Destination Plan

Fajardo & Luquillo

Prepared by: streetsense.

Powered by: Foundation for Puerto Rico

BOTTOM-UP
DESTINATION RECOVERY INITIATIVE

BOTTOM-UP

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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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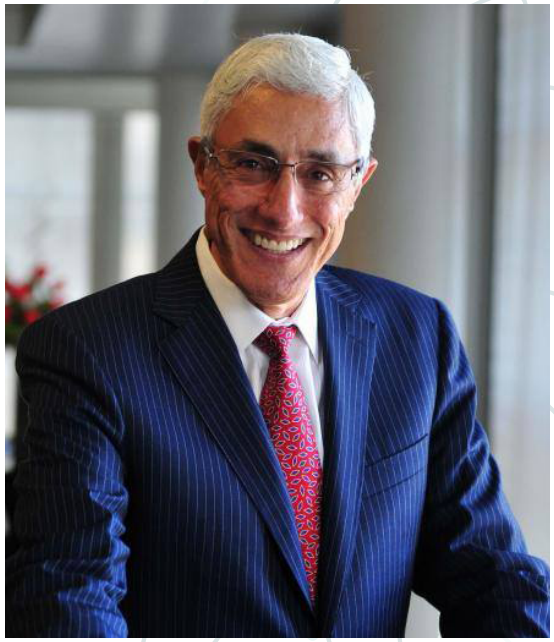
Message from the Chairman of the Board



Jon Borshow, Founder, Chairmen 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 and northern parts of the island, our Field Team moved to Fajardo and Luquillo 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 , 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

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 in proximity and affordability, among other advantages.

Bottom Up Field Team visit to Escuela de Apicultura del Este (Fajardo). Source: Foundation for Puerto Rico

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, Emprende 360°, and the Whole Community Resilience Planning.

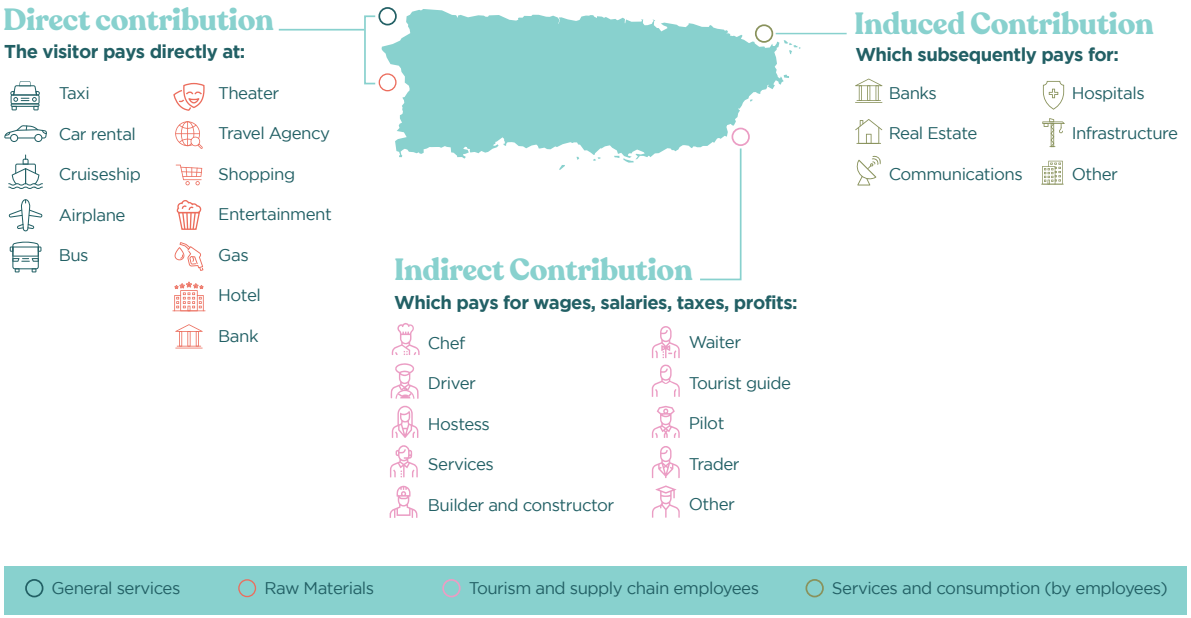
Visitor Economy

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.

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 both locals and 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.
- Travel that extends a work trip to include leisure time, or Bleisure, is growing amongst Gen X-ers and Millennials.
- 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 main 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]

North-East Region Diagnostic Findings

North-East Region is the second most popular tourist destination outside of the San Juan Metropolitan Area after Porta Atlántico (based on real-time consumer travel).

- North-East Region functions as a critical gateway for visitors traveling between

[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.*

the mainland and the neighboring island municipalities of Culebra and Vieques.

- North-East Region can reasonably support approximately 1.19 million annual person trips (assuming 8,303,000 total national person trips) and $1.19 billion in annual visitor spending (assuming $6.4 billion total national visitor spending).[4]
- The top two types of travelers into the North-East Region 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).
- On average, traveling from San Juan to the southernmost municipality of the North-East Region, Naguabo, on PR-3/PR-53 (or via the alternative route on PR-52/PR-30/PR-53) will take approximately 70 minutes by vehicle — more than twice as long as traveling to Luquillo.
- Without convenient access from San Juan, the North-East Region will continue to be a less desirable destination for off-island travelers who are unfamiliar with navigating roads on the island or feel less comfortable traveling long distances from their places of accommodation.
- There is a large disparity in major assets and available lodging between Fajardo/Luquillo and Ceiba/Naguabo likely as a result of alternative connections and accessibility.

Fajardo/Luquillo Diagnostic Findings

All highly-rated assets (based on Google ratings) in the North-East region are located in Fajardo/Luquillo.

- El Yunque, the major driver of tourism in the region, is faces critical environmental challenges that limit its growth and capacity.
- Small waterfall assets such as Las Pailas are growing in popularity among adventure-seeking visitors who are also less influenced by convenience and visitor amenities seek off-the-beaten-path destinations and experiences.
- There are over 1,600 available rooms across formal and informal lodging in Fajardo/Luquillo, primarily centered around the Coastal Dining & Leisure cluster in Luquillo and near the marinas in Fajardo.
- The low annual occupancy rate of lodging in Fajardo/Luquillo (52%) diminishes the likelihood of any unmet demand for the hotel market.
- Major shopping and dining offerings are primarily co-located near major assets along the coast and major roadway PR-3. Despite the importance of inland assets such as the rainforest and waterfalls, shopping/dining offerings complement these assets remain limited.

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 geographic levels — projects in Fajardo/Luquillo, North-East Region 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.

Fajardo/Luquillo Projects

Asset Enhancements

- Enhance the **public realm at Kioskos de Luquillo** to improve the overall customer experience and ensure comfort and safety of visitors.
- Enhance **visitor amenities at Balneario de Luquillo** to continue attracting domestic tourism in the region.

Mobility Enhancements

- Improve **connectivity between Playa La Pared and the Urban Center of Luquillo** to promote cross-visitation between the assets.
- Implement **North-East Trail Network** to support equal distribution of visitors across key natural protected areas.

Business Retention

- Grow retail, dining, and entertainment options that will help **revitalize the Urban Center of Fajardo**.

North-East Region Projects

The North-East Region recommendations emphasize a set of investments that address challenges shared across the municipalities representing the North-East Region. Given the proximity and location of several key attractions and destinations across municipalities, it is important to tie together the growth and successes of these assets holistically. As such, we have grouped the

[4] Estimates by Streetsense made based on Tourism Economics data on Puerto Rico tourism economy from 2019 before the pandemic

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 the North-East.

Capacity Building

- Build SAVE Tourism (Scientific, Academic, Volunteer, Educational) efforts through a coalition of operators and asset managers working in SAVE tourism

Mobility Enhancements

- Re-Open PR-191 as a low impact multi-use trail across El Yunque National Forest

Island Wide Projects

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

- Improve **Access and Safety to Waterfall Assets** to support the growing popularity of under-rated assets across the island.
- 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

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

Business Retention

- **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

- 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.
- Enabling 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 used by non-profit asset managers**, such as grant writing, administrative support, and co-location among others, 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 critical to the long-term sustainability of island-wide economic development efforts.

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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.[5] 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[6].

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)[7]. 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".[8] Compounded by reputation 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 through 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[9]. This was, however, estimated prior to a fuller understanding of methods and rates of transmission and likely did not

[5] "Puerto Rico's Visitor Economy, Highlights". Foundation for Puerto Rico. April 2019.
[6] "International tourist numbers could fall 60-80% in 2020, UNWTO reports," World Tourism Organization, May 7, 2020, unwto.org.
[7] "ASUR Announces Total Passenger Traffic for June 2020", PRNewswire, July 6, 2020
[8] Puerto Rico Tourism Company, 2020 (as reported in Global Press Journal, June 21, 2020. "Coronavirus Devastates Puerto Rico's Tourism Industry")
[9] 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 web page 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.

Simultaneously, 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 local 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.**

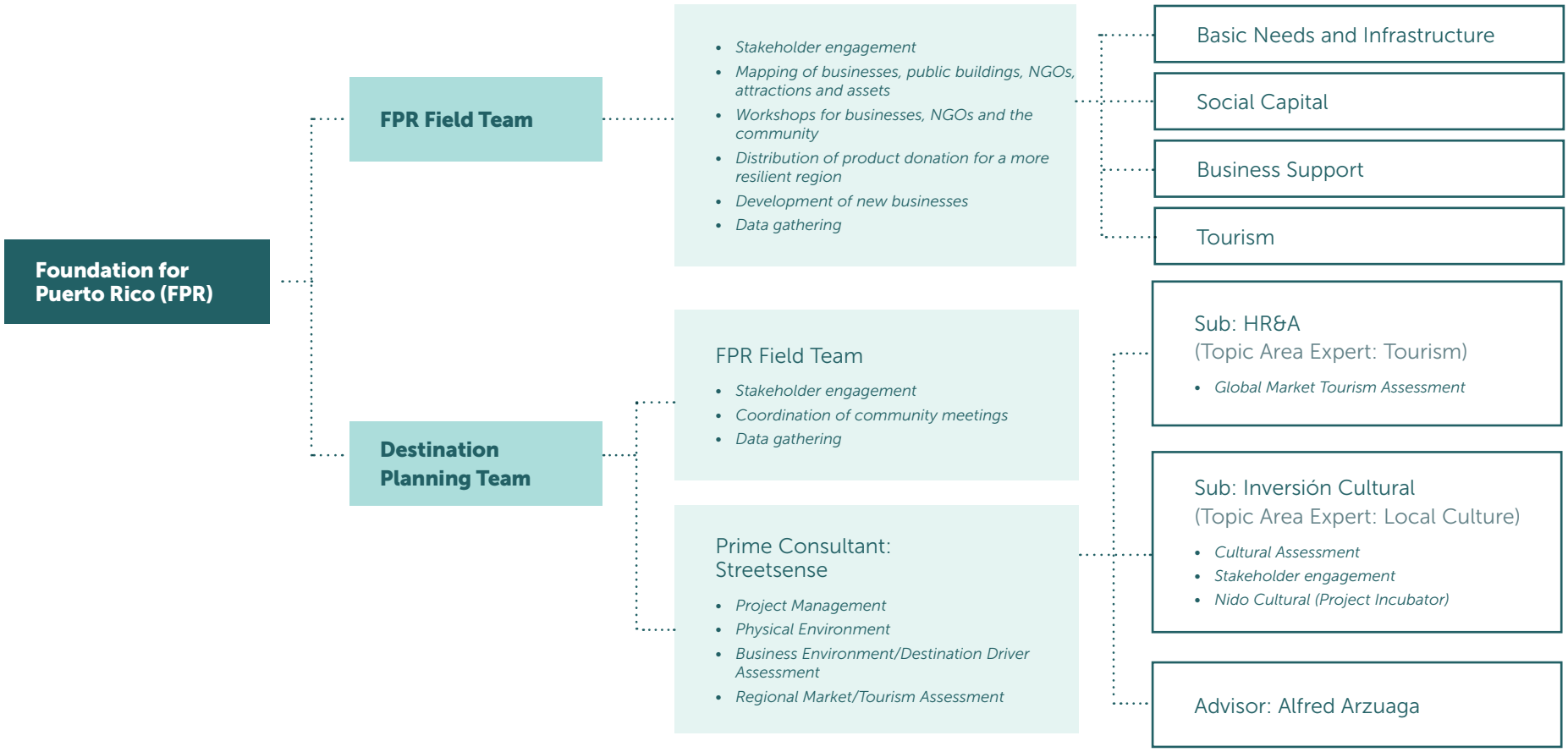
In practice, that means that the priority projects outlined in these plans often focus on improvements at high-value locations that offer significant opportunities to change visitor perceptions whit large, and clearly visible "wins" that help residents and business owners gain the confidence they need 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 conditions** 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 the North-East municipalities, 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 safely engaging local businesses, residents, and managers of cultural and natural assets amidst the COVID-19 pandemic. Their work included targeted stakeholder interviews with public, private and nonprofit sector leaders and virtual community meetings. The information was catalogued, 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 September 2020 and May 2021 to gather stakeholder input on existing challenges/issues facing the tourism economy in each region and to identify and refine key opportunities for improvement.

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

Stakeholder Engagement

Virtual Site Visit/1-on-1 Interviews

September-October 2020

Due to COVID-19 restrictions, the Destination Planning Team was unable to perform site visits to assets and attractions. Instead, the FPR Field Teams gathered audiovisual content and reports from anchors and attractions all over the region. In addition, the Destination Planning Team, with support of the FPR Field Teams, conducted virtual 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

October-November 2020

An open call-for-ideas process was established and managed by Inversión 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 , where the participants presented their final project sheets.

- Non-profit/grassroots/community group leaders
- Business owners

Interviews for Feedback on First Draft

February-March 2021

A series of individual and small groups interviews were conducted to gather feedback from local key stakeholders regarding the first draft of projects sheets for the Destination Plan. A list of stakeholders to interview was made based on the identified champions in the project sheets and other key community members. In addition, an email blast was sent to all contacts inviting them to contact the Destination Planning team to set up a meeting and/or request the draft for review. Depending on the preference of the interviewees, the meetings were held via phone call or Zoom (video conference platform). Stakeholders could also send their feedback via email.

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

Virtual Community Meeting #1

September 2020

A virtual meeting was held via Zoom 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-projects was presented as well as deliverables from the first phase of the Bottom Up Program. This event also served to explore how stakeholders visualized the tourism development in their regions.

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

Virtual Community Meeting #2

December 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. 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

Survey & Interviews for Feedback on Second Draft

April-May 2021

For the validation of the Destination Plan second draft a short video was made explaining all the projects presented in the plan. The video was uploaded to web and sent via email and/ or text to all the contacts of the region, along with a survey where stakeholders could provide feedback. This open call for feedback was also promoted in social networks to reach other residents of the area. In addition, individual interviews were conducted with several key stakeholders (either targeted by the FPR team as a champion or requested by the stakeholder itself).

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

Due to COVID-19, the original timeline and community engagement strategies were modified to adapt to the new restrictions and limitations in place. Prior to each engagement activity, the FPR staff and field teams led outreach efforts to ensure well-participated virtual community and targeted interviews. Although the virtual limits the community participation, the FPR team tried to reach stakeholders via phone (text/ calls), area facilitators (site visits with due precautions), virtual meetings (Zoom), emails and announcements through radio and newspaper.

Part 2: Diagnostic

The Destination Planning Team utilized the Commercial DNA (C-DNA),[10] 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 Puerto Rico 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-East 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 the beach and coastal 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 assessment of accessibility and mobility infrastructure in the region. This involved considering how visitors arrive to the island and to the region and how they moved around upon arrival.

The assessment was done primarily through fieldwork informed by the field team's site visits, remotely through Google Street View, and Google Reviews. Information was also gathered by the Field Team during a six-month community immersion and feedback from stakeholders.

The field 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."

[10] 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, primarily asset lists prepared by the Field Teams based on their lived experiences in the region and stakeholder feedback. Significant effort went into cleaning, classifying and merging data inputs 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 major asset against popular online review sites, including Google, TripAdvisor, and Hotels.com.

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), Puerto Rico Tourism Company, 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 ongoing 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 nonprofits.

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.[11] 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.[12] 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 visitation and customer sentiment through an analysis of ratings, and 4) a 2019 Hotel Destinations Report study commissioned by 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.

[11] *"More Puerto Ricans Move to Mainland United States, Poverty Declines". U.S. Census Bureau. July 2019.*
[12] *"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 visitation 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 visitation, 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 the North-East Region, 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.

Global Tourism Market Assessment

Global Tourism Market Assessment

In order to best understand how Puerto Rico can market and develop itself for tourism, 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 the North-East region to identify gaps in its offerings. The results of this analysis enabled the destination planning team 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 the region needs 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.

Although travel has long been considered a luxury good, over 2 billion people were expected to be traveling around the world by 2030 pre-COVID-19. 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 2020[13], 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 2020[14] —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[15]. 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%)[16]. 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 [17].

Although there is a lot of uncertainty around the recovery of tourism, for years, travelers have shifted preferences toward traveling 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

[13] *UNWTO World Tourism Barometer, 2020.*
[14] *Oxford Economics, 2020.*
[15] *International Air Transport Association, 2020.*
[16] *Harris Poll, 2020.*
[17] *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 plan 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 four major global trends that reflect opportunities to utilize or enhance unique local assets within the region. In particular, the North-East Region teeming with assets in a wide range of natural assets—beaches, bio bays, wetland reserves, 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,

El Yunque National Forest. Source: Discover Puerto Rico

etc. Despite rising criticism in the media, 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".[18] In the North-East Region, the main opportunities for voluntourism lie in the abundance of protected natural assets that are in need of care and maintenance.

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[19]. 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

[18] *Quantitative Analysis on the Traveler's Perception, February 2018*
[19] *World Tourism Organization (2014), AM Reports, Volume nine – Global Report on Adventure Tourism, UNWTO, Madrid.*

companies, such as Natural Habitat Adventures and Intrepid Travel, are tied to climate and environmental advocacy[20] 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 Montaña Explora 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 such as Casa Cubuy and Casa Flamboyant in Naguabo that make concerted efforts to reduce environmental impacts through participation in recycling/composting programs, farm-to-table dining, energy-efficient lighting, among other initiatives[21]. In 2018, 68% of consumers actively sought out eco-friendly accommodations, up from 65% in 2017[22].

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.

Bleisure: Bleisure, or 'business and leisure travel,' refers to travel that extends a work trip to include leisure time. In a 2017 survey of international guests, over 60% of business trips in the US were extended to include leisure time, on average adding two or more additional days to their business travel[23] — a 40% increase from the prior year. Although Gen X-ers still make up a large proportion of bleisure travelers, fast-growing age groups

Source: Christopher Burns (Unsplash)

Source: WeTravel (Flickr)

[20] *"Ecotourism Outlook 2018". Leah Joyner, Qwynne Lackey, Dr. Kelly Bricker. University of Utah College of Health. 2018.*
[21] *"5 Breathtaking Eco-Friendly Hotels and Resorts From Around the World". Sophie Hirsh. Green Matters. July, 2019.*
[22] *"Ecotourism Outlook 2018". Leah Joyner, Qwynne Lackey, Dr. Kelly Bricker. University of Utah College of Health. 2018.*
[23] *Expedia Group (2017). Bleisure Traveler Trends.*

consist of Millennials (25-34-year-olds) and Gen Z-ers who are now advancing in their careers. Key factors for extending bleisure travel include the availability of good entertainment and activities, which includes unique gastronomy, natural assets such as beaches, and historic monuments/ sightseeing.

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.[24] 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.

Source: Shutterstock

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 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.

[24] *Skift's 2017 U.S. Experiential Traveler Survey.*

Trends in Travel Planning

With the wide range of information now available online, planning and booking travel is increasingly done through online 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 mobile devices.[25] In Ceiba/Naguabo, however, many assets are still not listed on crowd-sourced reviews sites like Google and risk losing visibility to off-island visitors planning their trips to Puerto Rico.

Post COVID-19 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 will research how the destination they visit and its businesses are managing the coronavirus situation[26].[27]

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.

