),¹² framework to diagnose the challenges and opportunities in each region, and identify strategies and projects that aligned with the interests and priorities of each community. The framework looks at four areas of analysis: Physical Environment Assessment, Business Assessment, Market Analysis, and Administrative Capacity.

Market Analysis

The market analysis included three main components. The team first looked at global and regional tourism trends to uncover major themes and opportunities for tourism growth globally, island-wide, and at the regional level, utilizing existing secondary and primary data sources. The second component of the market analysis included a customer segmentation analysis by age cohort. This was used to identify nuances in consumer tastes and preferences by stage of life. The analysis benefited from a wealth of existing literature on visitor behavior, which is frequently segmented by age across the industry. To further investigate local trends, we supplemented this analysis with a “deep dive” into the specific thematic drivers of tourism that considers subsegments of tourism visitation.

Finally, two case studies were identified with similar profiles to our North Region to enable an assessment against competitive



benchmarks with similar tourism profiles. The first study was the Mayan Riviera, with an emphasis on Tulum. The second study was the Dominican Republic, with an emphasis on Samaná. Like Puerto Rico, both destinations are Spanish speaking, have grown significantly in recent years, and are widely known for authentic experiences that reflect responses to growth segments in the tourism economy. Furthermore, similar to the North Region, Tulum and Samaná are neither served by a large, international airport. As such, travelers arriving on international flights in both cities land at airports that require an additional

1-2 hours of travel time for the visitor. These similarities and their popularity and success for meeting the changes in the tourism market, particularly around adventure travel and experiences, make them excellent case studies for each Destination Plan.

Physical Environment Assessment

The analysis of the physical environment covers a physical assessment of the tourism assets in the region, including the quality of the public and private realms, and an evaluation of accessibility and mobility infrastructure. This involved considering how visitors arrive to island and to the region and how they move around the region upon arrival.

The assessment was done primarily through field work completed during a two-day site visit to the region by the Destination Planning Team, remotely through Google Street View. Information was also gathered from the Field Team during a six-month community immersion, and feedback from stakeholders.

The Destination Planning Team took time to walk the streets, drive around, visit local assets and attractions, and spend time in public places to assess both visual and physical connectivity. Additionally, geospatial assessments and mapping exercises are used to understand the relation between accessibility and adjacent or neighboring “destinations”.

¹² The C-DNA framework is an award-winning diagnostic methodology developed by Larisa Ortiz with support and in partnership with the Local Initiative Support Corporation, the nation's largest community development intermediary. It has been adopted by several communities, including the City of New York where it is used to inform public sector capital investments in communities throughout the city.

Business Environment Assessment

The Destination Planning Team conducted an audit of the island's business, natural and cultural assets using a variety of sources, including the newly released ViewPR database and online platform developed by FPR, asset lists prepared by the Puerto Rico Tourism Company, and asset lists prepared by the Field Teams. Significant effort went into cleaning, classifying, and merging these data sets to provide meaningful insight into the mix and quality of offerings. The assessment included identifying clusters of businesses, including food establishments, entertainment venues, commercial districts, and accommodations. We then conducted an audit of each asset against popular online review sites, including Google, TripAdvisor, and Hotels.com.

Two site visits in January 2020 included walking and driving tours of the area's assets. Additionally, geospatial assessments and mapping exercises are used to understand the locations and clustering of destination drivers, and their relationship to each other.

Gap Analysis

The market, physical and business environment assessment concluded with a gap analysis to evaluate the extent to which the region's tourism-supporting assets and offerings were meeting the needs and serving the tastes and preferences of the customer segments identified in the market analysis.

Administrative Capacity

Following the gap analysis, the report assesses, at a macro-level, the community's capacity for project implementation. This included an assessment of governance, partnerships and potential resources. Much of this assessment included conversations with officials at the island-wide level whose support, resources, and collaboration are necessary to support implementation. Stakeholders included Invest PR, Centro Para Emprendedores, Instituto de Cultura Puertorriqueña (ICP), PRTC, local municipality representatives, the Ports Authority, Boys & Girls Club of Puerto Rico, INprende, Grupo Guayacán, Kiva, Conservación Costera PR (CoCoPR), environmental stakeholder groups, community and local cultural associations, local businesses, and major developers. These interviews were conducted during two site visits and a series of on-going interviews.

An assessment of capacity involved one-on-one interviews with key stakeholders. Furthermore, team member Inversión Cultural greatly informed this assessment process. Inversión Cultural has a long history on the island and is very well versed in the unique challenges faced by local non-profits.

Part 3: Project Recommendations

After completing the assessment and gap analysis, the Team presented its findings to the public at community meetings held throughout each region. FPR led a workshop discussion at each meeting to generate ideas and responses to the assessment findings. Community members were asked to generate specific and actionable project recommendations, emphasizing short-term projects that responded directly to the findings from the gap analysis.

The Destination Plan is a summary of findings from the assessment and gap analysis. It concludes with a list of short-term, medium-term, and long-term projects that reflected an alignment against consumer and market demand findings.

Data Limitations In Puerto Rico

At the inception of the Bottom Up Destination Planning process, the Team began by collecting any and all available Primary and Secondary Data pertaining to each region's visitor economy assets and market conditions, taking care to prioritize and utilize **primary data** collected by the Field Teams in their preliminary work.

The Destination Planning Team quickly identified significant data limitations as related to the collection and analysis of **secondary**

data, owing to circumstances unique to the island. This required mid-course corrections and adaptations to the original methodology and approach. We outline the challenges below and how the methodology evolved to address these challenges.

Census Data

Following Hurricane Maria, Puerto Rico has seen the largest net out-migration of population since 1950. Between 2017 and 2018, official estimates show a decrease of 4.4%, or 142,000 people, according to the U.S. Census Bureau.¹³ The Center for Puerto Rican Studies further projects a 14% loss of population by the end of 2019, reflecting a loss of between 114,000 and 213,000 Puerto Rican residents annually.¹⁴ This significant loss of population has rendered the 2010 Census Data obsolete and unreliable.

14% Loss of Population

by the end of 2019, as reported by
the Center for Puerto Rican Studies

Lodging

Hotel market information frequently relies on Smith Travel Research (STR) which produces the Trend report, the industry standard for hotel performance intelligence. Baseline performance metrics include Occupancy, Average Daily Rates, and Revenue per Available Room to track historical and existing market

performance. In the markets and regions where the Team conducted lodging assessment, most establishments identified in the regions do not report to STR, rendering the report unreliable.

To address these data shortcomings, the Destination Planning Team utilized a combination of sources, including 1) AirDNA data to understand the Airbnb market, 2) stakeholder interviews with local developers and hotels to assess existing market performance, 3) review and booking sites to generate a picture of the volume of visitorship and customer sentiment through an analysis of ratings, and 4) a 2019 Hotel Destinations Report study commissioned by the PRTC. However, this report focuses on branded hotel products that are located primarily in the San Juan Metropolitan Area, where 61% of the total room supply on the island is located. Many of the findings from this study were found to be unreliable for the purposes of regional planning efforts.

¹³ "More Puerto Ricans Move to Mainland United States, Poverty Declines". U.S. Census Bureau. July 2019.

¹⁴ "Puerto Rico's population declined sharply after Hurricanes Maria and Irma". Pew Research Center. July 2019.

Puerto Rico Tourism Company (PRTC) Data

Existing data transmitted from the PRTC included endorsed visitorship and registration information, which has been extrapolated for preliminary quantitative modeling, cannot understand the “complete picture” based on the volume of hotels that are not PRTC endorsed in the assessed Destination Planning regions.

Hotel Tax Registry information from PRTC, which could be used to calculate hotel-based inputs of total visitorship was not available to us at the time of the analysis.

Visitor Estimates

The Destination Planning Team did not identify any operators that collected and analyzed visitor data in either Excel or Access database files. While many sites have logbooks, these entries are voluntary and handwritten, which would have required expensive manual data input for what is generally unreliable primary source data. While the Team asked individual operators to estimate daily visitation, these inputs were useful in understanding perceptions, though statistically unreliable.

As a proxy for visitation figures, the Destination Planning Team quantified the number of visitor reviews for every listed regional asset on the popular travel website TripAdvisor to determine the popularity of each destination driver and to discern visitation patterns among visitors.

Market Assessment Overview



Puerto Rico is positioned to target new audiences and make investments that improve the quality, both real and perceived, of tourism-supporting assets on the island. The Destination Planning Team’s evaluation of Arecibo/Camuy laid out in this document, is rooted in an understanding of who is currently visiting Puerto Rico and why, who can be attracted to visit through strategic investments and positioning, and the current state of key assets on the island.

The next sections lay out **global and regional tourism trends**, providing context on tourism in the region, as well as how consumer tastes and preferences are evolving within the visitor economy on a global scale.

Following the trends assessment, we introduce our **customer segmentation methodology**, which builds upon but does not duplicate psychographic analysis already produced by PRTC and Discover Puerto Rico, among others. Rather, the Destination Planning Team’s segmentation by age cohort is designed to serve as an accessible tool for local communities to determine the scope and

prioritization of potential investments in tourism-supporting assets based on the tastes and preferences of a wide range of potential visitors. Given the demographic composition of current visitors described above, this analysis is limited to tourists from the United States with the means to travel for leisure.

The Destination Planning Team’s gap analysis found in this document maps the value of key assets from the perspective of each age cohort to the quality of these assets in the region. Similar to the 2018 PRTC analysis, the Destination Planning Team evaluation highlights areas in which the region is not delivering an experience of adequate quality to potential visitors but is age-specific, enabling communities to develop projects whose implementation would directly serve to attract specific cohorts (e.g., Millennials). Broadly speaking, the results of this region-specific analysis align with the PRTC’s island-wide findings, namely in the areas of transport accessibility, reliability of the information, and maintenance of infrastructure.



Tourism Market Assessment

Tourism Market Assessment

To get a sense of what today's traveler is looking for in a destination, the Destination Planning Team began by developing a deep understanding of visitor trends and preferences. We began by analyzing global trends in the visitor economy best understood by considering existing visitor supporting assets—mobility, lodging, and destination attractions—that are continually evolving.

The global visitor landscape was segmented by age and categorized into five groups: Families (with young children), Generation Z (Gen Z), Millennials, Generation X (Gen X), and Boomers. After distilling the values and baseline travel needs of each customer segment, we analyzed these preferences against the existing conditions of tourism assets in Arecibo/Camuy to identify gaps in the region's offerings. The results of this analysis enabled the region to develop a very strategic set of short-, medium- and long-term project ideas that prioritize investment that respond directly to the needs and interests of the visitors they want to attract.

Global Tourism Trends

While travel and tourism have always been a fixture in people's lives, increased choice, affordability, and exposure to information about previously inaccessible destinations have elevated their overall role and importance. Trip taking has long been considered a luxury good. Over 2 billion people were expected to be traveling around the world by 2030 pre-COVID. However, according to the latest data from the World Tourism Organization (UNWTO), the COVID-19 pandemic has resulted in an estimated drop of up to 22% in international tourist arrivals during the first quarter of 2020¹⁵, and is projected to lead to an overall annual decline of between 60% and 80% when compared with 2019 figures.

A \$519 billion decline in travel spending in the US this year will translate into a total economic loss of \$1.2 trillion in economic output. International visits to the US will decline 54% this year assuming partial opening of borders in the second half of 2020¹⁶—with marginally larger declines for international visitors from Latin America and Europe, two critical origin markets for Puerto Rico. As for domestic travel from other parts of the U.S., recovery may be quicker. If China's domestic tourism market is any indicator, the U.S. will likely need to rely on domestic and short-haul travel for initial recovery.¹⁷ Especially if international flights remain restricted, financial circumstances of consumers remain challenging as a result of a recession, and if there continues to be a strong desire among travelers to stay local and

reconnect with family and friends (52%).¹⁸ In Puerto Rico, annual domestic passenger traffic has fallen by 75.9% as of June 2020 when considered on a year-to-year basis according to Grupo Aeroportuario del Sureste, the airport operators for Luis Muñoz Marín International Airport.¹⁹

Although there is a lot of uncertainty around the recovery of tourism, for years, travelers have shifted preferences toward travelling with a purpose, such as volunteering and activism, educational learning, cultural engagement, sports and adventure, health and wellness. When the global economy fully recovers, these preferences and trends will be ever more critical to driving visitation and spending in Puerto Rico.

Whatever an individual or group's specific reason for traveling, chances are that they are approaching their trips with intention from the initial stages of their vacation planning. For younger travelers between ages 18-38, authenticity is a major driver of choice and behavior. These travelers see little appeal in visiting traditional tourist nodes, including over-touristed areas where they will be surrounded by other tourists. Instead, they seek out local, curated, and unique experiences.

Social media's monumental and growing influence in putting these local experiences on the map to draw visitors has driven a significant change in how tourists of all ages plan, curate, and document their travel experiences. The photo album or home video, shared with close friends and family, has been

¹⁵ UNWTO World Tourism Barometer, 2020.

¹⁶ Oxford Economics, 2020.

¹⁷ International Air Transport Association, 2020.

¹⁸ Harris Poll, 2020.

¹⁹ ASUR Announces Total Passenger Traffic for June 2020*, PRNewswire, July 6, 2020.

replaced by the Instagram grid, which can be shared with millions of people with immediate effect.

This section explores a variety of trip purposes in greater detail, the importance of cultural engagement and places authenticity in travel, the use of technology, and major customer segments and their preferences that are each uniquely influenced by travel purpose and technology.

Purpose of Travel

More than ever before, tourists are planning their trips around specific goals that shape most, if not all, of their decision-making. Those goals vary from traveler to traveler, but below are three major global trends that reflect opportunities to utilize or enhance unique local assets within the region. In particular, the North Region teeming with assets in a wide range of natural assets —coasts, lakes, farms, and forests— offers outdoor adventure experiences that push boundaries alongside opportunities to immerse in local environments, culture, and holistic wellness.

Group Travel With Purpose (Voluntourism, Educational Learning): Voluntourism is often referred to as travel that involves volunteer work for a non-profit/mission-driven organization in the destination market. Group travel for volunteer work or educational learning may involve various participants (young and old) and types of activities, including work in agriculture, health care, environmental conservation, education, etc. Despite rising criticism in the media,



Source: Grow Dat Youth Farm

voluntourism, when done well, can serve to build capacity and knowledge of local organizations and communities in order to sustain long-term change and development in a destination. Most importantly, its intangible benefits include personal development for both travelers and hosts and expansion of the host organization's network base that in turn enhances the perception of the asset and promotion/fundraising in the future.

The opportunity for voluntourism in Puerto Rico lies in the younger traveler segment. An attitudinal study conducted post-Maria found that about a quarter of Millennials surveyed were attracted by "...an opportunity to make a difference on the island by volunteering".²⁰

In Arecibo/Camuy, the main opportunities for voluntourism lie in key religious and agro-culture assets such as the Iglesia de Piedra and Villa de la Central Los Caños. Religious assets often invite mission groups to partake in faith-based activities for a period of time (typically weeks or months long). This often includes short-term projects —whether rebuilding or expanding an asset, organizing large-scale events/programs for locals, or spreading the teachings of the church in local communities. Agro-culture assets in neighboring Hatillo, on the other hand, may provide volunteer groups the opportunity to learn the ins and outs of growing food sustainably while expanding existing crops on the asset.

²⁰ Quantitative Analysis on the Traveler's Perception, February 2018.

Ecotourism and Adventure: According to the Adventure Travel Trade Association, adventure tourism consists of travel that includes a combination of physical activity, a cultural exchange, or activities in nature that may be risky or that push travelers' comfort limits.²¹ As such, adventure tourism is often closely connected to ecotourism because the activities that tourists engage in are very similar, such as birding, camping, surfing, or climbing, among others. Many adventure travel companies, such as Natural Habitat Adventures and Intrepid Travel, are tied to climate and environmental advocacy²² and are leveraging travelers' desires who are increasingly interested in experiencing and contributing to the redevelopment of destinations that have recently suffered environmental or political distress. However, in recent years, adventure

tourism has trended towards disintermediation, or the removal of tour operators and agents. Adventure travelers today are more likely to go directly to providers in the destination market, such as Aventura Cueva Ventana, via digital platforms.

Eco-tourists, in particular, take trips specifically crafted to engage with nature, to help clean up, conserve, or improve a natural environment, or to simply observe the great outdoors while being careful not to alter the integrity of the existing ecosystem. As a result, these travelers also actively seek out eco-friendly accommodations that make concerted efforts to reduce environmental impacts through participation in recycling/ composting programs, farm-to-table dining, energy-efficient lighting, among other initiatives.²³ In

2018, 68% of consumers actively sought out eco-friendly accommodations, up from 65% in 2017.²⁴

Health and Wellness: Restoration and health-motivated travel has grown in popularity in the information age and an entire industry segment has emerged to respond to a growing market of travelers looking to tie their travel experiences directly to their physical, mental, and emotional wellness, with targeted activities to accommodate these desires. Wellness trips include meditation and yoga retreats, spa weekends, adventure retreats, or digital detox retreats. According to the Global Wellness Institute, wellness travel grew at a rate of 6.5% annually from 2015-2017 and is expected to grow more than twice as fast as general tourism through 2022.



Source: Christopher Burns (Unsplash)



Source: WeTravel (Flickr)

²¹ World Tourism Organization (2014), AM Reports, Volume nine – Global Report on Adventure Tourism, UNWTO, Madrid.

²² "Ecotourism Outlook 2018". Leah Joyner, Gwynne Lackey, Dr. Kelly Bricker. University of Utah College of Health. 2018.

²³ "5 Breathtaking Eco-Friendly Hotels and Resorts From Around the World". Sophie Hirsh. Green Matters. July, 2019.

²⁴ "Ecotourism Outlook 2018". Leah Joyner, Gwynne Lackey, Dr. Kelly Bricker. University of Utah College of Health. 2018.

Local Culture and Authenticity

The desire for authenticity is rooted in the significant value that travelers place on experiences over material goods. In fact, a survey found that avid travelers prioritized travel to experience new things over travel for relaxation.²⁵ For instance, millennials aged approximately 26-40 are also more likely to pick “live like a local” experience and create their own travel itineraries than use a travel agency—or even travel platforms that are popular with other age groups. Their resulting travel experiences diverge from the overly scheduled, contrived trips that their parents’ generation found comfort in. Although older travelers are also increasingly prioritizing unique experiences over comfort and convenience.

Attractions/Tourism Assets: Gen Z travelers, aged approximately 18-25, extend this deep interest in local experiences to a tendency to plan travel around attending highly localized festivals and events that enable more immersive cultural experiences. Across the world, destinations are leveraging a range of events and festivals to attract tourists, including those themed around local music, dance, food, adventure, and sports.

Lodging: Authentic experiences also extend to lodging preferences with younger travelers showing disinclination from staying in chain hotels given their interest in “living like locals”. Many are choosing alternatives to traditional hotels such as peer-to-peer (P2P) accommodation, including Airbnb and hostels. Equipped with similar amenities



Source: Shutterstock

to hotel rooms, these alternative lodging choices enable travelers to meet local hosts or other travelers easily and to live in residential neighborhoods like locals. However, it must be noted that hotels are also increasingly understanding the need to act as liaisons between guests and local communities by providing guest services that match guests with local cultural events, cuisine, and activities.

Gastronomy: As food tourism becomes more popular with the growth of Facebook, Instagram, and other social media platforms, destinations are also recognizing the benefit of curating unique gastronomic experiences to attract travelers that are looking to immerse themselves in local cuisine and cultures.

From local distilleries and breweries to local cooking classes and farm-to-table dining establishments, food-based activities are becoming an important pillar of experience-based travel.

Trends in Travel Planning

With the wide range of information now available online, planning and booking travel is increasingly done through on-line platforms well in advance of the visit. Today, the path to purchase for travelers is complex, crossing various platforms, media, and devices. In addition, once travelers have arrived at their destinations, many still want to stay “connected” during their vacations and, increasingly, staying connected on

²⁵ Skift's 2017 U.S. Experiential Traveler Survey.

mobile devices.²⁶ In Arecibo/Camuy, many businesses are listed on crowdsourced review sites like Google—in fact, only 12% of dining establishments assessed in the region were not listed on Google. Major assets are also well represented on review sites such as Google and TripAdvisor and have thousands of reviews, including Cueva Ventana, Cueva del Indio, Faro de Arecibo, and Arecibo Observatory (prior to the collapse of the radio telescope and main visitor attraction in December 2020).

Post COVID Message: Following the pandemic, the kinds of information researched by travelers have also shifted, indicating a greater need for destination-level information on safety and health measures. A survey conducted by Destination Analysts in May 2020 (as individual U.S. states began to lift stay-at-home restrictions) found that three-quarters of Americans who plan to travel this year reported that they would research how the destination they visit and its businesses are managing the coronavirus situation.^{27 28}

Therefore, it is important to restore passenger confidence through robust messaging and marketing that highlights safety and cleanliness measures and overall re-opening of destinations.

Before Trip: Digital platforms influence travel decision making. Although search engines and family/friend recommendations are the common initial source of inspiration for travel, travelers typically shift to Online Travel Agencies (OTAs) and airline/ hotel sites as they advance in research and narrow destination options. In fact, OTAs are growing in popularity

and have changed how tourists book their travel, with more than a third of travelers booking their vacation through OTAs.²⁹

Travelers using social media also tend to engage with various social media platforms at the beginning of their purchasing paths to view travel pictures/videos from people they follow or to look for trip deals. Instagram, for example, has become a major tool in driving travel decisions—40% of respondents to a recent Forbes survey who were under the age of 33 highlighted “instagrammability” as the single most important factor in choosing a vacation destination.³⁰ With many resources available for travel planning, destinations need to have an integrated channel strategy on key channels like OTAs and social media.

During Trip: The tourism industry has in recent years responded directly to the need for travelers to remain connected while on trips. In a Facebook-commissioned global survey of travelers who use social media, more than 80% reported using the internet while on vacation³¹, primarily on their smart phone devices. Airlines and cruise ship companies have followed this trend by enhancing connectivity onboard.³² According to a 2018 IATA global airline travel survey, 37% of passengers want to be able to book ground transportation or hotel stays while on their flight to their destination.³³



Source: Shutterstock

²⁶ Expedia Group, 2016. *Traveler's Path to Purchase*.

²⁷ Destination Analysts, 2020. "Update on American Travel in the Period of Coronavirus—Week of May 18th"

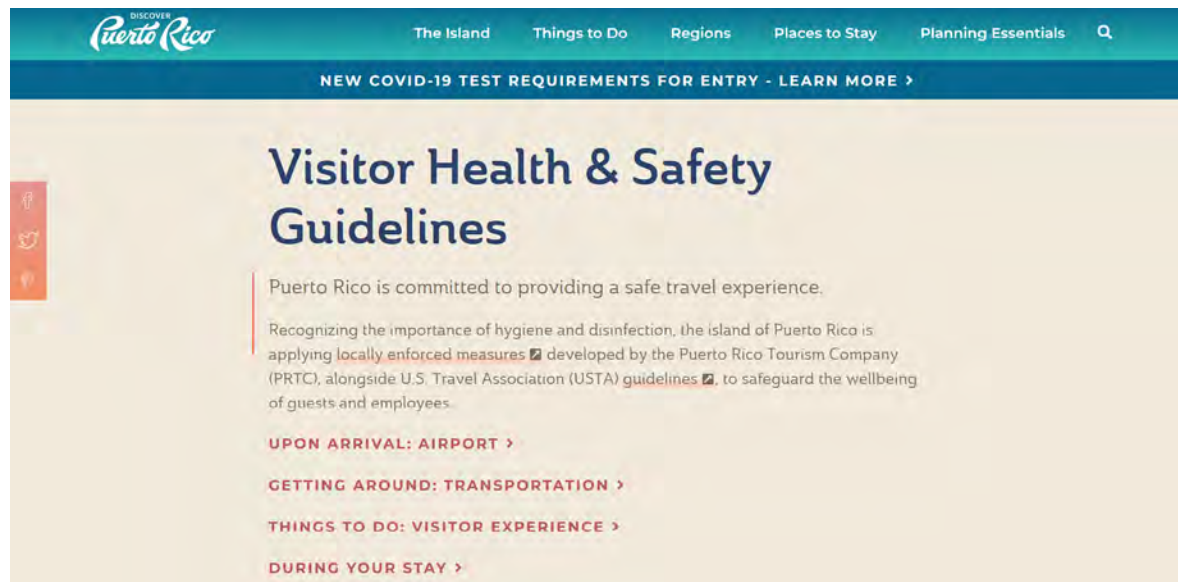
²⁸ Fuel Travel, 2020.

^{29,31} Deloitte, 2015. *Digital Channels for Travel Infographic*.

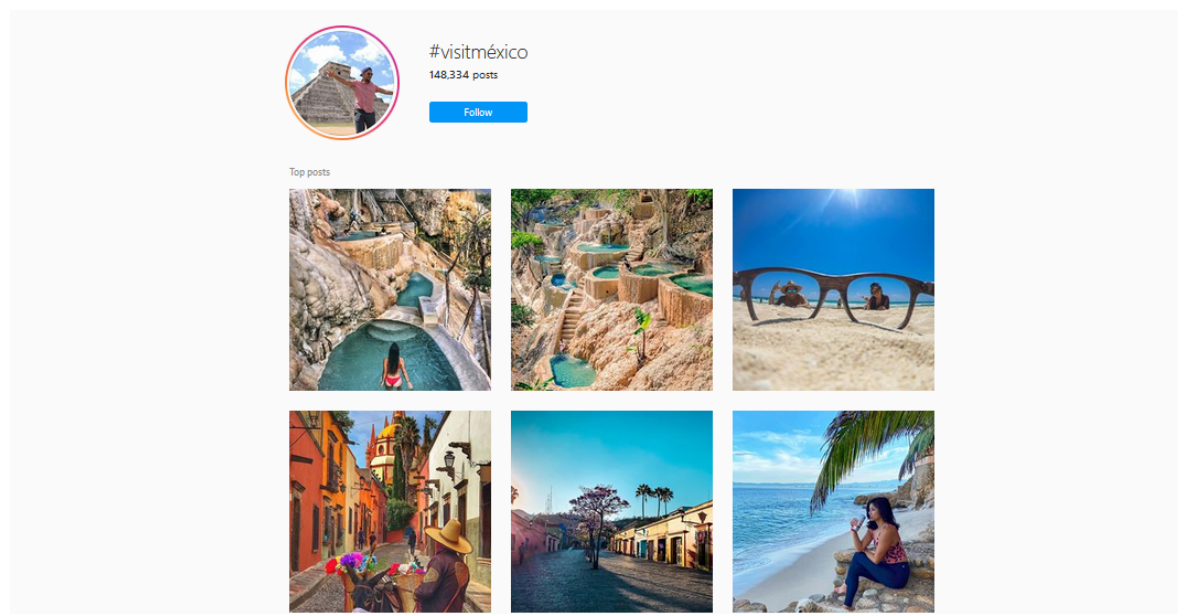
³⁰ "The 4 Biggest Travel Trends for 2019". Eustacia Huen. *Forbes*. December 24, 2018. ³² Deloitte, 2015. *Digital Channels for Travel Infographic*.

³² "2019 Cruise Trends & Industry Outlook". Sarah Kennedy. *Cruise Lines International Association (CLIA)*. 2019.

³³ *The International Air Transport Association (IATA)*. 2018



Source: Discover Puerto Rico



Source: Instagram (#VisitMexico) ³⁷

Post Trip: After a trip has finished, many tourists want to document their experiences and share them on social media. In fact, a Facebook survey found that about 42% of travelers who use social media log into Facebook within the same day of landing, and an additional 28% within the same week.³⁴

Some Destination Marketing Organizations (DMOs) partner with social media influencers or feature open blog sites for tourists to post about their travels. For example, the Dominican Republic Ministry of Tourism features a blog wherein tourists may express themselves and write about their unique travel experiences.³⁵ Mexico's Tourism Secretariat (VisitMexico) has over 400,000 followers on Instagram and creates an interactive platform for tourists to commemorate their travels by reposting photos from travelers themselves under the hashtag #VisitMexico or #FoundInMexico.³⁶

³⁴ Deloitte, 2015. *Digital Channels for Travel Infographic*.

³⁵ Go Dominican Republic.

^{36, 37} Visit Mexico.

Global Asset Trends

Mobility

Ground Transportation: While rideshare has recently been the most prominent development to disrupt the ground transportation market, with a focus on the taxi industry, the next new wave of disruptors are targeting multimodal transit—including micro-mobility options such as electric scooters, mopeds, and e-bikes for first and last-mile travel. As a result of the pandemic, this trend is projected to accelerate as many consumers seek alternative modes of transportation that do not require using crowded public transport or getting into enclosed vehicles with strangers that heighten the risk of transmission. With year-round warm weather and expansive outdoor destinations, including beaches and parks, Puerto Rico is ripe for the rapid expansion of micro-mobility options. Skootel, a locally-based start-up, is leading the market with new fleets of scooters in Condado, Santurce, Miramar, and other neighborhoods in San Juan.³⁸

Meanwhile, island authorities are continuing to support the taxi and rideshare industries by introducing additional safety measures to ease travelers' fears and insecurity in the post-pandemic world. Transportation providers, for example, are required to disinfect vehicles at regular intervals, drivers and riders are both required to wear masks, and drivers must also wear gloves when handling luggage and provide hand sanitizers aboard vehicles.³⁹

Lodging

Budget Accommodation: Despite its popularity in Europe, the US has only 3% of worldwide hostel properties and 10% of global hostel revenue. However, the demand is growing, and is primarily being driven by Millennials, and many who choose hostels or budget accommodation options are, in fact, taking four or more leisure trips annually than other travelers.⁴⁰ Factors that influence consumer selection of budget accommodation (other than price and value) range from location, the availability of social spaces and collective experiences/communal living, and the ability to avoid reliance on a rented automobile. Before the pandemic, hostels and budget hotels were already attracting travelers other than backpackers and will likely continue to see demand as disposable incomes contract over the next couple of years for many consumers following an economic recession.

Short-Term Rentals: The sharing economy has had a significant impact on people's consumer behavior. Companies such as Uber and Airbnb have radically altered the tourism landscape. Although the most prevalent form of vacation lodging is still hotels, vacation rentals are growing in popularity as Airbnb has experienced a 153% global compound growth rate over the past decade.⁴¹ While the vacation rental market has experienced significant regulatory pressure because of its impact on an already tight housing supply in many major global cities, the opportunities that the concept has given travelers to stay in places with few or no hotels has made entire regions far more accessible to tourists. Some of the leading vacation rental

platforms have also moved to directly compete with upmarket hotel chains by supplying luxury options with key design or distinguishing features. Airbnb, for instance, has created two new lines of rentals for this purpose—Airbnb Plus and Beyond by Airbnb.

Although overall accommodation performance fell to unprecedented levels during the



Source: Marcus Loke (Unsplash)

³⁸ "Electric scooters arrive in San Juan". *ElNuevoDia.Com*, 2020. Accessed online via <https://www.elnuevodia.com/negocios/empresas-comercios/notas/llegan-las-scooters-electricas-a-san-juan/>

³⁹ "Visitor Health & Safety Guidelines". *Discover Puerto Rico*, 2020. Accessed online via <https://www.discoverpuertorico.com/promise#component-10166>

⁴⁰ Phocuswright's Global Hostel Marketplace, 2014-2018

⁴¹ Several sources including "Airbnb STATISTICS: 2019/2020 MARKET SHARE ANALYSIS & INDUSTRY GROWTH". Accessed online via <https://comparecamp.com/Airbnb-statistics/>

COVID-19 pandemic and about 44% decrease in Airbnb host revenues is expected between June-August 2020⁴², the hotel sector experienced a much steeper decline than all short-term rentals for three major reasons⁴³ — a) business and group demand fell and b) traveler preference for accommodation that supported social distancing and long comfortable stays (particularly for families), and c) travelers looking for inventory in more remote destinations.

As such, short-term rentals have maintained higher absolute performance levels the sector is much closer to reaching previous year levels in revenue per available room (RevPAR), especially in regional markets.⁴⁴

Boutique Accommodation: Boutique hotel accommodations have increased in supply for the last five years, growing by 7% in 2017, a significant increase when compared to the 1.8% increase in the total mainland US hotel supply. In 2017, demand was growing as much as supply, at a 7% increase, outpacing upscale hotels and overall hotel demand.⁴⁵ Boutique hotels generate demand because they often have the freedom to tailor hotel design to their local market by offering personalized service and attention to detail that larger chains could not.⁴⁶

Beyond just boutique hotels, glamping facilities have also grown in popularity as boutique accommodation in recent years. These are outdoor camping sites (tents, cabins, refurbished camper vans) that include more luxurious amenities compared to traditional camping, including beds, spa-like bathrooms, and farm-to-table meals. Given that travelers will likely continue to seek safe, socially distant travel experiences following the pandemic, glamping sites will offer travelers separated lodging options that are outdoors and that limit close interaction and crowding with others.



Source: Shutterstock

⁴² "Survey Reveals How Airbnb Hosts Are Coping During COVID-19". IPX1031, 2020. Accessed online via: <https://www.ipx1031.com/Airbnb-covid/>

^{43, 44} COVID-19 Impact on hotels and short term rentals. Sanford, Will and DuBois, Dillon, 2020.

⁴⁵ "Boutique Quickly Becoming Fastest-Growing Segment". Kim Bardoul. Hotel News Now, May 15, 2018.

⁴⁶ "3 Reasons Why Independent Hotels are Thriving". Jonathan Webster (Geronimo Hospitality Group). Hotel Management. October 23, 2018.

Attractions

As travelers increasingly value once-in-a-lifetime experiences over more familiar, accessible destinations, new trends have emerged.

Second City Travel: The search for authenticity and curated experiences among a growing set of tourists has created a market for travel to smaller regional destinations such as Arecibo/Camuy within reasonable travel distance from traditional tourist nodes. Getting away from the tourist hotspots to visit smaller towns can make for budget-friendly, culturally enriching, and less crowded travel experiences. This final factor is critical post-pandemic as travelers remain leery of close interaction with others.

Last Chance Tourism: Last chance tourism is the general principle of visiting a place before it no longer exists (i.e., due to environmental factors) or it is no longer accessible (i.e., due to tourism restrictions). These tourists travel to places threatened by human impacts or attractions that may be closed in the future.⁴⁷

Customer segments

To understand what today's travelers typically want and need on their trips, the Destination Planning Team first sought to understand their tastes and preferences. Across the travel industry, these are typically correlated to and segmented by age, into five key groups:

Families (with children)

Because children play a substantial role in travel decision making and spending, this group encompasses all parties traveling with children under 18.

Generation Z

Born between 1995 and 2015 (or aged 5 to 25 years old), travelers in this category are growing in influence and spending potential. "Gen Z" travelers are young, willing to explore, and, as they gain financial independence, are breaking away from family-style travel.

Millennials

Born between 1980 and 1994 (or aged 26 to 40), travelers in this category are the first generation to have grown up with widespread internet access and usage, with life experiences shaped by access to significantly more information than their predecessors.

Generation X

Born between 1965 and 1979 (or aged 41 to 55), "Gen X" makes up approximately 25% of the U.S. population and enjoys relatively substantial travel and spending potential.

Boomers

Born between 1944 and 1964 (or aged 56 to 76), the Boomer traveler values predictability, comfort and wants as little guesswork as possible.

On each of the following pages, we have elaborated on the relative value that travelers in each of these segments generally place on the assets (physical and programmatic) that they look for in a destination, and how the recent COVID-19 pandemic may have impacted their travel choices.

⁴⁷ "Ecotourism Outlook 2018". Leah Joyner, Gwynne Lackey, Dr. Kelly Bricker. University of Utah College of Health. 2018.

Customer Segment

Families

(with children under 18 years old)

Traveling families often have stricter limitations than parties that are traveling without children. Transportation can be difficult with young children, so most parents opt for domestic trips. While these trips range in length, households with more children tend to take shorter trips. Family trip planning is typically centered around cost and resource availability, but among parents' top priorities is finding travel destinations where all members of the family will have fun.⁴⁸

COVID-19 Sentiment

As previously mentioned, following the pandemic, travelers are going to actively research destinations to better understand their health and safety guidelines and practices, in addition to preparing for any emergency health events. This will likely be more critical for families traveling with young children. Although the typical travel preferences amongst families to use rental cars and stay in hotels necessarily offer safer, socially distant vacation experiences that lower the risk of transmission, there are still great challenges that become present for families when major tourist attractions such as theme parks and museums are closed or limit occupancy. Keeping children entertained is, after, all one of the greatest challenges in traveling with children, and this will be truer once destinations begin to reopen within safety guidelines from states.

⁴⁸ "Generation Alpha & Family Travel Trends". Expedia Group Media Solutions.

⁴⁹ "Our Family Travel Survey Results are in!". Emma Sparks. Lonely Planet Kids. May 8, 2018.

^{50, 51, 52} "Generation Alpha & Family Travel Trends". Expedia Group Media Solutions.



The typical American family is planning a trip to a place in the US where there are activities for everyone in the family. Many parents will spend a vacation week with the kids at an amusement park, or somewhere the family can be outdoors. Additionally, with a fear of the kids getting sick, parents will likely choose a hotel with access to resources.

Source: Shutterstock



Mobility & Transit

Traveling with young children is a challenge, so families look for ease of access to their vacation site. When on vacation, many families use either a personal or a rental car to get around in addition to walking and taking public transit or taxis. Convenience is chief among a parent's vacation desires, so accessibility often dictates what families can do when traveling with children.



Lodging

Most families choose to stay in a hotel on their vacations for its convenience and proximity to resources. Over 40% of parents are most likely to choose a hotel over any other type of accommodation, and close to 58% of families with children under the age of nine opt for hotels.^{49, 50}



Attractions

One of the greatest challenges in traveling with children is keeping them entertained. Thus, family travel decision drivers are centered around activities for the entire family, places that young children will enjoy, and locations in which parents do not have to worry about their safety. Almost three-quarters of parents are looking for theme parks on their trip.⁵¹ Most families are also looking for water or outdoor activities. Though trips can be taxing experiences for parents, travelers look forward to spending time with their families, relaxing, and getting away from their everyday routine.⁵²

Customer Segment

Generation Z

(age 25 and younger)

Gen Z values travel and unique experiences, but they are conscientious spenders. Technology is an integral part of life and decision-making for a Gen Z and defines the generation.

The young, recent college graduate may not have as much disposable income as older customer segments that have advanced farther in their careers. However, Gen Z travelers highly value travel and unique experiences. Growing up during the recession, the spending patterns of this customer segment resemble that of Boomers, but their interests are more aligned with Millennials, and they are more willing to spend more on events and festivals.



Mobility & Transit

Gen Z travelers highly value low-cost transportation options that maximize accessibility. The typical Gen Z traveler thrives in locations with transit infrastructure, enabling them to be nimble in their vacation plans. They are interested in quick and on-demand transit options such as rideshare, taxis, and demand walkability and access to public transit wherever possible. Car rentals are less important to Gen Z travelers because many are not old enough to drive a rental car or do not have a driver's license.

Moreover, many rental car companies have significant restrictions and higher rental fees for those under the age of 25, making it difficult for younger travelers to vacation in places where mobility is highly reliant on an automobile.



Lodging

Growing up during the recession, the average Gen Z traveler is a more conservative spender than the preceding generation, and this is evidenced in their flexibility in lodging. Amenities are only moderately important, and most are willing to sacrifice fancier amenities to spend limited vacation funds on experiences.



Attractions

The average Gen Z traveler is meticulous about the attractions that they engage within any given destination. Quality and variety of attractions are more important to them than their overall quantity. They seek off-the-beaten-path destinations, are open-minded, and are constantly hungry for local recommendations.

Customer Segment

Millennials

(age 26-40)

Millennials do not want to work for their vacations, so ease of access is key. While they are value-oriented, they are willing to spend their money on “once-in-a-lifetime” experiences.

COVID-19 Sentiment

Millennials and Gen Z travelers showed higher levels of excitement to travel earlier than Baby Boomers (during the pandemic). They will likely be at the forefront of the industry’s recovery nationally and globally. This is not only fueled by the relatively higher sense of safety for themselves but also the motivation of price-cuts and discounts (46%).⁵³ In fact, nearly 40 percent of Millennial travelers reported in May 2020 that they will make travel at least a somewhat high priority in their lifestyle—double the number of Baby Boomers who said the same.

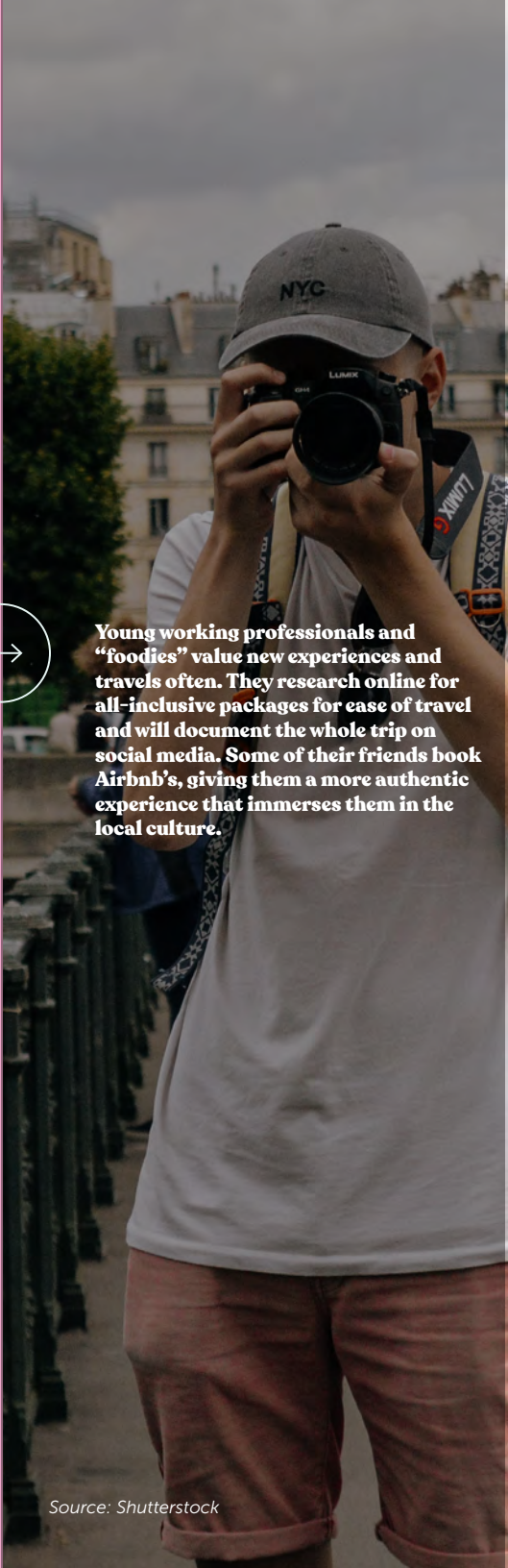
⁵³Destination Analysts, 2020. “Update on American Travel in the Period of Coronavirus—Week of May 18th”

⁵⁴ “American Multi-Generational Travel Trends, Travel Habits and Behaviors of Generation Z, Millennials, Generation X, and Baby Boomers.” Expedia Group Media Solutions.

⁵⁵ “American Multi-Generational Travel Trends, Travel Habits and Behaviors of Generation Z, Millennials, Generation X, and Baby Boomers.” Expedia Group Media Solutions.

⁵⁶ “Ecotourism Outlook 2018”, Leah Joyner, Owynne Lackey, Dr. Kelly Bricker. University of Utah College of Health. 2018.

⁵⁷ “American Multi-Generational Travel Trends, Travel Habits and Behaviors of Generation Z, Millennials, Generation X, and Baby Boomers”. Expedia Group Media Solutions.



Young working professionals and “foodies” value new experiences and travels often. They research online for all-inclusive packages for ease of travel and will document the whole trip on social media. Some of their friends book Airbnb’s, giving them a more authentic experience that immerses them in the local culture.

Source: Shutterstock



Mobility & Transit

Millennials value convenient access to transit. Like Gen Z, on demand transit, such as taxis and rideshare, are just as important to Millennials as walkability and local public transportation. For many Millennials, travel to the vacation location does not need to be far. For example, 40% of Millennials somewhat agree or strongly agree with the statement “I don’t like traveling far, as long as I’m not at work, I am on vacation.”⁵⁴ However, for the Millennials that do enjoy traveling to farther places, it is important for there to be convenient transit where they choose to visit.



Lodging

Like Gen Z, Millennials place less value in where they sleep on vacation, instead choosing to spend more time and effort in planning their experiences. Millennials enjoy an easy-to-plan and accessible vacation, which is evident in the fact that 83% somewhat agree or strongly agree that they prefer all-inclusive vacations like resorts or cruises.⁵⁵ Millennials care about the travel-cost, and the environmental impacts of their actions, which has contributed to a growth in ecotourism.⁵⁶



Attractions

Millennials value attractions of high quality, quantity, and variety because they place a high value on the experiential aspect of every trip. Food and its strong connection to social media have created a generation that takes photos of their food before consuming it. As “foodies” at heart, 66% of Millennials somewhat agree or strongly agree that they plan their travel around where they will eat or drink.⁵⁷ With younger generations, newer types of attractions such as ecotourism have grown more popular, and this increased focus on sustainability follows the global trend of intentional travel.

Customer Segment

Generation X

(age 41–55)

The typical Gen X traveler has high standards for their chosen vacation experiences but is willing to pay a little more to access these than the other cohorts. Gen X read more online reviews than any other demographic and above all, are looking to experience something they couldn't when they were younger.⁵⁸

COVID-19 Sentiment

According to various sources, the two major barriers to consumers' readiness to travel following the pandemic will include concern around transmission and infection, and economic burden. While Boomers/seniors are likely the most concerned about transmission and younger segments more stressed economically (particularly Gen Zs), the Gen X segment may be the target group of travelers post-pandemic. Their moderate concerns over transmission and income make them an important group for destinations to consider attraction although early surveys conducted during the pandemic indicated more than a third of Gen X's would still spend less on their next vacation.⁵⁹

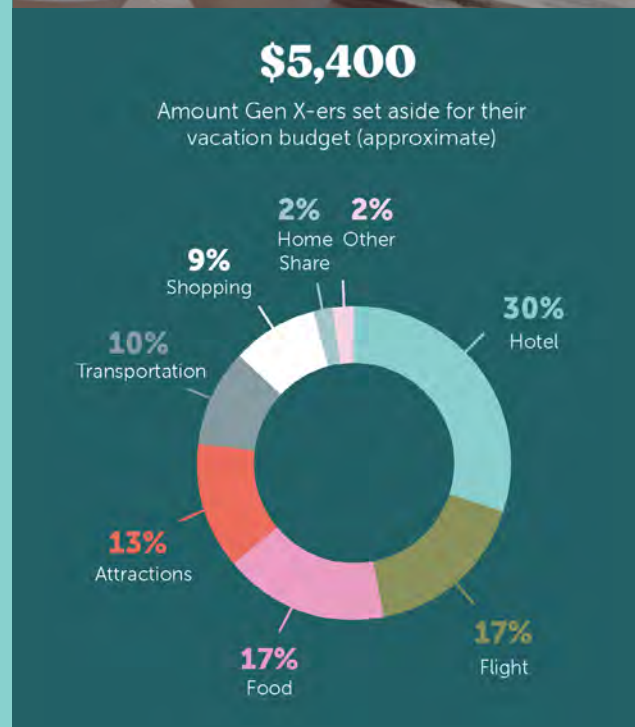
⁵⁸ "How to Sell to Generation X Travelers". Natalie Maneval. Travel Agent Central. April 18, 2016.

⁵⁹ "Fuel COVID-19 Consumer Sentiment Study Volume 4: Travelers Are Ready, Especially Millennials". Fuel Travel, May 21 2020.

⁶⁰ "American Multi-Generational Travel Trends, Travel Habits and Behaviors of Generation Z, Millennials, Generation X, and Baby Boomers". Expedia Group Media Solutions.

Empty-nesters have already seen parts of the world and now want to experience something new. They'll spend their off-hours researching Expedia reviews for the best wine spot and book their next trip on an online travel booking platform.

Source: Unsplash



Mobility & Transit

Gen X-ers prefer comfortable transportation options and, more generally, have a higher spending potential than younger generations. While still spry enough to be walking around and taking public transportation, Gen X-ers prefer car-based transportation over other modes of transit. Gen X value car rentals more than any other customer segment, and unlike other segments, 43% of Gen X travelers used a car to get to the destination on their last trip.⁶⁰



Lodging

Gen X-ers are willing to spend more of their budget on their lodging and this translates not only to higher expectations in amenities but also a higher willingness to pay. Although Gen X-er expectations are higher, they don't value hotel availability as much as others if the lodging meets their standards.



Attractions

The variety of a location's attractions is not as important to Gen X-ers as is the quality of the attractions. The typical Gen X traveler has already seen parts of the world, so while the attractions are not insignificant, Gen X-ers are more interested in traveling to destinations with superior attractions. Furthermore, when Gen X-ers travel, they seek to experience things they couldn't when they were younger. So, the higher the quality of the experiences is, the better those experiences will match Gen X-ers' expectations.

Customer Segment

Boomers

(age 56+)

Boomers are most interested in rejuvenation and spending time with friends, family, and the people they care about. Trips are often planned as bucket list items, reunions, multi-generation trips, or milestone trips.

COVID-19 Sentiment

During the pandemic, Boomer travelers exhibited higher levels of caution around COVID-19 and travel, given that the risk of severe illness from the virus increases with age. However, this does not suggest that this customer segment is any less important to the visitor economy. In fact, travelers across all segments are equally looking to health concerns while planning future travel and will look to similar guarantees around health and safety from destinations. For domestic trips, in particular, a survey conducted in May 2020 found that older age groups are the most likely for this kind of travel.⁶¹



Retired boomers want to spend time with friends and family. Sharing experiences with others is important, so a multi-generational or milestone trip may be in the cards.



Mobility & Transit

As with all travelers, Boomers most frequently fly to their destination. Of all types of transit, Boomers most prefer taxis and do not prioritize forms of transport, such as walking, public transit, or car rental, wherein they might be forced to actively participate in the act of transit itself. Similarly, rideshare is a very low priority for Boomers, who are less tech-savvy and are most comfortable sticking with taxis.



Lodging

Boomers are willing to spend on comfortable lodging experiences. They may be nearing retirement or have accumulated disposable income or vacation days, thus having higher expectations for the hotels they stay in. They expect the amenities to be of high quality and many options of hotels to choose from. They are willing to pay more than younger generations and spend more on vacations in general.




Attractions


For those who may not be as physically able to participate in active recreation or natural attractions, these activities have less appeal. But, where Boomers do not place as much value in some activities, shopping and cultural activities are of high importance for traveling Boomers. Shopping is also relevant not necessarily for Boomers themselves, but for purchasing souvenirs for loved ones at home. Boomers have seen more of life than younger generations, so unique cultural attractions are often of interest.


⁶¹ MMGY Travel Intelligence, 2020. "Travel Intentions Pulse Survey (TIPS): Impact of COVID-19. Key Findings – Wave IV – May 1-6, 2020".

Values By Customer Segment

The value and importance that each customer segment places on the offerings and characteristics associated with mobility, lodging, and attractions offer a framework for prioritizing improvements and projects that enhance the visitor experience.

- 

A “high” value level is assigned if customer segments make choices based on the line item. For example, if lodging price points or variety do not match the customers’ expectations or preferences, the customer will likely choose a different location to visit.
- 

A “medium” value level is assigned if customer segments are more likely to require or desire certain kinds of offerings during their visit. For example, the lack of higher-end or branded lodging options may not deter Gen Z or Millennials from a visit, but it may play into their decision making and/or affect their overall satisfaction with their visit.
- 

A “low” value level is assigned if customer segments do not traditionally make choices based on the line item. For example, it is unlikely that the lack of transit will impact visitor satisfaction for customer segments (like Families and Boomers) that rarely take public transit in the first place.

Unlike the supply-based assessments, the rating for customers does not change based on the region. The following chart identifies the rating assigned to each segment.

Customer Value Levels By Segment

Type	Families (with children)	Gen Z (age <25)	Millennials (age 26-40)	Gen X (age 41-55)	Boomers (age 56+)
Mobility					
Flights					
Car Rental					
Taxi/Rideshare					
Privately-Operated Tour Buses					
Walk/Bike					
Transit					
Lodging					
Availability					
Price + Variety					
Amenities					
Attractions					
Natural					
Cultural					
Recreational					
Shopping/Entertainment/Dining					
Agricultural					

Island-Wide Tourism Trends

Tourism is an essential driver of Puerto Rico's economy. In 2016, the visitor economy made up over 7% of Puerto Rico's Gross National Product (GNP).⁶² Between 2011 and 2017, visitation to Puerto Rico increased 24%, with 5.2 million people visiting the island in 2017.⁶³ In September 2017, Hurricanes Irma and Maria decimated portions of the island, leaving in their wake an estimated \$80 billion in damages, and there were 1.2 million fewer visits during the remaining three months of the year.⁶⁴

In the two years since then, Puerto Rico has seen its profile as a tourism destination on the global stage grow, as well as its capacity to receive visitors in search of a wide variety of experiences. By the fall of 2018, 90% of the island's total hotel inventory was restored and open for business, along with over 4,000 restaurants and 186 attractions.⁶⁵ In January 2019, the New York Times named Puerto Rico the Number 1 place to visit globally, a powerful recognition and symbol of the island's recovery.⁶⁶ Discover Puerto Rico, founded in March 2017, credits its media relations efforts for this piece and dozens of other publications, including Condé Nast Traveler, Forbes, Fodor's, Travel + Leisure, and Harper's Bazaar, many of which focused on regions outside of the San Juan Metropolitan Area.⁶⁷ Following COVID-19 and the forced closure of businesses and drastic reduction and near elimination of visitation to

the island, the visitor economy has suffered greatly and will require significant support to return to pre-COVID conditions.



Clockwise from top: Peñón Brusi in Camuy, Cavernas de Camuy, Cueva Ventana. Source: FPR, Discover Puerto Rico

⁶² "Puerto Rico Tourism Company Executive Director Ingrid Rivera Rocafort". *Caribbean Business*. March 6, 2016.

⁶³ "Puerto Rico Takes its Place on the Tourism World Stage" Government of Puerto Rico, Puerto Rico Tourism Company. *Skift*. October 24, 2019.

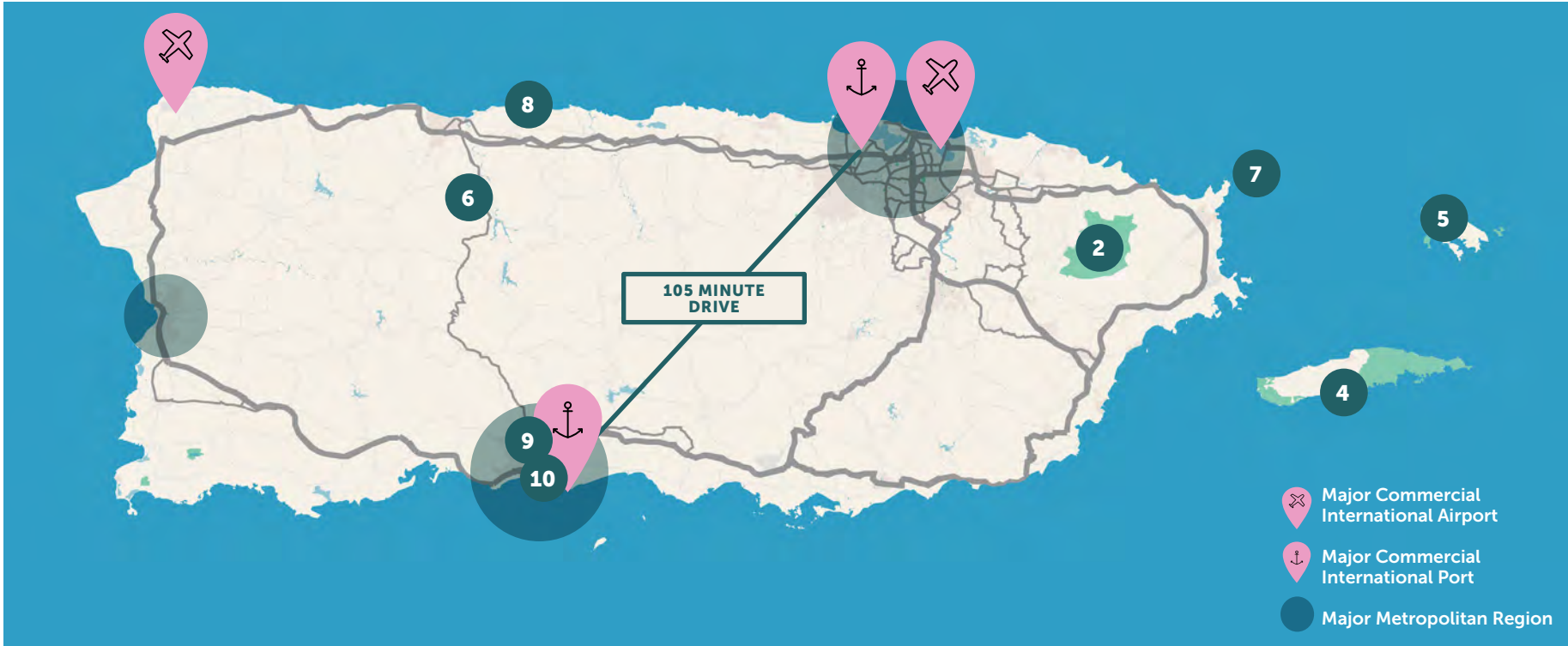
⁶⁴ "How Puerto Rico Is Using Tourism To Rebuild After Hurricane Maria, Forbes, Alexandra Talty". September 30, 2018.

⁶⁵ "Puerto Rico Uses Hurricane Headlines to Help Make It a Global Destination". Dan Peltier. *Skift*. September 27, 2018.

⁶⁶ "52 Places to Go in 2019". Rodrigo Honeywell, Adriana Ramic, Rumsey Taylor, Amy Virshup, Josh Williams. *NYTimes*. January 19, 2019.

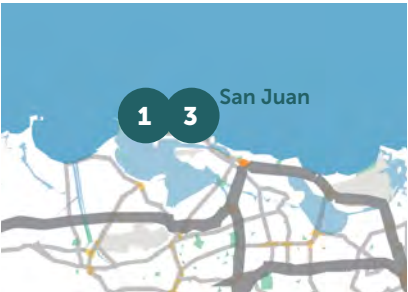
⁶⁷ "Discover Puerto Rico Annual Report (FY 2018-2019)". July, 2019.

Major island-Wide Tourism Context



Major Attractions⁶⁸

- 1 Viejo San Juan - San Juan
- 2 El Yunque National Forest - Rio Grande
- 3 Castillo San Felipe Del Morro - San Juan
- 4 Bahía Bioluminiscente - Vieques
- 5 Flamenco Beach - Culebra
- 6 Cueva Ventana - Utuado and Arecibo
- 7 Cayo Icacos - Fajardo
- 8 Cueva Del Indio - Arecibo
- 9 Parque De Bombas - Ponce
- 10 Paseo Tablado La Guancha - Ponce



⁶⁸ Google Trips

The following snapshot of the island's travel volume, typical visitor profiles, and competitive positioning is largely based on data from the island's peak recovery phases following Hurricanes Irma and Maria. However, in the last year, several disaster events have continued to shake the tourism sector of Puerto Rico, and the potential long-lasting impacts of the December 2019 earthquakes and COVID-19 pandemic are summarized in the subsequent section of the report.

Off island Visitors

Total Inbound Travelers

In 2019, over 8 million passengers traveled through Puerto Rico's major airport, Luis Muñoz Marín International Airport⁶⁹, with JetBlue carrying the largest share of passengers by operating about a third of in-bound flights. Assuming the country of origin composition of inbound travelers has not changed significantly since 2017 when the Puerto Rico Planning Board published a highly detailed profile of visitors to Puerto Rico, over 90% of visitors to the island come from the mainland United States.

Of these in-bound travelers from the US, about 40% arrive from the Northeastern Seaboard from states like New York, New Jersey, and Boston, and 33% arrive from the Southern states like Texas and Georgia. Another 12% arrive from the West, mainly from California.⁷⁰

Of international in-bound travelers, passengers arrive primarily from the Caribbean, Central and South America, and Europe, with top origin markets being the Dominican Republic and Panama.

In addition, Puerto Rico's major port in Old San Juan welcomed close to 1.66 million cruise passengers in 2018, up 25% from the prior year (1.23 million in 2017).⁷¹

Visitor Profile

In an attitudinal study conducted post-Maria of travelers in Puerto Rico's target markets, visitors are likely to be younger (52% Millennials) and primarily White (77%). They are also likely to have higher educational attainments —53% with a Bachelor's Degree or higher, earn moderate household incomes— 38% earning \$60,000-\$100,000 annually, and travel in groups of two or more.⁷²

Repeat visitors, however, differ slightly in demographics. While they may still be younger Millennials (58% aged between 24-44) with higher incomes (30% earn above \$175,000 annually), they are predominantly male (60%) and diverse —Hispanic (33%) or Black/African American and Asian (27%). Many also travel from Florida (20%) suggesting a likelihood that repeat visitors may also be diaspora travelers (further defined below).⁷³

Over 60% of visitors stay only in five municipalities in Puerto Rico, primarily in the San Juan Metropolitan Area.⁷⁴

Competitive Positioning

In August 2018, Discover Puerto Rico released a study of eight target markets from which to attract new and repeat visitors.⁷⁵ This study found that respondents in New York City, Miami, and Philadelphia had the highest share of existing visitors. A healthy percentage of respondents denoted themselves as potential visitors (also

places with a high percentage of diaspora residents) —giving all three of these markets the strongest potential for repeat and new visitation. In fact, 25% of Miami respondents expressed the likelihood of visiting Puerto Rico in the next 12 months, with 18% of New York City and 16% of Philadelphia respondents reporting the same.

The study also compared Puerto Rico's image in these target markets to those of South Florida, the Caribbean at large, Hawaii, Mexico, the Dominican Republic, Costa Rica, and Colombia, and found that respondents were more likely to visit Puerto Rico in the next 12 months than the Dominican Republic, Costa Rica, or Colombia and that respondents overall were only 4% more likely to visit Mexico (19%) than Puerto Rico (15%) in the next year.

A similar study commissioned by PRTC and released in March 2018 identified Florida, the Bahamas, Mexico, and Costa Rica among the top destinations considered in the same set as Puerto Rico among visitors over the past year.⁷⁶ The Destination Planning Team considered these findings in selecting the Samaná Peninsula in the Dominican Republic and the Riviera Maya in Mexico as competitive destinations for the North region.

The same study included a gap analysis between features and attributes that tourists look for when selecting a travel destination and Puerto Rico's assets. Among the important needs that Puerto Rico is currently perceived to be delivered were: an authentic local dining scene, historical and cultural attractions, natural and historic sightseeing opportunities, a variety of lodging options, pristine beaches, accessibility by air transportation, fresh food, opportunities

⁶⁹ Bureau of Transportation Statistics. 2019.

⁷⁰ Quantitative Analysis on the Traveler's Perception, February 2018.

⁷¹ Puerto Rico Tourism Company, 2018. Cruise Passenger Movement in Old San Juan.

⁷² Quantitative Analysis on the Traveler's Perception, February 2018.

⁷³ Post-Maria Destination Attitudinal Study, January 2018.

⁷⁴ "Perfil de los Visitantes". Gobierno de Puerto Rico. Junta de Planificación. November 14, 2019.

⁷⁵ "Brand Health Research". Insights Strategic Marketing and Research. Discover Puerto Rico. August, 2018.

⁷⁶ "Post-Maria Destination Attitudinal Study Quantitative Analysis on the Traveler's Perception". Puerto Rico Tourism Company. March, 2018.



Source: Shutterstock

to immerse oneself in the local culture, ease of communication, and good value for money.

Important needs that Puerto Rico is not currently perceived to be delivering, according to the survey, include: safety and security, ease of getting around, reliable information sources, clean air and environment, clean drinking water, a reliable electrical system, well-maintained infrastructure, access to internet and Wi-Fi, and a stable and ethical government.⁷⁷

Local Visitors and Visiting Family & Friends

Domestic Tourism

Locals who live on the island also periodically travel to other parts of Puerto Rico for leisure ('staycation') or business. In fact, 2018 hotel registration statistics show that 40% of hotel occupancy is attributable to the island residents.⁷⁸ According to World Travel & Tourism Council, domestic tourism is in fact the key driver of the tourism sector globally, accounting for 73% of total Travel & Tourism spending in 2017.⁷⁹ This type of travel is facilitated by the ease of regulatory and financial barriers, including the limited need for passports and visas, and currency change. Furthermore, domestic tourism may be a more affordable option for local residents on the island and should be distinguished and leveraged in destination planning efforts.

Given the circumstances of COVID-19 and its impact on consumer confidence, domestic tourism will be an even more important segment to leverage. According to surveys conducted during the pandemic, more than 40% of travelers suggested they would wait more than a year before taking a flight to a destination, and all customer segments are in agreement on future travel: "they are least afraid of staying local".⁸⁰ As such, domestic or local travel is likely to pick back up sooner —more than 65% of travelers indicated they would be willing to drive up to 2 hours from their home to a destination within 3 months or less of restrictions being lifted.⁸¹

Diaspora Tourism

The travel of people in the diaspora to their ancestral homelands to visit friends or family (VFF), vacation, or explore personal heritage is considered to be among the oldest manifestations of travel. Yet, it remains an undervalued type of travel for most economies, including Puerto Rico. Although many diaspora travelers choose to stay with friends and family when visiting their homeland, this segment of travelers still contributes to the accommodations sector and, in fact, has been found to contribute to increased domestic travel. Various studies have also found that the economic implications of VFF tourism include a more stable demand and greater dispersal of spending given the higher propensity to stay in and visit non-touristic areas of a destination.⁸²

Given the large net out-migration trend seen by the island following Hurricane Maria, Puerto Rico may be able to leverage this growing segment of the tourism market in years to come, especially during recovery phases from the pandemic. A survey conducted by SMARInsights in May 2020⁸³, amidst the pandemic, indicated strong potential in the diaspora market as a target audience for Puerto Rico tourism, given that these travelers are more familiar with the destination and more likely to plan a trip to Puerto Rico as compared to other National travelers.

⁷⁶ "Post-Maria Destination Attitudinal Study Quantitative Analysis on the Traveler's Perception". Puerto Rico Tourism Company. March, 2018.

⁷⁸ Puerto Rico Tourism Company, 2018.

⁷⁹ "Domestic Tourism: Importance and Economic Impact". WTTC, 2018.

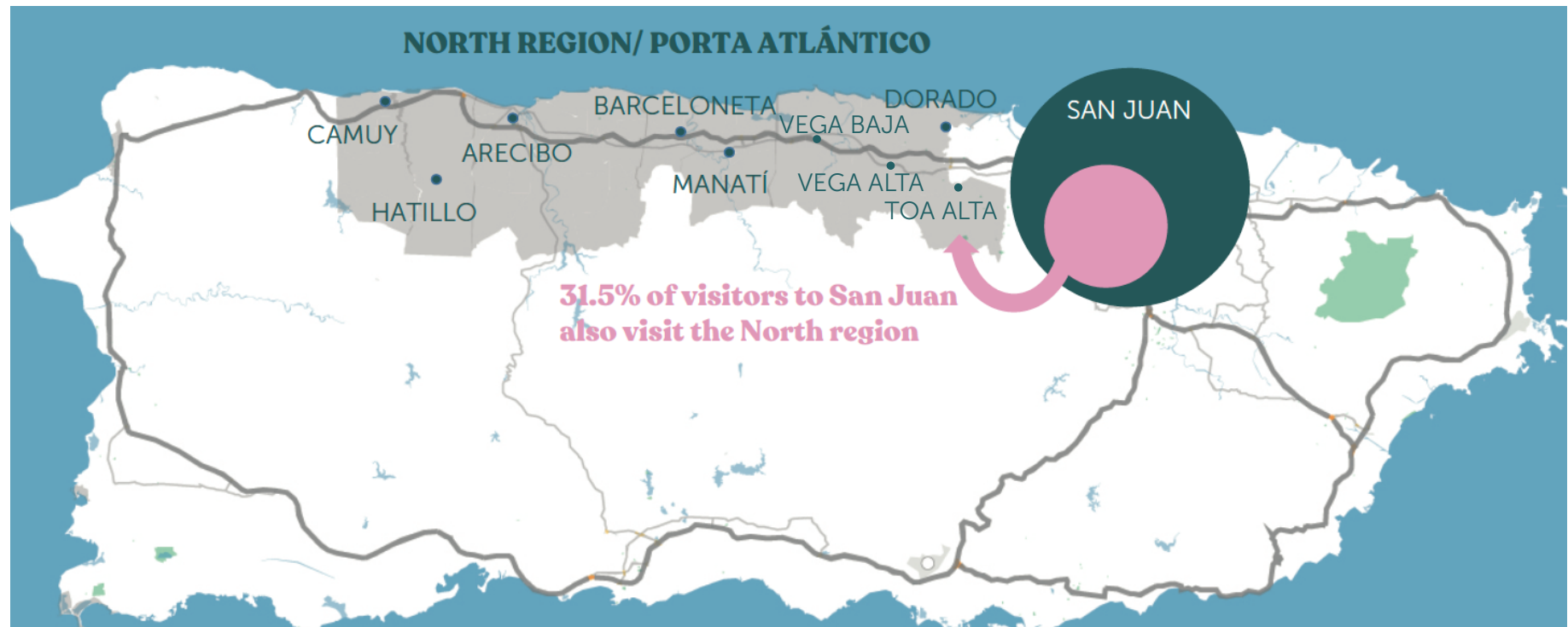
⁸⁰ Development Counsellors International, 2020. "Post-COVID-19: Generational Divides In Travel Planning"

⁸¹ Fuel Travel, 2020.

⁸² Griffin, Tom. (2013). Visiting friends and relatives tourism and implications for community capital. *Journal of Policy Research in Tourism, Leisure and Events*. 5. 233-251. 10.1080/19407963.2013.776370.

⁸³ "July Research Webinar: Puerto Rico's Competitive Position". Discover Puerto Rico, July 7 2020.

North Region/Porta Atlántico Tourism



Porta Atlántico was officially designated in 2011 by PRTC and includes the following municipalities: Camuy, Hatillo, Arecibo, Barceloneta, Manatí, Vega Baja, Vega Alta Dorado, and Toa Alta.