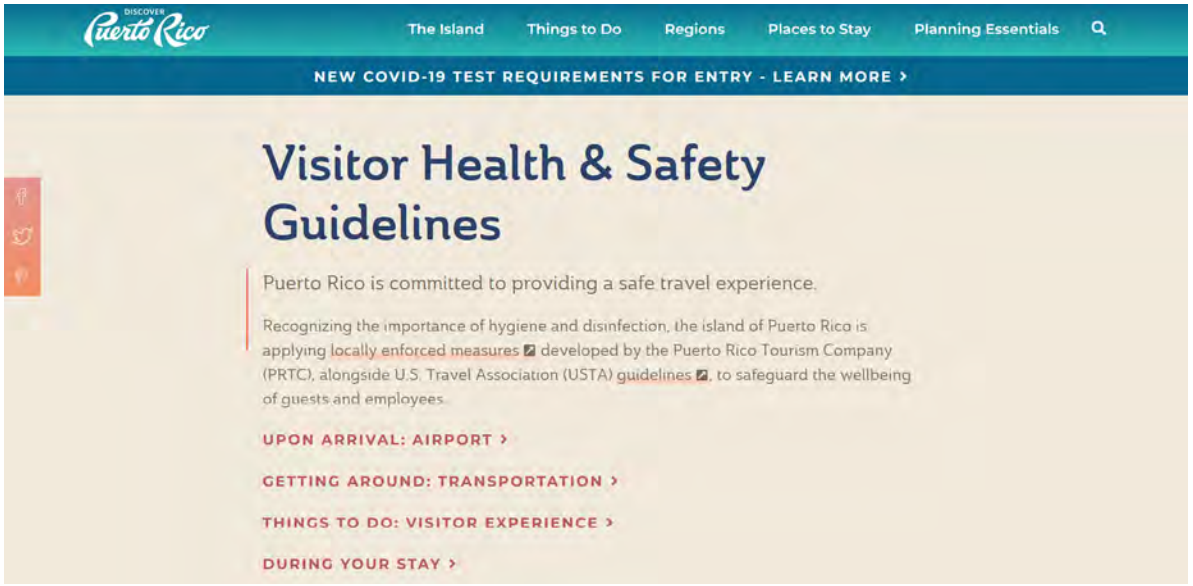
Before Trip: Digital platforms influence travel decision making. Although search engines and family/friend recommendations are the common initial source of inspiration for travel, travelers typically shift to Online Travel Agencies (OTAs) and airline/hotel sites as they advance in research and narrow 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. [28]

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.[29] With many resources available for travel planning, destinations need to have an integrated channel strategy on key channels like OTAs and social media.

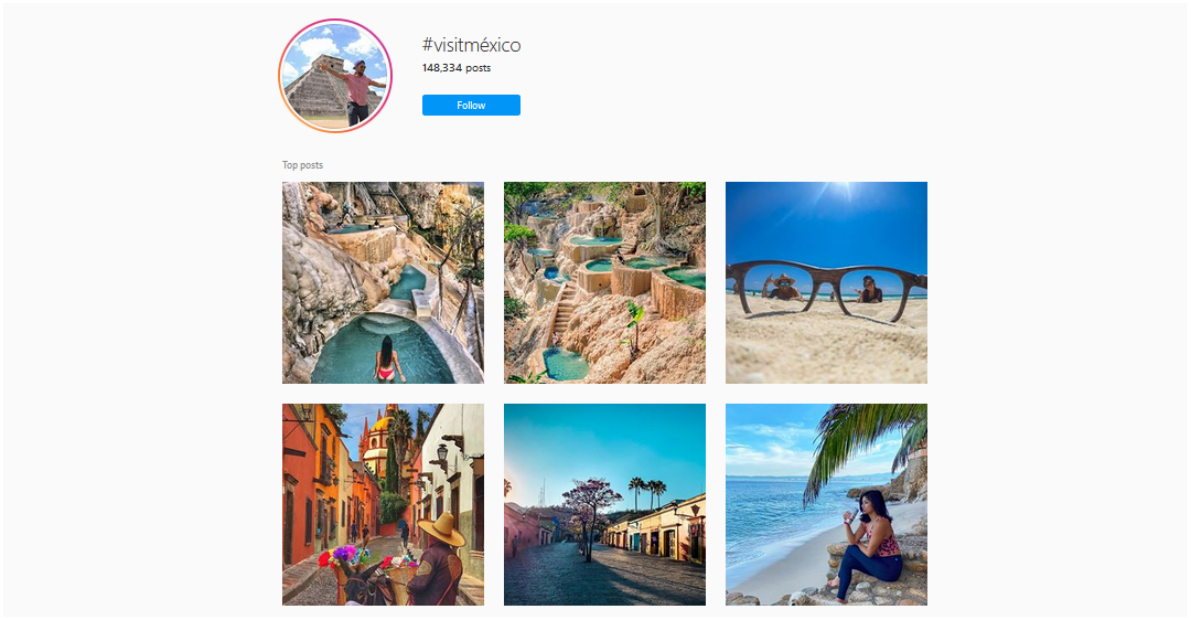
During Trip: The tourism industry has in recent years responded directly to the need for travelers to remain connected while on trips. In a Facebook-commissioned global survey of travelers who use social media, more than 80% reported using the internet while on vacation[30], primarily on their smart phone devices. Airlines and cruise ship companies have followed this trend by enhancing connectivity onboard[31]. 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.[32]

Source: Shutterstock

[25] Expedia Group, 2016. Traveler's Path to Purchase.
[26] Destination Analysts, 2020. "Update on American Travel in the Period of Coronavirus—Week of May 18th"
[27] Fuel Travel, 2020.
[28] Deloitte, 2015. Digital Channels for Travel Infographic.
[29] "The 4 Biggest Travel Trends for 2019". Eustacia Huen. Forbes. December 24, 2018.
[30] Deloitte, 2015. Digital Channels for Travel Infographic.
[31] "2019 Cruise Trends & Industry Outlook". Sarah Kennedy. Cruise Lines International Association (CLIA). 2019.
[32] The International Air Transport Association (IATA). 2018.



Source: Discover Puerto Rico



Source: Instagram (#VisitMexico)

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[33].

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.[34] 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.[35]

[33] *Deloitte, 2015. Digital Channels for Travel Infographic.*
[34] *Go Dominican Republic.*
[35] *Visit Mexico.*

Global Assets 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[36].

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[37].

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, 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.[38] 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 accommodations 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.[39] 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.

Source: Marcus Loke (Unsplash)

[36] *"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/*
[37] *"Visitor Health & Safety Guidelines". Discover Puerto Rico, 2020. Accessed online via https://www.discoverpuertorico.com/promise#component-10166*
[38] *Phocuswright's Global Hostel Marketplace, 2014-2018*
[39] *Several sources including "AIRBNB STATISTICS: 2019/2020 MARKET SHARE ANALYSIS & INDUSTRY GROWTH". Accessed online via https://comparecamp.com/airbnb-statistics/*

Although overall accommodation performance fell to unprecedented levels during the COVID-19 pandemic and about 44% decrease in Airbnb host revenues is expected between June-August 2020[40], the hotel sector experienced a much steeper decline than all short-term rentals for three major reasons[41] — 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.[42]

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.[43] 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.[44]

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 as 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.

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 Fajardo/Luquillo, 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.[45]

Source: Shutterstock

[40] *"Survey Reveals How Airbnb Hosts Are Coping During COVID-19". IPX1031, 2020. Accessed online via: https://www.ipx1031.com/airbnb-covid/*
[41, 42] *COVID-19 Impact on hotels and short term rentals. Sanford, Will and DuBois, Dillon, 2020.*
[43] *"Boutique Quickly Becoming Fastest-Growing Segment". Kim Bardoul. Hotel News Now. May 15, 2018.*
[44] *"3 Reasons Why Independent Hotels are Thriving". Jonathan Webster (Geronimo Hospitality Group). Hotel Management. October 23, 2018.*
[45] *"Ecotourism Outlook 2018". Leah Joyner, Qwynne Lackey, Dr. Kelly Bricker. University of Utah College of Health. 2018.*

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 and 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.

Travelers with Disabilities

According to the US DOT (2018), an estimated 11.2 million Americans aged 65 and older have travel-limiting disabilities. They accounted for 43.9% of people with disabilities in 2017 and 23.5% of their age group. This group represents only a small share of travelers with disabilities around the world whose participation in tourism is hindered by barriers in the physical environment and by attitudinal barriers. For years, their needs have been neglected by tourism destinations across the world.

However, from the travel planning stage to the day of travel, tourism destination operators are now increasingly incorporating new technologies and amenities that address the needs of this group of travelers - including ADA-accessible websites, specially-trained customer service staff on-site, and ADA-accessible signposting and sidewalks/ramps.

Several tourism assets in the North-East region such as Equinoterapia Puerto Rico and Marlin Sailing School are uniquely aligned to serve this group of travelers and have begun to create a cluster of accessible tourism assets offering an unmatched level of service.

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.[46]

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.

[46] "Generation Alpha & Family Travel Trends". Expedia Group Media Solutions.
[47] "Our Family Travel Survey Results are in!". Emma Sparks. Lonely Planet Kids. May 8, 2018.
[48, 49, 50] "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.[47,48]

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.[49] 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.[50]

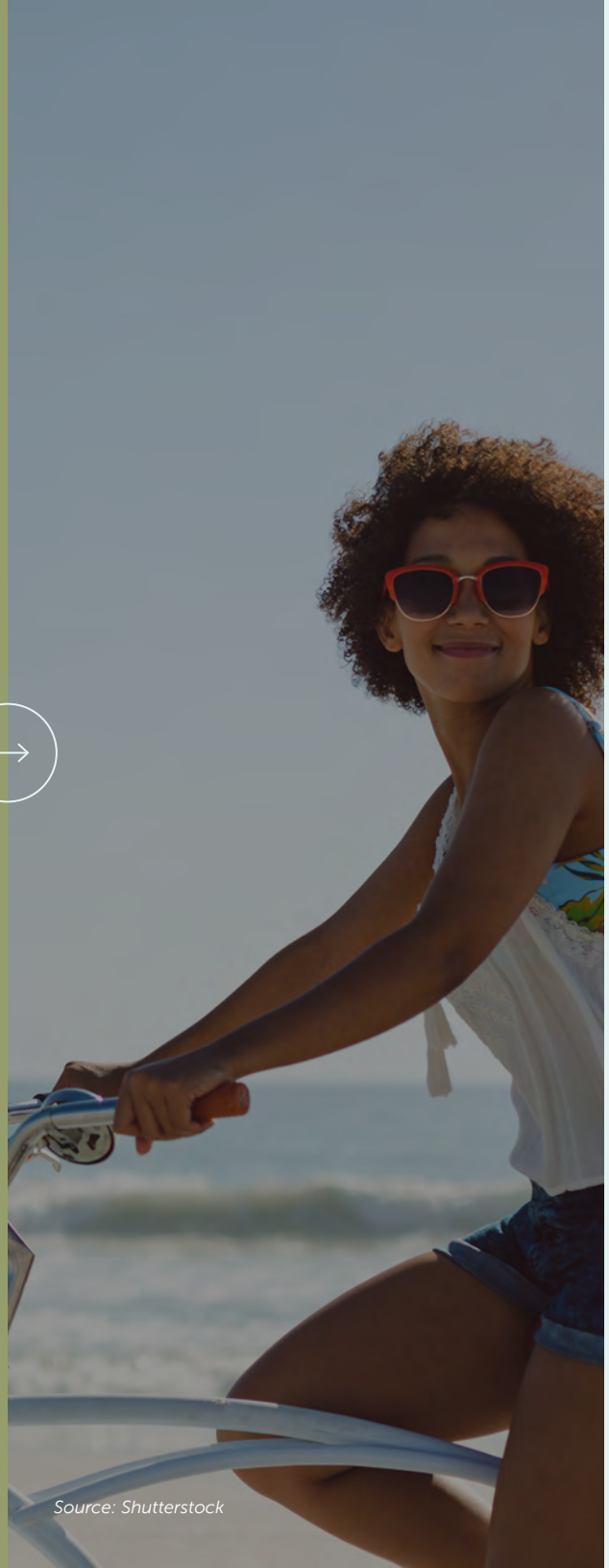
Customer Segment

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.



Source: Shutterstock

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 and 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

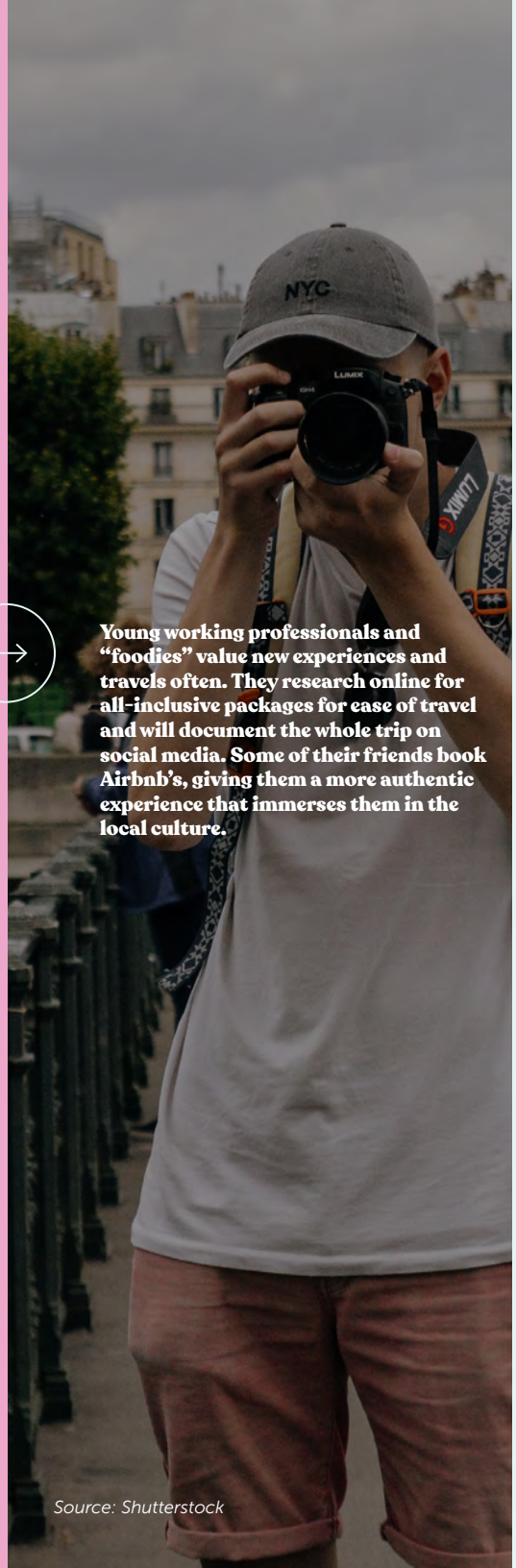
(age 26-40)

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%)[51]. 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.

[51] *Destination Analysts, 2020. "Update on American Travel in the Period of Coronavirus—Week of May 18th"*
[52, 53, 55] *"American Multi-Generational Travel Trends, Travel Habits and Behaviors of Generation Z, Millennials, Generation X, and Baby Boomers." Expedia Group Media Solutions.*
[54] *"Ecotourism Outlook 2018". Leah Joyner, Qwynne Lackey, Dr. Kelly Bricker. University of Utah College of Health. 2018.*



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."[52] 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.[53] Millennials care about the travel-cost, and the environmental impacts of their actions, which has contributed to a growth in ecotourism.[54]

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.[55] 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.[56]

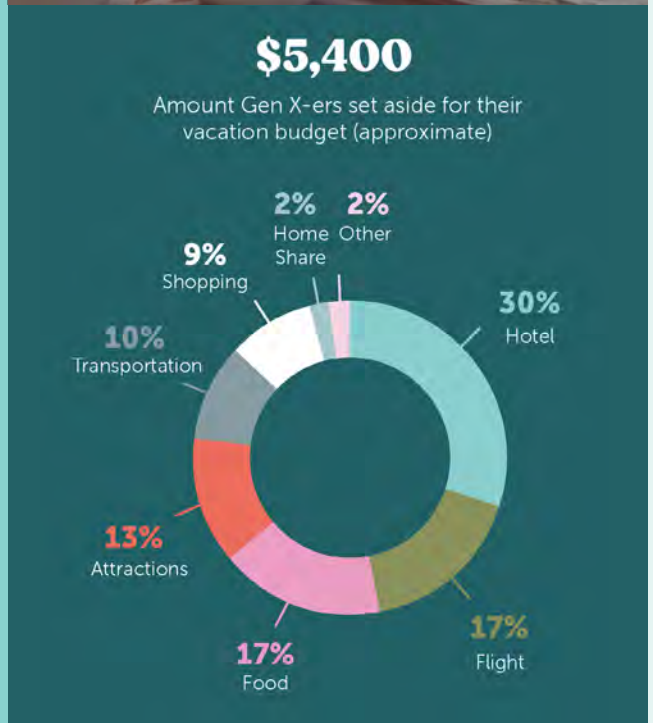
COVID-19 Sentiment

According to various sources, the two major barriers to consumers' readiness to travel following the pandemic will include concern around transmission, 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[57].

[56] *"How to Sell to Generation X Travelers". Natalie Maneval. Travel Agent Central. April 18, 2016.*
[57] *"Fuel COVID-19 Consumer Sentiment Study Volume 4: Travelers Are Ready, Especially Millennials". Fuel Travel, May 21 2020.*
[58] *"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.[58]

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-ers 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

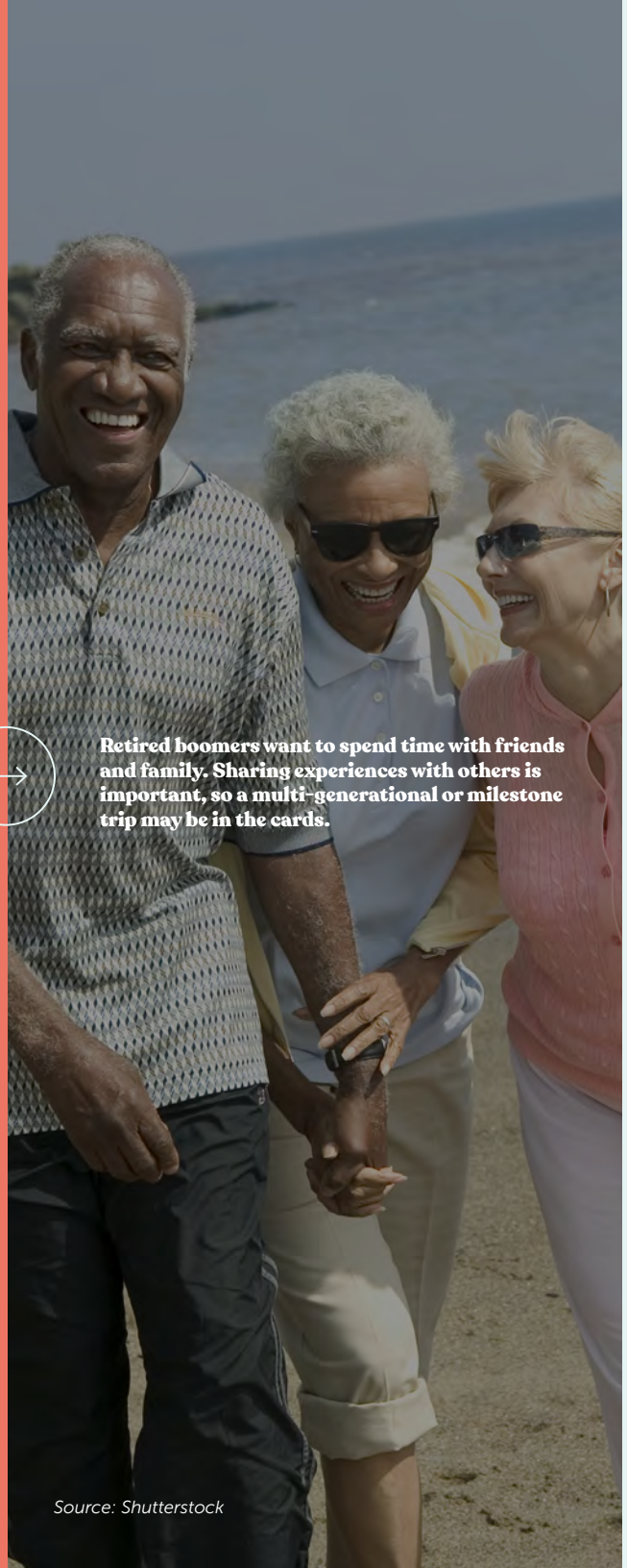
(age 56+)

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[59].

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



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.

Source: Shutterstock

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 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.