The North Region/Porta Atlántico competes directly with the San Juan Metropolitan Area, where about 55% of visitors to Puerto Rico primarily stay⁸⁴, as well as with the West Region, where the major beach and surf destinations such as Rincón are located. Located between two major airports, Luis Muñoz Marín International Airport and Rafael Hernández Airport, makes it an ideal day trip destination for visitors entering from both

ports of entry. Recent estimates indicate that about 31.5% of visitors to San Juan also visit the North region.⁸⁵

Estimated Market Capture

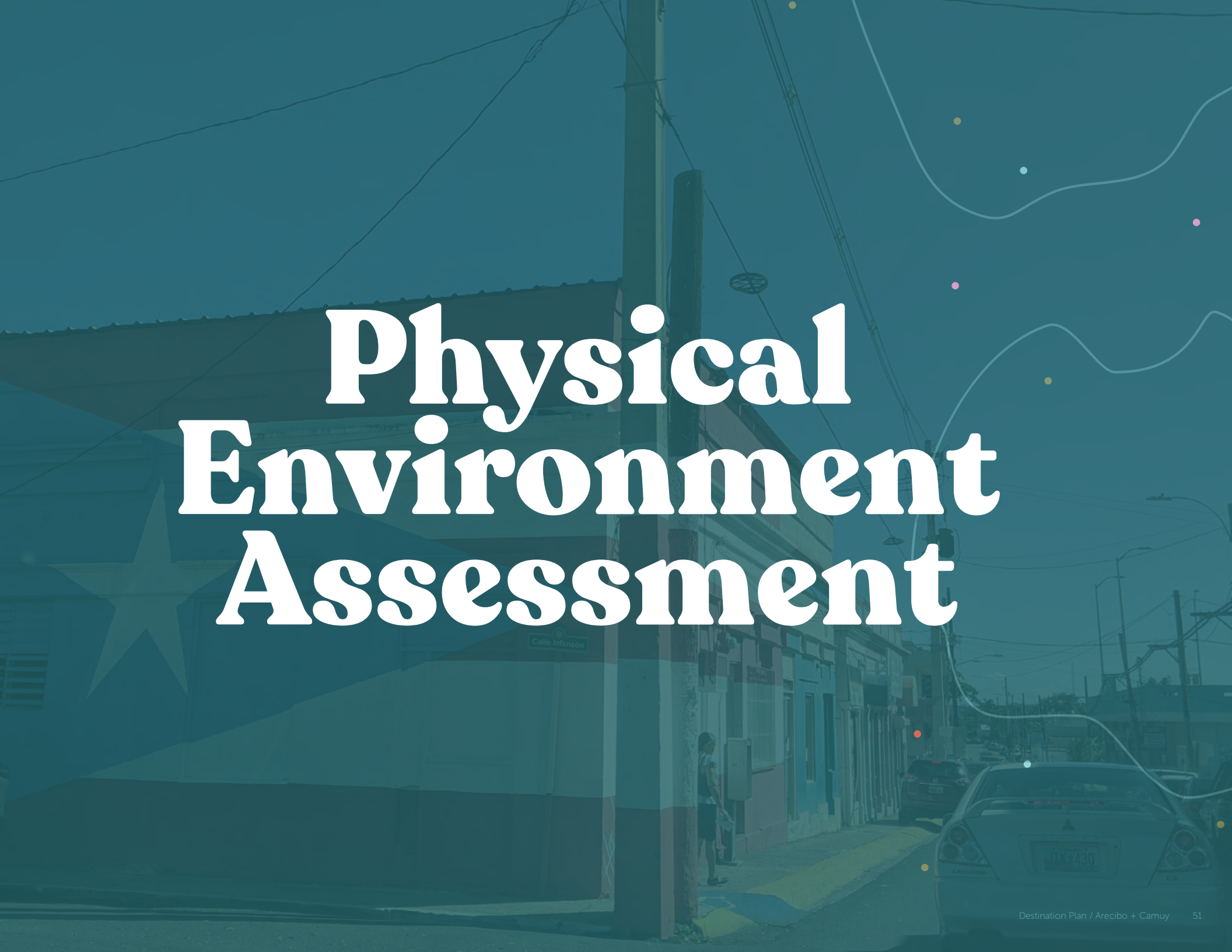
Based on the region's approximate supply of 5% of the Island's available lodging, the Destination Planning Team estimates that North Region/Porta Atlántico can reasonably support approximately 328,100 annual person trips (assuming 6,562,000 total national person trips) and \$251 million in annual visitor spending (assuming \$5.02 billion total national visitor spending). This could translate to over \$356 million in total economic impact and 3,997 jobs.⁸⁶

Based on data provided by Conversant, a digital media partner of Streetsense, among those convertible trips to the region, the top two types of travelers include budget travelers (over 6.93 million interested in Puerto Rico) and travelers that enjoy national parks (over 1.5 million interested in Puerto Rico). Before the pandemic, cultural travelers and beach and camping enthusiasts presented smaller shares of convertible trips, however, this may change following COVID-19. Beach and camping enthusiasts that enjoy the outdoors may be an important target market for Puerto Rico and the North Region following the pandemic as many travelers continue to seek socially distant recreation opportunities.

⁸⁴ "Perfil de los Visitantes". Gobierno de Puerto Rico. Junta de Planificación. November 14, 2019.

⁸⁵ Arrivalist, 2018 - 2019.

⁸⁶ Estimates by Streetsense made based on Tourism Economics data on Puerto Rico tourism economy from 2018"



Physical Environment Assessment

Physical Environment Assessment

The built environment and quality of a place play a significant role in consumer decision-making and satisfaction. Convenient and comfortable connections enable visitors to develop itineraries that allow them to visit and engage with multiple assets and offerings and extend their length of stay. The appearance and existing conditions of a place set the stage for a positive experience for visitors and newcomers as they walk and drive the region, and can be a notable competitive advantage to the region.

Customers want to know: Is it comfortable? Does it feel safe? Is it easy to get around? Is it visually appealing? And ultimately, will the visitor enjoy spending time there? The answers to these questions are informed by a combination of factors, including but not limited to the quality of the physical environment —public areas (streets, plazas, and sidewalks) and accessibility (the ability to arrive/depart in comfort and convenience and the ability to get around easily once there).

The Destination Planning Team, together with FPR staff and Field Teams took time to walk the streets, drive around, visit local assets and attractions, and spend time in public places to assess both visual and physical connectivity, as

well as to engage with stakeholders.

The Destination Planning Team assessed the utility of a variety of transportation modes to determine the degree to which each mobility option is available to visitors.

- 






A “high” rating level is assigned if the region offers high quality infrastructure and transportation services.
- 

A “medium” rating level is assigned if the region offers moderate quality infrastructure and transportation services.
- 

A “low” rating level is assigned if the region does not meet baseline conditions typically expected by visitors.
- No circle indicates that the item is not applicable or not available in the region.

General Mobility Assessment by Mode Type

Arecibo/Camuy

Type	Utility
Car Rental	
Flight	
Privately-Operated Tour Bus	
Taxi/Rideshare	
Public Transit	
Walk/Bike	

Access, Mobility & Transportation

Arecibo/Camuy is located approximately 75–90 minutes drive from Metro San Juan and Luis Muñoz Marín International Airport via PR-2 and PR-22 to the North through Dorado and Vega Baja. The region is also equally accessible from the West and is located less than an hour's drive's from Porta del Sol's Rafael Hernández Airport via PR-2 and PR-22. These highways experience the highest average daily traffic counts in the region of up to 50,000+ vehicles.⁸⁷ With many assets located farther inland, North-South highways are also well-traveled, particularly PR-129 which connects one of the region's most popular assets, Cavernas del Río Camuy, to the urban centers. According to data from the Puerto Rico Department of Transportation and Public Works (based on most recent data points collected in 2014 by the Office of Data Collection and Traffic Analysis), before the closure of the Cavernas del Río Camuy in 2017, PR-129 alone sees an average of between 20,000–35,000 vehicles daily.

Getting to the Region: By Automobile/ Cars

Car Rental

Upon arrival, the automobile is the easiest and fastest mode of transportation for the off-island traveler. For those wishing to explore the Island, car rental is a necessity due to

the absence of alternative transportation options. Although there are more than fifteen car rental operators conveniently located on-site at Luis Muñoz Marín International Airport and on Expreso 26 near the airport, car rental requirements often restrict rentals for drivers under the age of 25⁸⁸ or include an additional surcharge, squeezing out a growing customer segment —Gen Z (aged 18–25), as well as customers who seek vacations that do not require a car. Given that Arecibo/Camuy is not accessible by many other modes of transportation, this impacts convenience on younger travelers who may be staying in Metro San Juan or Porta del Sol and looking for alternative day trip destinations within close proximity.

Road Conditions

En route to Arecibo/Camuy, visitors driving their own vehicles will largely remain on well-maintained limited access highways PR-2 and PR-22. At night these highways are well-lit, creating a safe route for visitors arriving/ departing from the region. However, many of the region's assets (particularly the beaches and agro-culture sites and farms) are located farther inland along PR-129 or PR-10. Visitors may need to travel along local roads to get to and from some of these destinations. Local roads in the region are narrower, dimly lit in many sections (due to overhanging trees), and do not have clear signage. Without the assistance of a GPS navigation system, these assets may be inaccessible to visitors who are unfamiliar with the network of local streets.

Parking

Parking in the region is convenient and easily available at major assets such as Cueva Ventana, Cueva del Indio, and Cavernas del Río Camuy. However, the urban centers and coastal zones are less well-served by parking. In the urban centers, on-street parking is limited and often occupied by local residents and workers while along the coastal zone, the undefined nature of parking lots near beaches result in inefficient parking arrangements by drivers, often resulting in parking in or on ecologically sensitive terrain.



From top: Parking in the urban center of Arecibo, Parking at Cueva Ventana. Source: Streetsense

⁸⁷ Puerto Rico Department of Transportation and Public Works (based on most recent data points collected within the last ten years by Office of Data Collection and Traffic Analysis).

⁸⁸ Based on restrictions across various car rental operators and vehicle categories.

Getting to the Region: By Public Transit

Formal public transit exists in the region, although with limited reliability and service. The system of “carros públicos” or “public cars” operates on fixed routes and leaves from a local terminal in each urban center before crossing municipality boundaries. Typically used by local residents and workers, riders must wait until a vehicle is full before departing, resulting in longer dwell times at terminals and delays in travel schedules. In addition to patchy service, carros públicos service small geographic areas that do not include visitor destinations. As such, this public transit option is not currently designed for use by visitors who are often pressed for time or traveling on fixed itineraries and therefore expect reliable service.

In Arecibo, specifically, carros públicos are very rare and are hardly seen throughout the municipality. At this time, they do not have designated stops within the urban center.



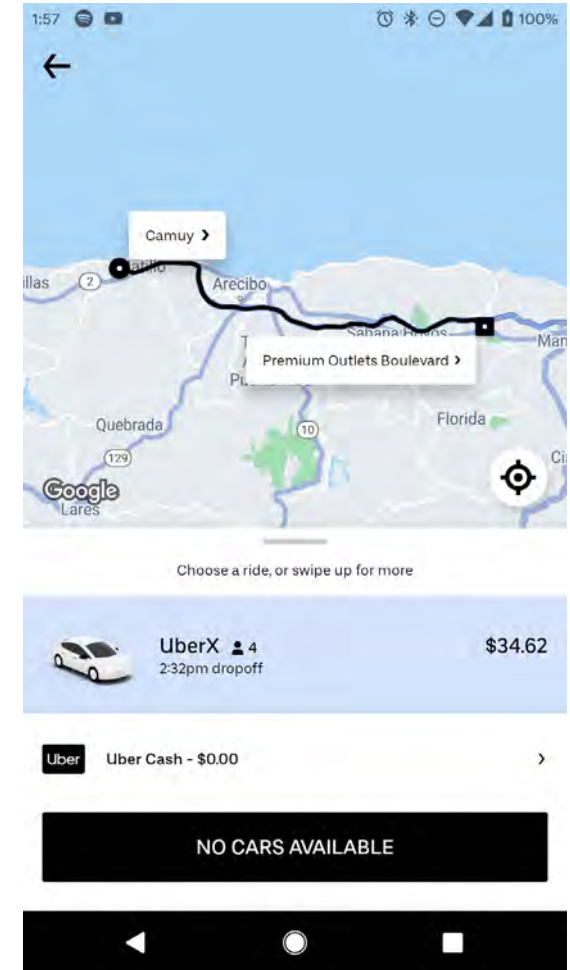
Privately-operated tour buses. Source: Shutterstock.

Getting to the Region: By Privately-Operated Group/ Tour Buses

A number of tour bus operators serve the area, particularly to major assets such as Cueva del Indio, Cueva Ventana, and Arecibo Observatory (prior to the collapse of the radio telescope in December 2020). These tour buses pick up visitors staying in San Juan and shuttle them directly to one or more of these assets in a day. Routes and itinerary packages are pre-determined by tour guide operators and range in cost depending on a number of assets visited on the route, length of trip, etc. On average, these privately-operated tour buses are affordable and typically incur a cost of \$140-\$150 per passenger for half-day trips (5-7 hour tours), including tickets for entry into assets, transportation, and any safety equipment rentals. These tours are convenient for groups that are unable to drive rental cars like Gen Zs or groups that feel less comfortable driving rental cars, such as Boomers and Seniors.

Getting to the Region: By Rideshare/Taxi

There is currently limited rideshare coverage in the region. Although visitors from Metro San Juan can secure rideshare from San Juan to Arecibo/Camuy, it is a 60-minute ride that can end up costing more than \$60. Furthermore, it is difficult to find a rideshare to return to



Screenshot of Uber app in Camuy . Source: Streetsense.

Metro San Juan with limited vehicles available in the region. For a more reliable method of transportation, visitors often opt to hire personal drivers or join privately-operated tour buses as previously mentioned.

Getting to the Region: By Bike

Bike infrastructure in Arecibo/Camuy is limited. Despite having abundant natural and adventure assets in the region, including Cueva Ventana, Cueva del Indio, and Villa de la Central Los Caños, the region does not have an extensive and reliable infrastructure for cyclists. The only existing pathways that may support cyclists are located along the waterfront/malecón in Arecibo (Avenida Víctor Rojas) and between Peñón Amador Beach and Peñón Brusi Beach. Mountain bikers seasoned in cross-country riding are often seen sharing vehicular lanes on major roadways in the absence of dedicated bikeways. As a result, biking is not seen as a viable or safe method of transportation.

Getting to the Region: By Walking

The region's major tourism assets are isolated from one another and are mainly accessible only by automobile. However, there are a few notable walkable environments in the region, primarily in the historic urban centers of Arecibo and Camuy, where tight-knit walkable streets were built before the advent of the automobile. However, to encourage foot traffic in these areas, pedestrian sidewalks, particularly in downtown Arecibo, will need significant investment. In many parts of downtown Arecibo, for example, along Calle

Gonzalo Marín —the main thoroughfare connecting the riverfront dining cluster with the main plaza, sidewalks are narrow (<4' wide), damaged, and often face abandoned and vacant buildings and storefronts with limited lighting at night.

These conditions undermine the safety and comfort of pedestrians. Limited walkable and comfortable pedestrian environments often mean that visitors rely on automobiles for movement between proximate destinations. Rather than walking 5 or 10 minutes, a visitor often elects to drive, which in turn results in more parking demand than would otherwise be necessary. Drivers also come away with the perception that parking is unavailable when they cannot park immediately adjacent to their destination. Parking more than a block or two away is often deemed unacceptable by both the visitor and the business owners. In urban environments, the inability to meet these suburban parking expectations seriously undermines the viability of businesses in the downtown core.

Cleanliness and Safety

Cleanliness and safety are significant components of visitor satisfaction. Overall, the coastal zone and adventure assets are well-maintained by individual property owners and appear welcoming to visitors. On the other hand, the urban centers require more sanitation efforts to enhance their appearance to visitors —especially in a post-pandemic world. According to qualitative reviews of each major tourism asset, exemplary sites that

exceed customer satisfaction in cleanliness and safety include the Xtreme Divers, Peñón Amador Beach, Peñón Brusi Beach, and Arecibo Observatory (prior to the collapse of the radio telescope in December 2020). Often these reviews focus on cleanliness and availability of visitor bathrooms and service/dining areas, and the safety of parked vehicles on facility lots. These are all basic amenities that visitors seek at assets and that need to be consistently held up by high standards of service. Generally, assets in Arecibo/Camuy that are managed by private operators or in partnership with private businesses have reportedly higher levels of cleanliness and safety and are lacking in assets that are solely publicly owned and managed. For example, public spaces in the urban center of Arecibo and Camuy have not been well-maintained and diminish the overall visitor experience in these areas despite growing popularity amongst locals and visitors. The conditions of these plazas are further described below.

In terms of waste management, business establishments continue to use single-use plastic and styrofoam packaging with regularity —which can be perceived negatively by visitors with sensitivity to environmental concerns.

Since January 2020, FPR has been coordinating the distribution of 60-gallon recycling containers and compostable container kits to more than 20 businesses, among other donations. Each kit was distributed with an informational one-pager that includes a series of suggestions and information necessary to raise awareness about the current situation of solid waste management on the island. This emphasizes the importance of taking responsibility for our environment and encourages transitioning to products that are less harmful to the environment and health. A QR Code on the one-pager also directed business owners to more educational materials and supplier contact information should they choose to switch to these sustainable packaging options.

Universal Mobility

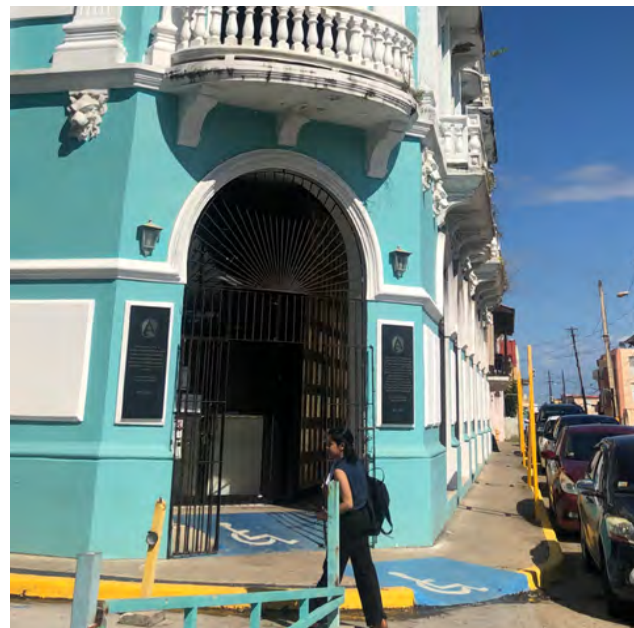
As with most of the island, ADA accessibility is challenged by terrain and elevation in most of the region's coastal assets. Fortunately, with the enforcement of the Americans with Disabilities Act (ADA), built-up areas like the urban centers and Faro de Arecibo have been retrofitted with ADA-accessibility features such as sidewalk ramps, wider sidewalks, and dedicated accessible parking spaces—although inconsistent across sites.

Following COVID-19, a heightened awareness of health and safety amongst travelers suggests that many will be choosing destinations that pose limited risks to their general well-being, including destinations that do not rely solely on travel by public

transport or travel by taxi or rideshare. In a survey by Destination Analysts in May 2020⁸⁹, travelers rated traveling by public transport and traveling in taxis or rideshare as some of the most unsafe components of a common travel experience after airport security checkpoints and airplane travel. Although these may be advantages to Puerto Rico in the short term, investment in alternative modes of transportation between and within regions should be prioritized, including micro-mobility options such as e-bikes, e-scooters, or Vespas.

Across the country, cities and popular destinations are increasingly partnering with micro-mobility vendors to increase sustainable mobility for both locals and visitors, and

therefore destination attractiveness.⁹⁰ In particular, visitors are unlikely to have their own transport when visiting a destination, and as such, are likely to consider other affordable and readily available modes of transportation such as e-bikes, e-scooters, or Vespas. With year-round warm weather and expansive outdoor destinations including a range of beaches facing the Atlantic Ocean, the region may be ripe for the entry of micro-mobility options. However, key risks must be considered including littering/vandalism, street infrastructure/network, operations/maintenance, and accessibility.



From left: Convenient curb cuts at the urban centers of Arecibo and Camuy. Source: Streetsense.

⁸⁹ Destination Analysts, 2020. "Update on American Travel in the Period of Coronavirus—Week of May 18th".

⁹⁰ Davies, N., Blazejewski, L. and Sherriff, G. (2020), "The rise of micromobilities at tourism destinations", *Journal of Tourism Futures*.



Plaza de Recreo de Camuy. Source: Streetsense.



Plaza de Recreo de Arecibo. Source: Streetsense.

Open Spaces

Public spaces —whether streets, sidewalks, markets, squares, plazas, parks, or beaches— are key enablers of economic development across municipalities. These spaces are part of the basic infrastructure of destinations and support economic vibrancy and cities' growth of cities by creating places for the exchange of goods and services, cultural activity, and social interaction.

Plazas

Plaza de Recreo de Arecibo & Plaza de Recreo de Camuy: Arecibo's Plaza de Recreo is located in the city's urban center and measures over 30,000 SF. It is lined by a mix of vacant buildings and new food and beverage businesses that were initiated by private business owners. The municipality has attempted to further strengthen the businesses on the street with Arasibo Steakhouse (a recent effort by the municipality to spur investment and revitalization of the urban center), which, in 2019, was sold to a private business owner. The businesses on the southern edge of the plaza form the most active corners with 'parklets' —parking spaces converted to outdoor dining areas. Although the plaza has maintained its classical design, offers shaded areas for sitting, and hosts a growing local urban market held monthly, it suffers from significant deferred maintenance. Light poles and furniture are damaged, and the floors are soiled. Bigger events are more frequently

held on Calle Gonzalo Marín in the eastern section of the urban center of Arecibo, where the street is closed to traffic and taken over by pedestrians and street vendors on major occasions, or three to five times annually. The street itself is marked by a number of vacant and dilapidated buildings but has become home to a cluster of popular restaurants, cultural institutions, and locally organized night-time arts events that have made it a popular destination within the region. Improving, connecting, and activating the public realm —and various pockets of public spaces— along Calle Gonzalo Marín and its terminus along the riverfront will be critical to enhancing the overall pedestrian environment for visitors.

Camuy's Plaza de Recreo is smaller in size (~20,000SF) and is a well-maintained plaza lined by Museo de Historia y Cultura and Parroquia San José, regular users of the public space. Like the Plaza in Arecibo, it is also classically designed and well-shaded by trees that encourage locals to linger in the space for a longer period of time. The Plaza also features a small retail kiosk that sells snacks and hot beverages in the southwestern corner, attracting users to the plaza in the daytime. The plaza is the site of many local arts events organized by the surrounding cultural institutions and is well used during Velorio de Reyes —the town's largest cultural event.

Waterfront: Beaches + Río Grande

Most of the coast and Río Grande are located within FEMA-designated special flood hazard areas subject to inundation by a 100-year flood (or a 1% annual chance of flooding). During the Hurricane, many of these areas suffered from flooding and have since been rehabilitated to reopen for visitors, although to varying extents. As these places continue to attract crowds and host different recreational activities, it is important to consider their long-term resiliency in the face of another natural disaster and inter-connectedness to create a major waterfront destination for the region.

At this time, the Arecibo urban riverfront dining cluster located at the terminus of Calle Gonzalo Marín, in the eastern section of downtown Arecibo fronting Río Grande, is at high risk of flooding. Businesses in the area are not protected by flooding events and have not created preparedness and continuity plans for their businesses. The public spaces that abut the river, including a historic square that was used during Spanish rule to fend off corsairs and pirates from the region, a basketball court, and a parking lot, also do not feature climate resiliency measures to mitigate impacts of flooding. Most of the surface covering these areas are impermeable and put the area at heightened risk during a 100-year flood event.

Private Realm

Waterfront Properties

In Barrio Islote (Arecibo), many privately-owned businesses and their properties are located in the 1% annual flood zones and are at severe risk to flooding. Even post-Hurricane, these popular waterfront dining properties have not undergone flood-proofing and will need guidance from the City through building code requirements or design guidelines for flood resistant construction techniques for any substantially improved buildings in FEMA-designated flood zones. Ensuring these properties are able to sustain a major flood event will be critical to the waterfront economy of the neighborhood. Especially as they offer complementary experiences to that at Cueva del Indio, Faro de Arecibo, and Estatua de Cristobal Colón.



Calle Gonzalo Marín

As previously mentioned, properties located on the eastern section of the urban center of Arecibo fronting Río Grande are not only in the 1% annual flood zone but also in need of rehabilitation and restoration. These properties are located along Calle Gonzalo Marín, Av. Santiago Iglesias Pantín and Calle Ariosto Cruz, and are currently in a variety of structural conditions. Many of these historic properties pose health and safety hazard to pedestrians walking along sidewalks and will need a plan of action that clearly delineates strategies for demolition, rehabilitation, or long-term adaptation of properties for resiliency. Types of future uses in any rehabilitated property along both these streets should complement the burgeoning arts and dining scene along the corridor.



Abandoned properties in Bo. Islote following the Hurricanes and the riverfront section of the urban center of Arecibo. Source: Streetsense.

The background is a photograph of a street scene in Arecibo, Puerto Rico, featuring a building with a sign that reads "Calle Infanzón". The image is overlaid with a semi-transparent blue filter. Decorative elements include a large white star on the left and several small, colorful dots (yellow, pink, blue) scattered across the upper right portion of the image.

Business Environment Assessment

Business Environment Assessment

Tourism Assets & Attractions

The basis of a region/ destination's unique strategic position lies in its comprehensive set of offerings. In Arecibo/Camuy, there are over 60 unique assets across the following categories: Cultural, Recreational, Agricultural, and Natural. These assets were identified via on-the-ground research by the FPR Field Teams before being further filtered down by the Destination Planning Team to identify top drivers.

In order to focus assessments on assets that are already well-established or closely aligned with other assets that significantly attract visitors to the region, the Destination Planning Team applied a filter based on the number and quality of online reviews.

Step One: Filter assets that have at least 100 reviews on Google review site.

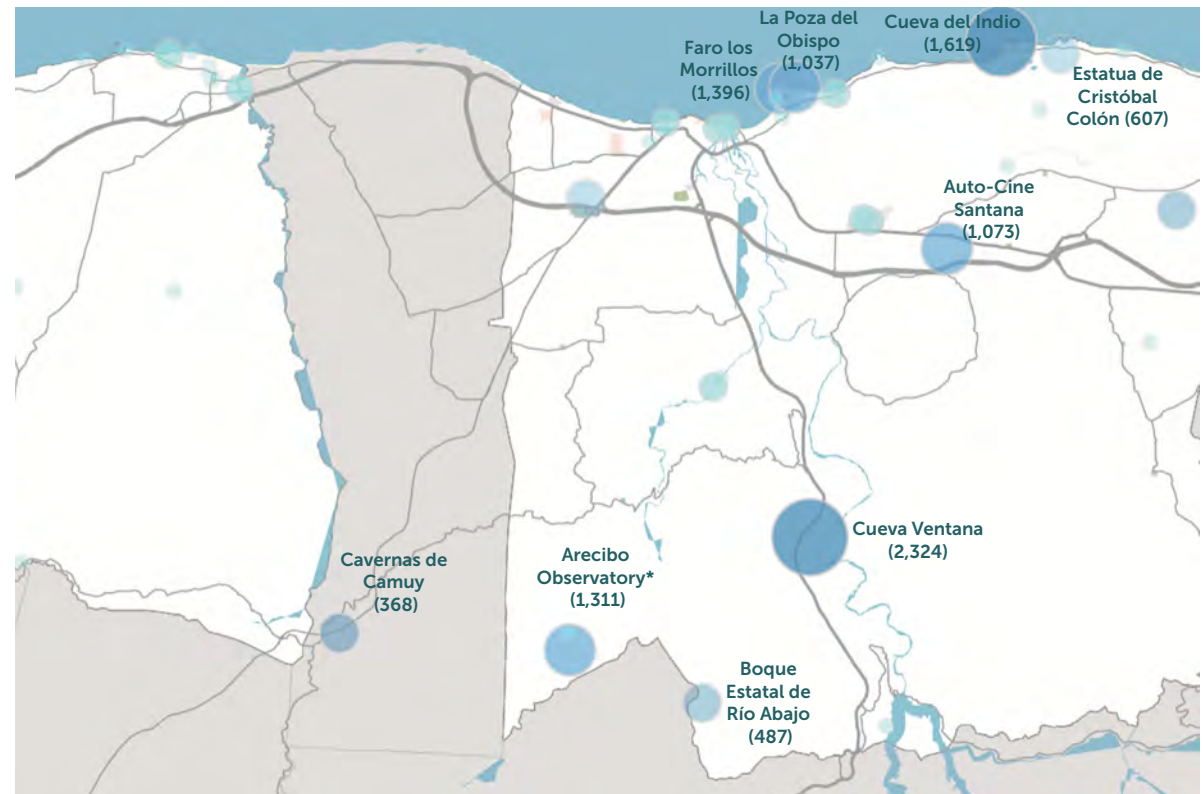
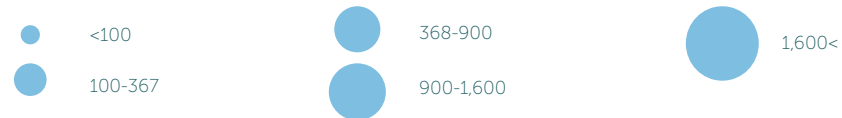
Step Two: Add any other assets that are highly reviewed on TripAdvisor that may not have ranked highly on Google.

Top-rated tourist assets in the region are centered around outdoor adventure and the theme of discovery. This includes assets such as Cueva Ventana, Cueva del Indio, Faro de Arecibo, Cavernas del Río Camuy, and the

Arecibo Observatory (prior to the collapse of the radio telescope in December 2020). Unfortunately, a number of these assets have remained largely closed to public since Hurricane Maria, and the Arecibo Observatory is still faced with challenges since the collapse of the radio telescope.

Another key differentiating factor for the region of Arecibo/Camuy growing in popularity is waterfront dining — especially with ocean-front offerings in Barrio Islote and river-front businesses in the eastern section of the urban center of Arecibo. The following assessment explores the quality of these destination drivers to the region.

Legend (No. of Google Reviews)



*Prior to the collapse of the radio telescope in December 2020.

Map of major assets by density of Google reviews. Source: Streetsense

TYPES OF ASSETS/ATTRACTIONS

CULTURAL

Churches
Plazas
Theaters
Museums
Historic sites/ buildings

RECREATIONAL

Sporting and hobby facilities
Adventure sites

AGRICULTURAL

Farms
Manufacturing/distilling facilities
related to agriculture products

NATURAL

Beaches
Caves/ caverns
Rivers/ lakes

List of Top Attractions

Name	Municipality	Type	Total # of Google Reviews	Average Google Rating
Cueva Ventana	Arecibo	Natural	2,324	4.6
Cueva del Indio	Arecibo	Natural	1,619	4.5
Faro Los Morillos de Arecibo	Arecibo	Recreational	1,396	4.3
Arecibo Observatory*	Arecibo	Cultural	1,311	4.7
Auto-Cine Santana	Arecibo	Cultural	1,073	4.7
La Poza del Obispo	Arecibo	Natural	1,037	4.7
Estatua de Cristóbal Colón	Arecibo	Cultural	607	4.1
Cavernas del Río Camuy	Camuy	Natural/ Recreational	368	4.0
Playa Peñón Brusi	Camuy	Natural	114	4.6
Playa Peñón Amador	Camuy	Natural	99	4.6
Bosque Estatal de Río Abajo	Arecibo	Natural	487	4.6
Cascada La Planta Eléctrica - Río Tanamá	Arecibo	Natural	261	4.7
Catedral San Felipe Apóstol	Arecibo	Cultural	225	4.8
Arecibo Water Park	Arecibo	Recreational	202	4.0

Source: Streetsense, Foundation for Puerto Rico. 2020.

*The radio telescope and main attraction for visitors to Arecibo Observatory collapsed December 30, 2020.

Adventure Tourism

For a long time, the region has been a destination for outdoor adventures (including skydiving, caving, and hiking) and off-the-beaten path travel. Across the industry, adventure tourism is often referred to as travel that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion—all of which are present in Arecibo/Camuy. Although its major adventure asset, Cavernas del Río Camuy, remained closed in 2020, the region maintains its stronghold as a destination for risk-takers with other major assets Cueva Ventana, Cueva del Indio, and XtremeDivers/Skydive Puerto Rico. It should be noted that adventure tourism activities don't end at the border of the municipality. Immediately to the South in Utuado, adventure tourism activities include river and cave tubing on the Tanama River, which should be noted as additional opportunities to build a set of assets and itineraries that further reinforce the area's "adventure tourism" identity.

The following is a summary of initiatives around adventure tourism that major assets in Arecibo/Camuy have established or plan on establishing (pre-COVID):

Arecibo Observatory

Arecibo Observatory is primarily an educational facility owned by the federal agency National Science Foundation and operated under cooperative agreement by

the University of Central Florida. A widely recognized radio astronomy, solar system radar, and atmospheric physics facility, the asset hosted visiting scientists year-round while offering other general public/student visitors an educational experience in its newly refurbished and extended Science & Visitor Center, including an internship program for local STEM students. The asset welcomed nearly 100,000 visitors annually prior to the collapse of the radio telescope in December 2020 and prioritized tours for Science Technology, Engineering, Arts, and Math (STEAM) student groups throughout the Island. Visitor experiences at the renovated and modern exhibition space and state-of-the-art auditorium may continue to operate beyond the collapse of the radio telescope.

Main Activity Type: Educational tour



Arecibo Observatory prior to the collapse of the radio telescope in December 2020. Source: Flickr.

Cavernas del Río Camuy

Further inland, Cavernas del Río Camuy underground system was first discovered in 1958 by Puerto Rican and American speleologists and remained closed to the public until 1986. Despite its remote location, the asset became one of the most important tourism drivers for the region for over 30 years before being flooded in Hurricane Maria. Cavernas del Río Camuy has not opened to the public since and has suffered a decline in maintenance and upkeep with few remaining full-time maintenance and operations employees funded by FEMA. Before closing during the Hurricane, Cavernas del Río Camuy was well-managed by the authorities and featured a dynamic ticket pricing structure that enabled a diverse group of visitors to enjoy the asset affordably.



Group walking tours in Cavernas del Río Camuy pre-COVID-19. Source: Streetsense.

Qualitative reviews left by visitors on crowdsourced sites such as Tripadvisor and Google indicated visitor comfort stations were decently maintained, although not exceeding customer satisfaction, and perception of safety amongst visitors exploring the caves.

The re-opening of the asset is a priority for almost every government official and tourism interest group —Federal, State, and Municipality— however, the complexity of funding sources and relationships across various organizations and agencies has resulted in some degree of decision paralysis, and Cavernas del Río Camuy remains closed today. Some of the most important places within the park that were previously enjoyed by visitors include Clara de Empalme Cave, the Tres Pueblos Sinkhole, the Espiral Cave, Catedral Cave.

Main Activity Type: Hiking/walking, caving

Cueva Ventana

Cueva Ventana is often cited as ‘one of the natural wonders of Puerto Rico’ and is an adventure asset run and managed by private operator Aventura Cueva Ventana (Salomé Ecoturismo, Corp.). Although initially met with resistance from various agencies and the community, the cave operators quickly gained the support of the Department of Natural and Environmental Resources(DNER) and PRTC becoming one of the region’s major adventure tourism assets. The asset is most popular among off-island visitors during Easter break,

Summer, and Christmas. However, even during low seasons, domestic tourism and local island student groups continue to drive ticket sales for the operator, likely due to attractive local visitor pricing.

Since the closure of Cavernas del Río Camuy following Hurricanes Irma and Maria, annual visitor numbers have dropped drastically from an average of 100,000 a year to 70,000 a year during 2018-2019. To mitigate against a further drop in visitor numbers as a result of the pandemic, the asset has created a company-wide strategy to enforce group size restrictions and social distancing measures in order to maintain visitor and employee safety. The asset has, time and again, proven its resiliency through each disaster event and continues to be a well-marketed and well-managed tourism asset for Arecibo/Camuy.

Main Activity Type: Hiking/walking, caving

Cueva del Indio

Located in Barrio Islote, Cueva del Indio is a natural cavern that is teeming with ancient petroglyphs. Although technically a publicly owned coastal asset, the cavern is mainly accessible through private property (a separate and more obscure trail is also available). There is a entrance/parking fixed fee per person. Although a popular site highly rated by visitors for the views of the ocean and nearby beaches, the cavern is also a hazardous site and has seen numerous incidents of injury amongst visitors. Following repeated occurrences of injuries, the manager instated a

mandatory safety demonstration before visitors are allowed entry. However, there is much that can still be done to ensure the safety of visitors to the assets, including guided markings across the property and ‘Do Not Enter’ signs in areas that pose danger to visitors.

Main Activity Type: Hiking/walking, sightseeing



Cueva del Indio hiking trail. Source: Streetsense.



From top: Villa de la Central Los Caños; Waterfront assets range from Atlantic Ocean to Rio Grande. Source: Streetsense.

Voluntourism

Villa de la Central Los Caños

Similar to its efforts in incubating food and beverage enterprises in the urban center of Arecibo, the municipality of Arecibo has worked to close the gap in available lodging near inland key assets by spearheading the development of Villa de la Central Los Caños. Located between the collapsed radio telescope at Arecibo Observatory, Cueva Ventana, and the coast, the asset features eight villas, each with 4-5 bedrooms (with overnight stay capacity for 200 people) on a restored sugar cane plantation site. The site has since expanded its offerings to include new glamping tents in addition to its livestock farm and sporting facilities. However, since opening in 2018 its marketing and reservation processes have primarily been targeted at local families and domestic tourists. To attract off-island visitors or even volunteer/ student groups, the asset will need to enhance its reservation capabilities and adjust its digital marketing content and strategy. Furthermore, there is limited lighting and signage directing visitors to the site that may be further enhanced.

Main Activity Type: Agriculture farming, sports/recreation

Waterfront

The region features a range of bodies of water —ocean, rivers and lakes— and Arecibo/Camuy has a breadth of opportunity to offer visitors of various segments waterfront dining and entertainment/recreation. From “chinchorros” to off-island visiting families, young Millennials, and outdoor enthusiasts, the waterfront of Arecibo/Camuy has something in store for everyone.

Playa Peñón Brusi & Playa Peñón Amador

With over 50,000 visitors annually (as reported by local stakeholders) the beaches are both well-maintained and activated with the support of neighboring businesses. The Municipality of Camuy has kept up high standards of cleanliness on these beaches by providing sanitation infrastructure and services, while local restaurants and boutique hotels have maintained storefronts and private properties on the beach, creating an overall vibrant oceanfront dining and entertainment destination. With affordable price points at many of the bars and restaurants in Peñón Brusi, many locals continue to drive most of the foot traffic to the area on weekends.

Arecibo Urban Riverfront + Barrio Islote

Located in Arecibo, both the riverfront and Barrio Islote feature clusters of restaurants and bars that offer diverse sets of cuisines to meet the off-island visitor palette. The urban riverfront, located by Río Grande and locally known as 'Barrio Gastronómico', is home to several restaurants and craft beer bar. Its eclectic mix of cuisine set in the culturally anchored section of the urban center is poised for further enhancement and revitalization as a dining destination for the region. Beach-adjacent restaurants such as Carbón y Leña near La Poza del Obispo, a swimming beach by Arecibo Lighthouse, and Salitre near Caza y Pesca, a small surfers' beach, are among the most reviewed and highly rated by visitors.

Lago Dos Bocas

Located on the border of Arecibo and Utuado, the man-made lake constructed in 1942 by the Puerto Rico Electric Power Authority (PREPA) offers a unique floating water culinary experience whereby visitors board boats from the dock at El Embarcadero that departs on weekends and stops at two floating restaurants. Its proximity to adventure asset, Cueva Ventana, has made it a popular dining stop for visitors in the region. However, since Hurricane Maria, this area has not been well-maintained and several restaurants have closed.



The riverfront in Arecibo urban center. Source: Streetsense

Tourism-Supporting Businesses

The business environment assessment examines the potential for tourism-supported businesses such as shopping and dining clusters to meet the needs and expectations of customers, as well as understanding hyper-local private sector realities. At this time, the major shopping and dining offerings visible and accessible to visitors are located primarily along the coast at Barrio Islote and along Calle Gonzalo Marín in Arecibo, and at Playa Peñón Brusi in Camuy. Despite the abundance of adventure tourism assets located farther inland, there is limited business activity following the closure of Cavernas del Río Camuy after the Hurricane that affected business sales.

Anchors/Clusters

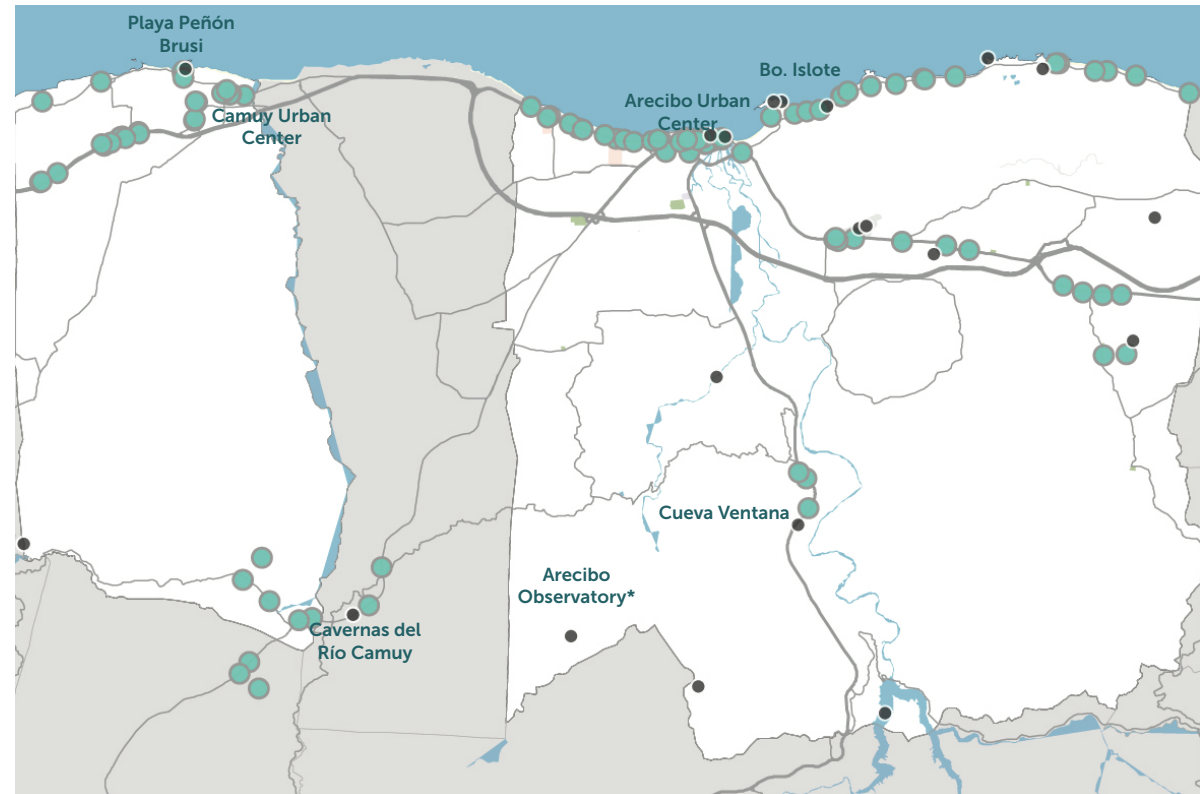
Barrio Islote: Primarily anchored by restaurants with higher price points catering to visitors, Barrio Islote sits between major assets, Cueva del Indio and the urban center of Arecibo. It features popular coastal assets La Poza del Obispo and Playa Caza y Pesca. These under-the-radar beaches offer a range of activities for visitors (swimming, sightseeing, surfing, and dining) and are well-rated on review sites Google and TripAdvisor. La Poza, for example, has over 1,000 reviews on Google averaging a score of 4.5 out of 5.0. According to stakeholder interviews, as the beaches and waterfront dining have gained popularity, business owners in the area have started to

work closely together to coordinate sanitation efforts to create a more sustainable model for doing business in the area. This grassroots effort indicates growing interest among local business owners to think about long-term resiliency.

Calle Gonzalo Marín + Arecibo Urban

Riverfront: Similar to Barrio Islote, the businesses in the urban center Arecibo, along

Calle Gonzalo Marín, have already formed a merchant's association and began to actively work together toward arts/ cultural programming and events to drive a greater foot traffic to the area. The identity of the area as a 'Barrio Gastronómico' was borne out of local efforts to market the unique section of the urban center toward both locals and visitors.



**Note: The radio telescope and main attraction for visitors at Arecibo Observatory collapsed in December 2020.*

Map of businesses near key assets. Source: Streetsense

Legend

● Asset/Attraction ● Shopping/Dining

Business Challenges

Keeping Digital Listings Up-To-Date:

Customers are increasingly using online tools and platforms, including Google Places, Yelp, and TripAdvisor, to inform their travel and spending decisions. Dining offerings in Barrio Islote, Calle Gonzalo Marín, and along PR-2 in Camuy are among the most reviewed and highly rated by visitors. Most businesses in the region have embraced digital marketing, with only 12% of dining establishments assessed not listed on Google. Online listing management allows restaurants to share basic information, including business hours, curate media, capture audiences, manage perceptions and respond to reviews, which helps customers plan trips and manage expectations. However, this data must consistently be kept up-to-date and requires dedicated attention of the staff if customers themselves are not actively contributing to reviews. This kind of data management is critical to a scalable business model that helps local businesses capture the spending of new residents as the emerging visitor economy grows.

Restaurants with High Average Ratings (for restaurants with over 100 reviews only)*

- Salitre Mesón Costero (4.3/5.0) – the restaurant also has strong marketing partnerships with adventure tourism assets located farther inland
- Carbón y Leña (4.6/5.0)
- Panadería El Cafetal (4.5/5.0)
- Tony's BBQ (4.5/5.0)

Limited Operating Hours + Emergency

Events: As with much of the rest of the island, before the pandemic, businesses in Arecibo/Camuy were already operating with limited or inconsistent hours throughout the week. The limited overall demand for goods and services from visitors during the pandemic and mandatory shutdowns for non-essential businesses will likely result in many tourism-supported businesses risking permanent closures without an urgent injection of capital to bridge the revenue gap.

As of 2019, across the United States, the overwhelming majority of businesses in majority black and Hispanic neighborhoods did not have enough cash on hand to pay for two weeks' worth of bills.⁹¹ In Puerto Rico, a March survey of 450 Puerto Rican businesses found that 85% of them did not have a contingency fund, and 59% indicated they would not be able to operate beyond a single month with existing capital on hand.⁹² Unfortunately, in the race to apply for funding, many minority business owners and entrepreneurs for whom English is their second language have had trouble accessing accurate information, relying heavily on secondary information in the popular media. And businesses that do not have an existing relationship with banks and SBA lenders face difficulties in accessing emergency capital and getting any reliable financial advice. Early surveys and reports suggest that 90% of small businesses of color have been excluded from SBA's Paycheck Protection Plan.

These risks also apply during natural disaster

events. Even after the Hurricane, where many businesses lost entire roofs or were flooded with over 8 feet of water and suffered thousands of dollars in damages and closed enterprises, over 75% of businesses assessed by FPR in Arecibo/Camuy still do not have emergency plans for future disaster events. FPR continues to foster resilience against future catastrophic events by educating micro entrepreneurs and small businesses on disaster preparedness, response plans, and use and installation of basic equipment included in a Business Resilience Kit distributed by the Bottom Up Field Teams (solar lamps, cisterns, water filters, etc.).

*Based on Google Reviews retrieved January 2020 for dining locations with 10+ reviews only

⁹¹ Small Business Financial Health in Urban Communities. Farrell, Wheat, Grandet, 2019.

⁹² Survey conducted on March 20 by Colmena66, a program run by the Puerto Rico Science, Technology and Research Trust

Lodging

One of the fundamental pieces of decision-making and of expectations of travelers is lodging. Today, the national landscape of accommodations includes traditional hoteliers and informal lodging, such as Airbnb. In total, the region has approximately 350 available rooms across formal and informal lodging options. However, most of this inventory is located near urban centers, major highways, and along the coast —particularly in Barrio Islote.

However, both formal and informal lodging near highly rated adventure tourism assets, such as Cueva Ventana and Cavernas del Río Camuy, are extremely limited despite high visitor rates —with the exception of Villa de La Central Los Caños. Given that the region is a convenient day-trip destination from either Metro San Juan or the West region, the lodging supply will likely respond accordingly and remain low in the near term owing to limited demand for overnight stays.

Formal Lodging

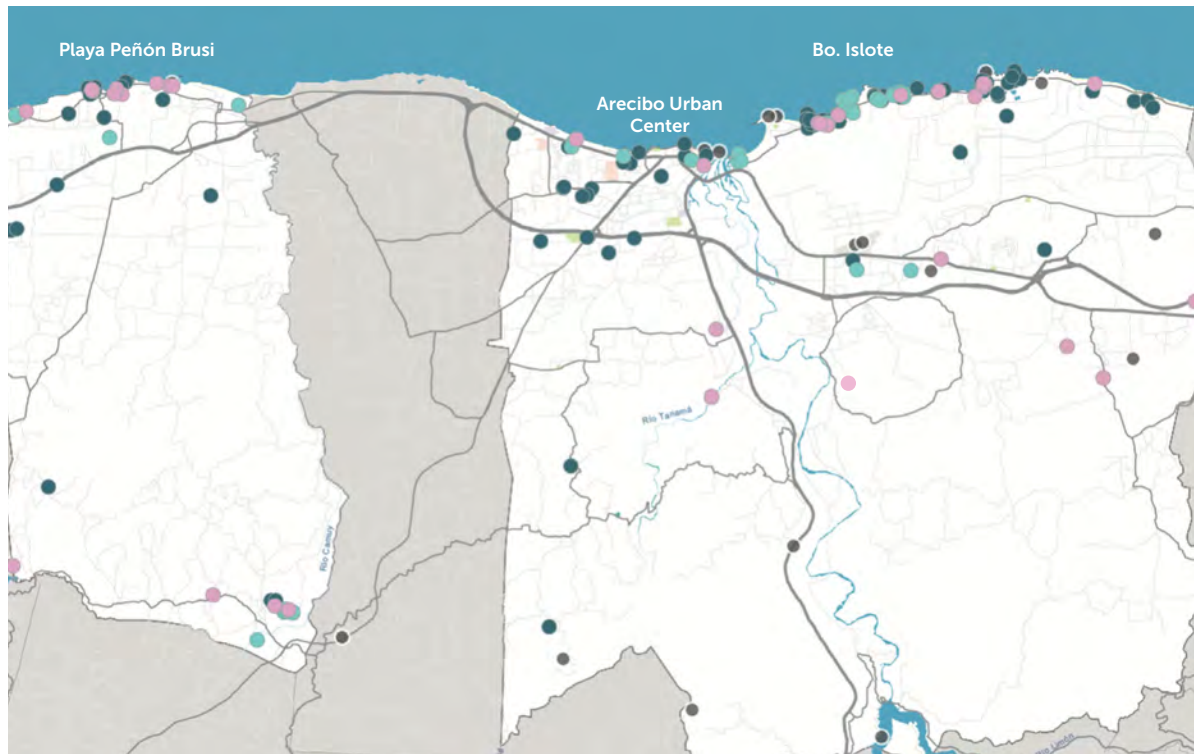
Of existing formal lodging options located near these inland assets, none are branded hotels. As a result, many do not have highly rated staff/customer service and cleanliness levels and may be less attractive to visitors seeking comfort and luxury in their lodging.

Informal Lodging Performance

Arecibo/Camuy

Municipality	Average Daily Rate	Average Occupancy Rate	Annual Revenue	Total No. of Bookings
Arecibo	\$151	43%	\$955,438	1280
Camuy	\$133	53%	\$208,402	332
Combined	\$148	45%	\$587,947	1,612

Summary of informal Airbnb lodging performance. Source: AirDna (Last scraped December 2018)



Legend

● Full Homes ● Private Rooms ● Hotels ● Top Assets

Map of available lodging in the region. Source: Streetsense

Informal Lodging

Due to a limited supply of highly rated formal lodging/hotels in the region, short-term rentals remain key to enabling the limited number of overnight stays by visitors in Arecibo/Camuy, particularly for leisure travelers. Currently, the occupancy rate for informal lodging is low at an average of 45% in Arecibo/Camuy, lower than island-wide occupancy rates that have historically been above 70% including the period following Hurricane Maria in 2017. Additional lodging is therefore not recommended. Instead, additional technical support and training around property marketing and/or interior design may help enhance the existing informal lodging supply, particularly at municipality-owned Villa de La Central Los Caños.

- **Total inventory:** 130 listings
- **Composition:** 73% whole apartment and 27% private rooms

Aligned with trends pre-COVID-19, younger travelers will continue to be “much more trusting of Airbnb/vacation home rental safety” compared to older travelers.⁹³

Qualitative Review of Formal Lodging

Arecibo/Camuy

Customer Ratings	Benchmark Comparison (Hyatt Manatí)	Arecibo Inn	Sol del Atlántico	Toque El Atlántico Family Inn	Ventana al Atlántico Hotel
Google Rating	3.5-star	2-star	N/A	2-star	3-star
Cleanliness Rating	9.5/10	8.2/10	6.9/10	8.3/10	7.0/10
Staff Rating	9.3/10	8.5/10	7.1/10	9.1/10	7.0/10
Top Amenities	Swimming pool, free WiFi, Fitness Center	Swimming pool, free WiFi	Swimming pool, free WiFi	Free WiFi	Swimming pool, free WiFi

Of existing formal lodging options located near key assets to the south of the region, none are branded hotels. As a result, many do not have highly-rated staff and cleanliness levels and may be less attractive to visitors seeking comfort and luxury in their lodging. Source: Priceline.Com; Google

⁹³ Destination Analysts, 2020. “Update on American Travel in the Period of Coronavirus—Week of May 18th”

Cultural Landscape

Culture has become an important driver of tourism due to the increasing importance of authenticity in the visitor's experiences. In Puerto Rico, arts, culture, and heritage represent an important asset to the island's positioning as a destination. Despite its geographic isolation, which could sometimes suggest homogeneous cultural manifestations, the native diversity of natural assets and local history across 78 municipalities means that Puerto Rico is teeming with a wide range of cultural experiences. Three main categories are proposed to clearly define the phenomenon of cultural assets: tangible, intangible, and natural heritage. These categories integrate artists, historical figures, beaches, nature reserves, traditions, legends, artistic projects, historical buildings, farms, organizations, gastronomy, events and festivals. These manifestations are present at different levels of development and recognition, so this analysis seeks to present challenges and opportunities.

Despite significant cultural and creative production around the island, it is important to recognize and strengthen the narratives that differentiate the island's regions. It is also essential to maintain a balance between a shared national culture and regional differences. For example, coastal regions have in common storytelling around the sea, fishing and music, among others. In the central areas, the narratives concentrate on the agricultural, the Jibaro music, and images related to rural life. On the other hand, at the municipal level, there is some consistency in terms of the municipal festivities, religious traditions, the presence of illustrious figures, commemorations and historical events.

The gastronomic richness of offerings represents a balance between national and local levels, as well as Latin music genres such as Salsa and Urban Music.

Management of arts and culture in Puerto Rico presents very similar challenges to other countries. Financing resources for cultural activity have been reduced over the years, especially the budgets of public entities in charge of protecting and disseminating cultural heritage. Outside of the San Juan Metropolitan Area, many local governments do not have formal processes in place to permit cultural programming and events in publicly-owned assets such as municipality theaters and plazas. As a result, cultural event producers and organizers often comply with the arbitrary requirements of each municipality, placing the burden on artists to navigate complex regulatory landscapes. In terms of the private cultural sector, there is much informality in projects, which in many cases makes it difficult to access funds to address economic sustainability. Similarly, in many cases, there is a lack of coordination between levels of government, third sector, and private sector; representing a great limitation for potential projects with a high impact on the visitor economy. Despite this, artists, collectives and cultural organizations operate in an environment of innovation and entrepreneurship, keeping their projects afloat through self-management.

Trends in Cultural Tourism

It is important to highlight the importance of culture in the visitor's experience. For example, the United Nations World Tourism Organization (UNWTO), in its report *Tourism and Culture Synergies*, establishes that four out of ten

tourists choose their destination based on the cultural offering. A survey of 69 countries states that in 90% of cases, cultural tourism is part of their public policy, while 84% mention that it is an important component of their marketing and promotion strategy.⁹⁴

Another vital trend related to cultural tourism is the so-called **night economy**. Entities such as Sound Diplomacy have published guides for cities to design, expand and/or regulate their offer after 6pm, strengthening entertainment and leisure alternatives for citizens and promoting safety and accessibility in environments normally designed only for the day. An additional trend is the so-called **creative tourism**.⁹⁵ According to the Creative Tourism Network, this new trend consists of a practice where the tourist co-creates the experience with a local. In this case, the visitor assumes an active role in creation, whether through gastronomy, dance, crafts, music or visual arts, among other activities.

Finally, we highlight the importance of official designations made by international organizations such as UNESCO (United Nations Conference for Education, Science and Culture). On the one hand, there are the official designations of the list of tangible and intangible heritage. These lists include important historic sites around the world and customs and traditions through the list of intangible heritage.⁹⁶ On the other hand, UNESCO also has developed a program of creative cities to design those areas that stand out in seven creative activities: crafts, design, film, gastronomy, literature, media arts and music.⁹⁷ The network currently has 246 cities among all categories, and these designations contribute to the city's brand and its offering to the visitor. In Puerto Rico, the UNESCO

⁹⁴ "Tourism and Culture Synergies". World Tourism Organization. 2018.

⁹⁵ "Una guía para gestionar su economía nocturna". Sound Diplomacy. 2018.

⁹⁶ "Intangible Heritage List". UNESCO. 2019.

⁹⁷ "Creative Cities Network". UNESCO. 2019.

World Heritage designation of Old San Juan, for example, enabled an easier process to recognize and formally designate important historic sites of cultural value such as La Fortaleza and Castillo San Felipe del Morro.

Based on these trends, it is possible to explore at least three main strategic components that could channel the cultural assets in the region: (1) night economy, (2) cultural events and creative experiences and (3) main squares. First, most municipalities have developed gastronomic clustering in different regions that could evolve to include live experiences such as music. In terms of cultural events and experiences, it could be important to expand the impact of actual events and festivals to address the visitor's experience. Also, new events could be developed in order to diversify the attractions available for tourists. Beyond events, the offering of experiences, some related to creative tourism, could be developed and promoted to platforms such as Airbnb Experiences. Finally, all of the main squares are examples of the traditional plazas of the island. These sites represent an opportunity of a new attraction that could impact different tourist segments because of historic sites, architecture, gastronomy, and live entertainment.



Bomba dancing in Old San Juan. Source: Discover PR

Island-Wide Cultural Challenges

At the island-wide level, cultural organizations are hobbled by several challenges, including:

- A limited budget to sustain operational costs and a limited ability to charge entrance fees. In many cases organizations avoid charging entry fees due to concerns that they will need to pay taxes and complicate accounting for what are largely volunteer organizations.
- A lack of coordination between different levels of government (state and municipal).
- A lack of on-going financial support from the Instituto de Cultura Puertorriqueña (ICP) to Cultural Centers.
- A limited entrepreneurial mentality among cultural organizations.
- A lack of tracking and data collection. Most cultural organizations do not track visitation. They may collect a monthly number of visitors, but these are typically in sign-in books, making it difficult to accurately estimate attendance and glean any information about the primary customer.
- Centralization of cultural activity in the Metropolitan Area.
- ICP has indicated that they have not explored National Endowment for the Arts "Our Town" Funding, for which many local cultural projects might be eligible.

Post-COVID Cultural Programming Reality

In addition to the challenges above, the COVID-19 pandemic has exacerbated the feasibility and profitability of arts and cultural events across the island. Public health analyses have indicated that arts and cultural events present a high risk of spreading the disease due to crowding and density of audiences. Over the first half of 2020, most cultural projects in Puerto Rico have had to cancel programming, whether in indoor or outdoor venues.



Dorado Drive-In Cinema. Source: Facebook.

In most cases, a very small portion of such activities has been converted to virtual events. In initial stages, to encourage audience's participation, many virtual cultural events and programs were conducted at no cost to the audience. Over the months, producers of cultural events have become more sophisticated and recently have learned to leverage new digital platforms to reproduce the experience of larger concerts, workshops, and exhibitions.

Despite the multiple initiatives to support cultural work by the government and foundations, the outlook for the immediate future is still unclear. Many organizations rely on concert halls, dinner theaters, bars and restaurants, galleries, and museums for their programming. These are indoor venues that pose high risk levels. Even in a reopening scenario like the one originally proposed and then reversed, there are very few entities and producers that can continue their programming at 50%-75% capacity.

Cultural events and art programming in public spaces will be an important opportunity for transitioning out of the pandemic as they present fewer challenges for social distancing. Similarly, the drive-in proposals for concerts, cinema, and other artistic manifestations are areas that require further research and development, and overall regulatory support by the public sector and funders. Beyond the immediate future, it will also be necessary to support greater hybrid live presentation formats with streaming to expand the viability of these cultural productions.

Region-Specific Opportunities

Based on a comprehensive assessment of local NGOs and municipality calendar of events and conversations with multiple stakeholders in the region of Arecibo/Camuy, a number of cultural assets were identified that might contribute to destination development, especially based on the visitor's experience. Overall, the downtown areas in both municipalities represent zones that, due to their historic architecture, main square, and grassroots revitalization efforts, offer a setting and stage for authentic cultural expressions and placemaking that can drive off-island visitation.

Although, at this time, the urban centers of Arecibo and Camuy each host a cluster of primarily recreational and cultural offerings, they are frequently promoted only in Spanish and only on the island, making them popular amongst locals and Island-based tourists. These events do not currently drive off-island visitation to the region. The high season for these events is during Lent (April), when many religious activities are organized by several churches in Camuy, and in the summer when SazonArte —a music, art, culture and gastronomy event that is hosted by Arecibo 1515 (merchants of the area)— is well-attended in Arecibo. Another regular arts and cultural event held in Arecibo is an initiative known as Arte 360 that was, pre-COVID, hosted on the first Thursday of each month in different venues around the urban center. Following shutdowns during the pandemic, Arte360 has transitioned to virtual events on digital platforms such as Facebook and Instagram.

Religious tourism was also raised by several stakeholders as a minor driver of tourism for local island visitors. PRTC completed the design of the Porta Atlántico Religious Tourism Route in 2016. This route is related to the historical heritage of the origin of religious faith, covering more than 500 years, including Catholicism, Evangelism-Protestantism, and Islam. This route includes the main churches and buildings from Toa Baja to Camuy. However, each asset still needs to build upon its visitor experience by providing wayfinding/signage and information to better describe the history of faith/religion and the site so that visitors can learn more about their roots and better understand the current context of Puerto Rico.

The following list presents a summary of opportunities related to cultural tourism for the region.

- Connect cultural institutions and histories of Arecibo through a **comprehensive wayfinding/signage system** in the urban center of Arecibo.
- **Restore historical structures** across each urban center in the region.
- Religious tourism, although not widely known by the off-island visitor, attracts a fair share of visitors during Christmas and Lent to churches across the Island, including in Arecibo/Camuy. The region hosts both educational and faith-based events and a central site for religious tourism is the **Iglesia de Piedra** that is located farther inland and isolated from other major assets.



Organizational Capacity Assessment

Organizational Capacity Assessment

The ability to implement the projects outlined in this plan is directly related to the capacity of existing organizations and partners on the ground that have the staff, expertise and resources to advance towards implementation.

Despite the wide potential for arts and cultural production focusing on the visitor economy, some administrative challenges that require immediate attention have been identified.

On-Going State of Emergency

The natural disasters that have continued to hobble the island in the form of both hurricanes and earthquakes have significantly impacted the capacity of both governmental and quasi-governmental entities. Resources for non-essential needs must be weighed against the pressing needs associated with broader recovery efforts. In addition, several political issues at the state level have further complicated the ability of the government to address needs and challenges.

The COVID-19 pandemic has also deepened the economic crisis for the island as travel bans were instituted for months and further

restrictions have had to be considered for visitors from two of the island's largest origin markets —Texas and Florida.

Lack of Tourism Training

Another key capacity issue that faces the island is the lack of tourism training and professional development opportunities for public sector leaders, particularly for municipality-level government officials. The Destination Planning Team's stakeholder interviews with each tourism director across the region revealed the need for training and expertise in tourism to better organize efforts in order to attract off-island visitors to the North Region. As part of the hospitality industry, the success of any region or destination's tourism sector is dependent on exemplary customer service and guest experiences that are often shaped by public sector policies and programs. Without the leadership of tourism directors who understand the complexities of the tourism market and the ever-changing preferences and lifestyles of various visitors (island and off-island), a region and destination will not be able to create a supportive regulatory and business environment for individual players to thrive.

Municipality tourism directors, for example, should be hired based on proven track record and professional experience in the hospitality industry. They should be given consistent training cross-jurisdiction to ensure a level playing field and the overall success of municipality-driven tourism efforts and initiatives. In general, the uneven experience of local tourism directors has resulted in lack

of cooperation and coordination as further expressed below.

Lack of Coordination Across Different Levels Of Government

Across several instances during the process, problems related to lack of communication between levels of government (municipal, local and federal) and across sectors (public, private, and non-profit) were discussed with stakeholders. For example, there are natural and cultural assets under the jurisdiction of state agencies that local groups and organizations are interested in using for visitor experiences —such as Cavernas del Río Camuy. In such cases, the implementation of local projects are often stifled by slow processes at the state level or lack of engagement between the state and local stakeholders. In other instances, the lack of cleaning or maintenance of natural, historical or cultural assets is also related to this lack of coordination between municipal and state government.

Regulations and Permits

While local entrepreneurs, such as the owner of Cueva Ventana, reported having limited issues in acquiring building and business permits when first creating and implementing his plan for a tourism asset at Cueva Ventana, there are multiple regulations that affect the performance of cultural projects and business ventures. One of those regulations includes having a production license for events, required for any event with admission's rights. The production and promotion of cultural events is a regulated practice that requires licensing from the Department of the Treasury and membership in a guild. Such membership involves recurring costs that vary according to the volume of guild revenues. For cultural agents who are not licensed, they must be associated with a collegiate producer through a formal agreement. Other important processes that must be carried out by producers/promoters of cultural events include tax reporting with the Department of Treasury. Numerous procedures must be completed before and after each event and are related to the endorsement of tickets before sales and a final settlement after the event, associated with the sales tax's retention.

Other regulatory hurdles associated with cultural and heritage assets include the formal certification process of tourist guides with PRTC, which often limits the development of ventures that seek to integrate cultural experiences as part of assets.

Limited Access to Capital

Through the Nido Cultural process, several cultural organizations and artists indicated challenges in accessing funding —whether from private sources or public grants— to support their projects. On many occasions, access to funds from foundations from the United States requires a non-profit organization structure with a state and federal tax exemption 501(c)(3), designations that very few start-up entities have in Puerto Rico. In addition, many of these organizations reported needing grant writing support to apply for local and federal funding.

Even in cases where these organizations and/or individuals are eligible for funds, there is a challenge of not having sufficient funds to cover operational expenses; something that affects the long-term sustainability of the initiatives. On more than one occasion, local cultural centers in the region reported receiving limited support from the ICP.

Developing Business Acumen

Stakeholder interviews with several owners and managers of tourism-supported businesses various sectors including, farms, restaurants, tour operators, and asset managers, revealed that the level of business acumen varies widely across the island. Whereas some businesses, such as Cueva Ventana, reported having plans put in place early on in its founding to manage and grow a supply of products and services, and to meet changing demands and preferences of consumers (locals and



Promotional material for Cueva Ventana in Arecibo
Source: Streetsense.

visitors) over the years, many others who were interviewed lacked a clear business plan and needed training in business accounting, digital marketing, product pricing, sourcing and supply chains, and customer service. Furthermore, in most cases, business owners were also not found to be measuring business performance and success or tracking any key metrics to build the case for further investment and funding, and often did not feel comfortable charging fees at assets.



Gap Assessment

Gap Assessment

The gap analysis conducted by the Destination Planning Team evaluates the condition of each of the customer segments identified. This enables communities and stakeholders in each region to conceptualize visitor economy projects to the extent that they address two main issues:

Meet the needs and expectations of targeted customer segments

- Which segments are we most or least likely to attract? What investments should be prioritized to attract a specific segment?

Maximize the benefits of resource allocation and capital investments

- Which assets are underperforming across most or all customer segments? What investments should be prioritized to improve the visitor experience for as many customer segments as possible?

The gap assessment considers each customer type and each identifiable class of tourism-attraction (transportation and mobility, lodging, attractions, shopping, and dining) and helps provide a thinking framework about what elements of the visitor economy must be addressed to better meet the needs of the most likely off-island visitors to Puerto Rico. Outputs from this assessment approach are systematically and consistently a product of a rating system as follows:

- A “high” rating level is assigned if a site or asset offers a high level of visitor satisfaction and/or consistently meets customer expectations.
 - ◐ A “medium” rating level is assigned if the site or asset offers a moderate level of visitor satisfaction and/or frequently, though not always meets customer expectations.
 - A “low” rating level is assigned if the asset or offering does not meet the baseline expectations of visitors.
- No circle indicates that the item is not applicable or not available in the region.

Arecibo/Camuy rates “high” in the categories of car rentals and natural offerings; “medium” with regards to cultural and dining attractions due to the clustering of offerings in Arecibo urban center; “low” with respect to lodging with basic amenities and walkability, rideshare and taxis.

Existing Performance Rating

Arecibo/Camuy




Type	Rating
General Mobility	
Flights	◐
Car Rentals	●
Taxi/Rideshare	○
Privately-Operated Tour Buses	◐
Walk/Bike	○
Public Transit	
General Lodging	
Availability	○
Price + Variety	○
Amenities	○
General Attractions	
Natural	●
Cultural	◐
Recreational	●
Agricultural	○
Shopping/Entertainment/Dining	◐













Regional Gap Assessment

The gap assessment analyzes how significant improvements or investments meet the needs and expectations of each individual customer segment. When looking at the region's potential for upgrades, the assessment offers an evaluation based on priorities: which improvements are critical to building and sustaining visitation from each customer segment?

Most notably, **improvements to transportation and mobility emerged as critical to customer needs and expectations**, including the ease and convenience of arrival and departure to the region as well as improved mobility and linkages between assets that are not solely reliant on rental car vehicles.

-  A "high" priority level is assigned if addressing the issue is critical to improving the experience for the customer segment. Some large or fundamental gaps may require long-term strategies outside of the scope of this effort.
-  A "medium" priority level is assigned if improvements would be beneficial, not necessarily critical to attracting more visitors from that customer segment.
-  A "small" priority level is assigned if improvements are not critical to attracting more visitors from the identified customer segment.

Gap By Priority Level For Arecibo/Camuy


Type	Families (with children)	Gen Z (age <25)	Millennials (age 26-40)	Gen X (age 41-55)	Boomers (age 56+)
General Mobility					
Flights					
Car Rental					
Taxi/Rideshare					
Privately-Operated Tour Buses					
Walk/Bike					
Public Transit					
General Lodging					
Availability					
Price + Variety					
Amenities					
General Attractions					
Natural					
Cultural					
Recreational					
Agricultural					
Shopping/Entertainment/Dining					

Most notably, **improvements to transportation and mobility emerged as critical to customer needs and expectations**, including the ease and convenience of arrival and departure to the region and improved mobility and linkages between assets that are not solely reliant on rental car vehicles. Across customer segments, travelers highly value the ability to move between attractions and destinations with ease. In recent years, this desire has grown with the advance of rideshare/mobility apps that allow users to hail or pick up vehicles (cars, bicycles, scooters, Vespas) at a touch of a button. In addition, travelers across customer segments seek out dense or urban destinations that enable safe navigation and exploration on foot. Safety and accessibility, however, is critical for families travelling with small children and for seniors who may have physical impairments, so walkable destinations need to provide safe sidewalks/trails and shared/slow street infrastructure.

Although Gen Z and Millennial travelers are flexible on lodging options and therefore place a lower value on price, variety and amenities of hotels and accommodations, other customer segments such as **families, Gen X, and seniors expect greater choice in lodging owing to their desire for child-friendly and disable-friendly environments. On the other hand, Gen X travelers have greater spending powers and therefore reasonably expect more luxurious lodging options.**

The region's relative strength in natural and outdoor adventure attractions should continue to be leveraged by enhancing existing assets

in these categories. At this time, **many natural assets including Cavernas del Río Camuy and Cueva del Indio feature difficult terrains and demand physical strength of visitors**, thereby affecting the ability of families traveling with young children or seniors to enjoy these offerings. To better meet the needs and preferences of these **customer segments, major natural attractions will need to improve basic infrastructure and amenities** including bathrooms, visitor centers, ADA-accessible paths, wayfinding, and on-site retail/dining.



Comparable Benchmarks

Comparable Benchmarks

Today's travelers have many choices when planning vacations, be it a long weekend or a multi-week stay. In order to ensure that Puerto Rico is the destination of choice for those seeking a warm-weather experience, we identified and compared two competitive destinations to the offerings and assets in Arecibo and Camuy, based on visitors with similar interests.

To select the most relevant and comparable locations, we again viewed travel through the eyes of the visitor. The goal of the case studies is to identify best practices in attracting each of the specific customer groups. Factors considered in the selection process of comparable destinations include the geographical location, types of attractions, and the target tourist demographic.