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 would have not usually 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

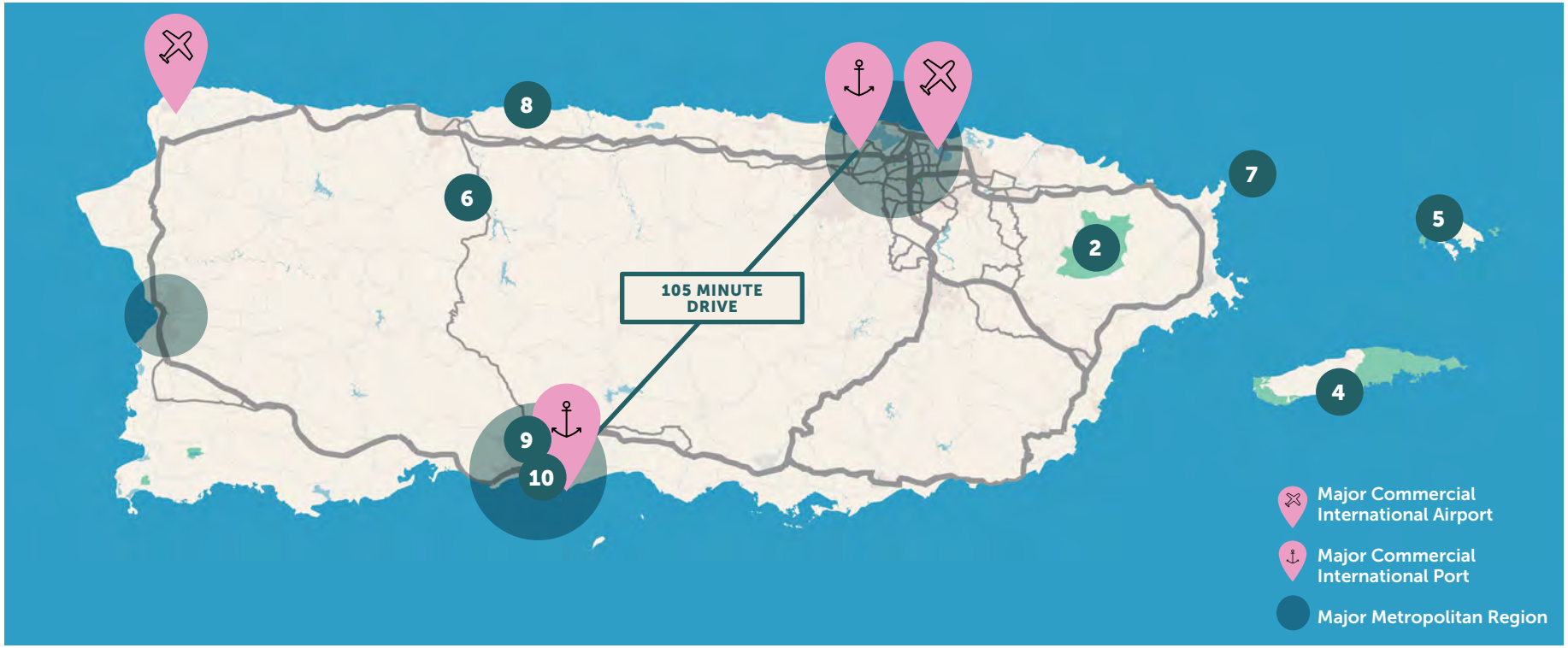
Tourism is an essential driver of Puerto Rico's economy. In 2016, the visitor economy made up over 7% of Puerto Rico's Gross National Product (GNP).[60] Between 2011 and 2017, visitation to Puerto Rico increased 24%, with 5.2 million people visiting the island in 2017.[61] In September 2017, Hurricanes 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.[62]

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.[63] 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.[64] 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.[65] 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-19 conditions.

Clockwise from top: El Conquistador Resort, Cabezas de San Juan Natural Reserve,, Corredor Ecológico del Noreste. Source: Discover Puerto Rico, FPR

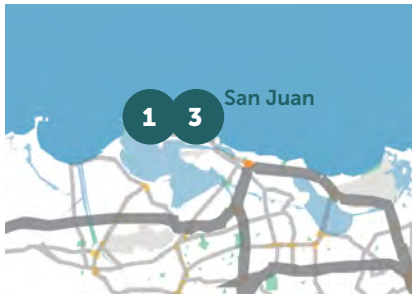
[60] "Puerto Rico Tourism Company Executive Director Ingrid Rivera Rocafort". Caribbean Business. March 6, 2016.
[61] "Puerto Rico Takes its Place on the Tourism World Stage" Government of Puerto Rico, Puerto Rico Tourism Company. Skift. October 24, 2019.
[62] "How Puerto Rico Is Using Tourism To Rebuild After Hurricane Maria, Forbes, Alexandra Talty". September 30, 2018.
[63] "Puerto Rico Uses Hurricane Headlines to Help Make It a Global Destination". Dan Peltier. Skift. September 27, 2018.
[64] "52 Places to Go in 2019". Rodrigo Honeywell, Adriana Ramic, Rumsey Taylor, Amy Virshup, Josh Williams. NYTimes. January 19, 2019.
[65] "Discover Puerto Rico Annual Report (FY 2018-2019)". July, 2019.

Major Island-Wide Tourism Context



Major Attractions (based on Google Trips)

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



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 Airport[66], 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 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[67].

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)[68].

Visitor Profile

In an attitudinal study conducted post-Maria of travelers in Puerto Rico's target markets, visitors to Puerto Rico 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[69].

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)[70].

Over 60% of visitors stay only in five municipalities in Puerto Rico, primarily in the San Juan Metropolitan Area[71].

Competitive Positioning

In August 2018, Discover Puerto Rico released a study of eight target markets from which to attract new and repeat visitors.[72] 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 the Puerto Rico Tourism Company (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[73]. 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-East 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 delivering, 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 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[74].

[66] *Bureau of Transportation Statistics. 2019.*
[67] *Quantitative Analysis on the Traveler's Perception, February 2018.*
[68] *Puerto Rico Tourism Company, 2018. Cruise Passenger Movement in Old San Juan.*
[69] *Quantitative Analysis on the Traveler's Perception, February 2018.*
[70] *Post-Maria Destination Attitudinal Study, January 2018.*
[71] *"Perfil de los Visitantes". Gobierno de Puerto Rico. Junta de Planificación. November 14, 2019.*
[72] *"Brand Health Research". Insights Strategic Marketing and Research. Discover Puerto Rico. August, 2018.*
[73, 74] *"Post-Maria Destination Attitudinal Study Quantitative Analysis on the Traveler's Perception". Puerto Rico Tourism Company. March, 2018.*

Source: Shutterstock

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.[75] 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.[76] 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"[77] 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[78].

Diaspora Tourism

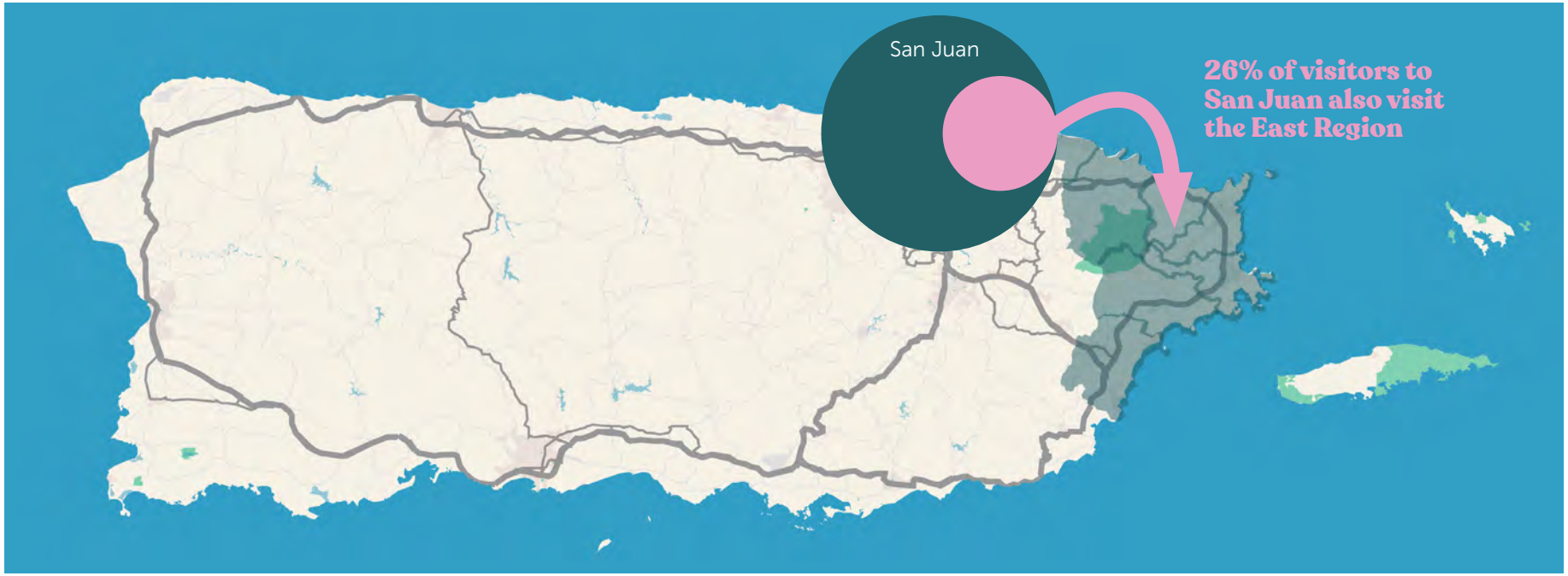
The travel of people in the diaspora to their ancestral homelands to visit friends or family (VFF), vacation, or explore personal heritage is considered to be among the oldest manifestations of travel. Yet, it remains an undervalued type of travel for most economies, including Puerto Rico. Although many 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[79].

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 2020[80], 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.

[75] Puerto Rico Tourism Company, 2018.
[76] "Domestic Tourism: Importance and Economic Impact". WTTC, 2018.
[77] Development Counsellors International, 2020. "Post-COVID-19: Generational Divides In Travel Planning"[78] Fuel Travel, 2020.
[79] 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.
[80] "July Research Webinar: Puerto Rico's Competitive Position". Discover Puerto Rico, July 7 2020..

North-East Region Destination Assessment

Tourism Market Assessment – East Region



Source: Arrivalist 2019; Streetsense

The East Region covers over fifteen municipalities, among them are the islands of Vieques and Culebra. To better understand the demand for tourism in the municipalities of Fajardo/Luquillo and Ceiba/Naguabo, specifically, the team is collectively defining them as a sub-market of the East Region, or the North-East Region.

According to Arrivalist, a proprietary data partner of Streetsense which tracks consumer trips based on mobile location, the East Region[81] is the second most popular tourism destination outside of the San Juan Metropolitan Area after Porta Atlántico[82] (based on real-time consumer travel). Porta Atlántico, which includes nine congruent municipalities from Toa Alta (east) to Camuy (west), attracts about 31.5% of visitors to San Juan while the East Region attracts 26% of visitors to San Juan[83]. Porta Atlántico's popularity is likely attributable to the cluster of all-inclusive resorts and highly rated lodging opportunities that are easily accessible from Luis Muñoz Marín International Airport (SJU) and popular for families, Gen X travelers, and others seeking private beach access and resort amenities.

Similar to Porta Atlántico, the East Region's proximity to Luis Muñoz Marín International Airport (SJU) makes it an ideal day trip destination for visitors arriving in San Juan. More importantly, the East Region functions as a critical gateway for visitors traveling between the mainland and the neighboring island municipalities of Culebra and Vieques.

Aside from connecting flights to Culebra and Vieques that depart from the San Juan Metropolitan region (Luis Muñoz Marín International Airport [SJU] and Isla Grande Airport [SIG]), visitors are also able to transfer by flight or ferry in Ceiba at José Aponte De La Torre Airport (NRR) or Ceiba Ferry Terminal in Roosevelt Roads.

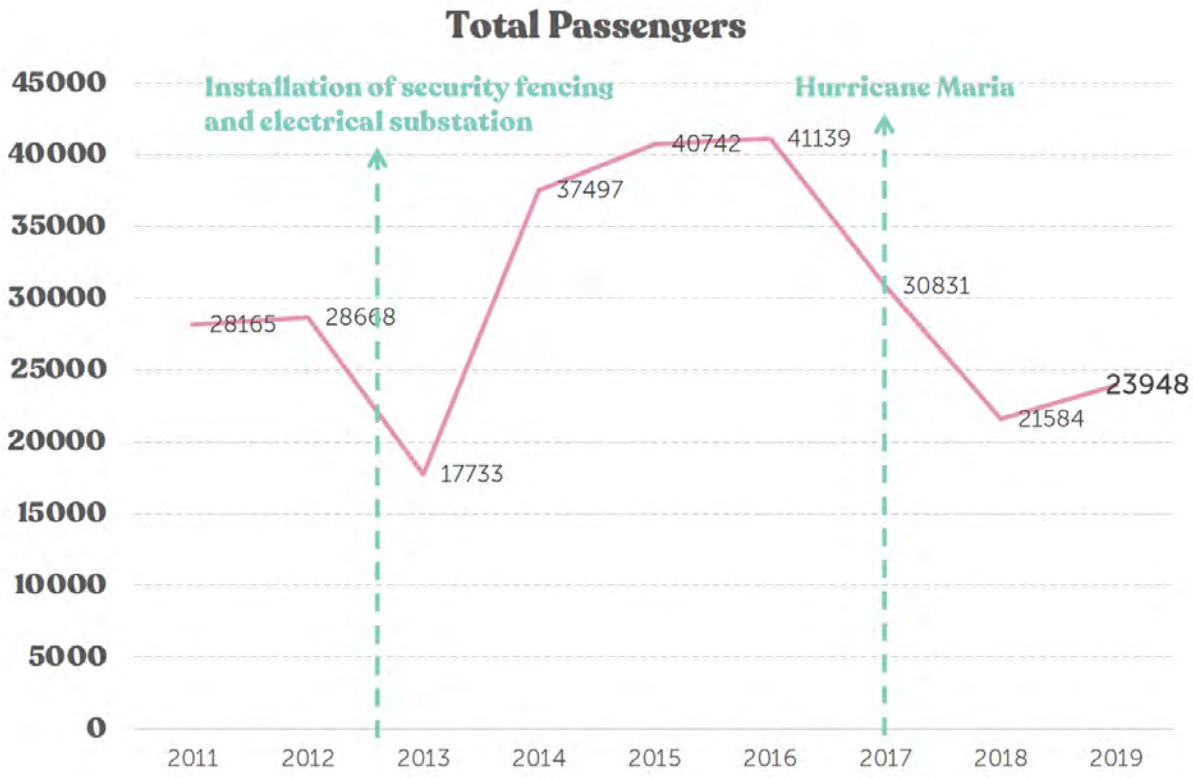
[81] *East Region includes the following municipalities: Loíza, Gurabo, Juncos, Las Piedras, San Lorenzo, Caguas, Canóvanas, Río Grande, Luquillo, Fajardo, Ceiba, Naguabo, Maunabo, Humacao, and Yabucoa.*
[82] *Porta Atlántico includes the following municipalities: Arecibo, Barceloneta, Camuy, Dorado, Hatillo, Manatí, Toa Alta, Vega Alta and Vega Baja*
[83] *Arrivalist, 2018 - 2019.*

Following electrical repairs funded by federal grants, José Aponte De La Torre Airport (NRR) in Roosevelt Roads offered scheduled commercial passenger service to Vieques and Culebra via two major airlines — Air Flamenco and Vieques Air Link. In fact, pre-COVID-19, the airport was experiencing an uptick in annual flights and passengers.

Estimated Market Capture

Based on the region's approximate supply of 18.5% of the island's available lodging before the pandemic, the Destination Planning Team estimates that the North-East Region can reasonably support approximately 1.19 million annual person trips (assuming 8,303,000 total national person trips) and $1.19 billion in annual visitor spending (assuming $6.4 billion total national visitor spending)[84].

According to 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). These segments of travelers are especially important to convert to the North-East Region given its main anchor asset, El Yunque National Forest, and its eclectic mix of complementary outdoor recreational assets, including waterfalls, beaches, and bays.



Source: Bureau of Transportation Statistics, T-100 Market (All Carriers)

[84] *Estimates by Streetsense made based on Tourism Economics data on Puerto Rico tourism economy from 2019 before the pandemic*

Physical Environment Assessment

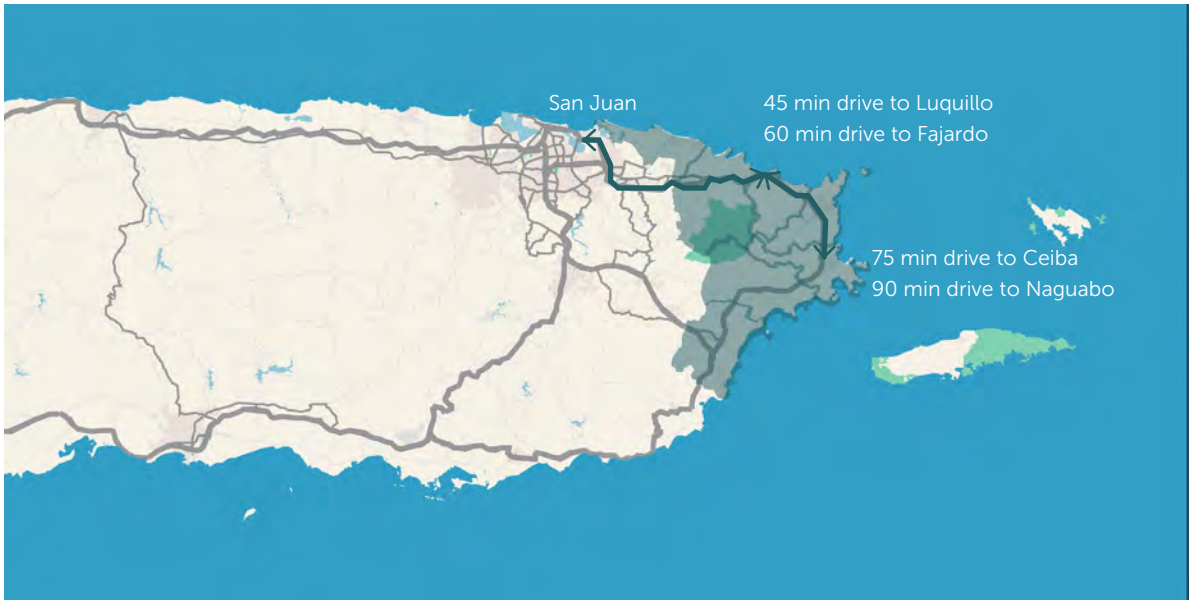
Physical Environment Assessment

How do we connect the North-East Region?

The North-East Region is currently connected by major roadways PR-3/PR-53. These highways, which circumvent El Yunque National Forest, provide visitors the most convenient route to the region's key assets including Los Kioskos de Luquillo, Las Cabezas de San Juan in Fajardo, Roosevelt Roads in Ceiba, and Malecón de Naguabo.

Before 1970, PR-191 offered visitors an alternative north-south connection. However, since then the roadway has been non-contiguous due to a landslide and has not been reopened. In 1992, the USDA Forest Service came to the conclusion that the soils in the area are highly unstable and withdrew any support to reopen the road.

As a result, it currently takes a visitor from San Juan approximately 30 minutes to travel to Luquillo, the northernmost municipality of the region on PR-3/PR-53. Travel times extend as a visitor continues on to each of the other municipalities in the North-East Region. This lack of alternative access since the 1970s has resulted in distance decay for travelers or the concept of diminishing convenience



Source: Google Maps; Streetsense

and interaction between two points that are located farther apart. On average, traveling from San Juan to the southernmost municipality of the region, Naguabo, on PR-3/PR-53 (or via the alternative route on PR-52/PR-30/PR-53) will take approximately 70 minutes by vehicle — more than twice as long as traveling to Luquillo.

This is a critical challenge to consider as over 60% of visitors to Puerto Rico stay only in five of the municipalities in Puerto Rico, primarily in the San Juan Metropolitan Area[85]. Without convenient access from San Juan, the North-East Region will continue to be a less desirable destination for off-island travelers who are unfamiliar with navigating roads on the island or feel less comfortable traveling long distances from their places of accommodation.

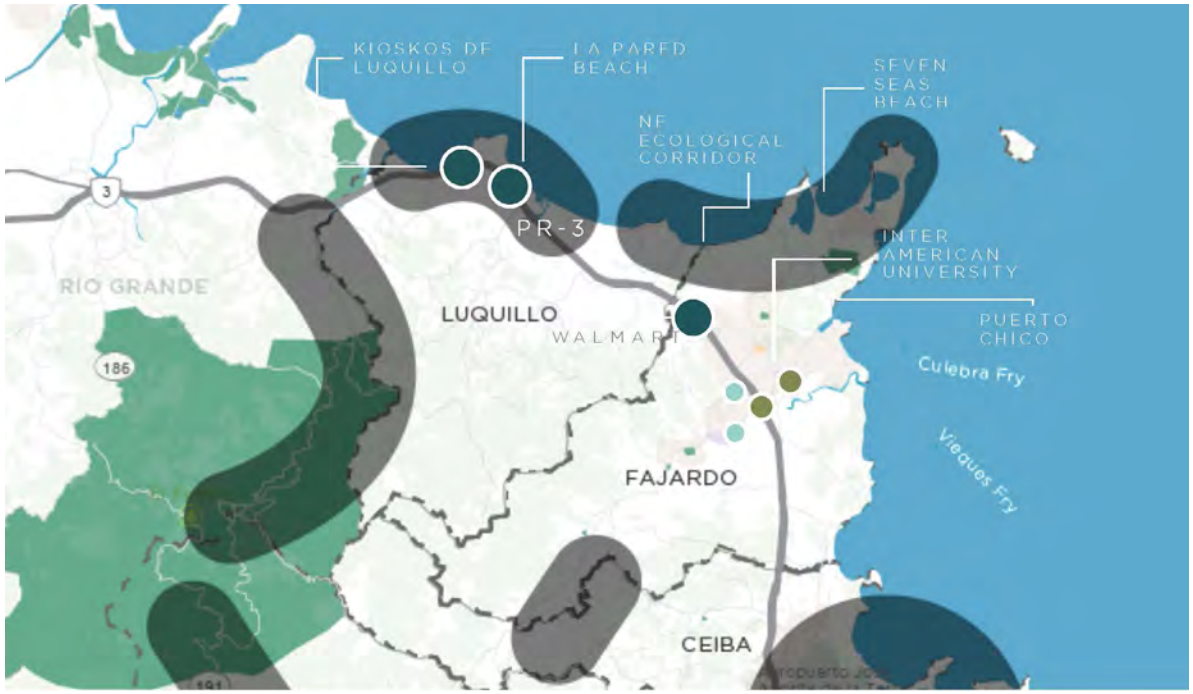
Distance decay is further demonstrated in the average vehicular traffic patterns on PR-3/PR-53. North of the Walmart in Fajardo, average daily traffic volumes exceed 30,000 along PR-3/PR-53[86], however, this volume tapers further south of the region and falls below an average of 15,000 daily vehicles on PR-3/PR-53 before picking back up at the Naguabo border with Humacao (south of the PR-191 access route into El Yunque).