Mexico and the Dominican Republic were selected in consultation with FPR due to the similarities in attractions, access, and visitor profile between these countries and Puerto Rico. Travel time between major tourist nodes in these comparable destinations is like that between San Juan and the North Region of Puerto Rico. Once tourists arrive, the activities are similarly focused on natural assets with many additional activities and existing infrastructure geared toward tourists. Recent studies completed by the PRTC identify Florida, the Bahamas, Mexico, and Costa Rica

among the top destinations considered by visitors to Puerto Rico.⁹⁸ Discover Puerto Rico also identified the same regions, adding to that list the Caribbean-at-large, Hawaii, Mexico, the Dominican Republic, and Colombia.

To inform both the gap analysis for each region and develop potential project ideas, the team analyzed two competitive destinations whose stakeholders have succeeded in closing their own asset gaps, the Riviera Maya along Mexico's Caribbean Coast and the Samaná Peninsula in northeast Dominican Republic.

The selected competitive destinations are popular coastal regions with a 1 to 2-hour drive away from a major international airport. Both are located in Spanish-speaking countries. Moreover, Samaná and Riviera Maya have seen recent and noteworthy investments in tourism, which is a significant economic generator for both destinations.

It is important to note that while the Riviera Maya and the Samaná Peninsula may provide Arecibo and Camuy with tourism best practices to emulate, we do not mean to suggest that this region's tourism economy could or should cater to tourists in the same way as those destinations, whose economies were shaped by their own local stakeholders with particular goals and interests. Arecibo and Camuy's project ideas, articulated later in this document, reflect the communities' considerations, rather than a desire to emulate these competitive destinations.

⁹⁸ "Perfil de los Visitantes". Gobierno de Puerto Rico. Junta de Planificación. November 14, 2019.

Comparable Benchmark

Riviera Maya, Mexico

The Riviera Maya is an important competitive market. A 2018 study commissioned by Discover Puerto Rico found that prospective visitors to Puerto Rico are 4% more likely to visit Mexico (19%) than Puerto Rico (15%).⁹⁹

The Riviera Maya is a large and established visitor destination for travelers interested in archaeology, beaches, and outdoor activities. Among its key attractions, the region features Playa del Carmen, where there is a range of aquatic reef activities available along the world's second-longest barrier reef system and a walkable shopping/dining destination along 5th Avenue.

Lodging options in Riviera Maya are diverse; however, its all-inclusive resorts are the biggest room contributors. Smaller boutique hotels and Airbnbs have also grown in popularity, particularly among younger Gen Z and Millennial travelers. In Tulum, highly-rated Airbnb rentals offer villa-style accommodations with private pools, beach access, and ocean views.

Overall, Arecibo/Camuy lacks a competitive advantage over lodging for visitors. However, there is still an opportunity to significantly enhance its inland natural and outdoor adventure attractions that offer different scenic landscapes of mountains and caves.

⁹⁹ "Puerto Rico DMO Brand Health Research". Insights Strategic Marketing and Research. 2018.



(Clockwise from top) Pedestrianized 5th Avenue at Playa del Carmen; Seaside plaza featuring Portal Maya bronze sculpture at Playa del Carmen; Public access to Cenote Yal-Ku. Source: Flickr



Comparable Benchmark

Samaná, Dominican Republic

The Samaná Peninsula is a collection of quaint beach-side neighborhoods and natural assets. The Peninsula's location relative to the nearest major city, Santo Domingo, resembles that between the North Region and San Juan. A car is typically required to get to this tourist node.

The town of Samaná itself is a walkable destination that enables visitors to easily move between hotel/lodging and restaurants/bars on foot. However, to travel to other parts of the Samaná Peninsula, such as El Limon Waterfall or the famous Playa Rincon, travelers typically book taxis or rely on rental SUV cars to traverse the region's mountainous terrain.

Core to the region's tourism economy are its ecotourism adventures in Las Terrenas and Los Haitises National Park, and the unique migration of humpback whales that occurs from the months of January-March. During this period, resorts, hotels, and boutique bed and breakfasts experience high booking rates.

In many ways, the high-quality natural coastal and mountainous assets of the Samaná Peninsula are similar to that of Arecibo/Camuy. However, the urban center of Arecibo still has the opportunity to grow and become an even more convenient walkable downtown destination similar to Samaná.



Top- Waterfall in El Limón; Bottom- Boats in La Palmilla. Source: Flickr



Comparative Existing Performance

The following chart illustrates the existing assessed conditions of each area’s ability to meet customer needs compared to each respective benchmark.

Mobility

Similar to Riviera Maya and Samaná, Arecibo/ Camuy is located a short drive away from the Luis Muñoz Marín International Airport by car. While there are public buses available within tourist nodes of the comparative markets that enable visitors to easily access closely-located assets and attractions, local public transit and rideshare options don’t exist in Arecibo/ Camuy.

Although the growing cluster of businesses and cultural events in the urban center of Arecibo has begun to revitalize the area and is attracting the attention of local and off-island visitors, there are significant investments that need to be made to the public realm to enhance the pedestrian environment and to allow them to explore local food and culture on foot safely. This is a fast growing preference that is popular among younger travelers who seek customized itineraries and authentic local experiences.

Comparative Benchmark Performance

Type	Arecibo/ Camuy	Riviera Maya	Samaná
Mobility			
Flights	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Car Rental	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Privately-Operated Tour Buses	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Taxi/Rideshare	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Walk/Bike	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Public Transit		<div><div></div></div>	<div><div></div></div>
Lodging			
Availability	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Price + Variety	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Amenities	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Attractions			
Natural	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Cultural	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Recreational	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Agricultural	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>
Shopping/Entertainment/Dining	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>

Lodging

Overall, lodging in Arecibo/Camuy is limited and visitors are hard-pressed to find a mix of safe and quality lodging options for overnight stays. Formal lodging options located near key natural assets that should be opportunities to extend visitor stays do not meet baseline customer satisfaction in terms of customer service and cleanliness. In comparison, hotels in Riviera Maya and Samaná rate higher on price, variety, and amenities. The availability of hotels in Riviera Maya, ranging from budget to luxury, surpasses Arecibo/Camuy, where lodging is limited to small independent hotels and Airbnb rooms near the urban centers, major highways, and along the coast—particularly in Barrio Islote. While the Samaná Peninsula has fewer options available to tourists, it is seeing an increasing number of highly-rated Airbnb options ranging from beachfront bungalows and villas (with private pools and jacuzzis) to condos (with waterfront views and beach access).

Attractions

Natural attractions, such as beaches and cave systems are prevalent in Arecibo/Camuy as well as the Riviera Maya and the Samaná Peninsula. However, the natural attractions in the comparable destinations are world-renowned. The scale of the barrier reef in Riviera Maya, for example, is only second to the Great Barrier Reef in Australia, and its ancient Mayan ruins draw tourists from around the globe. In the Samaná Peninsula, the region's strategic location on the migration route of North Atlantic humpback whales offers a unique experience that draws visitors annually to witness a majestic natural phenomenon.

While Cavernas del Río Camuy is often lauded as being a special experience at one of the world's longest underground rivers, the asset lacks basic amenities that contribute to visitor comfort and safety. This could be enhanced by stronger programming and activation that meets the mark of a world-renowned destination.



Arecibo Lighthouse. Source: Getty Images.

The background is a photograph of a street in Arecibo, Puerto Rico, featuring a building with a large star on its wall and a car with license plate J1K-430. The image is overlaid with a semi-transparent green filter. A decorative blue line with several colored dots (red, blue, pink) winds across the right side of the page.

Vision + Strategic Positioning

Vision + Strategic Positioning

The vision statement for this effort reflects the community's values and intentions. It was generated through discussion at a series of in-person and virtual community meetings that included local merchants, organizations, and residents. This vision helps ensure consensus among partners and supports direct investment into community assets.

A strategic positioning statement reflects the guiding principles and unique competitive advantages of each region as determined by both the community and the assessment process. The strategic positioning statement reflects the community's vision, but is also rooted in data-driven market realities. It communicates a region's brand essence and orients strategies towards the point of market distinction.

Together, the community vision and strategic positioning generate a coupled approach to catalyzing economic development (and maintaining a partnered approach) through a visitor economy and invites investment within the community vision.

Community Vision Statement

“

The region of Arecibo and Camuy will focus on its natural assets to strengthen adventure tourism experiences with the support of its artistic and cultural components in the urban centers.

”



The above community vision was formed through stakeholder feedback retrieved through surveys in the latter phase of the market assessment. The survey was shared via text message, email and calls by the FPR field team facilitators.

Strategic Position & Brand

The following reflect brand pillars for Arecibo/ Camuy:

- a. Ideal day-trip destination with an easy drive from San Juan and Porta del Sol
- b. Hub of adventure attractions including caving and celestial explorations
- c. Diverse natural landscapes ocean, lakes, cave systems, forests
- d. Scenic waterfront gastronomy
- e. Urban centers rich in Puerto Rican history, culture, and architecture

“

A region rich in natural landscapes stretching from the Atlantic Ocean and majestic Lago Dos Bocas to the caverns and karst forests, Arecibo/ Camuy offers some of the island's greatest attractions for risk takers and adventure seekers. Take a group out to explore Arecibo urban center on foot and learn more about Puerto Rican history and culture at a local street festival and museums. For local gastronomy, the region boasts a myriad of waterfront dining locations —the urban riverfront in Arecibo, Barrio Islote, and Lago Dos Bocas— each with its own flavor. Equidistant from Metro San Juan and Porta del Sol, the region offers a full day's worth of activity.

”



Plan of Action

Plan of Action

The comprehensive suite of projects and strategies outlined in the following section are categorized by those unique to **Arecibo/Camuy** and its key assets, the **North Region/Porta Atlántico**, and those that address widespread challenges that are shared across the **island** as a whole. Throughout this planning process, it became exceedingly clear that there are several issues that were not unique to any region, but instead reflected systemic island-wide challenges. Addressing these challenges at the highest levels of governance is critical to ensuring the sustainability of the economic development and visitor economy efforts on the Island.

Recommendation Framework

Recommendations are rooted in a set of essential and comprehensive improvements that aim to improve the overall visitor experience while also reinforcing the quality of places for which the region is already well known, i.e., Demand and Supply.

Strategies for Growing Demand from Visitors:

This includes raising the awareness of existing assets through marketing, promotion, and branding, as well as strategies that improve the accessibility and visibility of the region's offerings.

Strategies to Improve the Supply of Tourism Offerings:

This includes the quality and quantity of offerings that are unique to the region, with an emphasis on strategic destination drivers that reinforce brand and

further differentiate the region from other destinations. Improvements to supply focus on the assets that were analyzed and assessed through this process, including cultural and visitor assets, lodging and accommodations, and retail/ food and beverage operators.



Geographic Scope of Recommendations. Source: Streetsense.

Projects at various geographic scope levels were further classified into six designations as follows:



Marketing, Events + Promotion

These efforts aim to raise the profile and awareness of existing regional offerings and improve overall visitation to the region's unique assets.



Place-Based Asset Enhancement

The projects here focus on capital investments to places and strategic destination drivers that improve key cultural, natural, or business assets and result in measurable improvement to the visitor experience.



Infrastructure

These projects are, by their nature, island-wide and while outside of the scope of the Bottom Up Destination Planning effort, must continue to be highlighted as critical to stabilizing and supporting any form of economic growth on the Island.



Access and Mobility

These projects address challenges that visitors may have getting to/from the island, and their preferences for moving around the island and between assets or experiences once they arrive.



Business Support

These projects focus on the needs of existing businesses and outline strategies to help them raise their profile and better meet the needs and expectations of off-Island visitors.



Organizational Capacity

These projects address some of the challenges associated with meaningful implementation of the plan by local partners, and their resources and capacity to implement, manage and maintain the assets in question.

How Were Projects Selected?

Project ideas were generated using a variety of mechanisms, including community workshops, a call for proposals (Nido Cultural) led by Inversión Cultural, as well as by the Destination Planning Team.

The Nido Cultural process enabled the team to solicit grassroots projects that were in a good position to further develop and enhance the inclusion in the Destination Plan. Following a digital application form, selected participants were offered 1-on-1 and group technical assistance to develop project sheets for implementation.

Over the course of the Destination Planning effort, dozens of ideas for projects were generated through community outreach led by the Field Teams and FPR staff, as well as through stakeholder interviews and working sessions with the Destination Planning Team. The projects outlined here form an interrelated set of improvements that together create the conditions necessary to support growth in the visitor economy.

Each project was filtered and pre-qualified against a set of criteria as follows:

- Projects that would result in **tangible physical improvements to unique assets** that differentiate the region from others and help to further reinforce the region's strategic position and brand.

- Projects that **address fundamental organizational, operational and financial obstacles** that create the conditions necessary to support improvements and long-term maintenance of key visitor assets.
- Projects that **raise awareness of offerings and drive visitation** to the region's unique set of natural, cultural, and business offerings.
- Projects with **reasonable complexity and risk**. Typically, these are "shovel ready" projects with a readily identifiable "champion", i.e., a clearly defined partner with the know-how and access to the resources necessary for implementation.
- Projects that **aligned with guiding principles**. Following the market assessment, the Destination Planning Team and FPR determined five principles that were critical to the improvement and success of tourism in the region. These included: a) Enhancing Visibility and Connectivity between Assets, b) Promoting a collective set of offerings for volunteer, leisure, and business travelers, c) Encouraging sustainable growth of coastal dining offerings and ensuring the long-term sustainability of coastal tourism economy, d) Supporting year-round outdoor cultural events and programming, and e) Improving the quality of informal lodging.

Project Evaluation Tracking Impact

Key Performance Indicators (KPIs) are measurements that express impact through numbers or ratios. Recommendations for project-specific KPIs were included, but we note that there remain significant outstanding questions regarding who will be responsible for measuring and tracking the impact of these improvements over time. Statistically robust methods of performance tracking are not accessible for most organizations. As such, we have focused on "fit for use" measurements that can be tracked easily by the implementing entity or by an island-wide organization with resources for evaluation. We have also avoided KPI's that seek to measure business impacts owing to the difficulty of collecting accurate sales data and the widely understood challenges associated with determining causality between projects and business impacts. Although each of the following projects in this section of the plan is accompanied by KPI's to measure direct outcomes for each individual project and utilize more readily available metrics, we acknowledge the difficulty in executing such performance measures and instead recommend overarching KPIs for the region as a whole.

The four overarching KPIs that we have set to measure the overall impact of project implementation to the region of Arecibo/ Camuy include:








- Total number of visitor trips to the region
- Occupancy rates and average daily rates of lodging
- Total attendance at annual cultural events
- Total number of Resiliency and Emergency Preparedness Plans reported by local assets and businesses

Recommendations Strategy Matrix

Arecibo/Camuy Recommendations

Budget: \$ \$ \$ (Under \$50k), \$ \$ \$ (\$50k - \$200k), \$ \$ \$ (\$200k +)

Timeframe: **Short** (Less than 5 years), **Medium** (5-10 years), **Long Term** (10+ years)

Project	Category	Timeframe	Budget
1 Public Realm Investments in the Urban Center of Arecibo		Short	\$ \$ \$
2 Re-Open Parque Nacional de las Cavernas del Río Camuy (Cavernas del Río Camuy) With Enhanced Visitor Comfort and Safety Measures	 (Adventure Tourism Supply)	Short	\$ \$ \$
3 Enhance Property Adjacent to Cueva Del Indio Parking Lot Property	 (Adventure Tourism Supply)	Short	\$ \$ \$
4 Support expansion of Finca Pajuil		Short	\$ \$ \$
5 Establish A Formal Waterfront Merchants' Association		Short	\$ \$ \$
6 Establish a Coalition of Adventure Tourism Assets in the North Region	 (Adventure Tourism Supply)	Short	\$ \$ \$
7 Improve accessibility and connectivity between Playa Peñón Brusi and Playa Peñón Amador		Short	\$ \$ \$

Recommendations Strategy Matrix

North Region/Porta Atlántico Recommendations

Budget: \$ \$ \$ (Under \$50k), \$ \$ \$ (\$50k - \$200k), \$ \$ \$ (\$200k +)

Timeframe: **Short** (Less than 5 years), **Medium** (5-10 years), **Long Term** (10+ years)

Project	Category	Timeframe	Budget
1 Build on the Existing Brand and Marketing Efforts of the North Region	 (Agro-Culture Supply)	Short	\$ \$ \$
2 Expand North Region voluntourism/group travel opportunities	 	Short	\$ \$ \$
3 Create a Regional Waterfront Resiliency and Restoration Program		Medium	\$ \$ \$
4 Establish a Safe Coast Pilot Program		Short	\$ \$ \$

Recommendations Strategy Matrix

Island-Wide Recommendations

Budget: \$ \$ \$ (Under \$50k), \$ \$ \$ (\$50k - \$200k), \$ \$ \$ (\$200k +)

Timeframe: **Short** (Less than 5 years), **Medium** (5-10 years), **Long Term** (10+ years)

Project	Category	Timeframe	Budget
1 Establish a public activation program		Short	\$ \$ \$
2 Small Lodging Financing Fund		Long	\$ \$ \$
3 Regional Wayfinding - Highway Signage & Pedestrian Signage		Short	\$ \$ \$
4 Amplify the Region's Assets on Online Review Sites		Short	\$ \$ \$
5 Grants for Business Operations and Facade Improvements		Medium	\$ \$ \$
6 Customer Service Training		Medium	\$ \$ \$
7 Create a training and education program for municipality tourism directors/ coordinators		Medium	\$ \$ \$
8 Create a data co-operative for tourism assets		Short	\$ \$ \$

Recommendations Strategy Matrix

Island-Wide Recommendations (Continued)

Budget: \$ \$ \$ (Under \$50k), \$ \$ \$ (\$50k - \$200k), \$ \$ \$ (\$200k +)

Timeframe: **Short** (Less than 5 years), **Medium** (5-10 years), **Long Term** (10+ years)

Project	Category	Timeframe	Budget
9 Entrance Fees for Sustainable Asset Management, Employment, and Improvements		Medium	\$ \$ \$
10 Shared Services		Long	\$ \$ \$
11 Fiscal-Sponsorship for 501(c)(3) Status		Long	\$ \$ \$
12 Technological Tools to Enable Sales of Products and Entry Fees		Long	\$ \$ \$
13 Electrical Services		Long	\$ \$ \$
14 Waste Management		Long	\$ \$ \$
15 Water Quality		Long	\$ \$ \$




Recommendations

Arecibo/Camuy

1

Public Realm Investments in the Urban Center of Arecibo

Category	 Place-Based Asset Enhancement
Origin	Destination Planning Team
Location	Urban Center of Arecibo (Plaza de Recreo, Calle Gonzalo Marín, and urban riverfront)
Budget	<p>High (\$200,000+)</p> <p>Most of the strategies included in this project are eligible for Community Development Block Grant funding from the US Department of Housing and Urban Development, either directly or through the State government. CDBG Funds are flexible, available, and designed to meet community needs and often prioritize urban center revitalization.</p>
Timeframe	<p>Short Term (Less than 5 years)</p> <p>Soap and water strategies, pilot placemaking/ public space project, interim murals on abandoned/vacant buildings, wayfinding/ signage system.</p> <p>Medium Term (5-10 years)</p> <p>Rehabilitate/ restore historic properties, Streetscape Improvements, Permanent waterfront public space</p>
Risk	Additional engagement efforts are needed to develop a shared vision for the area and foster partnerships between public officials, local business owners, and community members. Collaborations and mutual support among these stakeholders are essential.
Key Performance Indicators	<ul style="list-style-type: none"> Annual no. of pedestrians on Calle Gonzalo Marín, Calle Ariosto Cruz (via pedestrian counter) Annual no. of events held in new public space Total no. of murals created



Public plaza in urban center of Arecibo and buildings along Calle Gonzalo Marín. Source: FPR



Public space and parking area on the riverfront in Arecibo.
Source: Streetsense.



View down Calle de Gonzalo Marín towards the riverfront.
Source: Streetsense

Action Items

Across the world, the revitalization of downtowns or urban centers has gained significant momentum in the last few decades as consumers increasingly demand walkable, vibrant places in which to live, work, and travel. In Arecibo, although small neighborhood-serving and convenience goods stores have closed due to competition from national chain stores outside the urban center, a grassroots revitalization movement has taken shape to attract new investment, off-island consumers and cultural activity on Calle Gonzalo Marín. This work has been led by a few business owners and cultural promoters and has evolved into a close-knit group of local artists, business owners, and community groups such as Arecibo 1515 and Arte 360.

Appearance matters. To build on the momentum in recent years, the following public realm improvements and redevelopment strategies should be undertaken on a pilot street or node (Calle Gonzalo Marín and the urban riverfront along Calle Ariosto Cruz) where an existing cluster of tourism-supporting businesses has begun to develop. These investments will improve the customer experience and perception of safety that set the stage for additional economic activity to the Arecibo urban center and serves as a model for enhancements in other sections:

- **Execute soap and water strategies**— painting and cleaning of occupied and vacant buildings around the Plaza and along Calle Gonzalo Marín
- **Implement streetscape improvements**

on Calle Gonzalo Marín, including sidewalk enhancements, landscaping, and lighting strategies

- **Explore “Demolition by Neglect” Ordinance**
- **Rehabilitate/ restore historic properties** along Calle Gonzalo Marín
- **Rehabilitate and reconstruct a new riverfront public space** that is rooted in sustainability and resiliency as core principles. An emphasis on permeable surfaces to aid in flood mitigation, as well as improved connectivity to the waterfront for boaters should be considered as part of the design.
- **Create a self-guided cultural wayfinding/ signage system** in the urban center (which includes historic markers).

Process

- **Execute soap and water strategies**

There are a number of environmental design strategies and basic cleaning programs that can be undertaken by the Municipality and local stakeholders in order to improve the street and sidewalk experience on Calle Gonzalo Marín and Calle Ariosto Cruz. First, power washing building façades and sidewalks can dramatically improve the appearance of block faces along a commercial corridor. Doing so enhances the overall feeling of security for customers, employees, and residents in the area.

Secondly, daily street-level cleaning operations (sweeping, emptying trash, power washing, etc.) will greatly benefit all pedestrians in the area and should

be conducted in cooperation with local merchants to minimize disruption to their businesses.

- **Implement streetscape improvements on Calle Gonzalo Marín**

In order to reimagine the streetscape along Calle Gonzalo Marín and Calle Ariosto Cruz, the Municipality will need to hire planning and placemaking consultants to create a new streetscape concept and design plan. This process should include an extensive public outreach and engagement component to ensure buy-in from business owners, property owners, and the cultural institutions on the new vision and plan for the street.

Urban design analysis and assessment of existing conditions of the sidewalks, streets, and overall public realm will need to be conducted before recommendations can be made around alternative surface treatments, ADA accessibility of the sidewalk and adjacent buildings if feasible, Al fresco dining layouts, crosswalk and curb enhancements, decorative lighting, street tree and landscaping including options for irrigation, and treatment of sidewalk furniture and amenities —sandwich board signs, benches, trash, and recycling receptacles, etc.

Following the creation of a streetscape concept plan, design plan, and phasing plan, transportation engineers will need to be engaged to evaluate existing and projected traffic conditions related to the streets in La Puntilla to determine any alternatives for the streets' configuration or modifications. With cost estimates and specifications, the Municipality may then bid for construction

and implement streetscape improvements as recommended.

- **Rehabilitate/ restore historic properties along Calle Gonzalo Marín**

To rehabilitate or restore vacant historic properties, the Municipality, property owners, and local community members will need to take the following combination of interim and long-term steps.

In the near term, the Municipality should restore funding to the mural program it supported a few years ago that has led to the strong presence of murals on building façades. The murals should be well-lit by decorative lighting if located along alleys and dark corners and should be changed seasonally to create a district-wide attraction for locals and visitors.

In the long term, the Municipality should consider a demolition by neglect ordinance. This process allows a building to deteriorate to the point where demolition is necessary to protect public health and safety, and allows the Municipality to acquire properties that have fallen into a significant state of disrepair. Typically, a notice is provided to property owners of the need to make repairs. Following that, if no action is taken by the property owner, the Municipality would file a demolition by neglect lawsuit to force the owner to repair and restore the building.

- **Create a new riverfront public space in the urban center of Arecibo**

As the businesses along Calle Gonzalo Marín and near the riverfront continue to grow their

brand and destination, an iconic and flexible public space by the river will be critical to expanding dining operations outdoors and hosting complimentary recreation activities (e.g., fishing/boating) and entertainment/arts events. At this time, the public space adjacent to the river, El Fuerte, is not well-designed for outdoor dining and is separated by vehicular flow and parked vehicles from the storefronts along Calle Ariosto Cruz.

To re-envision the public realm of the riverfront, a placemaking plan will need to be created that includes creative design approaches to grow the economy of the area, maintain and incorporate flood mitigation and resiliency of the riverfront, promotes environmental sustainability and protection of natural resources, offer creative opportunities for outdoor vending, and create a memorable place for visitors and flexible space for businesses. Pilot projects may be implemented and tested in the interim to verify community needs and preferences.

The long-term maintenance of this space should include active programming and activations that may be funded and organized through local organizations receiving funding from the Island-wide recommendation "Establish a Public Activation Program".

- **Create a self-guided cultural wayfinding/ signage system in the urban center**

Downtown and urban centers can be difficult to navigate for new visitors. Therefore, it is more important here than anywhere else that municipalities provide elements that help reduce stress on visitors who may be lost or disorientated. In addition, wayfinding

and signage can help reinforces a brand for the area. As such, it is important that the municipality of Arecibo enlists the support of a wayfinding/signage consultant to design a comprehensive set of signs that provide directional, identification (historic markers), and informational signs.

The design of the comprehensive set of signage must also be integrated with mobile wayfinding tools in the form of downtown websites and online directories so that potential customers and visitors are able to explore their downtown shopping, dining, and arts/cultural activity options ahead of time and plan their visits accordingly. A QR code system should also be used on informational/identification signs to enable visitors to take self-guided walking tours with their smart phones, including gastronomic, mural, or historic tours.

COVID-19 Recovery

COVID-19 has heightened the importance of public spaces for local communities and businesses. During the pandemic, restaurants and retailers around the world needed to find ways to operate within occupancy restrictions and social distancing guidelines and as a result many used the outdoor public realm to either display merchandise, market the business, or serve customers.

As such, it will be critical to improve the public realm in Arecibo urban center so that existing businesses have the flexibility in case of future disaster events to expand their offerings beyond the four walls of their storefronts.

Diagnostic: Why Is This Project Important?

A business environment assessment of the urban center found a growing node of dining and cultural anchors along Calle Gonzalo Marín and near the Arecibo urban riverfront. Many of the businesses here have cooperated on other efforts, such as the annual arts event SazonArte and monthly street event Arte 360. This burgeoning section of the urban center is an asset in itself and should be built upon through physical improvements in the public realm.

At this time, the node faces critical challenges in the built environment —buildings, sidewalks, and public spaces. There is insufficient sidewalk space for pedestrian activity, limited pedestrian-scale lighting at night, cleanliness issues, and poorly maintained private property facing the street, deterring longer dwell times in the urban center.

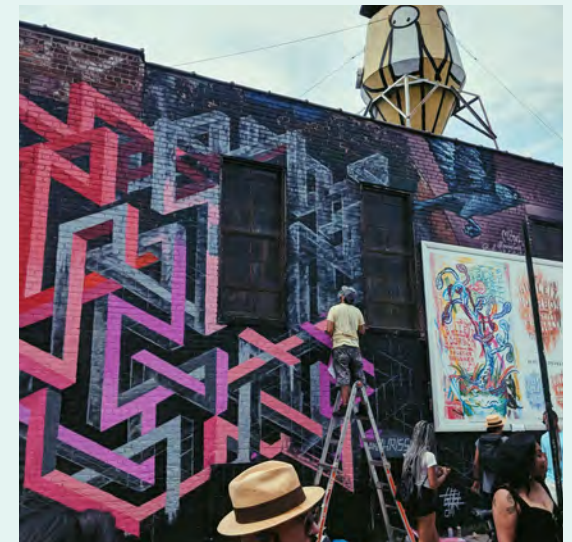
Partners & Resources

The process of downtown revitalization requires a high degree of cooperation. As such, a combination of public, private, and non-profit sector support will be critical. Private sector partners that will be critical to this effort include the following businesses, among others: La Buena Vida, Poke Sí, Patriarca, Amapola, and Callejón del Beso, and new businesses that have recently opened in the urban center.

In the non-profit and public sectors, the Municipality (Economic Development Department), arts organization Arecibo 1515 and Arte 360, and the Chamber of Commerce will be key partners.



Power washing public spaces is critical to maintaining cleanliness and restoring public confidence in public amenities, especially in a post COVID world. Source: Shutterstock



Live mural art events turn blank building facades into live canvasses and attract visitors from around the world. Source: Streetsense

Case Study or Best Practice

Soap and Water Strategy: Downtown San Diego, for example, carries out power washing monthly with support of the Storm Water Department of the City of San Diego and local Business Improvement District. Most of the power washing is accomplished between 2am and 6am, or during off-peak shopping hours. Similarly, in Asheville, North Carolina, an amount is allocated from an overall citywide tax increase to clean up downtown. The city spent about \$45,000 on an initial contract for the power washing.

Interim Mural Art: The neighborhood of Bushwick in Brooklyn NY has become a destination for vibrant street art. The formerly gritty and industrial neighborhood has transformed in recent decades into a mixed-use district that features an open-air gallery. Local artists today host art tours for visitors throughout the neighborhood and every year the local grassroots group, Bushwick Collective, throws a block party event that invites artists local and international to carry out live street art and refresh the walls of the neighborhood.



A re-imagined Calle de Gonzalo Marin featuring a shared street, pedestrian-scale lighting, public seating and green/painted facades.
Source: Streetsense

Pilot Placemaking Project:

In Downtown Fitchburg, a renaissance of new development and cultural evolution is taking place. To complement the wave of new businesses opening up in vacant storefronts and the redevelopment of historic buildings into mixed use facilities, Mass Development and the City of Fitchburg demonstrated through pilot designs a series of interventions in a 1-day event to provide a vision of how art and culture can transform the built environment and a single public space.

Historic Wayfinding/ Signage


System: South Main in Downtown Memphis TN is dotted with historic buildings such as Lorraine Motel and the Civil Rights Museum. To enable self-guided walking tours for visitors in the neighborhood, the local merchants association first inventoried important stories and content from the neighborhood with the support of heritage and historic societies. Then, the association enlisted the support of a technology and signage vendor to digitize the information and design a set of building decals/ stickers with QR codes that could be scanned and used on a self-guided tour.



A re-imagined Arecibo riverfront featuring green infrastructure and flood mitigation design, as well as opportunities for recreational activities and outdoor dining. Source: Streetsense

2

Re-Open Parque Nacional de las Cavernas del Río Camuy (Cavernas del Río Camuy) With Enhanced Visitor Comfort and Safety Measures

Category	 Place-Based Asset Enhancement (Adventure Tourism Supply)
Origin	The re-opening of the caves is a top priority for a range of state and local level organizations and individuals who are committed to revitalizing the tourism economy of the region, including State Representative of the Representative District No.15, FPR, PRTC, the Municipality of Camuy, and business owners. The strategies presented in this plan represent a combination of input from the above-mentioned groups.
Location	Cavernas del Río Camuy (Carr. 129 K. 18.9 Quebrada, 00669, Puerto Rico)
Budget	High (\$200,000+) Costs will cover contractors' hiring to carry out physical improvements, purchase any new equipment and furniture for visitor comfort and safety, and rebrand, market, and program the site in its re-opening phases.
Timeframe	Short Term (Less than 5 years) Given the weight and importance that this asset carries to the region's tourism economy, it is vital that the project be implemented in the shortest time frame possible, with the support of all stakeholders previously mentioned. Re-opening may be appropriately phased so that caves may be opened one at a time depending on maintenance and improvement levels. This will enable gradual reactivation of the tourism economy in the region.



Educational tours conducted at Parque Nacional de las Cavernas del Río Camuy before closures. Source: Flickr

Risk	<p>The long-term success of the park is contingent upon the area's complementary offerings and ability to create an all-rounded experience for visitors. As such, it is important for the park to clearly communicate to the local business community of its re-opening so that they are able to prepare storefronts and products and services for new visitors to the area.</p> <p>In addition, the reopening strategies outlined here should be carried out with the focus on environmental and economic sustainability. With growing numbers of visitors to the park, there is risk of burdening the natural environment. Local conservation advocacy groups should be engaged early on to get feedback on any potential impacts to the natural carrying capacity of the area and to seek advice on strategies moving forward.</p>
Key Performance Indicators	<ul style="list-style-type: none"> • Annual no. of visitors to the park • Total No. of Reviews and Average Review rating of the asset

Action Items

Cavernas del Río Camuy was once a highly rated and major asset in the region. Since its closure following Hurricane Maria, the asset has fallen into some disrepair and needs physical rehabilitation in many parts of the park and in its branding and marketing.

The types of repair and enhancements that need to be made in the park are primarily to elevate visitor comfort and safety, to promote environmental sustainability and protection of natural resources at the asset. This is especially important for an adventure site that hosts risky activities such as caving and hiking.

- Cleaning of vegetation and landscaping.
- Power washing and painting of welcome center/ pavilions.
- Install new safety rails and gates, and benches along the pathways.
- Purchase new safety equipment for rental by visitors, including helmets, ropes, and flashlights.
- Restore electrical system for lighting in caves.
- Fix trolleys that shuttle visitors between the parking and entrance to the caves.
- Create signage at the entrance of caves for self-guided tours.
- Re-design picnic areas and gazebos.

Programming and marketing will be critical to drumming up awareness of the re-launch and re-opening of the caves. There are several activities that may be held ongoing

to diversify the offerings for visitors to the park. For example, visitors who may be less risk-taking may want to engage in other less strenuous activities such as dining and entertainment at the caves.

- Set up a new website for the park that includes key details on operations, the asset, purchasing tickets/booking tours, etc.
- Regular food truck events
- Set up an annual calendar of events that include traditional dance and music programming

In the long term, as demand at the park continues to build, the following strategies should also be undertaken to expand offerings and dwell time of visitors to the park.

- Clear a safe and enjoyable trail/path for visitors to hike in the forest to the caves
- Clean and restore other caves that have collapsed during the Hurricane

Process

Many of the above strategies will require contractors, given the limited staff capacity and expertise on-site. Following the procurement of funding from Federal of State, the park will need to release bids for several opportunities, including power washing, installation of safety rails, gates, benches, and picnic benches.

For programming and events, the park should release a Request For Proposals from arts and culture consultants and vendors who have the expertise to serve as managers for

activations at the park. The programming and events manager will be expected to create and coordinate any tours, performances, and small format community-focused events for the park, as well as advertise and market these programs via the appropriate platforms.

Most importantly, for the re-launch, the park should also hire a consultant to rebrand and create a marketing strategy for the park. The consultant should engage stakeholders to obtain input to develop creative direction and then develop a set of creative assets, including website design, graphic design, photography, videography, key message development, marketing collateral design, exhibit and event materials design, email marketing design, and social media marketing services, among other things.

COVID-19 Recovery

Following a pandemic such as COVID-19, destinations will need to quickly respond to changing traveler preferences around health and safety and to leverage any opportunities that rural environments and outdoor recreation may present in the new normal of tourism. In a recent survey conducted by Destinations Analysts, among domestic travelers expecting to travel in 2020, “most say they will avoid crowded destinations (53%), and many say they will avoid air travel (34%) or cities/urban areas (25%)”, giving the park the perfect timing and opportunity to reopen its doors to visitors who are seeking socially-distanced recreation.

Diagnostic: Why Is This Project Important?

Since the Hurricane, the caves have also

suffered the effects of earthquakes and tremors. Despite this, much of the park is still in adequate condition for reopening to visitors, according to recent engineering inspections.

As the region continues to reel from the economic impact of various natural disasters and the recent pandemic, it is critical that the re-opening of the caves is made the number one priority to drive visitation and spending to the region. According to stakeholders, since the closure of Cavernas del Río Camuy in 2017, dining offerings that complement the asset and other highly rated destinations farther inland have reported a significant decline in visitation.