As such, to further encourage cross-visitation between municipalities of the North-East

[85] *"Perfil de los Visitantes". Gobierno de Puerto Rico. Junta de Planificación. November 14, 2019.*

region and to encourage spillover visitation from El Yunque National Forest to other key assets in each of the four municipalities, it is critical for the region to consider a range of strategies that will improve access for travelers. This includes reopening PR-191 as a low-impact multi-use trail that serves as an alternative north-south connection (region-specific recommendation) and enhancing signage and wayfinding on the region's existing network of secondary roadways (island-wide recommendation).

Without a more robust network of well-maintained and alternative pathways that extend to the southernmost sections of the North-East Region, travelers will continue to be inconvenienced and forced to backtrack on PR-3/PR-53 to travel between key assets.



Source: Department of Transportation (Most recent traffic counts)

Access/Connectivity Beyond Private Vehicles

Unlike many other tourism destinations in Puerto Rico, the North-East Region is easily accessible by private bus/van hires for half-day or full-day services from the San Juan metropolitan area. These transportation options, with pick-ups from major hotels in San Juan and from Luis Muñoz Marín International Airport (SJU), may be more costly than private car rentals for those traveling in smaller groups. However, they often offer other benefits such as having an informed tour guide on board, disability traveler accommodations, and parking convenience.

As such, to further enhance connectivity between individual assets within the North-East Region and to reduce environmental impact from private vehicle travel, it is important to provide support through shared operating services and customer service training (island-wide recommendations) to vehicle-for-hire and tour group service operators in the North-East Region. By increasing such alternative transportation services in the region, assets will also stand to benefit from creating access for travelers who may not be able to easily rent cars, including Gen Z travelers and those with disabilities.

[86] *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)*

Business Environment Assessment

Business Environment Assessment -

Disparity of Tourism Assets and Lodging in the North-East Region

The basis of a region's unique strategic position lies in its comprehensive set of offerings. In the North-East region, there are over 75 unique assets across the following categories: Cultural/Historical, Recreational, Agricultural, Natural/Outdoor Adventure, and Transportation Hub. These assets are clustered across seven major nodes as shown in the map.

Owing to COVID-19 restrictions, these tourism assets were identified via desktop research and limited site visits conducted by the FPR Field Teams before being further filtered down by the Destination Planning Team to identify top drivers.

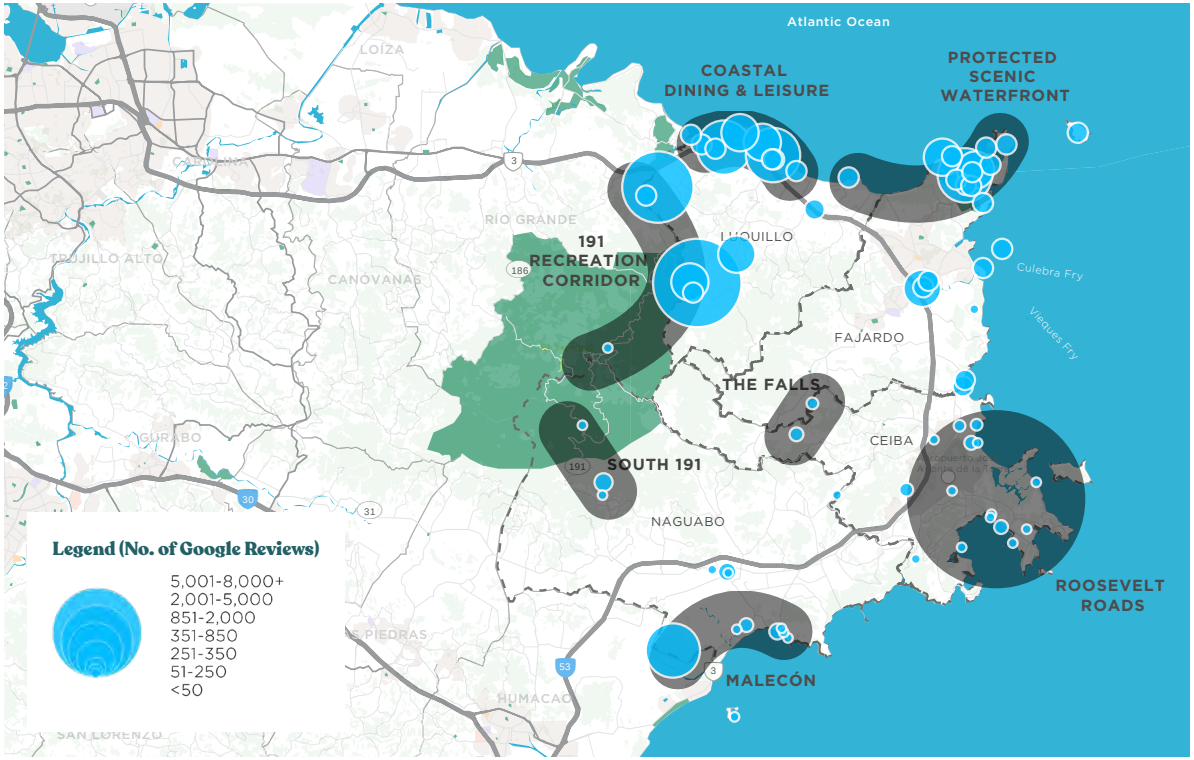
In order to focus assessments on assets that are already well-established or closely aligned with other assets that significantly attract visitors to the region, the Destination Planning Team applied a filter based on the number and quality of online reviews.

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.

Despite the close physical proximity of assets across the North-East Region and the opportunities for visitors to form itineraries that extend between the municipalities of the region, there remains a clear disparity in major assets between Fajardo/Luquillo and Ceiba/Naguabo, likely as a result of alternative convenient connections and accessibility. In fact, of the 75 unique assets identified in the region, only one-third are located in Ceiba/Naguabo. Furthermore, 100% of these top assets in Ceiba/Naguabo have fewer than 500 reviews on Google, indicating lower visibility of assets as perceived by visitors.

A more detailed assessment of the quality of top destination drivers may be found in "Section 3: A Closer Look at Fajardo/Luquillo".



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

NATURAL

- Forest
- Beaches
- Caves/ caverns
- Rivers/ waterfalls

SHOPPING/ ENTERTAINMENT

- Stores/ restaurants

List of Top Attractions

Name	Municipality	Type	Total # of Google Reviews	Average Google Rating
El Yunque National Forest*	-	Natural	8,116	4.8
Carabalí Rainforest Park	Luquillo	Recreational	2,395	4.6
Seven Seas Beach	Fajardo	Natural	1,387	4.5
Kioskos de Luquillo	Luquillo	Shopping	1,372	4.5
Playa La Pared	Luquillo	Natural	1,014	4.7
Playa Azul	Luquillo	Natural	791	4.7
Las Pailas Waterfall	Luquillo	Natural	606	4.7
Playa de Luquillo	Luquillo	Natural	576	4.7
Centro Urbano Fajardo	Fajardo	Cultural	557	4.6
Las Cabezas de San Juan	Fajardo	Cultural	542	4.7

**Main entrance located in Rio Grande*

Source: FPR Field Team Asset Inventory (August 2020); Google Maps

TYPES OF ASSETS/ATTRACTIONS

CULTURAL

- Churches
- Plazas
- Theaters
- Museums
- Historic sites/ buildings

RECREATIONAL

- Sporting and hobby facilities

NATURAL

- Forest
- Beaches
- Caves/ caverns
- Rivers/ waterfalls

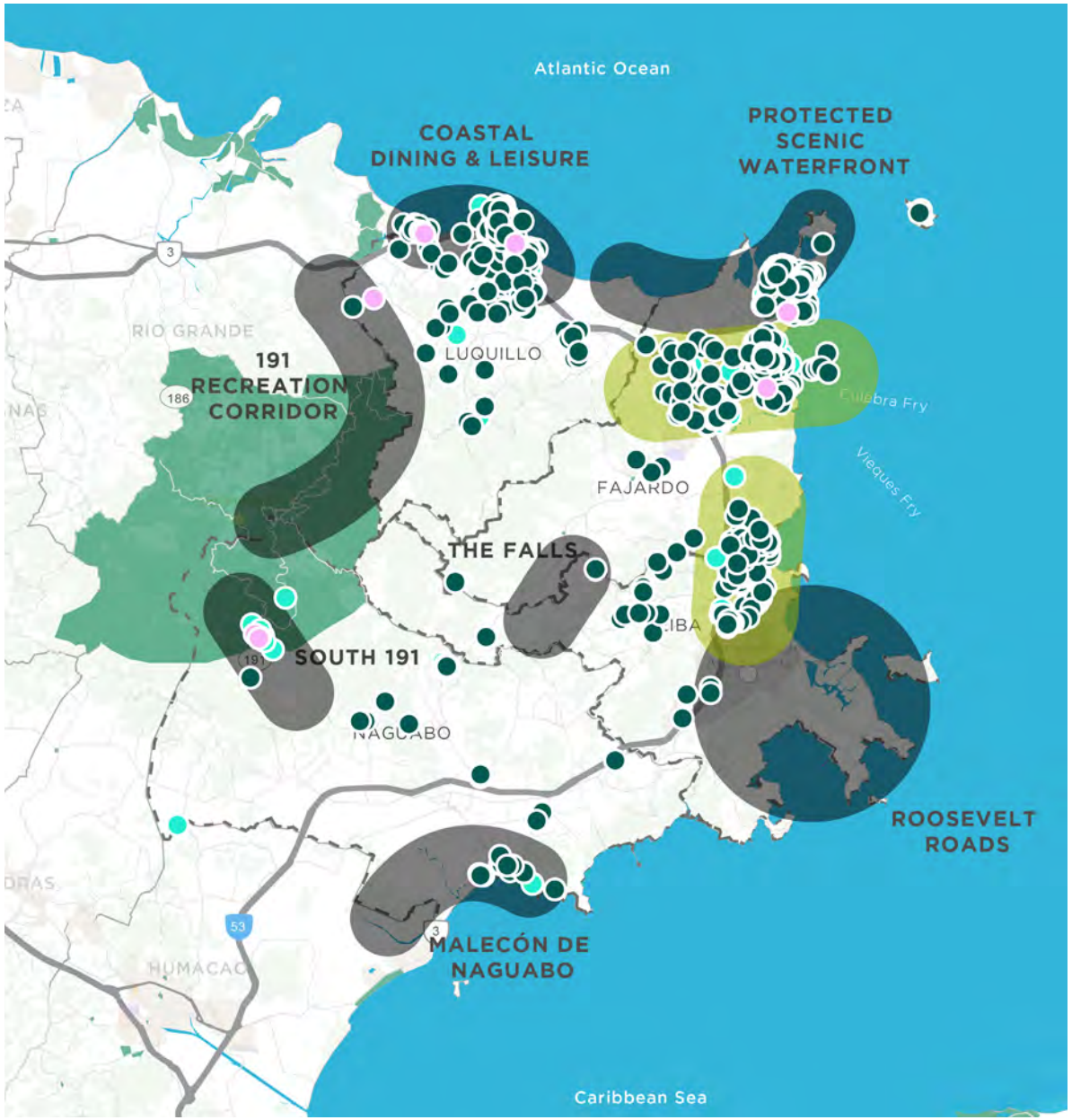
SHOPPING/ ENTERTAINMENT

- Stores/ restaurants

List of Top Attractions

Name	Municipality	Type	Total # of Google Reviews	Average Google Rating
Charco El Hippie	Naguabo	Natural	438	4.8
Plaza Publica Naguabo	Naguabo	Cultural	329	4.1
Paseo Tablado El Malecón de Naguabo	Naguabo	Cultural	215	4.7
Playa Los Machos	Ceiba	Natural	200	4.1
Tropical Beach Naguabo	Naguabo	Natural	194	4.5
Ceiba Ferry Terminal	Ceiba	Recreational	124	2.7
Roosevelt Roads Beach	Ceiba	Recreational	119	4.4
Natural Reserve Medio Mundo y Daguao	Ceiba	Natural	107	4.7
Charco Frío/ Las Tinajas	Ceiba	Natural	198	4.5

Source: FPR Field Team Asset Inventory (August 2020); Google Maps



Source: PRTC Hotel Room Inventory; AirDNA (Nov 2018)

Hotel

Informal Lodging - Entire Apartment

Informal lodging - Room only

The limited visibility of assets in Ceiba/ Naguabo on search engines like Google is further reinforced by limited lodging options that enable overnight stays in the southernmost municipalities of the North-East Region.

While there are over 2,600 available rooms across formal and informal lodging in the North-East Region, only 258 available rooms are located in Ceiba/Naguabo — of which only 30 are formal lodging rooms (PRTC-registered rooms) at Casa Cubuy and Casa Flamboyant. Furthermore, a large share of total available rooms in Ceiba/Naguabo remain concentrated north, near the marinas of Fajardo — with limited availability by Malecón de Naguabo and South PR-191/Sabana River Recreation Area.

Organizational Capacity Assessment

Organizational Capacity Assessment

Where can we support each other?

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.

Fortunately, for the North-East Region, there is an existing landscape of cross-sector partners and organizations that have been working hard to enhance individual assets and nodes of tourism activity. From environmentally focused organizations such as ECOSOL, A.P.R.O.D.E.C., Montaña Explora, and Para la Naturaleza, to grassroots arts,cultural and community support groups such as Bombae and Naguabo Somos Todos, the North-East Region is teeming with active non-profit groups that are willing and interested to participate in strategic planning efforts. This enthusiasm, however, is often limited by access to capital and resources.

Limited Access to Capital

Through the FPR field team immersion experience and the Nido Cultural process, several local organizations 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. Another issue faced by organizations is that many federal funding opportunities (such as CDBG-DR and FEMA funds) operate on a reimbursement basis, which requires accessing lines of credit or having sufficient capital. In fact, according to feedback provided by numerous stakeholders interviewed by the Destination Planning Team, many cultural organizations across the island face the dilemma of charging fees at assets as they perceive them to be public amenities that should be made affordable and accessible to all, exacerbating cash flow issues for many smaller and localized cultural and heritage sites.

Strained Working Relationships

Beyond limited capital and resources, non-profit organizations in the North-East Region also shared a sentiment of general distrust of public sector partners. In more than one stakeholder interview, local non-profit leaders admitted having little confidence in local and state office leaders who were perceived as not having the right skill sets and expertise to carry out tourism development. This relationship with public sector partners has also been exacerbated by the lack of continuity of tourism projects with repeated changes in public sector leadership, and limited community engagement efforts on municipal-led projects and initiatives.

One example of a strained relationship between public and non-profit sector partners is in Roosevelt Roads in Ceiba. Some top-down projects and improvements have been prescribed with limited input from local stakeholders and nearby residents, and with few considerations of impacts on existing tenants. It is therefore crucial that a trusted authority overseeing the property management such as Roosevelt Roads Local Redevelopment Authority (LRA) shepherds a clear vision for promoting greater collaborations between tenants. The rehabilitation of a former military base is, in itself, an incredibly complex undertaking by LRA and will require years of building trust and fostering relationships with local tenants and community stakeholders, as well as private investors. Other former military bases across the United States have faced similar issues, including those owned and managed by heavily resourced agencies like the National Park Service.

As the region moves forward post-pandemic, public sector partners including the USDA, LRA, and local municipal tourism directors should leverage the engagement efforts that have already been fostered by local community groups to further mend relationships and regain trust through more consistent community engagement sessions.

On-Going State of Emergency

In addition to the above-listed region-specific issues, there is also a suite of island-wide organizational capacity challenges that continue to cripple tourism development across Puerto Rico. In particular, recent natural disasters have continued to hobble the island in the form of both hurricanes and earthquakes. These events 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 state level have further complicated the ability of the government to address needs and challenges.

The COVID-19 pandemic has only 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 and Focus on Off-Island Visitor

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 a number of tourism directors across the island revealed the need for training and expertise in tourism which will result in organized efforts to attract off-island visitors to the North-East 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, and should be given consistent training cross-jurisdiction to ensure a level playing field and the overall success of municipality-driven tourism efforts and initiatives **(island-wide recommendation).** Given that visitors typically experience destinations regardless of municipality boundaries, it is also important for tourism development efforts to be closely coordinated with and communicated to leaders of neighboring municipalities. This will help ensure tourism assets function jointly and better tie into a visitor's overall experience of a region.

Regulations and Permits

Before the pandemic, multiple regulations affected 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 (Colegio de Productores de Espectáculos Públicos de Puerto Rico – COPEP) – with the exemption of non-profit organizations. Such membership involves recurring costs that vary according to the volume of guild revenues. For cultural agents who are not licensed 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 carried out before and after each event that is related to the endorsement of tickets before sales and a final settlement after the event, associated with the retention of the sales tax.

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 new ventures that seek to integrate cultural experiences as part of assets because of the certification's complexity and extensive requirements. PRTC is the agency selected by the government of Puerto Rico to supervise the certification and education of tourist guides on the island.

With the COVID-19 pandemic, new requirements have been added toward the production of events, including the requirement of a waiver/special permit issued by the Secretary of State's office for selected social events that are not authorized under the latest Executive Order (e.g., cultural events, sporting events, etc.)

Despite the introduction of the Single Use Permit (Permiso Único) by the Office of Permitting Management in 2019, business owners continue to face various bureaucratic challenges in obtaining the necessary permits to establish their businesses. This has only been exacerbated by the pandemic. This regulatory challenge is compounded by the added cost of doing business in Puerto Rico over the last decade with increasing shipping costs and taxes.

Performers playing Bomba on the Plaza de la Identidad Puertorriqueña, in San Juan, P.R., in March 2021. Source: Shutterstock

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 Jíbaro 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. 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.[87]

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.[88] 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.[89] 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.[90] 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

[87] *Tourism and Culture Synergies". World Tourism Organization. 2018.*
[88] *"Una guía para gestionar su economía nocturna". Sound Diplomacy. 2018.*
[89] *"Intangible Heritage List". UNESCO. 2019.*
[90] *"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 for a new attraction that could impact different tourist segments because of historic sites, architecture, gastronomy, and live entertainment.

Island-Wide Cultural Challenges

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

- Limited budgets to sustain operational costs, and limited ability to charge entrance fees. In many cases organizations avoid charging entry fees owing to concerns that they will need to pay taxes and that it will complicate accounting for what are largely volunteer organizations.
- Lack of coordination between different levels of government (state and municipal).
- Lack of on-going financial support from the Instituto de Cultura Puertorriqueña (ICP) to Cultural Centers.
- Limited entrepreneurial resources among or for cultural organizations.
- 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-19 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.

Regional Gap Assessment

Regional Gap Assessment

Filling the Gaps Across North-East Region

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 under performing 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 framework for thinking 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.
- — Indicates that the item is not available in the region.

Although options to get to the North-East Region are generally easily available, with high flight connectivity from both Luis Muñoz Marín International Airport (SJU) and José Aponte De La Torre Airport (NRR), and available car rental companies (e.g., Enterprise and Thrifty operate in Fajardo and Avis in Ceiba, with services to Vieques), intra-regional mobility is more challenging.

Type	Fajardo/ Luquillo Rating	Ceiba/ Naguabo 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/Outdoor Adventure	●	◐
Cultural/Historic	○	○
Recreational	◐	○
Agricultural	○	○

Limited alternative transportation options in the North-East Region require visitors to primarily travel by private vehicle between key assets (private bus hires are only available to select assets). Upon arrival at major natural assets such as El Yunque National Forest, the coastal reserves, beaches, and the urban centers, visitors can walk or bike safely to adjacent businesses and attractions. However, even within an enclosed campus like Roosevelt Roads, visitors still cannot easily travel between assets given the lack of safe bike lanes and robust networks of sidewalks.

As outlined in greater detail earlier, there remains a clear disparity in major assets and lodging between Fajardo/Luquillo and Ceiba/Naguabo, and this is reflected in the ratings above. While Fajardo/Luquillo scores highly in lodging with more than 1600+ available rooms across formal and informal lodging, Ceiba/Naguabo has low ratings in lodging with only a fraction of the North-East region's supply (258 available rooms), mostly in informal lodging facilities.

With regards to tourism attractions, Fajardo/Luquillo has a clear advantage in Natural/Outdoor Adventure offerings, given the region's access to key assets in the northern sections of El Yunque National Forest — including Angelito Trail Head and Puente Roto recreation site — as well as the Bio Bay. Although Ceiba/Naguabo has outdoor assets such as beaches, many of these remain local destinations. The beaches have limited amenities, inaccessible (especially those located within Roosevelt Roads), and are not well-managed. Off-island travelers that pass through Ceiba/Naguabo en route to/from Vieques and Culebra have set high expectations for beach experiences and offerings and are therefore unlikely to spend extended amounts of time at beaches in the region given current physical conditions. Also, despite Ceiba/Naguabo's access to El Yunque National Forest from the south through Sabana River Recreational Area, the entrance remains less popular to off-island visitors due to the lack of accessibility from San Juan and current road conditions of PR-191 South.

Overall, the limited number of popular assets in Ceiba/Naguabo at this time limits its ability to meet the demands and preferences of off-island travelers.

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 the North-East Region, 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-East 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. 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 the 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 the North-East Region with the best tourism practices to emulate, we do not mean to suggest that the mega region's tourism economy could or should cater to tourists in the same way as those destinations, whose economies were shaped by their local stakeholders with particular goals and interests.

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%).[91]

Similar to the North-East Region, 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 with 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.

The North-East Region's SAVE tourism opportunities, largely centered around El Yunque and other key natural protected areas along the NE Ecological Corridor, serve as a point of competitive advantage compared with Riviera Maya.

[91] *"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-East 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 hotels/lodgings 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, Los Haitises National Park, and the unique migration of humpback whales that occurs from January to March. During this period, resorts, hotels, and boutique bed and breakfasts experience high booking rates.

In many ways, the high-quality natural assets of the Samaná Peninsula are similar to that of the North-East Region. However, the convenience of a walkable downtown area in Samaná is currently missing in the municipalities of the North-East Region.

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

Community Vision

Community Vision for North-East Region

The vision statement for this effort reflects the community's values and intentions. It was generated through discussion at a series of virtual community meetings, surveys and 1:1 interviews that included local merchants, organizations and residents. This vision helps ensure consensus among partners and helps direct investment into community assets.

Given the limited number of offerings in the southernmost municipalities Ceiba/Naguabo, the overall growth of the North-East Region is inextricably linked to the development and overflow from Fajardo and Luquillo and, most importantly, El Yunque National Forest. As such the region needs to enhance its intra-regional connections and accessibility to encourage the seamless movement of visitors and tourism services between municipalities, particularly from north to south. This should include enhancing transportation infrastructure, wayfinding, signage, and online visibility for travelers conducting research prior to trips.

Stakeholders also highlighted that the **North-East Region is teeming with unrealized potential and opportunity, particularly in the southernmost municipalities, Ceiba/Naguabo**. As the region moves forward in post-pandemic recovery, it is critical to prioritize Roosevelt Roads, Malecón de Naguabo, and South PR-191/Río Sabana Recreation Area nodes as tourism development focus areas.

With the re-opening and new co-management of PR-191 by Río Sabana Recreation Area and upcoming Loopland hotel and other lodging developments like Center for Eco-Tourism from A.P.R.O.D.E.C. at Roosevelt Roads, the **southernmost municipalities must continue to be areas of investment by cross-sector partners.**

The overall growth of the North-East Region is inextricably linked to the development and overflow from Fajardo/ Luquillo, and most importantly, El Yunque National Forest.

With over seven rich ecosystems stretching from a tropical rainforest to coastal reserves, bays, mangroves and coral reefs, the **North-East Region is Puerto Rico's gateway hub of Scientific, Academic, Volunteer, and Educational Travel (SAVE Tourism).**

The region must therefore find better ways to unite and cross-promote these outdoor adventures and emerging aquatic experiences to ensure the overall sustainability of tourism in the years to come. As El Yunque National Forest faces challenges in reaching its carrying capacity — particularly in the northern sections of the asset in Río Grande, it is important that the region finds ways to disperse tourism activity to other less discovered assets that continue to be driven by community priorities and local entrepreneurship including Las Pailas, Charco Frío, Malecón de Naguabo, and various off-island cays (Icacos, Palomino, Cayo Algodones, Isla Piñeros etc.), and prioritize support for small operators and business owners who continue to offer local hospitality and neighborhood experiences.

Plan of Action

Plan of Action

The comprehensive suite of projects and strategies outlined in the following section are categorized by those unique to the North-East Region 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 island's economic development and visitor economy efforts.

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.

** The North-East Region was identified as a submarket within the East Region that includes Fajardo, Luquillo, Naguabo and Ceiba. Río Grande is also included within this map since it has the main entrance to a key asset: El Yunque National Forest.*

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 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) Encouraging sustainable development of assets, b) Prioritizing the conservation of natural resources, c) Enhancing connectivity and accessibility of the North-East region, d) Placing local communities at the center of tourism development efforts, and e) Growing and promoting local music, art, historic, and cultural assets.

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 the project implementation to the North-East Region, include:

- Total number of visitor trips to the North-East 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

North-East Region 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 SAVE Tourism (Scientific, Academic, Volunteer, Educational) Efforts		Short	$ $ $
2	Re-Open PR-191 as a low impact multi-use trail across El Yunque National Forest		Long	$ $ $

Island-Wide Recommendations

	Project	Category	Timeframe	Budget
1	Improve Access and Safety to Waterfall Assets		Medium	$ $ $
2	Establish a Public Space Activation Program		Short	$ $ $
3	Small Lodging Financing Fund		Long	$ $ $

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
4	Regional Wayfinding - Highway Signage & Pedestrian Signage		Short	$ $ $
5	Amplify the Region's Assets on Online Review Sites		Short	$ $ $
6	Grants for Business Operations and Facade Improvements		Medium	$ $ $
7	Customer Service Training		Medium	$ $ $
8	Create a training and education program for municipality tourism directors/ coordinators		Short	$ $ $
9	Create a data co-operative for tourism assets		Short	$ $ $
10	Entrance Fees for Sustainable Asset Management, Employment, and Improvements		Medium	$ $ $
11	Shared Services		Long	$ $ $

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
12	Fiscal Sponsorship for 501(c)(3) status		Long	$ $ $
13	Technology Applications & Tools to Enable Sales of Products and Entry Fee Collection		Long	$ $ $
14	Electrical Service		Long	$ $ $
15	Waste Management		Long	$ $ $
16	Water Quality		Long	$ $ $

Recommendations
North-East Region

1 Build SAVE Tourism (Scientific, Academic, Volunteer, Educational) Efforts

Category	Place-Based Asset Enhancement/Business Support/ Organizational Capacity
Location	East Region (Key nodes include: 191 Recreational Corridor [from Río Grande to Naguabo] and the Protected Scenic Waterfront [Reserva Natural Cabezas de San Juan and Reserva Natural Corredor Ecológico del Noreste])
Origin	Nido Cultural Destination Planning Team
Budget	**High ($200,000>)**
Timeframe	**Short Term (< 5 years)**
Risk	The success of this project is heavily reliant on the support and participation of USDA-Forest Service as an anchor organization. Stakeholders will need to work closely with USDA-Forest Service to sustain existing working relationships and to begin partnering on funding applications that can go toward funding the formation of this coalition.
Key Performance Indicators	• Total Amount of Grants (in dollars) distributed to program applicants • Increase in Annual No. of Visitors to SAVE assets funded by the program • Annual increase of user reviews — 3 stars and above (via Google Maps, TripAdvisor)

Budget (continued)

An initial grant from a philanthropic foundation or major organization focused on SAVE tourism or economic development such as USDA-Forest Service, the State Department of Economic Development and Commerce, Puerto Rico Science, Technology and Research Trust or PRTC may be needed to cover start-up costs such as a subscription service to establish a digital hub for sharing resources and communications. Or simply set up a website, and enlist the support of consultants training fees, etc.

In stakeholder interviews, USDA-Forest Service has indicated its willingness to support other complementary assets in the East Region and should be tapped as a critical partner for this effort. There are numerous co-benefits for USDA-Forest Service, including elevating its brand and identity as a significant natural conservation asset on the island and building meaningful relationships with local partners in the East Region.

However, as the coalition grows and formalizes, nominal membership fees may be collected annually to cover the costs of maintaining the group's operations. The coalition should also advocate collectively for greater resources from philanthropic organizations and the private sector in the long term.

Action Item

Build a coalition of operators and asset managers working in SAVE tourism who regularly meet, cooperate and collaborate to raise awareness and support advocacy of the SAVE tourism industry in the East Region of the island.

Process

Establish the East Region SAVE Tourism Coalition:

- Convene stakeholders and collect contact information
- Organize initial meeting and set coalition mission, goals, and guiding principles
- Establish regular meeting intervals to further advance collaborative efforts
- Determine digital hub/platform for sharing resources and regular communication between members (for example, Facebook Private Group, Slack, or e-mail)
- Establish a formal partnership agreement across members that outline common goals, objectives, and contributions
- Create a strategic plan for the coalition to guide future investments and direction of the sector

Provide technical and financial support to create new SAVE experiences and expand existing ones:

- Advocate for funding from philanthropic organizations and major tourism organizations
- Use funding to design a grant program for members of the coalition
- Establish fiscal conduit through high-capacity partner organizations
- Establish grant program priorities, funding requirements, and application guidelines

Nido Cultural applicant Sociedad Ambiente Marino, for example, is a well-positioned recipient of such a grant. The organization is currently developing a platform and brand that promotes tourism experiences in the Cordillera Reserve in Fajardo. The organization has received a round of funding from Grupo Guayacán and Punta Cana Foundation and is now seeking funding for equipment and operating costs to begin reef restoration and design unique experiences for visitors to assist and participate in these expeditions

COVID-19 Recovery

A FEMA survey found that 46 percent of respondents said they expect to rely on people in their neighborhood for assistance in the first 72 hours after a disaster. Similarly, with every disaster event, businesses and tourism assets will often seek out knowledge and resources on recovery from other peers and partners in the industry. Establishing a coalition ahead of another pandemic or catastrophic event will serve to build a resilient network of assets in the region that are constantly communicating, aligned in vision and priorities, and therefore willing and ready to support one another in the case of an emergency.

Especially following the pandemic, SAVE tourism operators that have seen a significant drop in tourism receipts will be in far more vulnerable financial positions. They will need to band together to strategize a collective recovery for the region. The coalition's first priority should be to assess all members' needs and opportunities and advocate for recovery funding that matches those needs.

Diagnostic: Why Is This Project Important?

SAVE tourism refers to a segment of tourism that combines demand across Scientific, Academic, Volunteer, and Educational Travel. The global SAVE tourism market size was valued at $69.5 billion in 2018 and is projected to reach $106.9 billion by 2026, with the Academic segment contributing the largest share.

In the East Region, El Yunque National Forest is arguably the largest contributor to SAVE tourism with its annual scientific, academic, and educational visitor groups. This includes those stationed at Sabana Field Research facilities, El Portal Rain Forest Center, and grassroots efforts in and near Sabana River Recreational Area (as led by local organizations) to organize volunteers to clearing destroyed trails in the forest.

However, the East Region has an entire landscape of various other tourism assets offering experience in the SAVE segments — including Roosevelt Roads and the protected scenic waterfront of Fajardo. Various tour operators and non-profit groups such as Montaña Explora, Alianza Pro Desarrollo Económico de Ceiba (A.P.R.O.D.E.C.), Sociedad Ambiente Marino, Escuela de Apicultura del Este, Coalición Pro-Corredor Ecológico del Noreste, ECOSOL, Amigos de El Yunque, Amigos del Corcho, Equinoterapia Puerto Rico, Corazón Latino, Sierra Club, and Para la Naturaleza offer a mix of volunteer and educational trips that aim to lead others

in ecological conservation efforts or simply explore natural habitats with limited environmental impact. These experiences are currently siloed and have limited capacity for expansion due to limited resources.

By establishing a coalition of SAVE tourism assets in the region, organizations will be able to pool together resources, learn from one another through regular convening, build relationships, and leverage the capacity and support of other larger assets like El Yunque National Forest (USDA-Forest Service.) All to further a shared mission and achieve the overall success of growing the SAVE tourism sector in the East Region.

Partners & Resources

- Coalición Pro-Corredor Ecológico del Noreste (The Coalition is currently composed of international, national, and local groups, all united in the fight for the conservation and ecotourism development of the Corridor and may be important champions of this project.)
- USDA-Forest Service/Community Resource Interface Management Area (CIRMA)
- Puerto Rico Tourism Company (PRTC)
- Sociedad Ambiente Marino (SAM)
- Escuela de Apicultura del Este (Note: currently closed)
- Fundación Amigos de El Yunque
- El Yunque Trails Volunteer Program
- Montaña Explora
- A.P.R.O.D.E.C.

Sabana Field Research Center. Source: Flickr

- ECOSOL
- Amigos del Corcho Inc.
- Equinoterapia Puerto Rico
- Corazón Latino
- Sierra Club
- Para la Naturaleza
- Let's Go PR

At the time of writing, the National Geographic Society — an international organization, provides grant funding (valued up to $50,000 per successful applicant) for research, conservation, and technology projects that support community-based and inclusive wildlife and cultural heritage site conservation. Over the years, similar grant programs have become available and must be continuously tracked by the coalition.

Case Study or Best Practice

Grant programs for tourism development efforts may be structured in myriad ways. Although the following examples are grant programs administered by the public sector, they are intended to provide a general direction for program requirements, award amounts, program eligibility, and award timeframes.

Colorado Tourism Office's Tourism Development Grant Program

The program provides funding to non-profit tourism organizations in the State for any kind of use that contributes to the overall development of the tourism industry. Funding is prioritized to support new efforts and initiatives and are provided as matching grant amounts of up to $15,000 per recipient.

Previous recipients have used funds to develop visitor surveys and to create tour apps.

Visit Hattiesburg's Tourism Grant Program

The program provides funding to any organization/event/project for marketing and other qualified expenses that can prove to increase overnight stays in the town. Eligible projects are provided funding in the amount of up to $5,000 per recipient and must be completed within the fiscal year in which the grant is awarded. Any funds left unused must be returned and all recipients must complete a final report that includes documentation on receipts/invoices to prove use of funds.

Lake Oswego Tourism Grant Program

Similar to Visit Hattiesburg, Lake Oswego's program requires recipients to complete projects within the fiscal year in which the grant is awarded and that all recipients submit final reports that outline how funds were expended. However, the program, prioritizes funding for projects contained within existing city master plans or that align with city council goals. This ensures greater alignment between the program and funder 's goals.

The International Ecotourism Society

The coalition is an international network of environmental NGO's, travel associations, conservation groups, and other organizations involved in the global ecotourism economy across major markets such as Europe, Southeast Asia, South America, and Africa. The network organizes annual conferences for knowledge-sharing, certification and education programs for members, and is primarily financed by international agencies such as the World Bank, UN Environment Program, and philanthropic foundations such as Ford Foundation and MacArthur Foundation.

Festival South is a multi-genre arts and entertainment festival and former recipient of Visit Hattiesburg's Tourism Grant Program . Source: Downtown Hattiesburg Association

2 Re-Open PR-191 as a low impact multi-use trail across El Yunque National Forest

Category	Access and mobility
Location	Section of PR-191 between Sabana River Recreational Area in Naguabo and Old Nursery Campground in Río Grande
Origin	Community Stakeholders
Budget	**Design and build low-impact trail: High ($200,000>)** (incl. planning and design, required environmental studies, and implementation) – furthermore, continued maintenance of trails will also result in High ($200,000>) annual costs **Create a greater variety of AABA-accessible trails: High ($200,000>)** – continued maintenance of trails will also result in **High ($200,000>)** annual costs **Create low-impact camping sites/lodging facilities along the trail: Medium ($50,000-$200,000)**
Timeframe	**Design and build low-impact trail: Long Term (10 years>)** The complementary strategies of creating a greater variety of AABA-accessible trails and low-impact camping sites/lodging facilities along the trail are contingent on the successful completion of the restoration of PR-191 low-impact trail. Hence, both projects will be **long-term (10 years>)**
Risk	Over-tourism continues to be the greatest risk for El Yunque National Forest. However, the redirection of visitors to other parts of the East Region through the restoration of a north-south-bound, low-impact trail in the rainforest will be critical to managing the capacity of the rainforest and local ecosystem. Outside of the rainforest, the limited coordination between State and Federal agencies overseeing various sections of the rainforest and PR-191 will pose a risk to the successful implementation of the low-impact trail. For a massive undertaking such as the restoration of PR-191 within El Yunque National Forest (as a low impact multi-use trail) to be successful, all key political players will need to be meaningfully engaged to determine a bipartisan plan for the route. In the long term, the trails will need to be effectively maintained to continue serving visitors. However, this task would place a significant burden on USDA-Forest Service and its resources. As previously mentioned, USDA has suffered from loss of federal funding annually over the past decade and will need significant gap financing to be able to support the maintenance for the trail project. As such, sustainable management of the trail will require co-ordination and participation from local volunteer groups (CIRMA) and other partners that have expressed interest in supporting these maintenance efforts.
Key Performance Indicators	• Length of restored trail (in miles) • Annual increase in trail users (via pedestrian counters) • Annual increase of user reviews — 3 stars and above (via Google Maps)

Action Item

The first project is a **low-impact trail for pedestrians** that supports not only human movement and circulation but also that of native species. Low impact trails typically involve limited clearing (and therefore limited re-vegetation) and prioritizes the use of locally sourced trail materials, which create familiar environments for native species. In addition, low-impact trails may include buffer zones between the trail and adjacent vulnerable areas like nesting places to ensure limited disturbance of the local ecosystem.

Overall, the re-opening of the PR-191 trail across El Yunque National Forest will enable visitors to hike north-south through the rainforest with little to no impact on the existing ecosystem — a crucial priority shared by local stakeholders.

The second project is the development of complementary forest amenities, including **eco-conscious facilities for overnight stays and AABA (Architectural Barriers Act)-accessible t**rails that offer inclusive experiences for seniors, young families and others traveling with people with disabilities.

Process

Design and build low-impact trail

According to local hiking enthusiasts, it currently takes 6-7 hours (with some difficulty) to traverse the PR-191 route across El Yunque National Forest (between Sabana River Recreational Area and Old Nursery Campground). The difficulty is not only a result of elevations but also the terrain and

El Yunque National Forest. Source: Discover Puerto Rico

overgrown vegetation that will need to be cleared in order to begin formalizing a natural trail. To restore the destroyed roadway as a low-impact trail for visitors of varying abilities, USDA-Forest Service, with support of the Department of Transportation and Public Works (DTOP) and various other agencies, will need to take the following steps:

Environmental Protection and Site Preparation

- Conduct extensive environmental, archaeological, and engineering studies toward the preparation of an Environmental Impact Statement — this step is critical in the process to evaluate the risk of further landslides or damage to potential trails
- Trail design and planning

Construction (may be phased in sections to test viability of trail and to evaluate level of maintenance effort and cost)

- Clearing alignment of trees/shrubs
- Trail bed preparation
- Installation of drainage culverts
- Design and fabrication of bridges

Note: This trail development effort would be a massive undertaking given that the roadway has been left without maintenance for years. Should the trail be developed, it will also require regular road maintenance by the USDA which, at this time, is extremely costly and unlikely to occur given the organization's budget constraints. As an alternative, the USDA recommends a wilderness trail that encourages overgrowth and requires low maintenance. However, this alternative, reduces visitor accessibility.

Create greater variety of AABA-accessible trails

Unfortunately, at this time, experiences for a wider group of visitors — including seniors, young children, and people with disabilities — are limited. Expanding inclusive trail options through the restoration of PR-191 will be critical to its success, especially as several other tourism assets in the East Region grow its offerings for people with disabilities. These trails should be located nearest to the entrances of the PR-191 low-impact trail across El Yunque National Forest for ease of access in any emergency situation.

By applying AABA (Architectural Barriers Act) standards to these trails, the road infrastructure may instead be reused without having to change grades and slopes etc.

Create low-impact lodging facilities along the trail

Although there are a few lodging facilities near the north and south entrances to El Yunque National Forest in Río Grande and Naguabo, many visitors are limited to staying overnight on the outskirts of the rainforest. Dispersed and group campsites remain the only available overnight lodging facilities within the rainforest (note: At the time of study, campsites remain closed in El Yunque

National Forest. The National Forest plans to announce the reopening of a limited number of campsites in 2021, with reservation and permit requirements for interested users of the facilities to limit crowds and to maintain safety on-site).

To support the full use of the restored PR-191 low impact trail across El Yunque National Forest, especially amongst groups with lower fitness and hiking capabilities, safe and eco-friendly overnight lodging facilities will need to be created along the route. This may include a combination of camp shelters (defined as partially enclosed structures that provide campers and hikers cover from weather and that do not contain plumbing fixtures or kitchen appliances) and cabins (required to comply with ABAAS section 806 for transient lodging where short term accommodations are provided).

USDA-Forest Service will need to provide Special Use Authorizations for the private, non-exclusive use of sections of the PR-191 trail. Vendors/businesses interested in setting up/operating recreation cabins, eco resorts, etc. should be procured through an open call RFP process.

COVID-19 Recovery

According to a 2020 report published by the Adventure Travel Trade Association, 63% of U.S. adventure travelers were planning on traveling domestically on their next planned trip. These same travelers are also seeking safe and remote destinations with nature, outdoor, and adventure activities — where the level of concern around health and safety is much lower. As outdoor adventure tourism bounces back faster, El Yunque National Forest will likely be able to continue leveraging its niche as the only national rainforest in the U.S. and its territories. However, its capacity will need to increase to accommodate the post-pandemic influx of domestic and off-island adventure visitors with expanded trails that connect to other key assets in the East Region and overnight lodging facilities.