Partners & Resources

FEMA has been an important resource for the park, covering the payment of employees tasked with basic maintenance of the site. However, according to Representative District of No. 15, more disaster recovery funds are still being awaited from FEMA to fix the electrical problems and lighting in the caves.

For now, the asset lacks clear leadership with several State-level organizations appearing to plan for the reopening of the asset in a variety of directions and priorities. At this time, PRTC is in communication with the superintendent of the National Parks, and the National Parks manager to get the list of materials that are needed to make the improvements before the reopening. PRTC is also allocating some funding for renovations and reopening of certain areas of the park.

Meanwhile, other groups such as DNER and Ana G. Méndez University have also expressed interest to enter into a collaborative agreement to program and manage the site after its re-opening.



*Creative lighting tours in Mammoth Cave National Park.
Source: Wikimedia; Needpix.Com*

Case Study or Best Practice

Mammoth Cave National Park (Kentucky), a UNESCO World Heritage Site and International Biosphere Reserve, is the longest cave system known in the world with more than 400 miles of surveyed passageways covering 52,830 acres of land. Altogether there are over 10 miles of passages made available for tours and rangers are knowledgeable in geological lore and histories of the region and the caves. The National Park Service offers several cave tours to visitors with varying levels of difficulty and lengths and covering different topic interests and audiences—history, geology, family/kids, seniors/disabled groups, and adventure-seekers. The Echo River Spring Trail, for example, is fully ADA-accessible and has touch activated descriptive audio at wayside exhibits.

Of the most creative cave tour offerings is the evening lantern light tour. Currently, there are two kinds of lantern tours with varying degrees of difficulty and distance covered to be inclusive of visitors who are less physically able. The lantern tour in the Great Onyx Cave, the easiest of the options, offers visitor a historical tour

through the caves with kerosene-lit gas lanterns giving visitors a feeling for what original discoverers felt when exploring. The gas lanterns illuminate a series of beautifully sculpted decorative rooms and passageways.

Beyond cave tours, there are also opportunities for visitors to hike on formal trails, go horseback riding, biking, picnicking, backcountry camping, canoeing, and fishing.

During the pandemic, [virtual tours](#) of Mammoth Cave ecosystems were made available through a new digital story map that is free to all exploring how events occurring above ground affects the amazing below ground ecosystems found within the National Park. When the park reopened late summer following closures from the COVID-19 pandemic, restrictions were put in place to encourage social distancing and only one cave tour was made available by reservation, the "Extended Historic Tour". All park operational and safety changes were documented through a video publicized across the site and on Facebook so that visitors could read and understand before entering the caves.

3

Enhance Property Adjacent to Cueva Del Indio Parking Lot Property

Category	 Place-Based Asset Enhancement (Adventure Tourism Supply)
Origin	Destination Planning Team
Location	Cueva del Indio, Arecibo 00612, Puerto Rico
Budget	Medium (\$50,000-\$200,000) Potential sources: FEMA Flood Mitigation Funds.
Timeframe	Short Term (Less than 5 years)
Risk	The land owner that provides access for visitors to Cueva del Indio also owns Pan American Grain and the land under Cristóbal Colón Statue. Engaging the property owner will need to be the first step of implementation to ensure aligned visions for the site and agree on any improvements to the area.
Key Performance Indicators	<ul style="list-style-type: none">• Annual number of visitors to Cueva del Indio (via ticket sales)• Annual number of cars using parking lot (via ticket sales)• Annual number of pedestrians in the public space (via pedestrian counter)• Annual number of events held in the public space• Total No. of Reviews and Average Review rating of Cueva del Indio



View from hike at Cueva del Indio. Source: Streetsense

Action Items

Cueva del Indio is the top-rated coastal asset in the region, with over 1,600 Google reviews. The scenic site boasts multiple rock formations and was once an area where indigenous Taínos groups gathered and left petroglyphs. Today, adventure seekers —young and old— make up a large share of visitors to the site. They often arrive either on foot from nearby Airbnb/short-term rental homes in Barrio Islote or by car. The entrance to the cave is an undeveloped parcel located in a flood hazard zone that is teemed with potential for low-cost but impactful public space activations. The parcel is currently used as a private parking area for visitors to the asset, given that it offers convenient access to a major entry to Cueva del Indio. Although the asset currently does not have a formally designated public entrance, the owner of the private property charges a small entry fee of \$5 per person without offering safety staff on-site.

The best waterfront assets are developed as public destinations —for both locals and visitors— and have succeeded by creating highly accessible and flexible spaces. Often, by creating a place that attracts residents first, tourists seeking authentic local experiences will follow suit. To create a vibrant waterfront asset at the entrance to the cave, a redesign of the land parcel should be undertaken to include a) a new parking lot and b) a flexible public space with performance and dining areas to enable local businesses to showcase local cuisine and art, and to extend visitor dwell time.



Food truck cluster in a parking lot. Source: Shutterstock

Process

- **Re-design the parking lot and create a flexible public space.**

An outdoor public space and parking lot that mitigates flooding in the area is resilient by design and enables the use of the space by various users, which will be important in driving greater visitation to the asset.

The following steps will need to be taken to re-design the parcel:

First, install permeable asphalt pavement for the parking area. The parking lot should include designated drop-off/pick-up zones, bike parking facilities, and priority parking spaces for tour buses to enhance the flow of vehicles on days with a higher visitor traffic. In addition, parking spaces should be clearly demarcated with line paint and traffic lanes within the parking lot to allow easy navigation.

The parking lot's design should also incorporate green infrastructure as an approach to stormwater management, including vegetated swales, increasing landscape to a paved area, planter boxes, etc.

As part of the parking lot reconstruction, a flexible public space should be designed to be able to incorporate creative floor treatments (whether with different materials or paint), lighting, movable furniture, and a stage/ elevated section that might serve as both a performance space and a flood mitigation measure.

However, to implement this strategy the active involvement of the property owner will be required. Development incentives—whether through property tax or ease of permitting requirements—may be used to encourage participation and coordination.

- **Implement streetscape improvements and create sidewalks connecting Cueva del Indio to Cristóbal Colón Statue and other assets**

In order to address pedestrian safety issues and encourage the use of the parking lot and new public space by visitors, adjacent sidewalk improvements must be made to ensure the safety of pedestrians walking between the asset and other nearby vendors, local businesses, and the currently shut Cristóbal Colón Statue (also owned by the same individual). A suite of sidewalk improvements should include i) construction of existing sidewalks on at least one side of the street (ADA sidewalk requirements require a minimum sidewalk width of 4 feet), ii) installation of pedestrian scale-lighting, crosswalks, and other traffic calming measures.

In the short term, quick and inexpensive tactical lighting and traffic calming interventions should be implemented in partnership with local artists and businesses. These low-cost and easily permitted fixtures, including ornamental tree lighting and painted bulb-outs, improve visibility and perception of safety, and can be creatively designed to reflect the area's character

and local neighborhood aesthetics. The installation of ornamental lights is especially beneficial for commercial corridors/clusters and may also be more easily funded through philanthropic grants focused on arts and cultural efforts.

COVID-19 Recovery

Following a pandemic such as COVID-19, destinations will need to quickly respond to changing traveler preferences around health and safety and leverage any opportunities that rural environments and outdoor recreation may present in the new normal of tourism. In a recent survey conducted by Destinations Analysts, among domestic travelers expecting to travel in 2020, “most say they will avoid crowded destinations (53%), and many say they will avoid air travel (34%) or cities/urban areas (25%)”, leaving the potential for Cueva del Indio to adapt and enhance its outdoor coastal assets to enable socially-distanced adventure recreation.

Diagnostic: Why Is This Project Important?

Without on-street parking spaces, vehicular parking in the area is limited to private parking areas such as the lot managed by the owner of Cueva del Indio and other smaller restaurants. As such, the existing network of streets and parking facilities means assets remain physically isolated from one another, and there is limited opportunity for cross-visitation by tourists.

Partners & Resources

- Property owners
- Local business owners
- State and municipal departments of transportation and public works
- Local arts organizations seeking space for outdoor performances and entertainment venues, including Cine Semillero and Guamanique

Case Study or Best Practice

The Tulum Beach Strip is a pedestrian- and bike-friendly commercial street that runs the length of the beach and leads visitors to the main access of the Sian Ka'an biosphere, a major natural asset. While some street sections have newly-built sidewalks, others are fronted by storefronts that are lively and well-activated, encouraging pedestrians and cyclists to dwell in the area and cross-shop between businesses on the strip.



Tulum beach strip, Mexico. Source: *TheRivieraMayaTimes.Com*

4

Support expansion of Finca Pajuil

Category	 Place-Based Asset Enhancement
Origin	Nido Cultural (Applicant: Finca Pajuil)
Location	Carretera #490 KM 4 Barrio Pajuil, Hatillo (18.430566, -66.782327)
Budget	Low (<\$50,000) The project is now advanced and will only require limited funding for minor cosmetic renovation work and construction on the farm.
Timeframe	Short Term (Less than 5 years)
Risk	Property ownership currently still lies with the Land Authority of PR. The creator and founder of Finca Pajuil is still in talks to purchase the land directly.
Key Performance Indicators	<ul style="list-style-type: none"> • Annual no. of visitors to Finca Pajuil • No. of community workshops and events • No. of reservation nights • Total No. of Reviews and Average Review rating of Finca Pajuil



The founders and volunteers of Finca Pajuil lead the management and maintenance of the farm. Source: Finca Pajuil (Facebook)



Action Items

Finca Pajuil, a former sugarcane plantation at the turn of the century and then a pineapple farm, is a historically rich site that has now been carefully preserved as an agro-tourism asset focused on Ayurveda and Permaculture practices. The asset currently hosts a variety of events ranging from weekend retreats to overnight campouts as well as workshops for individuals and groups alike.

As the asset expands its offerings to visitors, the site is also being improved and renovated to offer more rooms for overnight visitors and more comfortable educational spaces. This expansion project includes the complete construction of the farm to expand ayurvedic and agro-tourism experience and completion of a glamping site and site wayfinding/signage.

Process

In order to complete the improvements and renovations on the farm, a few maintenance details must be performed. The actions needed range from paint jobs and fence building to finishing touches to the outdoor kitchen and shower that the team at Finca Pajuil has been building for the glamping area.

In addition, the team is looking to design and install a comprehensive set of wayfinding/signage to provide directional visuals and site information to the visitor (including educational signs on local flora and fauna), as well as to install a solar panel that was donated to the farm. The solar system is critical to

ensure the farm is energy self-sufficient.

For the new on-site lodging facilities, Finca Pajuil plans to finish up the details on the glamping spaces and to launch a robust advertising and digital marketing campaign for all the entire assets, its products and experiential services (including workshops and lodging facilities). With the new lodging on-site and various other improvements to the farm, the asset should form close alliances with other agro-tourism assets in nearby Barceloneta-Manati to cross-pollinate visitors and experiences.

COVID-19 Recovery

The expansive space that Finca Pajuil has on-site means that visitors can easily find ways to recreate outdoors in a socially distanced manner. Furthermore, following a stressful pandemic and public health crisis, travelers may consider restorative trips to improve overall health and wellness.

Diagnostic: Why Is This Project Important?

Finca Pajuil has been offering agro-tourism experiences since 2013 and has evolved over the years to continuously meet changing consumer preferences. Today the eco-friendly lodging site is almost completely self-sustaining in terms of energy, waste, water, and food.

While its health and wellness offering appeals to those traveling for restorative experiences (a market that, according to Global Wellness Institute, grew at a rate of 6.5% annually



An old building at Finca Pajuil has been restored to house guests on weekend retreats. Source: Finca Pajuil (Facebook)

from 2015-2017), the farm has also risen as a voluntourism asset. After the Hurricane, tourists that visited the region were found to be mostly looking to help restore the farm/Island. Finca Pajuil has benefited from this movement and is continuing to leverage its position to appeal to both the conscious traveler and volunteer groups.

Partners & Resources

Finca Pajuil Founder Jennifer Marie García Mathews has been celebrated for her business success by Guayacan's EnterPRize competition in the category of 'best new venture and woman-led business'. Her all-female team has also been critical to the success of the farm to-date.

Presently, Finca Pajuil is working closely with Sierra Club and FarmAid who both provided financial support so that the asset can continue its educational efforts and focus on food sovereignty.



Case Study or Best Practice

According to Nido Cultural participants from Finca Pajuil, this project is heavily inspired by Anjali School of Ayurveda in Kannur, Kerala which provides a similar all-rounded experience for the visitor customer. Although the Anjali School of Ayurveda does not have on-site lodging options, the School has partnered up with local lodging spots to offer different types of experiences to its users, from student dorm-like and hostel lodging to more upscale hotels.



Holistic outdoor accommodation inspiration. Source: Espen Bierud (Unsplash)

5

Establish A Formal Waterfront Merchants' Association

Category	 Organizational Capacity
Origin	Destination Planning Team
Location	Barrio Islote, Arecibo
Budget	<p>Low (<\$50,000)</p> <p>An initial grant from philanthropic foundations or from the Municipality may be needed to cover initial capital costs such as a digital subscription service to establish a digital hub for sharing resources and communications amongst members, as well as any initial pilot projects. In particular, the association should work closely with the Municipality to align its work with any goals/vision for Community Development Block Grant (CDBG) funding from the US Department of Housing and Urban Development, either directly or through the State government. CDBG Funds are flexible, available, and designed to meet community needs.</p> <p>More recently, merchants' associations have also turned to crowdsourcing funds facilitated through on-line third-party platforms that involve accepting investments from a wide network of smaller donors.</p> <p>As the coalition grows and formalizes, however, nominal membership fees may be collected annually to cover costs of maintaining operations of the group.</p>

Crowdsourcing Platforms:



Unlike the other platforms, Kiva crowdsources 0% interest loans (in increments of \$25 or more) to small business owners who could not otherwise access traditional loans, which are contingent on preexisting capital. These loans will be repaid by the recipient and then used by lenders to fund new loans, donate, or withdraw.



Smaller targets that may be easily met as the platform operates on an all-or-nothing model. However, if your project is successfully funded, Kickstarter collects a 5% fee and payment processing fees (between 3-5%).



Unlike Kickstarter, Patronicity allows partial funding so that if the goal is not reached, funds can still be disbursed towards the project. Rolling funds distribution is allowed before the campaign ends. In addition to enabling crowdfunding, Patronicity provides program management and individual project coaching to each campaign in a given program. Fees have also been waived for non-matched crowdfunding campaigns that launch prior to May 15th.



Most effective for short-term fundraising (1-2 months) as the platform operates on a subscription service at \$179 per month. Donors may also be given the choice of Equity (\$50k–\$10m funding goal) or Rewards (raise funds from the public by selling products, pre-orders, or merchandise & services).



In addition to having a 0% platform fee and providing donor protection guaranteed, GoFundMe has also created a Small Business Relief Initiative to help small businesses that have been affected by the COVID-19 pandemic and empower their communities to rally behind them. As part of the Small Business Relief Initiative, GoFundMe, Intuit QuickBooks, Yelp, GoDaddy, and Bill.com have each donated to the Small Business Relief Fund, which will issue \$500 matching grants to qualifying businesses that raise at least \$500 on GoFundMe.

Timeframe	<p>Short Term (Less than 5 years)</p> <p>This project should be implemented quickly to provide recovery support to businesses in Barrio Islote following the pandemic.</p>
Risk	<p>As recovery from the pandemic wanes, member participation may also decline. Active marketing and communications efforts must be led by members of the association to keep the momentum going. Regularly recognizing and celebrating the efforts of individual members through member spotlights/ features may also serve as an incentive for members to continue supporting the coalition in its efforts.</p>
Key Performance Indicators	<ul style="list-style-type: none"> • Total no. of members • Annual new member sign-up • Attendance rate at member meetings/sessions

Action Items

Merchants' associations are important organizational structures that serve to bring together a set of business owners within unique geography to define and execute on a set of aligned priorities and goals.

These organizations are typically membership-based and can start small with a handful of members before growing into a more established and formal organization with strategic plans and member services. Located along the Atlantic coast, Barrio Islote has a strong growing cluster of waterfront businesses that are sharing quality Puerto Rican cuisine and leveraging scenic views to drive visitor spending in Arecibo. By forming

a merchants' association, these individual restaurants and business owners will be able to create a platform to regularly share resources, knowledge, and information—especially during disaster events.

Process

- First, one or two founding members should come together to organize regular meetings to discuss early challenges and opportunities in the area that may help form key goals and missions of the merchants association. Founding members should have strong existing relationships with other business owners in the area to drum up support for the organization and rally any initial funding and resources.



Source: Pixabay

- Once a regular interval of meetings has been established by a core group of members, the association should develop a membership database (including basic information about the member and his/her business) that should provide a template for any communications and sharing of resources. This may be done through a number of platforms – WhatsApp, e-mail (regular newsletters), Facebook Private group, Slack, etc.
- As a group, the association should begin to assess current business conditions and services and track these over time in order to craft a strategic plan for the area.
- With a plan in place, the organization may want to formally establish as a non-profit and begin collecting membership fees or applying to grant funding to provide training and support in digital marketing, supply chain, sanitation/ recycling, emergency preparedness, etc.

COVID-19 Recovery

According to a survey of PR businesses in April 2020 by Colmena66, a program run by the Puerto Rico Science, Technology and Research Trust, about 85% of the businesses surveyed did not have a contingency fund, and 59% will not be able to operate beyond one month with their available capital. At a time where a range of difficulties have arisen for small businesses in Arecibo, especially ones reliant on the visitor economy, it is important to create platforms for continued communication and sharing of information and resources so that businesses

can emerge stronger following disaster events with the support of their peers.

Diagnostic: Why Is This Project Important?

According to the FPR Field Team members who conducted outreach to local business owners, many businesses reported that despite suffering damage during the Hurricane, they still did not have an emergency preparedness plan. The risk of not having an emergency preparedness plan is heightened during a disaster event when businesses do not have strong relationships with others in their community or a constant means of communication to share information and knowledge to overcome challenges in the industry.

Establishing a platform for organizing/ convening ahead of another catastrophic event will serve to build a resilient network of businesses in the region that are constantly in communication, aligned in vision and priorities, and therefore willing and ready to support one another in the case of an emergency.

Today, the collaborative programs and sessions held by such coalitions may also be safely conducted virtually through video conferencing tools such as Zoom and Google Hangouts.

Partners & Resources

Founding members are important to establish momentum and provide leadership of a merchants' association. They should also have a strong track record of running a business in the area to serve as mentors to other members.

Case Study or Best Practice

East Harlem Community Alliance and the [116th Street Merchants' Association](#) seek to unify and organize the merchants of East 116th Street. The group has currently gathered support and participation from 14 merchants and continues to accept membership applications. Interested members who have a physical establishment in East Harlem simply have to fill in a [Google form](#) with basic business details. Currently, membership is free; however, the association is heavily sponsored and funded by grants from city agencies.

This project can be replicated in other tourist nodes along the region, either to create new merchant associations or strengthen the existing ones. Both Arecibo and Camuy have multiple business clusters that could benefit from forming alliances. Moreover, local stakeholders in Camuy have expressed the need to support the existing merchant association that currently counts with 135 members and has received federal funding in the past. However, more than 1,000 businesses are paying patents in this municipality that could be participating in this partnership.

6

Establish a Coalition of Adventure Tourism Assets in the North Region

Category	 Organizational Capacity (Adventure Tourism Supply)
Origin	Destination Planning Team
Location	Porta Atlántico (Arecibo, Barceloneta, Camuy, Dorado, Hatillo, Manatí, Toa Alta, Vega Alta, and Vega Baja)
Budget	<p>Low (<\$50,000)</p> <p>An initial grant from a philanthropic foundation focused on tourism and economic development or PRTC may be needed to cover costs such as a subscription service to establish a digital hub for sharing resources and communications, or set up a website, and enlist the support of consultants training fees, etc. However, as the coalition grows and formalizes, nominal membership fees may be collected annually to cover costs of maintaining operations of the group.</p>
Timeframe	Short Term (Less than 5 years)
Risk	As recovery from the pandemic wanes, member participation may also decline. Active marketing and communications efforts must be led by members of the coalition who have the greatest capacity in order to keep momentum going. Regularly recognizing and celebrating the efforts of individual members through member spotlights/features may also serve as incentive for members to continue supporting the coalition in its efforts.
Key Performance Indicators	<ul style="list-style-type: none"> • Total no. of members • Annual new member sign-up • Attendance rate at member training/ info sessions

Action Items

The coalition aims to gather several organizations —small and large, private and public sector— that are currently or planning to be leaders of adventure tourism in the North Region. Given that there is a heavier concentration of major adventure tourism assets in Arecibo and Camuy, the region should lead the coalition formation efforts and extend its activities and membership to various other assets beyond the region.

By banding knowledge, information, and resources together through a shared platform and through regular convenings, members of the coalition can network, build relationships, align tourism priorities, set goals and principles that should be adhered to further a shared mission and achieve the overall success of growing the adventure tourism sector. The concerted approach of the coalition will also enable any advocacy and policy-building efforts that need to happen to grow the sector and advance its agenda.

The types of information and resources that will need to be shared through the coalition include:

- Health and Safety Regulations
- Emergency Preparedness and Recovery
- Asset Branding & Marketing
- Tourism Distributor Networks
- Permitting and Licensing
- Event Planning and Organization

Process

- Convene stakeholders and collect contact information.
- Organize initial meetings and establish regular meeting intervals to determine member roles and responsibilities, set coalition mission, goals, and guiding principles.
- Determine digital hub/platform for sharing resources and regular communication between members (for example, Facebook [Private Group], Slack, or e-mail).
- Establish a formal organization with membership fees to provide training and support in digital marketing and tour/program design to members.
- Create a strategic plan for the coalition to guide future investments and direction of the sector.

COVID-19 Recovery

Like the rest of the hospitality and tourism industry, adventure tourism will be negatively impacted by COVID-19. In the near term, tourism companies will need to pivot their marketing and operations to meet the needs of new consumer preferences around health and safety —e.g., enforcing safe occupancy restrictions for tours, maintaining social distancing within facilities, etc.— and even lean in to domestic or diaspora tourists. The coalition's resource platform will enable stakeholders to share challenges and solutions, troubleshoot, and advocate for resources from the State and other philanthropic entities together.

Diagnostic: Why Is This Project Important?

The adventure tourism opportunities within the region include hiking (Cueva Ventana, Cueva del Indio), skydiving (Xtreme Divers and Skydive Puerto Rico), swimming (Cascada la Planta), as well as river and cave tubing within the larger region. Despite these assets and the opportunities to collaborate and cross-promote, at this time, there are no formal partnerships between adventure tourism organizations. While some organizations such as Xtreme Divers and Cueva Ventana make informal guest referrals between assets, there are no partnerships in marketing or strategies to align the growth of the sector as a whole.

Partners & Resources


- Funding and Technical Assistance Partners: PRTC, Foundation for Puerto Rico
- Founding members can be well established adventure assets such as: Xtreme Divers, National Science Foundation, Cavernas del Río Camuy, Cueva Ventana, Cambalache Forest

Case Study or Best Practice

British Columbia Adventure Tourism Coalition is a group of 19 adventure-tourism organizations launched in 2016 to give a wide array of industry stakeholders a unified voice. The Coalition has gone on to create a strategic plan for which it is advocating for resources and funding from State and National agencies, including the Ministry of Forests, Lands, Natural Resource Operations and Rural Development.

7

Improve accessibility and connectivity between Playa Peñón Brusi and Playa Peñón Amador

Category	 Access and Mobility
Origin	State Representative of the Representative District No. 15
Location	Calle Amador Brall/PR-485
Budget	High (\$200,000+) The installation of lighting along the pathway and designing and constructing a parking lot will constitute a large share of the budget for this project —especially if solar-powered and climate-resistant options are considered to ensure the sustainability of the infrastructure. Meanwhile, public art murals and benches/furniture can be low-cost and creative.
Timeframe	Short (Less than 5 years) Given that the pathway has already been built between the two assets, furnishing it with amenities will not take a significant amount of time. Furthermore, in early 2020, State Representative of the Representative District No. 15 had already taken steps toward bidding for lighting installation.



Risk	<p>Located in a flood zone with velocity hazard, the beach is at risk to major flooding and coastal erosion. Any further improvements made in the area will need to be designed with environmental impact considerations and the support of coastal engineers to ensure they are contextual to the coastline. This may include using materials that are highly permeable to reduce flooding or using movable furniture/amenities that can quickly be removed in the event of a natural disaster. Native landscaping should also be incorporated, as needed.</p> <p>In addition, stakeholders have shared that better communication will need to be established with the owner of the pescadería in Playa Peñón Amador as the business currently lacks consistent operating hours affecting overall vibrancy of the asset. The Villa Pesquera administration also does not currently permit the establishment of other businesses in the area. The success of the project will lean on municipality control through purchase of land or business regulations.</p>
Key Performance Indicators	<ul style="list-style-type: none"> • No. of pathway users (via pedestrian counter) • Total No. of Reviews and Average Review rating of the assets



Source: Streetsense

Action Items

Although small in size, Playa Peñón Brusi and Playa Peñón Amador are both popular beaches amongst locals, especially for food and entertainment. To enhance both assets and create better waterfront connections between the two, the following strategies aim to use public art, lighting, and public space design to increase vibrancy and safety in the area:

- **Improve lighting and activate pedestrian walkway near the waterfront**

The walkway between the two assets, also known as paseo lineal, was recently constructed and remains in good condition. However, it is currently underutilized since it lacks lighting at night (when most of the visitors arrive by chinchorro buses) and creative activation that encourages the pedestrian to use the walkway. As such, sustainable pathway lighting (permanent and decorative) should be designed and installed along the path, along with small areas of rest and/or activation. Public art elements, including sculptures or murals, and seating and shade/landscaping should also be used along the pathway. In addition, wayfinding/ signage should be installed along the path to guide visitors between the assets.

- **Improve parking and dock for fishing activity and create a seasonal outdoor market**

The dock at Playa Peñón Amador is popular among local fishing enthusiasts and sees regular use by local visitors. In recent

years, local government has planned for improvements in the area to continue driving visitation, including adding safety rails and repainting the dock (currently in progress). Building upon these efforts, a number of other strategies should be considered to improve convenience, safety, and comfort for visitors, including clearing a parking lot with defined parking spaces, designating an area for the set-up of seasonal market vendors, and installing lighting (permanent and decorative), and bike parking spaces to maximize the overall efficiency of space. In addition, a gateway sign or public art element that calls attention to the area from the roadway will be critical to attracting visitors driving on the 485.

Process

- The above improvements should be collectively planned and designed to ensure cohesiveness of design and construction. This visioning and beach masterplan design should be conducted by a team of urban design, architecture, and engineering consultants with experience programming and planning coastal assets.
- Stakeholder outreach and engagement, and field survey and topographic assessments should be a critical first step in the consultant's scope as the plan and design must be responsive to the local community's needs and environmental constraints.
- Simultaneous to the planning and

development of detailed plans, specifications, and estimates, the Municipality will need to institute a vendor permit program for the newly designed vendor spaces.

COVID-19 Recovery

Fortunately, the businesses here rely heavily on chinchorro buses and local visitors to drive visitation and sales. Following the pandemic, island visitors will be the first segment of customers to return to the market and they will likely be seeking outdoor dining spaces that enable social distancing such as the ones at Peñón Brusi. Enhancing the assets and connecting the two to build a bigger dining and waterfront destination will be imperative in the new normal of tourism.

Diagnostic: Why Is This Project Important?

Playa Peñón Brusi is an already established dining cluster, popular with locals especially chinchorro groups. Anchored by Ohana, El Caldo and other restaurants, the beach is a unique outdoor dining destination in the region that has a vibrant sense of place and should be leveraged to farther drive off-island visitation to the area —especially amongst travelers seeking authentic Puerto Rican experiences.

Likewise, with Playa Peñón Amador, the traveler seeking a local experience can immerse themselves in local seafood and the popular hobby of fishing by the dock. At this time, however, the asset does not offer more than the dock and will need to be complemented

by other amenities—whether outdoor eateries, seating areas or hobby fishing tours/ experiences.

Partners & Resources

- State Representative of the Representative District No. 15
- Municipality of Camuy
- Villa Pesquera and local businesses



Dory Fleet. Source: Orange County Register



Montagu Fish Market. Source: Daniel Wolf (Flickr)



Iconic entrance to Dory Fleet. Source: Ken Jones Fishing

Case Study or Best Practice

Newport Dory Fishing Fleet Market (Newport, CA)

The Dory Fishing Fleet and Market is a historic beachside fishing cooperative open 5 days a week. It is popular amongst local customers seeking fresh seafood for cooking and amongst visitors for an authentic market feel.

Montagu Fish Market (Nassau, Bahamas)

The Montagu Fish Market is an off-the-beaten historic asset where vendors sell freshly caught seafood at designated market stands. The stands are open-air allowing for easy sanitation/cleaning.



Recommendations

North Region/ Porta Atlántico

1

Build on the Existing Brand and Marketing Efforts of the North Region

Category	 Marketing, Events and Promotion (Agro-Culture Demand)
Origin	Destination Planning Team
Location	Porta Atlántico Municipalities (Arecibo, Barceloneta, Camuy, Dorado, Hatillo, Manatí, Toa Alta, Vega Alta, and Vega Baja)
Budget	Medium (\$50,000-\$200,000) Costs may cover consultant fees for the creation of the plan and production of conceptual marketing collateral. Execution of the plan and any marketing/advertising strategies adopted from the plan will incur additional costs that will be estimated by the consultant through the strategic planning process.
Timeframe	Short Term (Less than 5 years) This project will need to be established immediately to ensure a COVID-19-responsive brand.



Finca Espiral Hatillo. Source: Backpacking PR

Action Items

Establishing a strong destination brand is a key element of overall tourism marketing for the North Region. Given that visitors don't distinguish between municipality boundaries when they visit a destination and often seek a comprehensive set of assets to visit and fulfill an itinerary, it is important to consider a brand for all of the North/ Porta Atlántico region rather than just the four municipalities (Arecibo/Camuy and Barceloneta/Manatí) that are involved in the Destination Planning process.

Discover Puerto Rico has executed this effort across many of its marketing platforms in which it identifies the North as a region to discover "caves, beautiful beaches, and fine resorts". While this aligns closely with the island's brand as a whole as the "Heart and Soul of the Caribbean" and the "sun-kissed Caribbean paradise" rich in history and culture, exceptional food, pristine beaches, and mountains, there are far more unique pillars in the North that local stakeholders have indicated and that the team's asset analysis identified.

As such, the region's brand pillars should be updated to include other strategic assets and market niches such as agro-tourism, voluntourism, and historic center revitalization that stand to attract a greater variety of customer segments.

Risk

As customer preferences shift and travel patterns change in the near term following COVID-19, the brand for the North Region will also need to consider short- and medium- term goals and values. Over the next two years, as domestic US tourism bounces back more quickly than international travel, the brand developed for the North Region should seek to prioritize island residents and families and be particularly relatable and/or attractive to American visitors from target areas such as NY-NJ, Florida, and Texas.

For example, following the SARS outbreak in 2003, the city of Toronto and the Toronto Transit Commission (TTC) collaborated with a series of advertisements encouraging local residents to engage in tourism in their own city. The campaign consisted of using well-known figures from Toronto to nudge locals to take advantage of the assets, destinations, restaurants, and accommodations in the city. Campaign advertising was focused on local transit systems where millions of local Torontonians could be engaged. In Puerto Rico, the transit system may not be as popularly used so local radio, TV, newspapers (or other popular local media and regional events) should be used instead to advertise the new brand for the region to encourage domestic tourism.

In addition, the Coalition focused its post-SARS marketing and advertising efforts on key areas, including promoting it as a safe destination and alleviating fears of travelers; organizing familiarization trips and site tours; and portraying the merits of the city and identifying new markets.

Key Performance Indicators

- Increase in information requests
- Total Number of Day Visitor Trips to the Region Annually
- Day Visitor Spend per person
- Total Number of Tour/ Booking Cancellations

Process

To establish a new brand strategy for the North Region that expands upon current efforts, Discover Puerto Rico and PRTC with support of a team of consultants experienced in working on community branding and marketing, will need to:

- Conduct in-depth research on the region's brand potential, including conducting consumer outreach, brand testing and focus groups.
- Review current brand efforts and existing creative elements.
- Conduct an analysis of competitor marketing strategies.
- Create a strategic plan that includes implementation, management and ongoing promotion of the new brand.
 - Create a brand/logo and other marketing collateral for assets of the North Region, including signage for key assets that form part of the region's tourism routes/itineraries.
 - Create health and safety marketing initiatives.
 - Create a North Region agro-culture and adventure itinerary.
 - Create an ongoing outreach strategy to leverage existing interest and attract new interested visitor parties.
 - Create an integrated communication initiative that considers various channels: Owned, Earned, Shared, Paid Media.

COVID-19 Recovery

As part of the regional branding effort, Discover Puerto Rico and PRTC will need to lean into its role as a community organizer to make sure it also addresses any immediate concerns that stakeholders and businesses who support the destination may have as a result of the pandemic.

The brand strategy must also seek to build an image of the North Region as a safe destination and one prepared for crises or unforeseen events in order to influence visitors' perception of health and safety. Following the pandemic, visitors will expect destinations to have reliable hygiene programs and experiences that allow social distancing.

Diagnostic: Why Is This Project Important?

Based on the asset analysis and stakeholder feedback, the strategic position of the North Region is heavily rooted in its diverse natural landscapes, shopping and entertainment places, rich Puerto Rican history and culture, and most importantly its proximity/convenience to San Juan Metropolitan Area. Furthermore, the region needs to build its appeal to two major types of travelers that, through the island-wide assessment, were determined to be more easily converted to this region, including budget travelers and travelers to national parks.

Suggested Strategic Position for the North Region:

“

Located an hour's drive from two of the Island's major international airports, the North Region is an ideal day-trip destination for visitors staying in San Juan and Porta del Sol. Teemed with diverse natural landscapes —from under-the-radar beaches on the coast of the Atlantic Ocean, to lakes and karst forests, the North Region offers adventure seekers and conscious travelers the opportunity to immerse in agro-tourism and voluntourism opportunities, to take risks and embark on off-the-beaten path journeys, and to enjoy rich Puerto Rican architecture and culture in historic downtown settings.

”

Partners & Resources

Critical to the success of the re-branding of the North Region is the leadership of Discover Puerto Rico and PRTC. Its existing staff capacity, expertise in branding and marketing, and past/ongoing efforts to promote the Island (including 2019 Voy Turisteando campaign

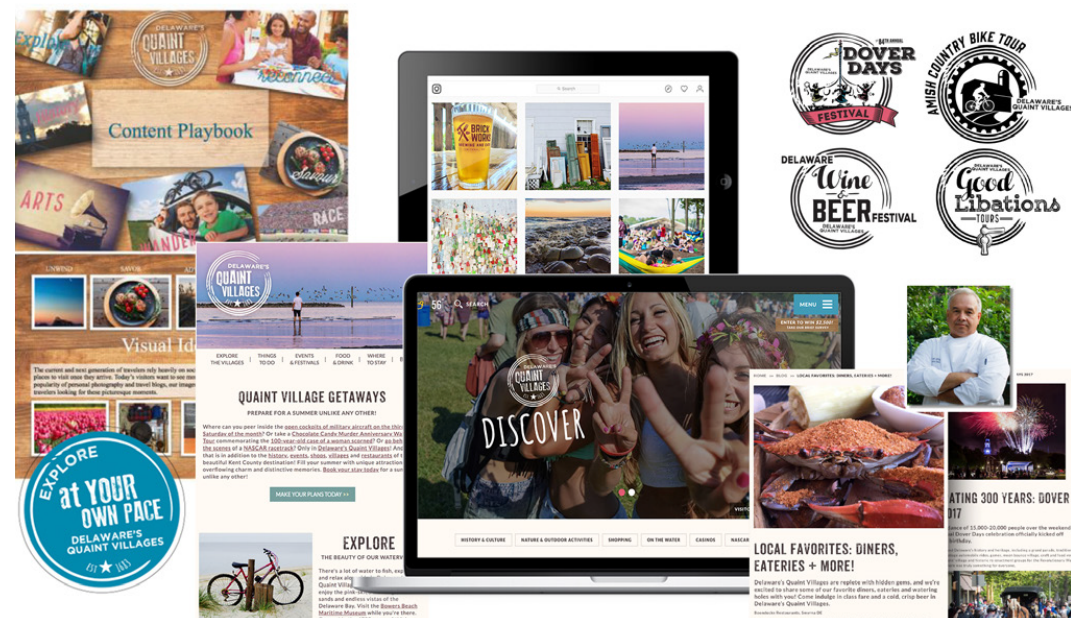
launched by PRTC) as a whole to visitors place the organization in the best position to build and maintain an improved brand for the North Region.