Diagnostic: Why Is This Project Important?

As a major tourism asset for the East Region and the entire island, El Yunque National Forest is now managed and maintained by a mix of organizations — from top (Federal) to bottom (local grassroots). The involvement of local organizations in the forest's management is in fact a new strategy in El Yunque National Forest's management plan. Each organization has been taking piecemeal actions to enhance the asset over the years, including restoring and clearing trails, creating new visitor areas, and improving accessibility. However, a major feat remains the closure of PR-191 since the 1970s, from the entrance at Río Grande (within close proximity to Luquillo) to the Sabana River Recreational Area in Naguabo, that once used to function as the only north-south vehicular artery running through the rainforest. The roadway closure was caused by irreparable damages.

Currently, there is no connection to neighboring municipalities such as Naguabo through El Yunque National Forest owing to the closure of a large segment of PR- 191, effectively forcing over 600,000 annual visitors to El Yunque National Forest arriving from the north to backtrack to PR-3 in order to get to neighboring municipalities like Ceiba and Naguabo.

Enabling the seamless movement of visitors through the forest to southern municipalities in the East Region will enable a trickle down and spread of visitor spending to businesses, lodging, and other assets south of El Yunque National Forest. USDA-Forest Service has noted concerns over exceeding the carrying capacity in the northernmost section of El Yunque National Forest as visitor numbers have climbed in the last decade. Based on this assessment, it was determined that the social carrying capacity of the forest is around 1,485 visits per day. According to a 2014 USDA-Forest Service study, forest visitation should be kept below 1,500 people in order to provide a quality experience for the majority of the visitors in terms of the number of encounters at the forest.

Partners and Resources

- United States Department of Agriculture (USDA) — although the El Yunque National Forest is currently being managed by the USDA, the organization has cited major concerns over leading this effort owing to loss of funding annually over the past decade. The support and leadership of various other organizations listed here will be critical to this effort.
- Department of Transportation and Public Works (DTOP)
- Volunteer Non-Profits via CIRMA (These groups have been successful in seeking crowd sourced support to continually maintain trails in the forest)
- El Yunque Trails Volunteer Program

Case Study or Best Practice

San Bernardino National Forest

The USDA-Forest Service authorizes private, non-exclusive use of National Forest land in San Bernardino through a Special Use Permitting procedure. These permits provide temporary authority to permit holders to create recreation cabins and resorts that are compliant with the Forest Service's management plans and laws.

Sani Lodge Amazon Rainforest

The award-winning eco-lodge and camping ground set in the Amazon rainforest is located between Cuyabeno Reserve and Yasuni National Park — two heavily protected natural habitats. Fully owned and run by the indigenous community, the lodge serves as a case study of a lodging operator with success in marrying low-impact lodges with fully immersive and guided natural experiences that ensure limited visitor impact on the local rainforest.

Coon Creek Cabin in San Bernardino National Forest. Source:AllTrails.Com

Recommendations

Island-Wide

1 Improve Access and Safety to Waterfall Assets

Category	Place-Based Asset Enhancement/Business Support/ Organizational Capacity
Location	Island-Wide
Origin	Destination Planning Team
Budget	**High ($200,000>)** Membership fees/levies should be tied to all those participating in the programs provided by the overarching national organization/legal entity (whether an existing one such as PRTC or a newly formed administrative body).
Timeframe	**Medium Term (5-10 years)**
Risk	In the early stages of this project, the participation of private property owners will be a key risk to successful implementation. Often, these owners are absent and difficult to contact and engage. It is therefore important to pilot the project in municipalities where there are existing strong relationships with local property owners and tour operators. The success in a few pilot municipalities may help gain traction in other parts of the island. As entrances to these previously under-the-radar assets become more prominent and accessible to larger segments of visitors, there is high risk that the carrying capacity of these natural environments will be overburdened. As such, local conservation advocacy groups should be engaged early on to conduct carrying capacity studies (as appropriate), provide feedback on any potential impacts to the natural environment, and to advise on strategies moving forward to manage tourist numbers through limited opening days/ hours.
Key Performance Indicators	• Total no. of active members in the program • Annual no. of visitors to under-the-radar waterfalls and natural assets (via pedestrian counters) • Annual increase of user reviews — 3 stars and above (via Google Maps, TripAdvisor)

Action Item

To support the formalization of entrances to the waterfall assets and their adjacent hiking trails, an overarching national organization/ legal entity (whether an existing one such as PRTC or a newly formed administrative body) needs to lead the following programs and strategies for members offering under-the-radar adventure tourism offerings:

- Design an educational program for adventure tourism operation and maintenance
- Provide technical assistance and funding for adventure tourism facility enhancements
- Create insurance program that relieves property owners of liability for visitor injuries/deaths

The organization should be membership-based and focused on promoting and advocating for adventure tourism across the island. Nominal fees paid by members should be used to fund part of the execution of the above-listed strategies.

Process

Design an educational program for adventure tourism operation and maintenance

The program should serve to educate property owners, those providing access to waterfalls and other under-the-radar hiking trails on best practices for operating and maintaining such assets, including safety risks and crowd control methods (for example, a limited daily entry model). This should also include on-the-ground safety

training for any employees operating entrances to the assets or running tours at these assets. Annual site audits by professional consultants can also help program participants better assess the needs and challenges of their properties and determine any improvements required. In addition, sustainable practices and low impact strategies should be key principles in the development of the curriculum.

Provide technical assistance and funding for adventure tourism facility enhancements

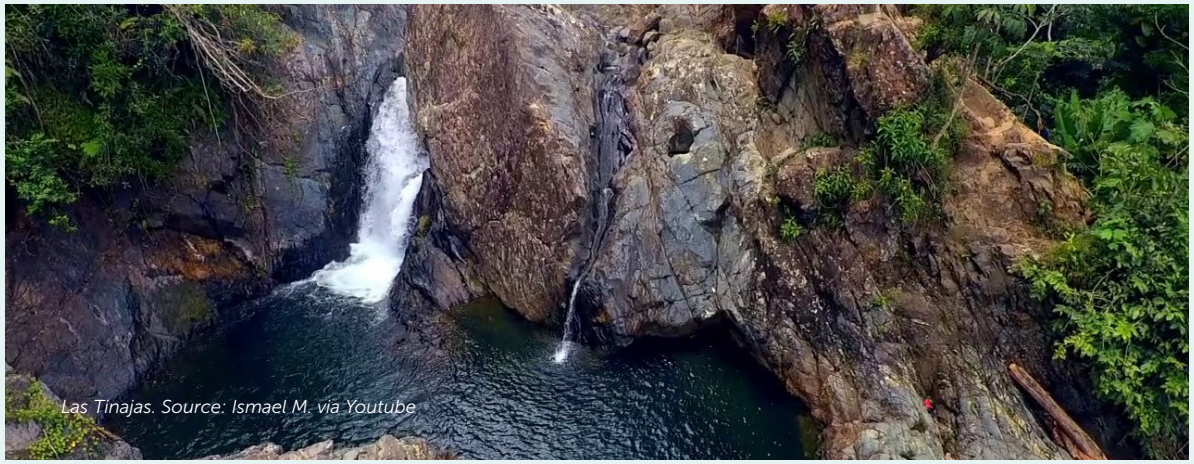
Structured similar to a grant program for storefronts and other small place-based asset improvements, small amounts of funding should be provided specifically to property owners/ tour operators of adventure tourism assets to implement key improvements such as:

- Purchasing point-of-sale systems to enable formal fee collection methods
- Building on-site visitor amenities (including bathrooms, pathways, wayfinding/signage, trash cans/ recycle bins)
- Creating designated parking lots with formal payment systems and security cameras
- Developing safe hiking/trekking trails
- Installing directional signage to each waterfall asset from major roadways and nearby urban centers

Create insurance program that relieves property owners of liability for visitor injuries/ deaths

To protect members with formalized entrances to waterfalls and other adventure tourism assets, a group umbrella insurance policy should be purchased specifically for members — including property owners and tour operators that help guide tours through these assets.

In Puerto Rico, such general liability insurance policies may be purchased through companies like AIG and MAPFRE, and typically cover bodily injuries or damages to property caused by accidents suffered on premises (typical incidents reported by stakeholders interviewed through the Destination Planning process).



Las Tinajas. Source: Ismael M. via Youtube

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 that were expected 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 waterfalls and under-the-radar natural assets the perfect timing and opportunity to welcome visitors who are seeking socially distanced recreation.

Diagnostic: Why Is This Project Important?

Under-the-radar waterfalls and adjacent hiking trails that lead to these waterfalls are often difficult to find with lack of signage on roadways, poorly maintained, and only accessible through private properties and informal entrances that have been carved out by previous visitors.

As a result, visitors are often left traversing muddy, uneven trails and often face unsafe conditions, which in turn limits visitation to a small subset of able-bodied visitors.

To grow awareness of such unique experiences and to formally operate and offer safe adventure tourism experiences such as those typically found near waterfalls and other major natural assets, property owners and tour operators must often seek general liability insurance. This insurance policy protects

businesses against losses for General Liability, which cover a range of damages including reimbursement of medical expenses to third parties as a result of accidents for which the policy holder may be found to be legally liable. However, although there are several providers in Puerto Rico, these insurance policies, can be cost prohibitive to small property owners.

As such, many individual tour operators (including some of whom were interviewed during the Destination Planning process) have either continued to operate without the appropriate permits, training, and insurance or have pursued an alternative solution by offering experiences through Airbnb. As an Airbnb experience host, tour operators are covered under Experience Protection Insurance provided by the platform for occurrences during Airbnb experiences (within reasonable limits – for example, high risk activities such as cliff jumping, rappelling, and skydiving require separate individual insurances or indemnity forms).

Partners and Resources

- Puerto Rico Tourism Company (PRTC)
- Department of Natural and Environmental Resources (DRNA)
- Airbnb
- Insurance companies
- Tour operators/guides
- Private property owners
- Conservation advocacy groups

Case Study or Best Practice

New Zealand Universal No-Fault Public Indemnity

New Zealand has a universal no-fault public indemnity insurance system. The Accident Compensation Corporation is paid for through public levies and underwritten by the New Zealand Government. Under the system, employers, businesses, and sports clubs pay levies to the Accident Compensation Corporation, calculated to reflect the risk of an activity provided.

Australian Adventure Activity Standards

The Australian Adventure Activity Standards (AAAS) and Good Practice Guides (GPGs) unites the outdoor adventure industry in the country under a common set of guidelines. The new framework was designed to create a clear set of rules nationwide, delivering streamlined business operations, and avoidance of regulatory burden on small and medium sized businesses.

2 Establish a Public Activation Program

Category	Marketing, Events and Promotion
Origin	Destination Planning Team
Budget	**Medium ($50,000-$200,000) - assuming by region** 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.
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	• 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)
- Flamboyan 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 annually 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.

3 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	***Project-Specific:*** • 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. ***General:*** • 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 implementing 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

- Puerto Rico Tourism Company
- 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/

4 Regional Wayfinding

Establish tourism-oriented directional signs, including highway signage and pedestrian signage

Category	Access and Mobility
Origin	Destination Planning Team
Budget	**Medium ($50,000-$200,000)** *Costs include Program Administration Costs and Sign Fabrication Costs. The 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.
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	• 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

5 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	• 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 Fajardo") 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 start 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.

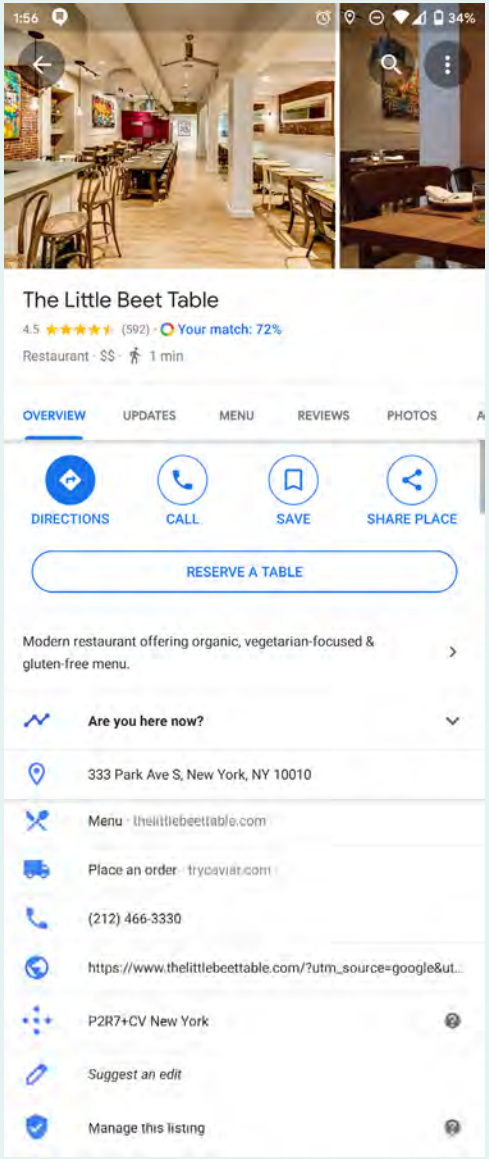
We recognize that FPR and its small business technical assistance partners have had programs to help businesses claim their online listings. However, given the increasingly critical nature of online and mobile tools in travel decision making, we must continue to invest heavily in these efforts until 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.



Example of a 'rich' local business listing based on a user query. Source: Google.

6 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	• 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 crowd sourcing 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. Puerto Rico Tourism Company 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

- PRTC
- 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.

7 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	• 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 Association of Hotels and Tourism 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 & 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.

8 Create a training and education program for municipality tourism directors/ coordinators

Category	Organizational Capacity
Origin	Destination Planning Team
Budget	**Low (<$50,000) - annualized** 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.
Timeframe	**Short Term (Less than 5 years)**
Risk	***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.
Key Performance Indicator	• 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 Discover Puerto Rico, 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 Discover Puerto Rico events/ training sessions toward planning a new, combined calendar of events for collective promotion and marketing.

  - Ensure there are no overlaps in curriculum and scheduling.

  - Ensure comprehensive sessions covering topics from destination marketing to data collection, analysis, and reporting.

- Convene PRTC and Discover Puerto Rico 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 Discover Puerto Rico/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 Discover Puerto Rico 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
- Discover Puerto Rico
- 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)

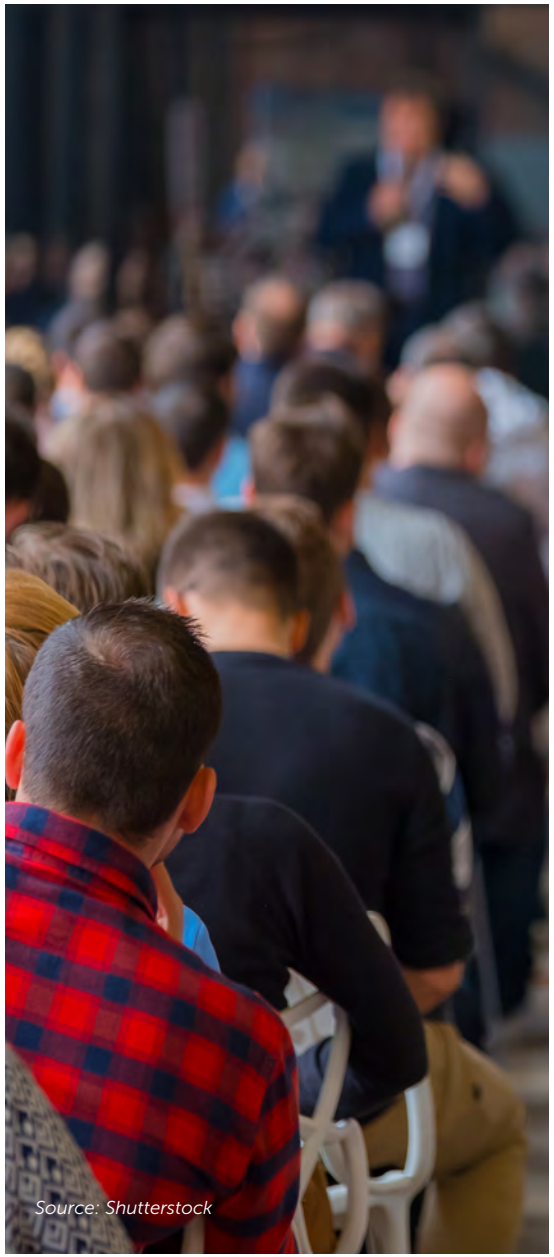
The Facebook group was established to enable leaders across the city to share live information and provide industry updates and resources quickly in an accessible setting.

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

9 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	• 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, 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.

Source: Unsplash

10

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	• 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 NGO's 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 new entrance fees 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

11

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	• 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 the 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 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/

12

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	• 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.

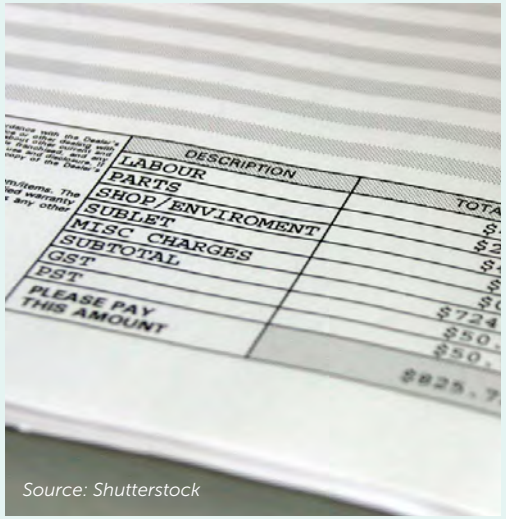
501(c)(3) organizations are highly regulated entities with strict rules of governance and ongoing compliance. Helping non-profit organizations understand these requirements and manage them is critical to enabling them to gain the benefits associated with tax exemption, which would help them with long-term 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 record keeping 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

13

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	• 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 the 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 employees of the business.

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

14

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.[92]

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.

[92] *"Puerto Rico Territory Energy Profile". U.S. Energy Information Administration. November. 21, 2019.*

15

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. Also, 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 in order 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 separate food waste properly and to effectively recycle.

16

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

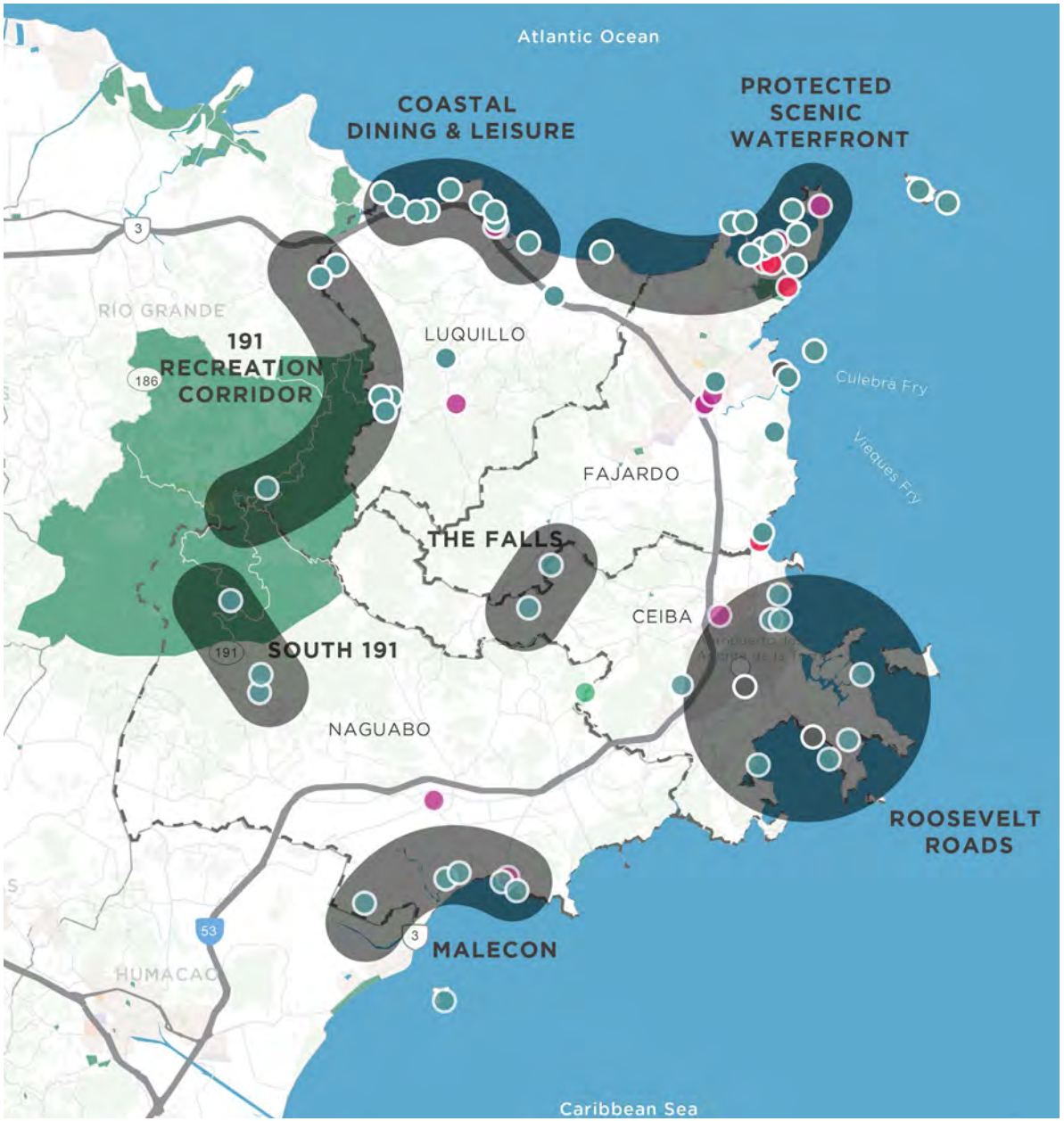
Watershed restoration at Playa Tamarindo in Culebra with National Oceanic and Atmospheric Administration's Office for Coastal Management; 2009 Reducing Monofilament Puerto Rico Coast Marine Debris.