However, in the process, several on-the-ground stakeholders and suppliers must also be engaged to ensure full buy-in and execution, including the participation of Frutos del Guacabo, Para La Naturaleza, Atenas Pineapple, Semila, Xtreme Divers, and Aventura Cueva Ventana among other key assets. For visitors and travelers to have a positive experience and to nurture their loyalty to a destination such as the North Region, the local stakeholders and community must participate in developing the brand as they will help ensure that the brand is delivered and sustained in years to come.

Case Study or Best Practice

Kent County Tourism Corporation is the destination marketing organization for Kent County, Delaware, and its incorporated cities and towns. In its effort to rebrand the county, Kent County engaged consultants experienced in destination marketing to conduct town hall sessions to secure stakeholder input, leverage online listening technology to understand the locale's reputation, and conduct a proprietary and projectable panel study of consumers living within a 250-mile radius of the area.

The in-depth audience research revealed three target audience segments whose interests resonated with Kent County's offerings. Informed by consumers, the consultant then strategically repositioned the area with a compelling new name — [Delaware's Quaint Villages](#) — and tagline, "At Your Own Pace". After being implemented strategically across all communication channels, the evolved brand, including its new website, has resulted in tracked incremental return on marketing investments of \$18 Million, a return of \$47 for every marketing dollar invested, a 19% increase in accommodation tax collections and visitor parties who collectively visited all 20 of its cities, towns, and villages in Kent County.



Marketing collateral created by Streetsense for Kent County Tourism Corporation as part of its rebrand. Source: Streetsense

2

Expand North Region voluntourism/ group travel opportunities

Category	  Organizational Capacity/Place-Based Asset Enhancement
Origin	Destination Planning Team + Community Stakeholders
Location	Semila Farm, Atenas Pineapple, Frutos del Guacabo, Finca Pajuil, Para La Naturaleza, Finca Espiral & other local farms; Villa de la Central Los Caños, Iglesia Metodista De Piedra & other historic churches.
Budget	<p>Low (<\$50,000)</p> <p>Infrastructure is in place at Villa de la Central Los Caños, in addition to the new 'glamping' facilities that were recently erected on-site to expand overnight stay capacity of volunteer groups and other visitors. (Note: Although volunteer groups may be staying at Villa de la Central Los Caños, they may also support volunteer work at various other participating assets including Semila Farm, Atenas Pineapple, Frutos del Guacabo, Finca Pajuil, Para La Naturaleza and Iglesia Metodista De Piedra).</p> <p>Costs will mainly cover administrative time to seek qualifications from partner operators and managers for the site.</p>
Timeframe	Short Term (Less than 5 years)



Facilities at Villa de La Central Los Caños Source: Streetsense

Risk	<p>The most critical risk of this project is finding a volunteer program coordinator that is mission-aligned with local agro-culture and faith-based assets and that is not driven by profit and instead focused on creating safe, affordable, and productive volunteer opportunities for both participants and local assets.</p> <p>At this time Villa de la Central Los Caños can only accommodate overnight stays for a limited group size. There are currently eight villas (each with 3-4 rooms), and an additional set of permanent tents. During peak volunteer seasons (Summer), the demand for accommodation for volunteer group lodging may exceed the Villa's availability. As such, partnerships with local bed-and-breakfasts or boutique lodging assets may need to be established for peak seasons.</p> <p>The agro-culture and faith-based assets are all located a distance away from each other and will therefore require transportation operator partners for groups staying at the Villa to be able to access these sites daily.</p>
Key Performance Indicators	<ul style="list-style-type: none"> • Occupancy rate • No. of group reservations • No. of completed volunteer projects • Total no. of volunteer hours logged at each participating asset



Market display at Villa La Central Los Caños. Source: Streetsense

Action Items

To expand the North Region's voluntourism/ group travel opportunities, a combination of appropriate group accommodation assets and activity sites will need to be enhanced and coordinated. This includes:

- Improving the management and programming of Villa de la Central Los Caños to cater to larger and more frequent group reservations.
- Building robust volunteer programs across each activity site/ agro-culture and faith-based asset.
- Creating an annual calendar/roster of volunteer needs across each activity site/ agro-culture asset.

Process

Villa de la Central Los Caños

- Create a private-public partnership agreement for the management and operations of the Villa, or consider lease agreements to a private operator. To ensure the Villas continue to be competitively maintained according to industry standards and expectations of group travelers, it is important to have operators and property managers with hospitality backgrounds and experience in running large-scale accommodation facilities such as the Villas.
- Enhance reservation systems at Villa and marketing. At this time, reservations are largely accepted only through a

municipality hotline, which is inaccessible and inconvenient for the international traveler and even more so for non-Spanish speaking groups who are unable to clearly communicate by phone with municipal operators. The Villas will need to upgrade its reservation capabilities to an online-based system that can easily be accessed around the country and world, and the Villas will also need to be digitally marketed to group travel operators and non-profit/ mission-based organizations through virtual tours of the facilities.

Semila Farm - Atenas Pineapple - Frutos del Guacabo - Finca Pajuil - Para La Naturaleza - Finca Espiral & Other Local Farms - Iglesia Metodista De Piedra & Other Historic Churches

- Identify volunteer needs and volunteer projects.
- Create year-round volunteer programs.
- Hire/ Train facilitators and/or partner with professional group tour operators.
- Establish a partnership between Villa and volunteer group organizers.



Church volunteer group on an agro-culture site in Latin America. Source: Shutterstock

COVID-19 Recovery

Following the pandemic, volunteer group travel may be slow to start given the high risk of transmission when traveling and engaging in activities within close proximity of others. As such, it will be important for agro-culture and faith-based assets, and the Villas, to incorporate safety standards and market/communicate cleaning/safety efforts to potential group travelers.

For example, volunteer activities conducted outdoors may easily adhere to social distancing guidelines, and the Villas should be conducting comprehensive cleaning and enabling flexible cancellations and self-check-in procedures.

Diagnostic: Why Is This Project Important?

An assessment of national tourism trends found that group travel with a purpose has grown in significance in recent years. In fact, one in four American travelers (27%) reported plans to volunteer on a trip, with Millennials being the segment that is more likely to travel abroad to participate in volunteer activities.

Although Discover Puerto Rico currently works to coordinate group travel with a handful of non-profit and mission-driven organizations in Puerto Rico, many of these existing volunteer group partners are not located in the North Region despite the area's abundant opportunities in agriculture and food system education and cultural and faith-based institutions. This project should serve to complement the existing efforts by

Discover Puerto Rico by expanding group travel and voluntourism in Arecibo/Camuy and Barceloneta/Manatí.

Partners & Resources

- Non-Profit/Mission-driven volunteer organizations
- Municipality of Arecibo
- Instituto de Permacultura de Puerto Rico
- Asset managers: Semila Farm, Atenas Pineapple, Frutos del Guacabo, Finca Pajuil, Para La Naturaleza, Villa de la Central Los Caños, Iglesia Metodista De Piedra, Finca Espiral and Visit Rico



Group participants at Finca Pajuil. Source: Finca Pajuil (Facebook)

Case Study or Best Practice

Miami Beach Loews Hotel, Miami FL


Miami Beach Loews Hotel: City of Miami Beach entered into a public-private partnership with Loews Corp. to build an 800-room, partially bond-financed convention-quality hotel development. The redevelopment agency of the City sold \$21 million of tax-exempt bonds in 1994 to purchase the hotel site, which it leases to Loews for \$500,000 annually (escalating every 10 years). In the agreement, the city is guaranteed 3% of the hotel's net operating revenue for a term of 30 years with four 15-year renewal options. Since completion, the hotel has generated a significant increase in the City's resort tax, convention development tax, and utility tax proceeds.

Finca Pajuil, Hatillo PR

Finca Pajuil currently organizes and welcomes volunteer and art student groups to participate in educational programs and practices in addition to supporting manual labor efforts on the farm. Similarly, Semila Farm has hosted volunteer groups to help with the maintenance of the grounds and to offer basic planting/grafting support given the limited staffing capacity of the organization.

3

Create a Regional Waterfront Resiliency and Restoration Program - La Boca, Barceloneta

Category	 Infrastructure
Origin	Destination Planning Team
Location	Porta Atlántico Municipalities (Arecibo, Barceloneta, Camuy, Dorado, Hatillo, Manatí, Toa Alta, Vega Alta, and Vega Baja)
Budget	High (\$200,000+) Costs may cover administrative fees for municipalities' participation in the program, fees for providing any technical assistance and incentives provided to program applicants. Potential federal funders include FEMA and the US Department of Housing and Urban Development, who helped fund the Road Home blight program in New Orleans following Hurricane Katrina. These funds will likely need to be administered by a national agency.
Timeframe	Medium Term (5-10 years)
Risk	<p>The lack of coordination between municipalities to date may be attributed to the different administrative capacity and resources available, as well as varied leadership priorities. To establish a successful Regional Waterfront Resiliency and Restoration Program, mayors across the North Region and their directors for tourism and environment/natural resources must first come together to align priorities and zoning regulations, set goals and objectives, and maintain transparency about capacity and resources.</p> <p>At this time, there are complex zoning issues across municipalities that will need to be resolved prior to any waterfront rehabilitation and restoration.</p>



Property near La Boca. Source: Streetsense

Key Performance Indicators

- Total area (SF)/ length (miles) of buffer zone established
- No. of properties demolished
- No. of public art murals/ installations implemented (This KPI will be used to measure number of properties along the waterfront that have been improved in the interim prior to demolition or stabilization efforts)

Action Items

One of the key brand pillars and competitive advantages of the North Region/ Porta Atlántico is its under-the-radar beaches. Despite its importance in tourism development for the region, the coastal assets have suffered from and may continue to be at risk to natural disaster events. As such, it is critical for the region's leaders to band together to establish a regional waterfront adaptation, resiliency and restoration program that includes a suite of projects and policies that serve to protect the region's valuable natural resources even as tourism grows and strengthens.

This project serves to reinforce earlier recommendations made by a range of consultants, including Estudios Técnicos, Inc. (2019), to develop regional climate action plans that coordinate efforts and development of programs and policies related to climate adaptation and mitigation across

jurisdictions. This type of concerted regional planning and programming will only serve to strengthen applications to Federal funding.

Process

As previously recommended by Estudios Técnicos, Inc. (2019)¹⁰⁰, there are a number of planning and regulatory tools that should be adopted in the North Region as waterfront adaptation strategies, including:

- Creating design guidelines for properties within flood zones.
- Establishing 'Withdrawals/ Buffer Zones' or zoning and overlapping districts that limit the construction of properties in flood zones.
- Creating living shoreline policies and permits.
- Enabling transfer of credit or development rights.



Property along PR-684 in Barceloneta. Source: Streetsense

¹⁰⁰ Estudio sobre la integración de estrategias para la adaptación y el desarrollo de resiliencia en la planificación de usos de terrenos. Estudios Técnicos, Inc., 2017.

To execute the above efforts, municipalities in the North Region will first need to assess and map properties at risk along the waterfront to determine priority sites and zones, as well as bring together stakeholders (particularly property owners) to ensure consensus-building and visioning for the waterfront. High-risk sites and zones that are identified should then be prioritized for receiving any incentives and technical support to implement any/all of the above tools mentioned, including funding for property demolition and non-structural stabilization strategies, including public art mural on interim abandoned sites.

In addition to the recommendations made by Estudios Técnicos, Inc., the North Region should also leverage its burgeoning arts scene in resiliency efforts by incorporating public art murals at high-risk waterfront sites in the interim as they undergo planning, retrofitting, or redesign as part of the Regional Waterfront Resiliency and Restoration Program. Art can be an important tool in explaining and engaging local residents and visitors on key issues, including climate adaptation and resiliency.

COVID-19 Recovery

Following a pandemic such as COVID-19, destinations will need to quickly respond to changing traveler preferences around health and safety, and leverage any opportunities that rural environments and outdoor recreation may present in the new normal of tourism. In a recent survey conducted by Destinations Analysts, among domestic travelers expecting to travel in 2020, “most say they will avoid crowded destinations (53%) and many say

they will avoid air travel (34%) or cities/urban areas (25%)”, leaving the potential for the North Region to adapt and enhance its outdoor coastal assets to enable socially-distanced recreation.

Diagnostic: Why Is This Project Important?

For destinations to remain competitive and attractive in the long-term, especially to the rising group of conscious travelers, regions will need to go beyond marketing efforts and will need to work closely with local stakeholders to manage destinations sustainably and protect the assets and places that indeed attract visitors in the first place. In particular, popular tourism assets such as the urban riverfront and Bo. Islote in Arecibo, La Boca in Barceloneta, and Playa Los Tubos and Playa Mar Chiquita in Manatí, are each located in special flood hazard areas subject to inundation by the 100-year flood and at risk to perpetual coastline erosion and flooding.

Despite this, there are currently inconsistent efforts across municipalities to prioritize coastal and waterfront restoration and resiliency planning. In Porta Atlántico, the municipalities of Arecibo, Dorado and Vega Alta have individually published mitigation plans. Barceloneta, Hatillo, Toa Alta and Vega Baja are in the process of creating their mitigation plans and have drafts available for the public.

Partners & Resources

- Department of Natural and Environmental Resources
- Office of Emergency Management
- Puerto Rico Climate Change Council
- Municipalities
- Cámara de Desarrollo Económico y Empresarial de Arecibo
- Para La Naturaleza
- Ruta Alterna 681
- P.A.S.E.(Piratas Aliados Sirviendo en la Emergencia)

Case Study or Best Practice

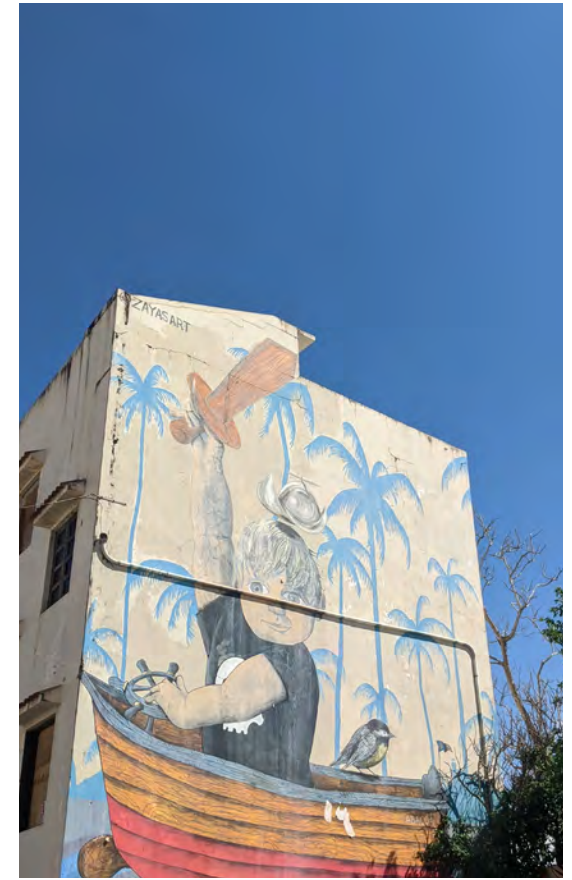
Demolition Program

The original Road Home program in New Orleans provided federal cash grant to property owners affected by Hurricane Katrina to rebuild or sell homes that were severely damaged, or to rehabilitate properties to facilitate elevation in flood prone areas. Administered by the State, the program disbursed over \$9 billion in awards to local residents and property owners. Although the program was later criticized for discriminatory impacts, the program helped fight blight after the Hurricane and may be an important model for the North Region.

Interim Public Art Projects on Abandoned/ Vacant Waterfront Sites

As part of the [Gentilly Resilience District Art Project](#), the Arts Council of New Orleans conducted trainings for local artists interested in getting involved in co-creating public art for public spaces near London Avenue Canal. During Hurricane Katrina, many of the homes in the neighborhood were submerged by more than

six feet of water and are currently undergoing a range of adaptation and resilience efforts. These artist trainings aim to educate artists on environmental resilience, stormwater management, and community history so that they may then develop public art proposals that directly align with the topic. A selection committee consisting of a combination of art, design, and resilience professionals was established to select winning proposals that will each receive grants to be used toward the implementation of the final artwork.



Mural on an abandoned property in the urban center of Arecibo masks a dilapidated building facade. Source: Streetsense

4

Establish a Safe Coast Pilot Program

Category	 Organizational Capacity
Origin	Destination Planning Team
Location	Porta Atlántico Municipalities (Arecibo, Barceloneta, Camuy, Dorado, Hatillo, Manatí, Toa Alta, Vega Alta, and Vega Baja)
Budget	<p>High (\$200,000+)</p> <p>PRTC has, in the past, provided funding for lifeguards under Blue Flag Program efforts. Other ways that funding may be raised include through charges levied on visitors (in tandem with parking fees near beaches) or via visitor donations and local business sponsorships.</p> <p>Costs of the program might include wages and training for lifeguards on duty, beach equipment, and signage production and installation.</p>
Timeframe	Short Term (Less than 5 years)/Ongoing
Risk	A major risk for a lifeguard program is the case of liability. Beachfront property owners, in particular, are only liable for incidents and injuries happening between the shore to the high-tide line. As such, the local government will have to bear liability for any incidents and injuries past the high-tide line.
Key Performance Indicators	<ul style="list-style-type: none"> • Total no. of new signage installed • Total no. of part-time lifeguards hired • Annual no. of reported injuries/ deaths in open water • No. of positive visitor statements on beach safety on crowdsource review sites (e.g., Google and Yelp)



View of Playa Cañay Pesca in Arecibo. Source: Streetsense



Warning sign for strong currents at Playa Mar Chiquita. Source: Streetsense



Safety procedure demonstration provided by employee at Cueva del Indio entrance. Source: Streetsense

Action Items

A safe coast program aims to increase aquatic safety for residents and visitors to North Region's under-the-radar beaches. Despite being less popular when compared with major surf destinations to the west and resort beaches closer to San Juan, the North Region does feature a number of unique coastal assets such as Poza del Obispo in Arecibo and Poza de las Mujeres in Manatí (other major beaches in the North Region include Cueva Del Indio, Playa Mar Chiquita, Playa Los Tubos, Playa La Cueva De Las Golondrinas, and Playa Caza y Pesca) that each offer a mix of passive and active recreation opportunities. However, as with many beaches/ coastal areas of Puerto Rico, these assets may have harsh conditions and pose a danger to uneducated tourists or visitors with disabilities.

To protect beachgoers in the North Region, municipalities will need to make concerted efforts to educate visitors on the hazards present at each major coastal asset through signage, wayfinding, and online safety listings, and offer rescue services during emergency events in the form of lifeguards on-duty.

Process

- Municipalities to convene to identify beach safety priorities and determine joint beach guidelines (with support of advisors from DNER, PRTC, and Puerto Rico Sea Grant).
- Conduct an assessment of ADA-accessibility of key beaches and identify structural improvements required to comply with ADA regulations.
- Contract and design new North Region

Safe Coast signage that aligns with any existing beach signage, including that produced by Para La Naturaleza for Playa La Cueva De Las Golondrinas.

- Select high-risk beaches to benefit from pilot signage and lifeguards, and ADA-compliance improvements.
- Hire and train the first batch of North Region lifeguards who will be rostered across selected high-risk beaches of the region to carry out lifeguard duties for a year. Training for North Region lifeguards must meet national standards determined by the United States Lifesaving Association.
- Assess the success of pilot programs at the end of the first year to determine program modification/expansion.

COVID-19 Recovery

As previously mentioned, coastal assets that offer expansive outdoor spaces will be critical in the immediate post-COVID-19 travel era as travelers seek socially distanced recreation options. Travelers will also be on the lookout for health and safety guidelines across destinations, including at beaches. In the immediate years following the pandemic, beach safety signage created as part of the program may also include 'social distance markers' along the length of beaches.

Diagnostic: Why Is This Project Important?

Physical assessments conducted by the Field Team and Destination Planning Team at a number of key beaches/waterfront attractions in the North Region, including Cueva del Indio, found that many of these assets feature

dangerous terrain and current/ tide conditions that have not been mitigated by clear safety signage or lifeguards on-duty placing many tourists at risk when visiting these assets. In addition to anecdotal information provided to us by the ticketing manager at major asset, Cueva del Indio, around annual reported injuries on-site, a recent study by Sea Grant College¹⁰¹ Program also found that there is one open-water drowning every twelve days in Puerto Rico associated with “rough surf, rip currents, and jagged rocks that are very prominent on many of Puerto Rico’s beaches.”

Safety and security have always been indispensable conditions for travel and tourism. Without active reassurance of safety, visitors may be discouraged from entering a site or repeating a visit.

Partners & Resources

- Department of Natural and Environmental Resources (DNER)
- Municipalities
- Property owners who provide access to the beach, including Para La Naturaleza in Manatí.
- Puerto Rico Sea Grant may be able to provide strategic assistance in setting up the program in the North Region, given its ongoing efforts to implement a lifeguard program on high-risk beaches throughout the island.
- PRTC will be a key partner given their vested interest in ensuring visitor safety, especially following recent natural disaster events and the COVID-19 pandemic.

¹⁰¹ “Strategies for the Implementation of a Lifeguard Program to Mitigate Drowning Rates at Puerto Rican Beaches”. Sponsored by the Puerto Rican Sea Grant, 2015.



Design inspiration of lifeguard towers from beaches around the world. Source: Shutterstock

Case Study or Best Practice

Although the State of Hawaii does not provide lifeguards, it elected to contract with each City and County’s Safety Divisions to place their own lifeguards at key beaches. Each City/ County then determines its own lifeguard schedules and hiring/ training practices; however, all lifeguards must be certified by the Hawaiian Lifeguard Association, and rescue services must be made available throughout the week from 9am-5pm across Hawaii.

The Hawaiian Lifeguard Association established the [Hawaii Beach Safety](https://www.hawaiilifeguard.org/) website that consolidates all information pertaining to aquatic safety within a single portal so that both locals and visitors are able to easily access real-time water conditions online from anywhere so that they are able to make informed trip decisions.



Recommendations

Island-Wide

1

Establish a Public Activation Program

Category	 Marketing, Events and Promotion
Origin	Destination Planning Team
Budget	<p>Medium (\$50,000-\$200,000) - assuming by region</p> <p>Costs may cover local arts partner's administrative staff time to manage application process and administer grants to successful applicants, in addition to grants distributed.</p>
Timeframe	Short Term (Less than 5 years)
Risk	In the early stages of the program, funding may be limited and therefore competitive. As such, fair and transparent selection processes will need to be established to encourage local artists of various backgrounds to bring forward their ideas. Judging criteria should be determined early on to select projects with high potential and existing experience in the field to proof the concept of the grant program.
Key Performance Indicators	<ul style="list-style-type: none"> • Annual participation rate of grant program • Total attendance at activations funded by grant program • Mix of activation types • Media highlights on activation

Action Item

A public activation program provides funding and technical assistance to local arts and culture groups/individuals to create, organize, and maintain art events, installations, and other forms of expression to be enjoyed by the public. For the program to truly respond to the needs of local artists, a grassroots organization with extensive local experience in capacity building and relationships with artists should administer the program within each municipality, with guidance from a nationally recognized institution such as the ICP.

Types of eligible arts programming may include:

- Performance Art (dance, music, theater, etc.)
- Visual Art (painting/ mural, photography, sculpture, ceramics, film screening, lighting installation, etc.)

Typology of spaces to activate:

- Plazas
- Streets
- Parks
- Beaches
- Vacant Lots

Process

- Establish a national grant program for public activation projects.

- Solicit proposals from local artists with the support of property owners.
- Provide grants and event organization training to local artists to hold free screenings and live performances at public spaces.

COVID-19 Recovery

As COVID-19 has heavily impacted the consumers' perception of safety in enclosed venues and large group gatherings, funding guidelines should include priority for projects that offer virtual programming or programming in outdoor spaces that enable social distancing practices amongst event attendees.

Technical support provided to grant applicants should also include technology training to enable local partners to pass on knowledge and skills to local artists and organizations so that they may more easily provide virtual programming alternatives.

Diagnostic: Why Is This Project Important?

Through stakeholder interviews and close coordination with local arts organizations and individual artists who participated in the Nido Cultural process, the Destination Planning Team found a large gap in financial resources and organizational/ administrative training for micro arts organizers in lesser-known regions outside the metropolitan area.

Many local arts and cultural groups that have

not established relationships and connections with larger arts foundations are seeking training and technical resources to formally establish their mission, organization, and work.

Partners & Resources

National Arts Institution disseminating grants:

- Institute of Puerto Rican Culture (ICP)
- National Association of Latino Arts and Cultures (NALAC)
- Flamboyant Arts Fund

Local Arts partner administering grants:

- Example: Arte 360 (Arecibo)



Public art in Mérida, Mexico. Source: Jeremy Martin (Flickr)

Case Study or Best Practice

[The North Carolina Grassroots Arts Program](#) administered by the state's Arts Council provides per capita-based funding for arts programming to counties across the state. Funds are typically awarded to designated and provisional local arts partners to ensure opportunities for residents to experience the arts in each of their communities. Funds may be used up to 50% on general operating support, with the remaining amount to be used to conduct arts programming.

Local governments nominate and approve the local arts partners who manage the grant allotment. To receive funding, all designated local partners must submit a full application every three years (with annual updated applications). A set of operational and programming standards are also set for local partners to meet in order to maintain their designated status. This ensures quality programming year on year and consistent tracking/ evaluation of grant allocations.

2

Small Lodging Financial Fund

Provide additional funding to existing small hotel operators

Category	 Place-Based Asset Enhancement
Origin	Community
Budget	High (\$200,000+)
Timeframe	Medium Term (5-10 years) to Long Term (10+ years) / Ongoing
Risk	High - This will require many willing partners working across many layers of complexity. Thorough inspections of facilities from a structural perspective (buildings, infrastructure) should be completed. Recommend selecting one or two operators as a pilot program to work out details and logistics prior to a full campaign.
Key Performance Indicators	<p>Project-Specific:</p> <ul style="list-style-type: none"> Establishing the Fund (goal should be aggressive as the needs and costs will be high). Successful completion of the application / underwriting process for at least 1-2 hotel operators in a 12-month period. Moving from application to implementation on at least one applicant in a 24-month period. Successful completion of one project within a 36-month period. Once improvements are made, KPIs will include more operational items like increase visitation (occupancy rates), customer feedback, etc. <p>General:</p> <ul style="list-style-type: none"> Increased lodging options for tourists. Increased annual revenue for lodging operators. Increased tax base. New opportunities to expand existing facilities (this could be a growth of the program if robust funding can be made available moving forward).

Action Item

Establish a pilot program to provide capital to existing small hotel operators in order to improve / upgrade their facilities. Funds may be used to purchase/ enhance existing structures and basic amenities expected by visitors, including installation of water heating systems, air conditioning systems, and Wi-Fi.

Process

- FPR should identify partners that can provide capital and strategic planning for this effort.
- Create a 'Hotel Operator Assistance Committee' comprised of individuals with the various expertise needed (financing, construction, hotel operations, marketing, potential funders, etc.). The Committee would work with vetted operators on establishing grants or loans, underwriting criteria, leverage requirements (job creation, establishing a capital reserve account, money invested, etc.).
- A revolving loan fund could be created to ensure the program can continue. Interest rates can be very low, and the loans could be combined with SBA loans for commercial real estate.
- Local and or state agencies' support can occur through existing (or newly created) economic development programs. These programs typically have some leverage requirements, such as job creation, for example.
- Establishing metrics/requirements for performance after improvements are

made is essential. Metrics/requirements should include: keeping an up-to-date capital needs a plan for the facility and establishing a capital reserve fund (which could be seeded under this program as well), among other items deemed essential by the Committee.

Diagnostic: Why Is This Project Important?

Lodging facilities require ongoing capital improvements in order to stay relevant. In many cases, deferred maintenance results in lower occupancies, poor customer experiences, closure, or obsolescence. Many years or decades of unattended issues have resulted in sub-par conditions for some existing hotel facilities in the area. Economic circumstances make it infeasible for many operators to address these items as they have plenty to take care of with the present needs of the facility.

Assisting these operators in developing comprehensive, sustainable capital improvement plans to meet the facility's needs, alongside providing low cost funding options for the implementation of these plans, are the goals of this initiative. Lodging operators with limited capital for improvements, including local paradores and B&B's in the region, would be the primary beneficiaries of this program.

Partners & Resources

- PRTC
- Puerto Rico Hotels and Tourism Association
- Local Financial Institutions
- Instituto de Cultura Puertorriqueña

(Many of these opportunities exist in the historic parts of the municipalities and in certain cases will require historic preservation considerations in the design of renovations / improvements; the ICP is the resource to ensure those considerations are made)

- Local & State government
- Philanthropic Foundations
- Small Business Administration
- Grupo Guayacán



Source: Unsplash

Case Study or Best Practice

The Virginia Tourism Development Financing Program provides gap financing by reallocating a quarterly percentage of state collected sales and use taxes from a certified project to compensate for a shortfall in project funding. The program's purpose is to provide a gap financing mechanism for projects that cannot, otherwise, find 100% funding or lending for a project. Eligible projects must generate state sales and use tax, such as lodging, dining, meeting space rental and catering, and limited, project-specific retail. For more information, visit: www.vatc.org/tdfp/

3

Regional Wayfinding

Establish tourism-oriented directional signs, including highway signage and pedestrian signage

Category	 Access and Mobility
Origin	Destination Planning Team
Budget	<p>Medium (\$50,000-\$200,000)</p> <p>*Costs include Program Administration Costs and Sign Fabrication Costs. In addition, Puerto Rico Department of Transportation and Public Works will also need to devote staff time and resources. The program can be designed to ensure that all administrative and sign fabrication costs are paid for by applicants. Applicants can be charged an administrative fee, sign costs, and an installation fee, estimated at \$500-\$1,000 per sign.</p>
Timeframe	Short Term (Less than 5 years)
Risk	Low - Tourism-oriented directional signage is common and an accepted form of directional signage for visitor destinations in many places.
Key Performance Indicator	<ul style="list-style-type: none"> Total count of new signs directing visitors to local businesses and increase sales and visitation

Action Item

Provide tourism-oriented directional signage (TODS) to qualified tourist-related businesses, services, or activities where income is derived from visitors who do not reside in the immediate area where the business is located. TODS is a formal designation generally accepted by State Highway Agencies.

Process

- Outreach to stakeholders and a convening of partners will be necessary to begin to enlist the appropriate agencies and identify the appropriate resources for this effort. An NGO can encourage participation by committing the initial seed-funding and marketing push for the fundraising campaign.

Diagnostic: Why Is This Project Important?

Much of the directional signage across the island is faded, outdated, or missing, owing in part to the impacts of Hurricane Maria. Furthermore, GPS coordinates are often inaccurate, making it difficult for visitors to find destinations with ease.

Partners & Resources

- Puerto Rico Department of Transportation and Public Works

Case Study or Best Practice

The State of Wisconsin Department of Transportation has established a Tourist Oriented Directional Signage (TODS) Program that offers opportunities for qualifying businesses to have standardized signage along with highway rights of way. Qualifying businesses include businesses whose income is derived from visitors who do not reside in the immediate area. The businesses also cannot have direct access to a state highway and must be located within five miles of the state highway. These businesses pay an administration fee (\$100 per sign) and the cost associated with the sign installation. Typically, these costs come up to approximately \$550.



Sample TOD Sign in Wisconsin. Source: Wisconsin Department of Transportation




Sample TOD Sign in Newfoundland and Labrador (Canada). Source: CBC.Ca

4

Amplify Region's Assets on Online Review Sites

Help businesses claim and manage their online listings

Category	 Business Support
Origin	Community
Budget	Low (<\$50,000)
Timeframe	Short Term (Less than 5 years)
Risk	Low
Key Performance Indicators	<ul style="list-style-type: none"> Total count of small business participants in workshops Total count of assets actively managed on TripAdvisor.

Action Item

Provide training and one-on-one technical assistance to businesses that enable them to claim their business listings on a variety of popular review sites, including TripAdvisor, Google, Facebook, and Yelp.

Become a Google My Business Partner.

Google has developed a new program that provides customized support to agencies that can maintain client business listings on their behalf. Agency partners receive a personalized dashboard that enables them to track and update basic business listing information, including a business' location, hours, and services.

Structured Data Websites. A well-designed website uses "structured data", which refers to the standardized format of providing information on a page and classifying content. When data is properly structured on a website, a user who searches for a business (for example, "best dinner in Aguadilla") will see results that include both listed and unlisted businesses.

Process

- Explore partnerships between merchants' associations and local educational institutions that bring together technically savvy students - either at the high school or college level - to provide technical assistance in exchange for credits.

Diagnostic: Why Is This Project Important?

For most visitors, the decisions they make that inform where they go, where they stay, and what they do after arrival starts long before tickets are purchased. It begins with review sites that aggregate content and provide travelers with qualitative assessments that inform their decision making. A business that is not listed on review sites like Google, Yelp, and TripAdvisor effectively does not exist for most visitors. We understand that language barriers and discomfort with the internet may prevent many owners from claiming their listing, but this step is critically important to driving visitor traffic to local businesses and must be a priority for the Destination Planning effort.

We recognize that FPR and its small business technical assistance partners have had programs to help businesses claim their online listings. However, given the increasingly critical nature of online and mobile tools in travel decision making, we must continue to invest heavily in these efforts until there is a significant improvement in Key Performance Indicators.

Partners & Resources

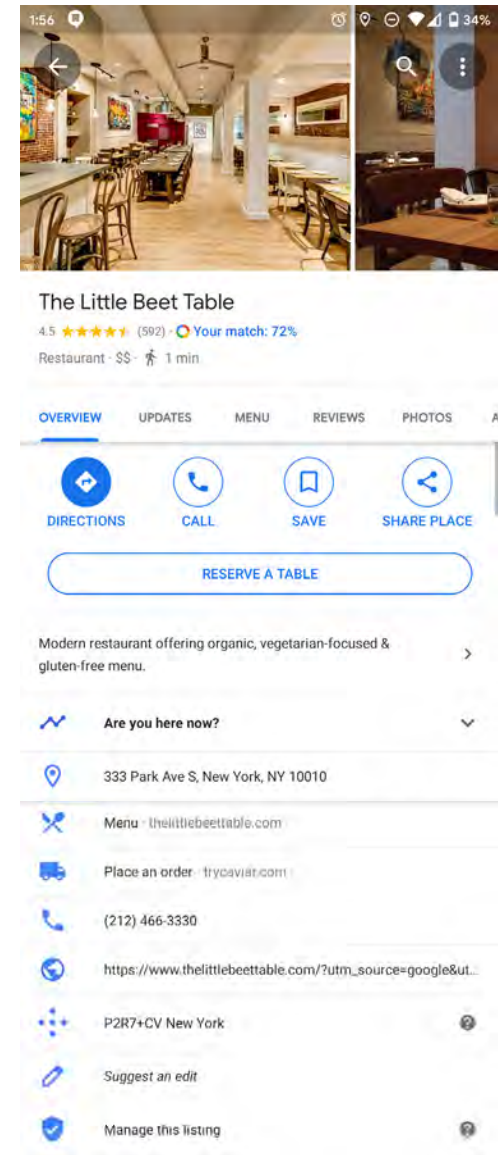
- Local Merchants Association in collaboration with Universities.
- FPR

Case Study or Best Practice

Local small business service providers can work to develop training curriculum in partnership with merchant's associations to develop campaigns that work to get each and every business owner/ asset manager to claim their online profiles on TripAdvisor, Google and Yelp.

**12% of the region's
local assets are
not listed on
Google**

according to a recent survey
conducted by Streetsense (2020).




Example of a 'rich' local business listing based on a user query. Source: Google.