FPR field team member briefing business owner on donation of water filters. Source: FPR

A Closer Look
at Fajardo/Luquillo

Asset-Specific Physical Assessment

Compared with Ceiba/Naguabo, all highly-rated assets (based on Google ratings) in the North-East region are located in Fajardo/Luquillo — presenting a significant disparity in current visitor offerings between the two adjacent regions. The success of major destinations in Fajardo/Luquillo therefore will heavily influence any spillover visitation to Ceiba/Naguabo. It should be cross-marketed as holistic offerings in the North-East region.



Map of Assets by Category. Source: Foundation for Puerto Rico; Streetsense

El Yunque National Forest

With over 8,000+ Google Reviews, an average visitor rating of 4.8 out of 5.0, and an estimated 600,000 annual visitors (pre-pandemic), El Yunque is a major driver of tourism for the East region. Although the ecological strengths of the asset attract visitors across a variety of customer segments (primarily Gen Z through Gen X) to the region for more than six months every year, they also present significant challenges to the growth of the asset as a tourism destination. In particular, the northern access points to the rainforest at Río Grande as well as trails and research areas located closest to these entrances are, at peak seasons, close to or experiencing overcapacity. At this time, El Yunque is an all-in-one SAVE tourism asset that offers experiences and opportunities to a mix of scientific research groups and leisure travelers — each with their own needs and interests that must be balanced carefully.

For leisure travelers, the more than 13 hiking trails and a variety of rivers and waterfalls are the primary draws. However, most leisure visitors arriving at these assets within the rainforest are doing so by private vehicles and cars. Heavy vehicular traffic during peak seasons has posed environmental and accessibility challenges as parking space availability is limited resulting in overflow parking on the already limited major roadways.

In addition, local climate change and heavy rainfall events in recent decades have resulted in several landslides eroding

Waterfall and trails in the northern sections of El Yunque National Forest. Source: FPR and Discover Puerto Rico

major access points and hiking trails. As a result, USDA-Forest Service is actively looking to diversify its offerings and enhance accessibility to other sections of the rainforest to prevent overcrowding in Río Grande (near Fajardo/Luquillo) and to re-route visitor traffic to other major rainforest assets in Naguabo.

Seven Seas Beach

Although Seven Seas Beach has a comparatively lower average rating of 4.5 on Google (total of 1,387 reviews), it has exemplary infrastructure features compared with other local beaches across Puerto Rico. Popular for sunbathing and swimming, particularly amongst local or domestic visitors, the beach was widely known for its food truck park — a privately-funded and —managed placemaking effort — which curated local food businesses on an adjacent parking lot (pre-pandemic). Although its post-pandemic recovery is slow, the complementary outdoor dining offering is a major differentiator for the beach and serves as a local's alternative to Kioskos de Luquillo.

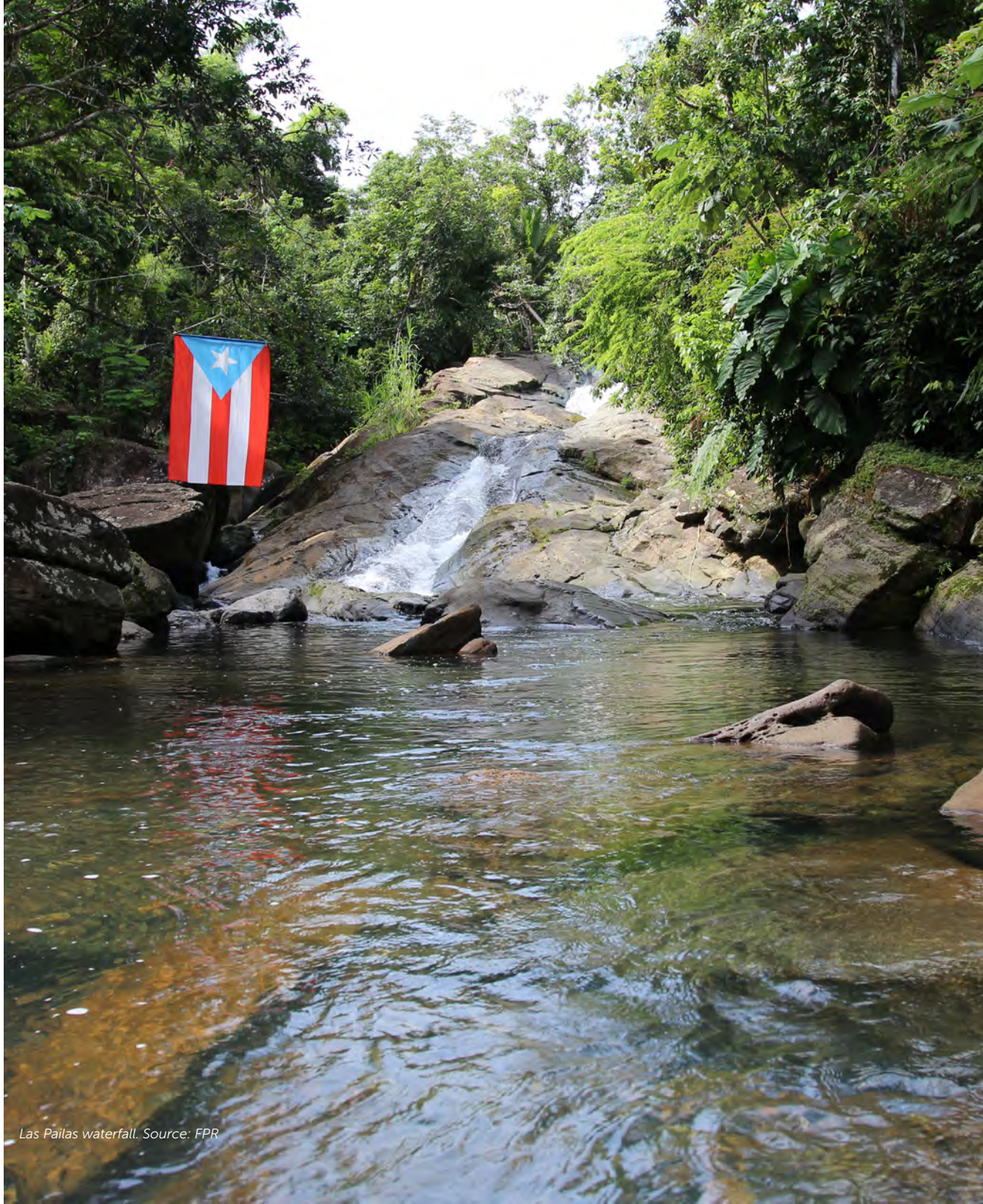
The beach property itself has been well-maintained with paved pedestrian paths and pedestrian lighting installed. Seven Seas Beach is also serviced by key basic visitor amenities including clean bathrooms and gazebos. The beach has been able to effectively manage these amenities and facilities through private concession arrangements managed by DRNA. Bathroom facilities, beach rental and tour booths, for example, are privately- run and managed through concession agreements. In addition, gazebos on the beach are available for rental from the DRNA at a rate of $30/day, creating a steady stream of revenue that is used to manage and maintain the public realm of the beach.

Seven Seas Beach facilities. Source: Discover Puerto Rico and FPR

Las Pailas

Like many other small waterfall assets across the island, Las Pailas is mostly under-reported in paid or earned media but is highly rated on shared media and has gained over 600+ google reviews and a 4.7 average rating. It has mostly grown in popularity among adventure-seeking visitors who are also less influenced by convenience and visitor amenities and seek off-the-beaten-path destinations and experiences.

Although the waterfall pool area is clean, it remains an under-resourced asset with limited parking facilities (mostly on-street parking arrangements) and trail management. Access to the asset is only available via adjacent private properties and short but often difficult terrains are inaccessible to visitors with disabilities, young children, or seniors. The absence of maintenance of these trails creates unsafe conditions (flooding and erosion).



Las Pailas waterfall. Source: FPR

Playa La Pared

With over 1,000+ Google reviews and an average rating of 4.7, Playa La Pared is a popular asset for sunbathing, swimming, and coastal dining. The adjacent cluster of dining and beach rental businesses along the waterfront boardwalk offers an added amenity to visitors. In fact, the food trucks on the western end of the beach have grown in popularity, becoming a destination in and of themselves.

The waterfront boardwalk, a recent investment by the municipality, features calming street improvements that create a pedestrian-friendly environment. However, similar to other infrastructure beach projects across Puerto Rico, the improvements are designed with limited green infrastructure and soft landscaping to mitigate the island's hot climate and vulnerability to coastal flooding.

Although the beach is closely located to Luquillo urban center and Plaza Pública (a 2-minute walk), the walkability between the two areas is negatively impacted by deteriorating properties and a large parking lot fronting Calle Acapulco. General maintenance of these sites and properties, as well as activation through lighting, murals, and community events will need to be considered to enhance the pedestrian experience between these public spaces.

Popular outdoor dining facing the waterfront. Source: FPR

Waterfront boardwalk and narrow roadway creates pedestrian-friendly environment. Source: FPR

Bioluminescent Bay/Laguna Grande

One of the three bioluminescent bays in PR, Laguna Grande, is an under-rated asset that is largely only reviewed on TripAdvisor (2,500+ reviews) and that has reportedly declined in quality in the last decade. Qualitative reviews on TripAdvisor between 2005 and 2020 revealed a stark decline in visitor experiences, with many reporting the Bio Bay as reaching overcapacity during peak seasons (which has in turn overridden the protection of the natural asset) and/or lacking quality tours and visitor amenities at launch points (including lack of bathrooms, snacks/drink vending, and parking facilities).

Cabezas de San Juan Nature Reserve

Las Cabezas is one of the top ten assets in Fajardo/Luquillo, with over 542 Google reviews and a high average rating of 4.7 out of 5.0. The asset is most attractive to families with children or school groups given its extensive educational tour offerings. Although the asset is undergoing repair from damage caused by Hurricanes Irma and María, visitors highlighted in reviews that one of the asset's major experiences includes its unrestricted view of the northeast tip of Puerto Rico from the top of the Fajardo Lighthouse.

The high quality of the asset is consistent with other attractions managed by Para La Naturaleza. It features a well-designed museum and event space, as well as convenient visitor parking available near its main building. Recent investments in new signage and environmental conservation efforts on surrounding land continue to elevate the customer's overall experience at the asset.

Although access to the asset is restricted and tours only made available by reservation, these measures have been critical to limiting visitor impact on the natural lands managed by Para La Naturaleza.

NE Ecological Corridor Natural Reserve

The NE Ecological Corridor Natural Reserve is located on the coastal strip north of PR-3 across Luquillo and Fajardo. The Reserve, consisting of approximately 3,000 acres of land, was designated as a natural reserve in 2013 and has since been endorsed by various governmental and private entities concerned with the ecological preservation of the area. Although there is a range of unique sites within the Natural Reserve, the asset is not yet a well-recognized tourist destination given the lack of visibility of its offerings online as well as in-person. Its offerings have not been highlighted on paid and earned media sites, and entrances to sections of the reserve remain difficult to identify, given limited signage and wayfinding.

The Coalition has been proactively taking steps to mitigate these access and visibility challenges by flattening dirt roads to various beaches within the reserve. Signage and security efforts are also underway.

Bio Bay (Fajardo) Source: Omark Reyes via Discover Puerto Rico

Business Environment Assessment

Lodging

One of the fundamental pieces of decision-making and traveler expectations is lodging. Today, the national landscape of accommodations includes traditional hoteliers and informal lodging, such as Airbnb. In total, there are over 1,600 available rooms across formal and informal lodging in Fajardo/Luquillo. These are primarily centered around the Coastal Dining & Leisure cluster in Luquillo and near the marinas in Fajardo. Compared with 2018, PR Occupancy rate of 70%, the annual occupancy rate of lodging in Fajardo/Luquillo is only 52% — diminishing the likelihood of any unmet demand for the hotel market.

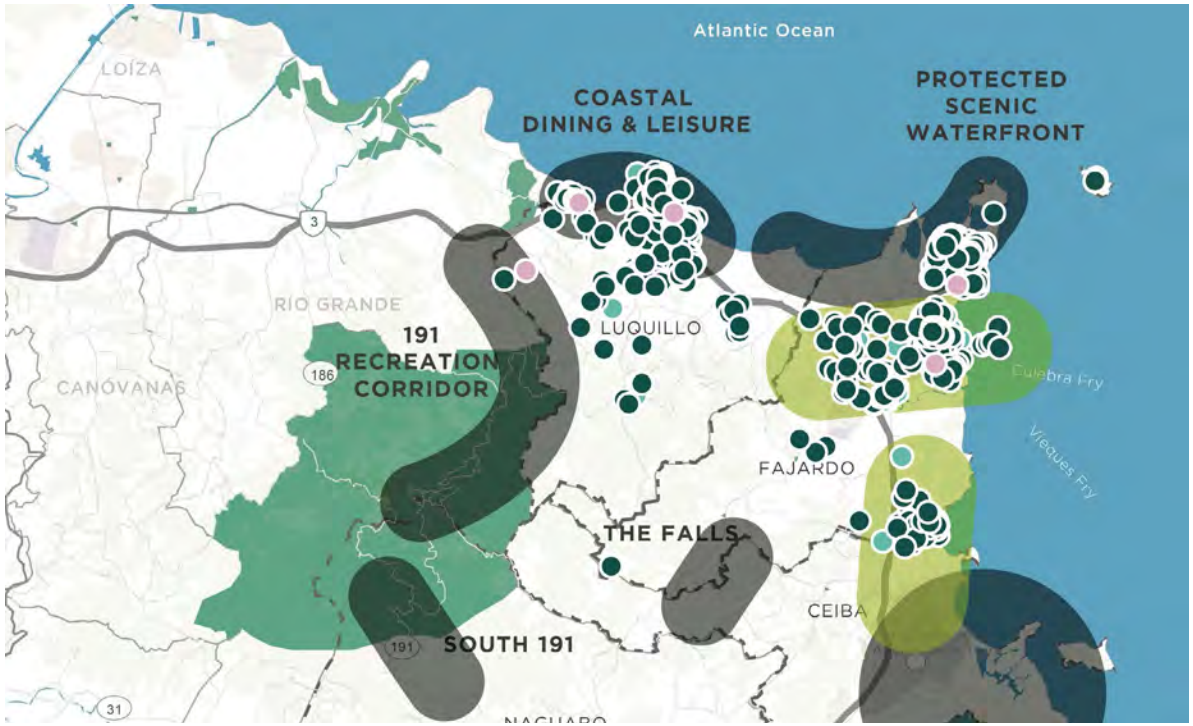
Formal Lodging:

Nearly half of the available lodging rooms in Fajardo/Luquillo, or approximately 75% of all formal lodging rooms in the region, are located at El Conquistador. Although the reopening of the Waldorf Astoria Resort was initially scheduled for mid-December (with COVID-19 restrictions), it has since been pushed back to the summer of 2021 — likely due to the continued low rates of inbound flights to Puerto Rico. Upon reopening, anticipated room rates will lean higher compared to other lodgings in the region, starting from $299. The resort will feature 4-star amenities targeted at families and travelers with higher spending powers, closing the gap for any other upscale hotel entrants to the market.

Informal Lodging:

The Average Daily Rate of informal lodging is almost half that of formal lodging options in Fajardo/Luquillo — $197.26 compared with formal lodging at $321.50[95]. Despite the disparity in rates, highly rated Airbnb's in the region also offer common amenities such as swimming pools, gyms, tennis courts, and gated parking. Some of the most expensive listings located near Fajardo's marinas and the beaches of Luquillo also feature waterfront access and panoramic views similar to El Conquistador, although at a far more affordable price.

However, given the overall low occupancy rates, the convenience of the region as a day-trip destination from Metro San Juan, as well as upcoming inventory from El Conquistador, will need to focus efforts on enhancing the quality of existing short-term rentals/informal lodging to better meet the needs of travelers with lower budgets and travelers with changing preferences around cleanliness, convenience, and safety.

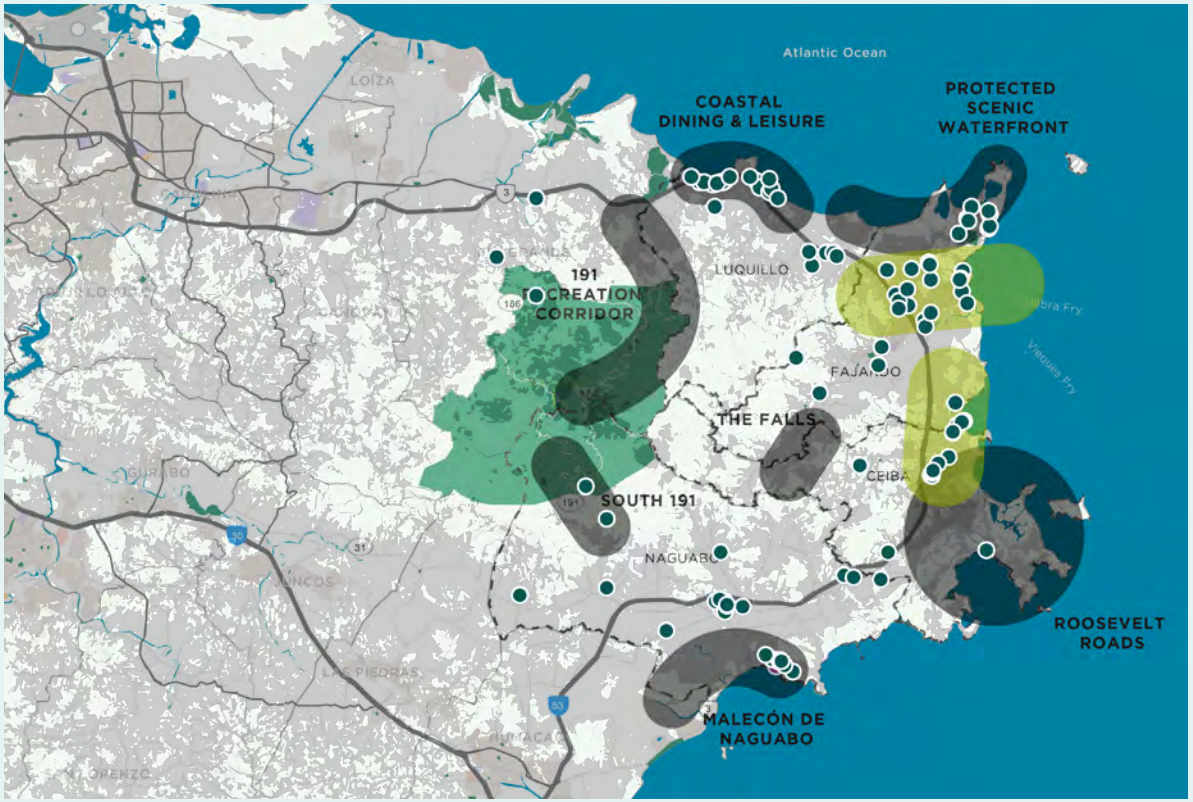


Map of Lodging Clusters in Fajardo/Luquillo.
Source: Foundation for Puerto Rico; Streetsense

[95] *PRTC Monthly Statistic Report; AirDNA Performance Data (Last scraped December 2018)*

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. Currently, the major shopping and dining offerings visible and accessible to visitors are primarily co-located near major assets along the coast and along major roadway PR-3, for example, Kioskos de Luquillo, and the urban center of Fajardo — near the marinas. Despite the importance of inland assets such as the rainforest and waterfalls, shopping/dining offerings complementing these assets remain limited



Map of Shopping/Dining Clusters in Fajardo/Luquillo. Source: Foundation for Puerto Rico; Streetsense

Shopping/dining locations

Kioskos de Luquillo:

Receiving over 1.2 million visitors annually (pre-pandemic), Kioskos de Luquillo is a dining and entertainment asset that serves customers across all segments. The asset, which has accumulated more than 1,300 Google reviews online, features a mix of traditional frying kiosks and full-service restaurants offering Creole and international cuisine and is currently managed by the Luquillo Kiosk Owners Association (the Association).