5

Grants for Business Operations and Facade Improvements

Provide financial assistance to business owners to enhance business sales.

Category	 Business Support
Origin	Destination Planning Team
Budget	Medium (\$50,000-\$200,000)
Timeframe	Medium Term (5-10 years)
Risk	Medium - A permanent fund requires multiple partners to coordinate and share resources.
Key Performance Indicators	<ul style="list-style-type: none"> • Total no. of program participants • Total dollar amount invested/leveraged through the program (including any matching funds by participants) • Reported increased sales and total jobs created through the program • Increased sales tax base • (Qualitative) Local business success stories and before/after visuals of facade improvements

Action Items

Provide grants to business owners for facade improvements and procurement of point of sale technology. Local business retention, expansion, and resilience should be supported by visitor economy institutions.

Process

Work with partners to develop grant proposals that focus on establishing a fund or lending tools that might include a variety of financing mechanisms, including mini-grants through crowdsourcing platforms, revolving loan funds, or matching grants. The specific uses for the funds should be defined (i.e., point of sale technology, facade improvements, expansions, or equipment acquisitions). Partners such as Kiva could support matching grants. PRTC could be a partner in the development of the fund. A call for applications could be developed twice a year for the grants. Grants should be attached to the impact in the visitor economy, increase sales or job creation.

Diagnostic: Why Is This Project Important?

Many businesses do not track customer data, sales or have long-term business plans. This makes it difficult for them to grow, much less accommodate or respond to the needs of the visitor customer base. Basic operations technology and support for improvements will aid business owners in their efforts to sustain and grow their businesses.

Partners & Resources

- Puerto Rico Tourism Company
- Local Merchants Associations
- Kiva (a crowdfunding resource platform)

Case Study or Best Practice

The Universal City Storefront Improvement Program (Universal City, TX) encourages both business owners and property owners to enhance storefronts on commercial, professional, and retail buildings by providing reimbursable grants for a range of improvements such as new signage, windows, outdoor displays and outdoor seating, painting, landscaping, and awnings.

Each successful applicant is awarded based on a dollar for dollar reimbursement of up to a maximum of \$10,000 per building per funding cycle. The program has been in effect since the fiscal year of 2005.

6

Customer Service Training

Provide training to local workers employed in the tourism economy and managing tourism assets.

Category	 Business Support
Origin	Key Stakeholders; Destination Planning Team
Budget	Low (<\$50,000)
Timeframe	Short Term (Less than 5 years) to Medium Term (5-10 years)
Risk	Low
Key Performance Indicator	<ul style="list-style-type: none"> Total number of participants in the workshops



Source: Unsplash

Action Items

Provide continued support and expansion of existing training programs in hospitality and customer service in partnership with targeted programs led by local partners.

Process

- Identify partners that could offer training to local businesses.
- Design a program that addresses customer service for the visitor economy.
- Develop yearly programming (workshops, courses, and mentorship).
- Call for businesses to participate in the educational programming.

Diagnostic: Why Is This Project Important?

The lack of customer service training was consistently and repeatedly raised as a concern among business owners, hotel operators, and small business support intermediaries. Several interviewees have developed programs in customer service training, including non-profits such as the Centro Para Emprendedores and the Boys and Girls Club. The head of the Puerto Rico Hotels & Tourism Association further indicated that he sponsors regional hospitality training at his hotel. Continued support and expansion of these efforts are critical.

Partners & Resources

- PRTC
- Puerto Rico Hotels and Tourism Association
- Centro Para Emprendedores
- Boys & Girls Club of Puerto Rico has begun to lead customer service training efforts from some of its regional clubs in partnership with Generation, a Global employment program.
- Universities such as Ana G. Méndez University, Interamerican University, and University of Puerto Rico may also be additional key partners.


Case Study or Best Practice

The Ottawa Host Customer Service Training program is offered by the Ottawa Tourism office to employees of hospitality businesses (including restaurants, retail, hotels, etc.) in the Ottawa region. The program, which trains participants in destination knowledge and promotion as well as principles of customer excellence, was designed in partnership with local higher education institutions with hospitality tracks and courses.

Employees do not incur costs when participating in the training and receive a certificate once training has been completed.

7

Create a training and education program for municipality tourism directors/ coordinators

Category	 Organizational Capacity
Origin	Destination Planning Team
Budget	<p>Low (<\$50,000) - annualized</p> <p>Costs may cover staff time to set up, manage and organize regular communications, meetings, and forums; fee for trainers conducting educational programs and events; reimbursement as 'scholarships' / 'fellowships' for municipality tourism directors attending international conventions.</p>
Timeframe	Short Term (Less than 5 years)
Risk	<p>Low - The project risks a drop off in participation numbers without adequate promotion and marketing of program to Mayors and municipality tourism leaders. Lead actors will need to set aside sufficient funds toward marketing and promotion of the program, especially for the awards competition as it may serve to incentivize active participation among municipalities.</p>
Key Performance Indicator	<ul style="list-style-type: none"> • Annual Participation at forum • Participation in training sessions

Action Items

A tourism training and education program should be established for municipality tourism officials, with the partnership of DMO, PRTC, and local mayors. The program should encompass a combination of a) networking opportunities to align local tourism efforts and b) technical assistance to equip municipal officials with the know-how to market, brand, and implement successful tourism efforts across the island.

The suite of strategies that fall under this program should include the following:

- Hosting an annual Puerto Rico tourism leaders forum.
- Creating a standardized set of roles and responsibilities for tourism offices, and defining a recommended set of qualifications for municipality tourism staff.
- Pooling a shared fund to support the participation of municipality tourism leaders at international conventions and conferences.
- Create an award system to celebrate the successes of municipality tourism efforts.

Process

- Establish a consolidated mailing list of tourism coordinators island-wide and create an official group and communication platform.
 - This may include regular newsletters compiling industry information

targeted at tourism managers, updates on available training sessions/ events, and quarterly/ biannual conference calls/ in-person meetings to share progress updates of tourism efforts in each municipality.

- Types of platforms for regular communication that may be used include Facebook Private Group.
- Take an inventory of existing PRTC and DMO events/ training sessions toward planning a new, combined calendar of events for collective promotion and marketing.
 - Ensure there are no overlaps in curriculums and scheduling.
 - Ensure comprehensive sessions covering topics from destination marketing to data collection, analysis, and reporting.
- Convene PRTC and DMO leadership, and local mayors, to determine standards for tourism offices, including establishing roles and responsibilities for various staff in each office.
 - Direct report
 - Essential duties
 - Knowledge, Skills and Abilities requirements of the position holder
- Pool funds to support the participation of municipality tourism leaders at international conventions and conferences.

- To incentivize long-term participation in the program, offer marketing support or direct funding for a single tourism project as a reward for multi-year participation.
 - Any direct funding or marketing support offered as an incentive should be provided as a grant and directly tied to modules/ lessons taught in the program, as well as DMO/PRTC's overarching tourism vision and strategy.

COVID-19 Recovery

As part of training programs, disaster management curriculum/ informational sessions should also be held to educate municipality tourism directors on the variety of initiatives and efforts that need to be created by municipalities to support the economic and environmental resiliency of tourism-related businesses.

Diagnostic: Why Is This Project Important?

Stakeholder interviews conducted by the Destination Planning Team during preliminary assessments revealed a range of expertise and capabilities across tourism directors of each municipality. While some directors were well-informed of tourism efforts across their municipalities and had resources to track information and evaluate the performance of assets, others were limited by staff, knowledge of the industry, and administrative capacity.

Building local capacity is critical to the overall success of the island's tourism market. While

PRTC and DMO may provide a strategic vision for the overall Puerto Rico tourism economy and guidance on priority projects and strategies, it is up to local leaders to be the boots on the ground building resources and partnerships or buy-in from local stakeholders towards each vision or strategy. Making sure these leaders are informed of industry trends and market forces will also be critical to building confidence amongst investors.

Partners & Resources

- PRTC
- DMO
- Mayors
- Municipal Directors of Tourism

Leveraging existing educational resources and curriculum will be key in the initial stages of this work. There are several tourism industry-recognized training programs that are readily available such as [Southeast Tourism Society's Travel Marketing Professionals certification](#) course and others provided through [Certified Tourism Ambassador Network](#).

Case Study or Best Practice

Communication Platform/ Protocol: NYC BID Leaders Facebook Group (New York, NY)

The Facebook group was established to enable leaders across the city to share live information and provide industry updates and resources quickly in an accessible setting.

Tourism Leadership and Education Program: Colorado Tourism Leadership Journey (Colorado)

The [Colorado Tourism Leadership Journey](#) is a tuition-based executive training program organized by the Colorado Tourism Office to “build the bench strength of the state’s tourism industry”. Participants range in representation from within the tourism sector, including federal, state and city agency leaders, and industry operators. Tuition costs \$2,500 and includes all educational expenses, with limited scholarships available. Colorado Tourism Office contracts with Keystone Policy Center to facilitate the program and design the curriculum which encompasses required readings, 1-on-1 mentoring, and hands-on projects.

Tourism Awards: Dutchess Tourism Awards of Distinction (Dutchess County, NY)

Established in 2013, the [Dutchess Tourism Awards](#) are held annually to acknowledge local tourism partners that have provided exceptional offerings to visitors and travelers across a range of categories, including distinction in the arts, culinary, family entertainment, history, outdoors, hospitality service, and accessible hospitality. Beyond municipalities, private operators may also be nominated for awards. Winners not only receive a plaque and media coverage at an awards event but also gain a [marketing spotlight](#) on the county tourism site.



Source: Shutterstock



Create a data co-operative for tourism assets

Category	 Organizational Capacity
Origin	Destination Planning Team
Budget	Medium (\$50,000-\$200,000)- annualized Costs may cover staff time to set up, manage and market the data cooperative, and to hire a contractor to analyze and report on data quarterly. Funding from federal or state government should be requested to sustain this project in the long-term.
Timeframe	Short Term (Less than 5 years)
Risk	Medium -The project risks long-term inactivity without providing any incentives to members to regularly update data on the platform. Lead actors will need to continually market the cooperative and data warehouse to leading industry organizations and other intermediaries to communicate reliability and use of the platform towards economic growth and success. There is currently no capture of asset performance data. Furthermore, confidentiality will be key to businesses participating in the cooperative.
Key Performance Indicators	<ul style="list-style-type: none">• Increased rate of cooperative members.• Increased volume of annual data input.

Action Items

A data co-operative functions as a central data collection, storage, and distribution facility for tourism industry product and destination information from across various geographies. To be truly effective, data will need to be compiled in a nationally agreed format and should be electronically accessible by a combination of actors in the industry, including tourism business owners (operators), wholesalers, retailers and distributors for use in their websites and booking systems.

Ultimately, as defined by the International Cooperative Alliance, a cooperative should be an “autonomous association of persons united voluntarily to meet their common economic, social and cultural needs and aspirations through a jointly-owned and democratic enterprise”.

Most importantly, the data co-operative should serve to gather information on asset performance for members to better understand their own challenges/successes—including total annual reservations, ticket sales, the annual number of visitors— and business information for marketing purposes.

Process

- Establish data guidelines and rules for inclusion in the database.
- Set up an open-source data dashboard that enables registered members to log and analyze visitation and lodging data, in addition to basic product names and descriptions, and photos. Initial set-up and first-year usage may be made free to businesses.
- Establish distributor payment structures.
- Publish regular data reports by region to key stakeholders and potential investors.
- Market and promote the use of the co-operative platform through a nationwide educational campaign.

COVID-19 Recovery

A data cooperative is critical to enabling stakeholders to collectively track the performance and progress of the overall tourism economy, especially following the recovery from an occurrence of a disaster event. This data should not simply be collected and stored but continuously analyzed to be used in making a case for funding to federal or national agencies.

For example, during any crisis, the data cooperative should be used as a platform for tourism operators and distributors to update authorities on any changes to operations and any business closures.

Diagnostic: Why Is This Project Important?

Market assessments conducted across each region of Puerto Rico revealed incomplete data on annual visitation figures to specific assets and regions, lodging occupancy rates for facilities that were either not official PRTC hotels or not listed as informal lodging on sites like Airbnb and VRBO. These and other business-side data points (including annual number of tickets sold/ tours sold, etc.) are critical to understanding market demand and supply, and need to be consistently and accurately measured over time to fully picture the tourism market on the island.

However, current attempts in Puerto Rico to collect robust tourism data are disjointed across a number of organizations. FPR's ViewPR is targeted at collecting data for online marketing purposes, while PRTC collects hotel data from a small selection of registered hotels on the island.

ViewPR was an important and extensive data-gathering effort that began before the Hurricane, however, its main goal was simply to collect and push information about assets and attractions out to consumers via other third-party marketing platforms such as TripAdvisor. It did not originally set out to measure the dynamics of the tourism market, so a re-imagining of this effort as a data warehouse to collect both marketing and business operations information is essential.

Partners & Resources

Technology vendors such as Entrada Insights, Live XYZ, or Geocentric Citylight Software

A technology vendor that has already developed an application/ software that functions as a content and member management system and mapping tool will be important to the success of this work. PRTC, Discover Puerto Rico, and FPR are not currently equipped with technical expertise to handle data management efficiently and will require the support of a vendor.

PRTC, Discover Puerto Rico, FPR, National Tourism Industry Consortiums/ organizations

A partnership with these various tourism-related organizations to lead the project is key to ensuring the data cooperative reaches a wide audience.

Major Tourism Operators (Lodging, Assets, etc.)

The bottom-up input from partners on the ground is needed for the most up-to-date and accurate information. ViewPR's previous experience with having staff conduct desktop research to create data inputs on the platform resulted in many inaccurate data points that needed cleaning and fact-checking.

+ Municipality Tourism Directors

Case Study or Best Practice

The [Hawaii Department of Business, Economic Development & Tourism](#) established a publicly available [Tourism Data Warehouse](#) to enable stakeholders to download regularly updated datasets that can help inform investment decisions. Similar to PRTC's Statistics platform, the types of data cleared through Hawaii's warehouse include visitor trends, visitor characteristics, expenditure patterns, and hotel performance. However, data is compiled based on input from a range of sources and stakeholders.

The [Australia Tourism Data Warehouse](#) is Australia's national platform for digital tourism information. Data input is provided by tourism suppliers/operators (including accommodation, attraction, events, tour, transport, hire operators, food and drink or general service), reviewed and processed by authorized data managers at municipality-level, and used widely by tourism distributors and other stakeholders. Aside from supporting digital marketing of tourism suppliers, the data warehouse serves to generate business intelligence and insights by offering an analytics dashboard with comprehensive statistics & graphs for premium users of the warehouse.



9

Entrance Fees for Sustainable Asset Management, Employment, and Improvements

Support assets by developing a fair and equitable fee model for entrance

Category	 Organizational Capacity
Origin	Destination Planning Team
Budget	Low (<\$50,000)
Timeframe	Medium Term (5-10 years)/ Ongoing
Risk	Medium
Key Performance Indicators	<ul style="list-style-type: none"> No. of organizations participating in orientations. Target 'returns' per event/ activity. Total no. of new attractions with entrance fee. No. of information sessions held to educate NGOs on how to address tax implications associated with fee for entry models

Action Items

Non-profit organizations need training and technical assistance in developing models that enable them to charge and easily pay taxes owed. Entrance fees are critical to long-term sustainability of these assets. These include entrance fees, and parking fees for access to key local assets as demand increases.

Process

- Inventory of events and attractions with actual or potential entrance fee.
- Coordinate orientation or mentorships with ticket sales companies to identify benchmarks and reasonable fees.
- Provide information on experiences, events, and venues to digital platforms that provide event calendars.
- Assess the impact of the new entrance fee on attractions.

Diagnostic: Why Is This Project Important?

The majority of assets and attractions have no user fees due in part to a lack of staffing and challenges associated with taxation policies that some have indicated do not differentiate between non-profit and for-profit revenue. As a result, many non-profits choose to avoid collecting entrance fees for this reason, and many assets lack sustainable financial resources for maintenance and improvements.

Partners & Resources

Ticket Sales Companies (Ticketera, PRTicket, TicketCenter, TicketPop)

Case Study or Best Practice

Entry fees are common in the non-profit world to help compensate for the administrative, staffing, and maintenance costs associated with meeting their non-profit mission. That said, the IRS places restrictions on income generated by non-profit organizations. For income to be tax-exempt, it must be related to the non-profit's charitable purpose. NGOs need tax guidance to ensure that the fees they collect are not categorized as "Unrelated Business Taxes", which would be subject to taxation.

In Puerto Rico, one such example is Para La Naturaleza, which charges for tours and entry to a number of its locations on the island.



Source: Unsplash

10

Shared Services

Support shared operational services amongst small organizations working in the visitor economy

Category	 Organizational Capacity
Origin	Community
Budget	Medium (\$50,000-\$200,000)
Timeframe	Long Term (10+ years)
Risk	Medium - This project requires coordination with multiple providers and identifying sources of funds to support the participating organizations.
Key Performance Indicators	<ul style="list-style-type: none"> Total funds raised to provide shared services Total of organizations benefiting from the shared services.

Action Items

Conduct a needs assessment of local organizations in the visitor economy to better understand shortcomings and gaps in services and operational resources in order to develop a medium-term program to provide services, grants or packages.

Diagnostic: Why Is This Project Important?

Small non-profit organizations and projects have expressed the challenge of not having enough economic and human resources to address the operational aspects required to advance their visitor economy initiatives. This includes administrative issues, grant writing, accounting, and project management. This support could allow organizations to better focus their time and efforts on programmatic issues that impact local tourism.

Process

- Identification of management and administrative needs for organizations and projects impacting the visitor economy.
- Identification of institutions providing management services to non-profit organizations.
- Developing a fund to offer services grants for organizations.

- Creating a call for applications of organizations interested in receiving support through services.
- Develop a membership model for the long-term sustainability of the initiative for shared services.

Partners & Resources

Universities, Philanthropic Foundations, and Non-Profit Organizations

Case Study or Best Practice

The Virginia Tourism Corporation Marketing Leverage Program is a program run by the Virginia Tourism Corporation that provides matching dollars to programs that are developed in partnership with other tourism service providers. Applicants are required to include a minimum of three partners to be eligible for matching dollars.

For more information, visit: <https://www.vatc.org/grants/leverageprogram/>

11

Fiscal Sponsorship for 501 (c)(3) Status

Fiscal sponsorship to enable organizations to access 501(c)(3) status exemptions.

Category	 Organizational Capacity
Origin	Community
Budget	Low (<\$50,000)
Timeframe	Long Term (10+ years)
Risk	Low
Key Performance Indicators	<ul style="list-style-type: none"> Total value of funds raised through fiscal sponsorship program

Action Items

Identify organizations or create a fiscal-sponsorship organization to support local non-profits. In addition, provide training to participating organizations so they may better understand compliance requirements and processes.

Process

- Identification of organizations and initiatives with the need of fiscal sponsorship for new projects that could impact the visitor economy
- Identification of existing organizations that provide fiscal sponsorship.
- Assess the feasibility of creating a 501(c)(3) entity to provide fiscal sponsorship to projects in the visitor economy.

Diagnostic: Why Is This Project Important?

Most non-profit organizations in Puerto Rico do not have formal 501(c)(3) tax exemption status. For this reason, they cannot apply for funding from foundations and government programs. They are also not eligible for tax exemptions from sales and property taxes.

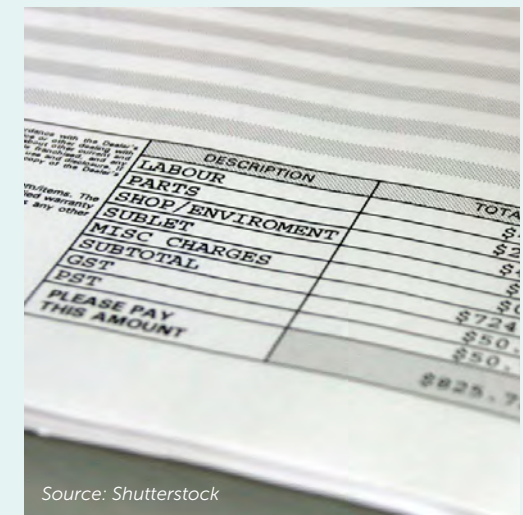
501(c)(3) organizations are highly regulated entities with strict rules of governance and ongoing compliance. Helping non-profit organizations understand these requirements and manage them is critical to enabling them to gain the benefits associated with tax exemption, which would help them with long-term financial sustainability.

Partners & Resources

- Local Philanthropic Foundations

Case Study or Best Practice

A written agreement should be outlined between the fiscal sponsor organization and the sponsored non-profit organization. The agreement should specify the responsibilities of the fiscal sponsor, including recordkeeping and legal compliance, and the administrative fee that the sponsored organization will provide to its fiscal sponsor for these services. For a sample of a written agreement, [refer to this resource from the National Council of Non-Profits](#).




Source: Shutterstock

12

Technological Tools to Enable Sales of Products and Entry Fees

Provide technological tools to facilitate customer services and visitor experiences

Category	 Organizational Capacity
Origin	Destination Planning Team
Budget	Low (<\$50,000)
Timeframe	Long Term (10+ years)
Risk	Low
Key Performance Indicators	<ul style="list-style-type: none"> • Total number of businesses participating in the program • Perceived benefit of improvements by participating businesses • Increased recorded sales from related activities

Action Items

Conduct a needs assessment to better understand gaps in technological tools/ resources amongst local assets. Following that, partner with technology companies to fill gap in services and provide technical training on tech solutions.

Process

This project could be aligned with the shared-services initiative and the grants for business operations and improvements. Activities could include:

- Assessment of specific needs in the business community
- Coordination of orientations and mentorships with service providers
- Development of cash and/or services grants to support these activities

Diagnostic: Why Is This Project Important?

Most cultural and social organizations with potential projects to support the visitor economy lack technological solutions that enable the sale of products and services or that enable them to collect entry fees. Reservation and ticket sales tools, payment methods, and digital marketing are important to ensure the on-going sustainability of these organizations.

Partners & Resources

Tech companies providing those solutions: ticket sales, POS software, etc.

Case Study or Best Practice

The Downtown Alliance Digital Innovation program offers grants of up to \$10,000 per business to cover the costs of hiring technical consultants that help businesses upgrade technological capacity and build online sales. Grants are paid directly to the selected consultant on behalf of the winner and may not be used for capital improvements to business premises or as salary/compensation for the business's employees.

Eligible technological tools/upgrades funded through the program have included installing new point-of-sales platforms and building mobile-friendly business websites and ticket platforms.




Recipients of the Downtown Digital Innovation grant in 2019. Source: Downtown Alliance NY

13

Electrical Service

Ensure long-term local resilience of electrical services

Category	 Infrastructure
Origin	Destination Planning Team
Budget	High (\$200,000+)
Timeframe	Long Term (10+ years)/ Ongoing

Action Items

Continue to lobby and advocate for the PR Electrical Power Authority to provide stable electrical connections. In addition, explore options for alternative electrical service, including a micro-grid.

Diagnostic: Why Is This Project Important?

The Island's electrical grid is notoriously dilapidated and antiquated. The damage inflicted by the hurricane knocked out power, and repairs were frequently limited to reconstruction in a "pre-hurricane" state.

Moreover, electricity costs for commercial establishments are nearly double that of the United States. Puerto Rican businesses on average pay 21.02 centers per kilowatt hour, compared to 13.17 cents in the United States.¹⁰²

The secondary impact of high energy costs is manifold. Our stakeholder interviews found that businesses often elect to avoid running appliances, like dishwashers, and using energy. Instead, they elect to purchase disposable —often Styrofoam— plates and cutlery, finding the financial trade-off more economical. However, these decisions create additional waste management (see Waste Management below) and litter problems that further undermine the visitor experience.

Partners & Resources

- Municipalities
- Puerto Rico Electric Power Authority
- InvestPR
- Puerto Rico Government



Fallen power lines and damaged roads following the aftermath of Hurricane Maria. Source: Flickr.

¹⁰² "Puerto Rico Territory Energy Profile". U.S. Energy Information Administration. November. 21, 2019.

Waste Management

Ensure sustainable waste management practices and reduction of plastics/ styrofoam products and packaging

Category



Infrastructure

Origin

Destination Planning Team

Budget

High (\$200,000+)

Timeframe

Long Term (10+ years)/
Ongoing

Action Items

Restaurants need additional education on changing preferences among visitors to reduce ecological impact and consumption of single-use plastics. As such, an educational training program and campaign should be launched nationwide to raise awareness of shifting consumer trends as well as to share sustainable waste management practices that can be adopted by local businesses at limited to no additional costs. In addition, businesses should be encouraged to contract recycling services collectively (as a commercial district).



Tais processing organic waste into compost. Source: FPR

Diagnostic: Why Is This Project Important?

In the long term, businesses are facing difficulty in keeping utility costs low and affordable. This is largely due to high energy rates that are twice that of the United States, making it difficult to convince restaurants to switch from single-use plastics and Styrofoam boxes to reusable containers and dine-in plates and cutlery that need to be washed. At this time, the costs of running a commercial dishwasher can exceed the cost of purchasing single-use containers.

Meanwhile, consumers are increasingly becoming more educated with easy access to information about destinations online. As such, they are also becoming conscious about their impact on destinations visited.

Therefore, expect destinations and the businesses that support visitor economies to make significant contributions to the environment.


Case Study or Best Practice

Trito Agro-Industrial Services, Inc.(TAIS) is a Puerto Rican corporation dedicated to providing recycling and composting services to commercial businesses and residents. As part of its services, TAIS conducts a pre-service analysis to identify the specific needs of businesses to personalize services based on the amount of food waste and mixed recyclable materials each business generates. TAIS also trains kitchen and maintenance teams and provides the necessary materials to properly separate food waste and to effectively recycle.

15

Water Quality

Improve water quality through investments in sewage treatment

Category	 Infrastructure
Origin	Destination Planning Team
Budget	High (\$200,000+)
Timeframe	Long Term (10+ years)/ Ongoing

Action Items

Advocate for and support water conservation efforts and sewage infrastructure improvements.

Diagnostic: Why Is This Project Important?

Poor water quality is a significant threat to visitation across several natural tourism assets located near the ocean, lakes, and rivers. As previously mentioned, a 2018 study of visitors commissioned by PRTC found that the perception remains that Puerto Rico fails to deliver on 'clean drinking water' and 'clean air and environment'. These perceptions impact the overall visitor expectations of Puerto Rico as an eco-friendly and sustainable destination.

Addressing conversation around improving water quality is an important long-term

goal if Puerto Rico aims to see continued growth in visitors and competitive edge over other similar destinations such as Samaná and Riviera Maya. The root causes of poor water quality include pollutants from urban/storm-water runoff, inadequate wastewater systems, and collection system failures that are common across the island.

Partners & Resources

Seaventures, National Oceanic and Atmospheric Administration, UPR Caribbean Center for the Reduction of Aquatic Debris, University of Puerto Rico, Blue Flag Beaches.

Case Study or Best Practice

Watershed restoration at Playa Tamarindo in Culebra with National Oceanic and Atmospheric Administration's Office for Coastal Management; 2009 Reducing Monofilament Puerto Rico Coast Marine Debris.



FPR field team member briefing business owner on donation of water filter. Source: FPR



Recommendations

Early-Stage

The following recommendations in this section were presented to the Destination Planning Team by local community stakeholders through the Nido Cultural Process. Although these strategies present opportunities to attract new visitors and leverage new spending in the region, they are early ideas that will require significant support and reinvention following the impacts of COVID-19. Many key elements that will enable the full execution of the strategy have not been uncovered and will require further exploration.

1

Create Museo de Historia Natural de Puerto Rico

Category	 Place-Based Asset Enhancement
Origin	Nido Cultural (Applicant: Ciudadanos del Karso)
Location	Arecibo Urban Center (On La Monserrate hill, between Oriente and Fernandez Juncos streets. 18.47163611, -66.71944444)

Similar to the proposed Interdisciplinary Center in the Barceloneta/Manatí Destination Plan, the renovation of a historic Art Deco building in downtown Arecibo is being revitalized as the Karso Institute of Puerto Rico and the Caribbean -IKPReC-, which will contain the Museum of Natural History of Puerto Rico and the Caribbean on the first floor and a Center for Scientific Research on the upper floors. Other programs on-site will include multipurpose rooms, a Café/Bistro, and Hostel.

The Museum of Natural History of Puerto Rico and the Caribbean aims to

be an anchor “must-see” destination for the region, with educational exhibits, interactive learning and cultural programming and events.

The IKPReC will function as a non-profit institution, dedicated to providing educational experiences on the nation’s natural history to locals and visitors and will stimulate knowledge exchange between universities in the Americas and Europe, and research centers. In the event of emergency situations such as a hurricane, earthquakes or tsunami, the facility also aims to be a support hub for the community.



Source: Streetsense

Partners & Resources

Ciudadanos Del Karso will be responsible for developing the project until its construction and a Board of Directors will be appointed to be responsible for the IKPReC.

Other key partners that will play a role in supporting the museum's marketing include the Arecibo Tourism Office and PRTC. The museum also hopes to form partnerships with other agro-tourism and adventure attractions whose missions align with the museum's, such as Cueva Ventana.

Research and architectural design partners for the museum include: M&M Arquitectos, Puerto Rico Speleological Federation, CienciasPR, Polytechnic University of Puerto Rico, University of Puerto Rico, Karst Research Institute, Puerto Rico Science, Technology and Research Trust.

Risks

The biggest immediate limitation of the project is financing. The project is incredibly complex and will require a thorough feasibility study and financial support from various sectors, including public grants and private investment.

Case Study or Best Practice


Notranjska Karst Museum in Postojna, Slovenia



Source: Simon Avsec; Miha Dolenc

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Enhance Visitor Journey at Cascada La Planta

Category	 Place-Based Asset Enhancement
Origin	Destination Planning Team
Location	Tanamá, Arecibo, Puerto Rico, Arecibo 00612, Puerto Rico

Rio Tanamá and Cascada La Planta combined create an important natural inland asset for the region that is more popular with local visitors and young families. Despite its local appeal and scenic waterfalls, the area's visitor facilities (such as parking lot, wayfinding/ signage, and pathways) have not been well-established or maintained. There are currently issues around trash collection and management at the asset.

The asset requires reimagining and safety enhancements as it continues to grow as an off-the-beaten-path attraction. This may include improving parking lots for visitors (the Municipality has expressed interest in developing this), the installation of gateway signage at the parking lot entrance, construction of a small self-sustaining visitor comfort station/ bathroom facilities, a comprehensive wayfinding

system along the trails to the waterfall, the creation of picnic areas and vendor kiosks (equipped with trash cans, tables and chairs) and natural trails leading visitors clearly to the waterfall from the parking lot.

Partners & Resources

At this time, the local community and property owners are largely responsible for maintaining the area along the stream and waterfalls. The local government has not heavily invested in the area and will need to be involved, alongside natural resource partners with expertise in site clearing and natural habitat restoration.

Risks

The river is prone to flooding and erosion, as evidenced in recent heavy rainfall events. As part of the reimagining of the waterfalls and streams, it is critical



Cascada La Planta is an off-the-beaten path waterfall and popular bathing spot. Source: Siry Rivera (Pinterest)

to consider design strategies and measures that mitigate impact of flooding in the area.

In addition, there have been difficulties trying to integrate the local community in the design and planning process for the asset. As such, the Municipality will need to lead and make a concerted effort to conduct outreach and engagement efforts with community stakeholders.



Source: Shutterstock

Case Study or Best Practice

Buttermilk Falls State Park in New York has beautiful scenic areas, waterfalls, a swimming area, picnic tables, and clearly marked trails. The asset is managed and maintained by the NY State Department of Parks, Recreation and Historic Preservation.

Conclusion

Conclusion

The Destination Plan provides a set of a comprehensive and strategic starting points for investment and policies to improve the assets that make each region unique. These improvements are based on an assessment of the gaps that exist between the assets themselves and the expectations of individual customer segments. The approach is comprehensive because growth in the visitor economy is a complex process that cannot be accomplished through a single project. Much like a three-legged stool—if one of the legs is broken, a project cannot succeed. For successful long-term efforts, a comprehensive approach is critical.

The projects outlined here are also incremental and focused on existing assets, by design. Many of the short and medium-term projects in the plan are starting points to help communities build their ability to take on simple projects, leading them to a more sophisticated understanding of how the visitor economy works. Starting with projects that enable communities to see tangible success helps build the confidence, credibility, and skill sets necessary to tackle more complex and ambitious projects over time. Every effort must begin somewhere, and we must begin where communities are rather than where we want them to be.

What Comes Next?

The strategies outlined in this plan address a multiplicity of forces that impact the overall visitor experience. Together they are greater than the sum of their parts. That said, priorities must be set to enable the efficient allocation of limited resources, including partners with limited staff, time, existing financial commitments and stretched budgets. Moving forward, further refinement of projects and project ideas will require initial conversations with potential partners to identify champions and begin developing strategies for resource allocation through advocacy, grant writing and partnerships. Local leaders must have the desire, capacity, and wherewithal to support and lead project execution. This plan provides ideas and direction, FPR provides support, resources, and training, but ultimately, long-term success is predicated on the involvement and commitment of community stakeholders as well as municipal and state government/agencies.

Continued community engagement that enables the prioritization and further refinement of projects outlined here is a critical next step to determining which projects are truly ready for prime time. Exploratory conversations are necessary with potential partners, resource providers, and public leaders to determine which projects align with their interests and objectives. These conversations will build community confidence in the process and enable stakeholders to see how their participation results in tangible outcomes that lead to success. Engagement in turn builds the necessary capacity to support the long-term commitments necessary to change

the fundamental underlying dynamics of the visitor economy.

Concurrent with community feedback, efforts should be made to establish a network of local leaders and develop a model of governance that will support plan execution. These local advisors will create a positive feedback loop to identify champions, resources, and community support for the projects and strategies outlined in this plan.

Ultimately, local leaders must have the desire, capacity, and wherewithal to support and lead project execution.

The Destination Plan should be viewed as a living document, a blueprint that will inevitably evolve as communities provide real time feedback, as partners and resources are identified, and as shifts occur in island-wide and municipal priorities and leadership. These changes to the plan are to be expected and encouraged. In fact, the ability to spark dialogue and action, whether it looks exactly like the projects outlined here or reflects the push and pull of dialogue and compromise, are the hallmarks of a great plan—one that lives on in the actions and efforts of key stakeholders over time.

A photograph of a beach scene with a thatched umbrella and a beach chair. The image is overlaid with a semi-transparent olive green filter. The text 'Technical Appendix' is written in a large, white, serif font across the center. On the right side, there are decorative elements: a light blue wavy line and several small colored dots (red, blue, pink, and light blue).

Technical Appendix

Project Rubric

Category	Marketing, Events + Promotion; Place-Based Asset Enhancement; Infrastructure; Access and Mobility; Business Support; Organizational Capacity
Location	Street address of the project or area of coverage
Origin	Where did the project originate from? You may select one or more options: Destination Planning Team, Community Meetings, Nido Cultural, FPR, National Agency, i.e. PRTC Porta del Sol Plan, or other
Budget	These budgets are formulated based on industry experience and comparable project budgets. Low Budget (Under \$50k), Medium Budget (\$50k - \$200k), Large Budget (\$200k +)
Timeframe	How long will the project take to implement? Short Term (Less than 5 years), Medium Term (5-10 years), Long Term (10+ years)
Risk	How challenging is this project to get off the ground? This includes political will, regulatory restrictions, community interests, site ownership, environmental constraints, or financing limitations.
Key Performance Indicators	What are the project's anticipated impacts on the visitor economy – cultural, social, economic – and identify catalytic/ transformative nature of the project?
Action Item	Description of the project
Process	Description of chronological steps that must be taken to fully implement the project, including any property/ land purchase and transfers, training and technical assistance, etc.
COVID-19 Recovery	How will this project mitigate impacts of COVID-19 and/or help the region recover from the pandemic?
Diagnostic	How did the market assessment findings lead us to this project?
Partners and Resources	Who are the potential partners and champions of this effort?
Case Study/Best Practice	What local/regional/national/international examples are similar to the project being proposed or that may inspire the current project?

Destination Plan Thank You

For more information, contact Foundation for Puerto Rico

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Prepared by: **streetsense.**

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