Overall, storefronts have been well-maintained and large-scale signage facing PR-3 maximizes the visibility of the asset from the roadways. Although retailers at this location benefit from high visibility at its PR-3 location, on-site circulation and accessibility are limited by vehicular congestion and available parking spaces during peak hours and weekends. Beach goers are reportedly occupying the convenient parking spaces located behind the Kioskos that are intended for patrons of businesses.

To alleviate circulation challenges and limited parking supply for patrons at Kioskos, the Association is working to establish two new parking areas on adjacent lots to the east and west of the site. This effort will serve to complement other efforts to connect the Kioskos and nearby Luquillo Beach, where another public parking lot is available. While parking and vehicular congestion is being mitigated, there are longer-term challenges facing Kioskos de Luquillo that must be addressed. Given that most of the coastline in Fajardo/Luquillo is located in a flood zone with velocity hazard (wave action), the Kioskos site is similarly at severe risk of coastline erosion and flooding. It will need to be redesigned to consider flood mitigation measures.

Centro Urbano Fajardo:

The urban center of Fajardo is located less than a 5-minute drive from the marinas and has the potential to further meet the needs of nautical tourists. Although there were few dining establishments available in the urban center pre-pandemic, the fate of many of these businesses following the pandemic (like that of others across the island) remains uncertain. Many of these businesses will need significant support in promotion and marketing — especially to high-spending nautical tourists arriving at the marinas. However, at this time, Fajardo/Luquillo offers limited cultural events that can help extend visitor dwell time. Many existing events primarily serve locals, including Carrera "Maratón" Malelo, Festival del Coco, Patron Saint Fest, and Kioskos Culinary Fest, Abordo Fishing Derby.

General Business Challenges:

Lack of Visibility on Digital Platforms: Today, customers navigate the digital landscape to inform real-time decision-making. Dining offerings at Kioskos de Luquillo are among the most reviewed and highly rated by visitors, while retail and dining establishments outside of this cluster are often not listed on Google. Online listing management allows restaurants to share basic inforation (including business hours), curate media, capture audiences, manage perceptions, and respond to reviews which helps customers plan trips and manage expectations. Social media data management, among other tools that businesses are not using in the region, is critical to a scalable business model that helps local businesses capture the spending of new residents as the emerging visitor economy grows.

Aerial view of Marina Puerto del Rey, located 10 minutes from the urban center of Fajardo. Source: Discover Puerto Rico

Cultural Opportunities

Based on a comprehensive assessment of local NGOs and municipality calendar of events and conversations with multiple stakeholders in the region of Fajardo/Luquillo, 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. Even before the pandemic, the cultural offering in these spaces has not been recurrent. However, the new approach to outdoor activities after COVID19 presents an opportunity to resume a consistent programming, considering the presence of local artists interested in using public spaces.

In particular, Kioskos de Luquillo presents an incredible opportunity to strengthen a gastronomic/cultural cluster through more live music programming. Currently there is a variety of cultural entertainment to expand upon and business owners are rallying behind proposals to market the area as a place where multiple music offerings can be accessed in a single location. The recognition of Puerto Rico as a Latin music hub can be further supported by the Kioskos as a one-stop live music hub for tourists.

The following list presents a summary of various other opportunities related to cultural tourism for the region. Many of which were highlighted by local stakeholders:

- Cultural events at the main square:
  - Monthly events focusing on multidisciplinary arts and gastronomy
  - Development of cultural routes and experiences focus on architecture and monuments
  - Experiences of creative tourism through workshops and performances on folkloric music partnering cultural projects such as Bombae, Corredor Ecológico del Noreste and local merchants.
- Cultural and historic routes developed by Corredor Ecológico del Noreste
- Revitalizing Playa La Pared, which represents an important natural heritage.

Key events to strengthen in the region:

- **Festival del Coco:** managed by community leaders, and the entity Artesanos del Este in October at Plaza de Luquillo
- **Festival del Tinglar:** educational event with cultural activities

Opportunity at the Centro Juan Martín as a hub for artists and cultural projects with links to ecological focus.

Festival del Coco Promotional poster from 2013.
Source: Sondeaquipr

Strategic Positioning for Fajardo/Luquillo

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.

The following reflect brand pillars for Fajardo/Luquillo:

a. Ideal day-trip destination with easy drive from San Juan in under an hour.

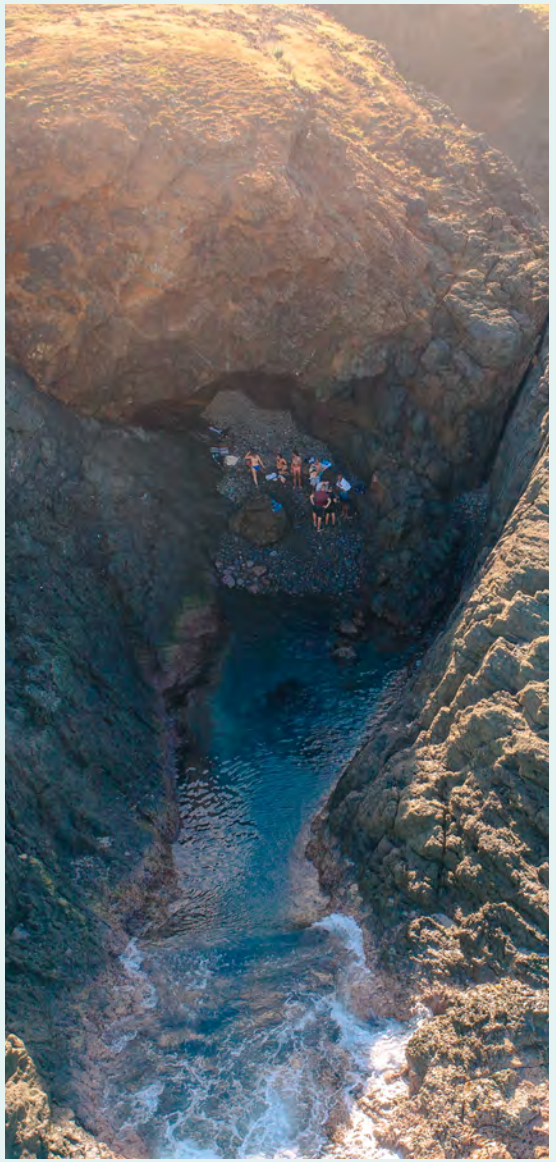
b. Seven unique ecosystems spread across the coast, protected wetlands, and mountains.

c. Community-driven and sustainable tourism opportunities.

d. Puerto Rican seaside gastronomy destination.

e. Safe, educational, and family-friendly experiences.

Fajardo/Luquillo is a day-trip SAVE "Scientific, Academic, Volunteer, and Educational" travel destination located within a 40-minute drive from San Juan. Teeming with community-driven and sustainable tourism opportunities, the region is home to seven unique ecosystems set amidst protected natural areas from coast to mountains, including Laguna Grande/Bioluminescent Bay, Las Pailas Waterfall, and the US Forest Service's only tropical rainforest asset, El Yunque. The region also features one of the island's most popular Puerto Rican seaside gastronomy and entertainment clusters – Kioskos de Luquillo – and a range of other family-friendly experiences at Cabezas de San Juan, Carabalí Rainforest Park, and El Conquistador – newly reopened Waldorf Astoria resort.



La Zanja at Fajardo. Source: Discover Puerto Rico.

Fajardo/Luquillo Projects

Recommendations Strategy Matrix

Fajardo/Luquillo Recommendations

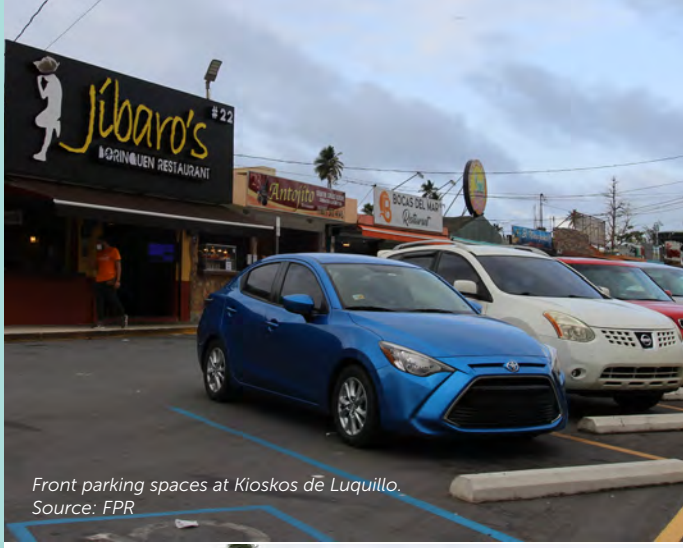
Budget: $ $ $ (Under $50k), $ $ $ ($50k - $200k), $ $ $ ($200k +)

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

	Project	Category	Timeframe	Budget
1	Enhance the public realm at Kioskos de Luquillo		Medium	$ $ $
2	Enhance Visitor Amenities at Balneario de Luquillo		Medium	$ $ $
3	Improve connectivity between Playa La Pared and Luquillo urban center		Long	$ $ $
4	Implement North-East Trail Network		Long	$ $ $
5	Grow retail, dining and entertainment in Fajardo urban center		Long	$ $ $

1 Enhance the public realm at Kioskos de Luquillo

Category	Place-Based Asset Enhancement Access and Mobility
Location	Kioskos de Luquillo
Origin	Asociación de Propietarios de los Kioskos de Luquillo, Inc. + Destination Planning Team
Budget	Repair pedestrian bridge connecting Kioskos de Luquillo to Balneario de Luquillo: **High ($200,000>)** State Government funds may be available for this effort through DRNA Build new parking lot on adjacent site: **Medium ($50,000-$200,000)** Re-design the public space fronting the ocean: **Medium ($50,000-$200,000)**
Timeframe	Re-design the public space fronting the ocean: **Medium Term (5-10 years)** Build new parking lot on adjacent site: **Short Term (Less than 5 years)** Repair pedestrian bridge connecting Kioskos to Balneario: **Medium Term (5-10 years)**
Risk	However, prior to the implementation of major infrastructure improvements, local businesses have shared the need first to address fundamental fixes such as waste management, utilities, and security. These are also critical in impacting the customer experience and should be prioritized alongside major infrastructure improvements laid out in this strategy. The location of the asset in a special flood hazard area with a 1% annual chance, or 100-year flood (as determined by FEMA), will pose severe risks from any natural disaster such as a hurricane or any other wave occurrence. As such, public realm design will need to heavily incorporate flood mitigation measures such as heavy vegetation — a flood damage-resistant material — and berms that act as a barrier to flooding.
Key Performance Indicators	The physical improvements will create a more seamless and enjoyable customer experience that will also support more visitors throughout the year and greater spending at the various on-site restaurants. • Annual visitor numbers (pedestrian count at entrances) • Business sales (annual self-reported surveys)



Front parking spaces at Kioskos de Luquillo.
Source: FPR

Traffic calming measures and raised crosswalks.
Source: FPR

Operable storefronts and outdoor dining.
Source: Discover Puerto Rico

Action Items

The Asociación de Propietarios de los Kioskos de Luquillo has taken major actions towards maintaining and enhancing the asset in recent years by organizing stakeholders and advocating for resources. The project includes three components as follows:

- Repair and restoration of a pedestrian bridge connecting Kioskos de Luquillo to Balneario de Luquillo.
- Construct a new parking lot at an adjacent location.
- Re-design the public realm fronting the ocean.

These strategies, further outlined below, aim to increase parking capacity for visitors arriving by car protect the shoreline from damage caused by parked vehicles as well as improve the experience at the asset to ensure it is safe, comfortable, and memorable.

Process

Repair pedestrian bridge connecting Kioskos de Luquillo to Balneario de Luquillo

There is currently no formal pedestrian pathway connecting the Balneario and its parking facility to the Kioskos. A bridge that once connected the two assets by the shoreline was destroyed during previous hurricane events and needs to be restored to create a safe and comfortable walkway for pedestrians. This will include clearing pathways through vegetation and rebuilding a bridge over a small waterway located on DRNA land. The association and the municipality of Luquillo are actively advocating for resources and control of this project from DRNA. Once a lead agency has been identified, an assessment of the site to flood risk and construction drawings will need to be designed to create the new connection between the Kioskos and Balneario. Resilient materials and plantings, and durable design, will need to be considered by the designers and engineers.

Construction of a new parking lot on adjacent site

- Conduct a traffic engineering study to reconfigure circulation of vehicles on-site to optimize flow and efficiency.

At this time, the roads on-site facilitate one-directional flow of traffic, which reduces the ease of overall traffic circulation.

- Seek permission to control and manage adjacent land on the West side of the Kioskos to create additional parking spaces for customers.

The association has begun efforts to gain control and management of adjacent land from the DRNA in order to expand parking facilities. At this time, there are approximately 100 parking spaces located between the beach and storefronts that will need to be relocated to the adjacent site in order to enable public space and outdoor dining expansion facing the beach.

- Design environmentally resilient parking lot.

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

- Implement a parking management system that enables the association to enforce parking time limits for customers and charge parking fees to non-customers.

To ensure parking spaces located on-site directly serve customers of the Kioskos, an automated parking payment system should be established in coordination with the landowner. These systems should also enable customers to redeem free parking if dine-in purchases are made at Kioskos businesses. Some examples of existing providers from other assets across Puerto Rico include MyPark and SP+Parking. Once a new parking system has been established, new locations of available spaces should be integrated with other existing navigation/ parking applications in the region, such as Google Maps and MyPark. Clear parking signage should also accompany the installation of new gates/ payment systems so as to allow parkers/ visitors to easily identify available parking spaces/ lots, pay for parking, and be directed on how to exit the facility. Revenue from parking fees may be used to enhance and maintain parking areas regularly as well as to enforce parking regulations on-site. This may include hiring security and cleaning staff for the parking facility.

Re-design the public realm fronting the ocean

Despite the asset's location a few feet away from the ocean, the ground floor dining experience is significantly impeded by parked cars on the beach area between the ocean and the Kioskos. Not only are views blocked by vehicles, but the noise and air quality that customers expect in an enjoyable beachside dining experience are impacted by vehicles

circulating around the property. To address this issue, the area between the beach and the Kioskos will need to be re-designed to be more pedestrian-focused so as to maintain a comfortable and safe outdoor dining experience.

Planning

- Assess site-specific flood zones and risk
- Review topographic data against future sea-level rise projections
- Conduct a shoreline inspection
- Determine if communities can benefit from park-based coastal protection measures and conduct a cost-benefit analysis
- Determine desired public uses and concept design for viable space with community stakeholders

Design

- Adapt coastal park edges to account for tidal flooding due to appropriate sea-level rise projections
- Specify resilient materials and plantings, and utilize durable design details
- Incorporate directional signage in the public space for both pedestrians and cyclists to facilitate the urban connector trail passing through the area that has been planned as part of the North-East Trail Network Concept (refer to Implement NE Trail Network project sheet)

Diagnostic: Why Is This Project Important?

Kioskos de Luquillo is an oceanfront culinary destination featuring over 130,000 SF of retail and dining spaces with various price points to match spending power across all customer segments. In fact, in August 2019, a law was passed to declare the area that encompasses the Kioskos de Luquillo as "Special Gastronomic Center of the Eastern Region of Puerto Rico". Its proximity to El Yunque National Forest and several other coastal assets, including Balneario Luquillo and Playa Azul, combined with its convenient location off the PR-3 highway, make the Kioskos one of the most prominent rest and dining stops for travelers in the East Region.

Before the pandemic, stakeholders from Kioskos de Luquillo Merchants Asociación cited low vacancies in recent years, a strong indicator of the success of businesses at the location. In fact, according to the association, the Kioskos received over half a million off-island and local visitors annually, created over 800 jobs, and generated more than $3.5 million in sales tax annually.

However, despite its successes and growth in popularity over the years, there are several accessibility issues facing the businesses (as shared through stakeholder interviews), including traffic congestion and limited parking availability on peak days.

COVID-19 Recovery

As with many other commercial clusters and districts across the island and the United States that relied heavily on visitor traffic, Kioskos de Luquillo has seen a large drop in customer traffic and sales since March 2020, when Puerto Rico travel bans and local resident curfews were instituted.

As a result, business owners responded with shorter operating hours to lower operating costs and leveraged existing outdoor dining spaces and beach-facing areas to accommodate safer dining arrangements for customers that continued to visit. With an enhanced public realm at Kioskos de Luquillo, business owners will be able to expand its outdoor dining offerings permanently and grow sales potential, while physical improvements will enhance the overall experience for customers (tourists or locals) and drive greater annual visitation numbers.

Partners and Resources

Asociación de Propietarios de los Kioskos de Luquillo (The merchants have organized themselves by forming an entity; Asociación de Propietarios de los Kioskos de Luquillo, Inc., duly incorporated under the Government of Puerto Rico on 2016.)

- Department of Natural and Environmental Resources (DRNA)
- Department of Transportation and Public Works (DTOP)
- Puerto Rico Tourism Company (PRTC)
- Municipality of Luquillo

Case Study or Best Practice

NYC Design Guidelines

Beach Flood Resilience Selected Best Practices:

- Design and construct native-vegetated sand dunes with relevant experts (e.g., landscape architects, ecologists, botanists, engineers, etc.) to help protect the beach against wave action and erosion. Use native vegetation adapted to the coastal environment, as invasive species may also inhibit sand accretion.
- Develop a plan for necessary beach nourishment and maintenance of dunes and dune plantings to ensure the best possible performance during and after a storm event.
- Limit structures on beaches to those that provide crucial waterfront uses, such as bathrooms and lifeguard stations.

Before + After of public realm improvements. Source: Google; Streetsense

2 Enhance Visitor Amenities at Balneario de Luquillo

Category	Place-Based Asset Enhancement
Location	Balneario de Luquillo (also known as Balneario La Monserrate)
Origin	Destination Planning Team
Budget	Create a beach master plan: **High ($200,000>)** Establish beach vendor program: **Medium ($50,000-$200,000)** At the time of writing, early efforts to enhance the asset are reportedly underway. PR National Parks and the local municipality have applied for state-mandated asset revitalization funding and grants through AARP. If successful, funding will be used toward ADA-accessible improvements for beach facilities/ infrastructure and the improvement of comfort stations.
Timeframe	**Create a beach master plan: Medium Term (5-10 years)** **Establish beach vendor program: Short Term (<5 years)**
Risk	The location of the asset in a special flood hazard area with a 1% annual chance, or 100-year flood (as determined by FEMA), will pose severe risks from any natural disaster such as a hurricane or any other wave occurrence. As such, the long-term design of the beach will need to heavily incorporate flood mitigation measures such as landscape and vegetation — a flood damage-resistant material — and berms that act as a barrier to flooding.
Key Performance Indicators	• No. of beach vendor permits issued annually. • Annual self-reported business sales (via merchant surveys) • Annual increase of user reviews — 3 stars and above (via Google Maps)

Top to bottom: Mixed levels of maintenance of visitor amenities at Balneario de Luquillo. Source: FPR

Action Items

The Balneario de Luquillo is a popular beach destination in the region, particularly amongst locals and fishermen, and is often packed with groups of people exercising or enjoying picnics. However, some of the infrastructure at the beach, were damaged during Hurricane Maria and has not been fixed or maintained causing them to deteriorate in the following years.

To continue attracting domestic tourism in the area and encouraging other visitors at adjacent Kioskos de Luquillo to explore eastwards toward the Balneario, the physical environment between the two assets must be enhanced. This will also help encourage cross-visitation on foot as a greater set of offerings and activities become available within easy reach, extending visitor dwell time overall. As such, the beach will need to implement two significant projects:

- Create a beach master plan that includes interim strategies to repair damaged beach furniture and structures; and long-term strategies that incorporate flood resiliency design and prioritize ADA-accessible infrastructure.
- Encourage rotation of food and beverage trucks, vendors selling souvenirs, and beach equipment.

Process

Create a beach master plan

The Municipality of Luquillo, with the support of DRNA, should engage in a) an interim enhancement planning effort that outlines emergency repairs on infrastructure damaged by coastal erosion and b) a long-term master plan that outlines a vision for the beach (and its parking lot) and includes resiliency, safety, and accessibility improvements.

In this work, a coastal engineering firm will need to assess beach conditions and determine protective strategies that mimic natural environments. A planning and design firm should also be engaged in extensive community outreach to develop site concepts and prepare any environmental reports necessary to support application to federal funds, as well as capital improvement plans that outline cost estimates for every infrastructure item included in proposed concepts.

This beach master plan should serve as the guiding document for the re-envisioning of the Balneario and should prioritize the restoration of ADA-accessible infrastructure (including ramps and designated accessible parking spaces) and waste management. Components of the master plan should include a maintenance plan to establish the network of partners and agencies that will need to work together to oversee the implementation and management of beach improvements. Furthermore, it must be tied closely to other improvements and connections being made at the Kioskos de Luquillo. The success of both these projects will depend on the alignment of vision and improvements.

Establish beach vendor program

Food and recreational vendors offer a convenient offering to beach goers who often need refreshments after a long day at the beach and should be encouraged in larger numbers and of greater variety throughout the week. A vendor permit program administered by the municipality (with support of DRNA) helps curate and manage the volume of activity on the beach to prevent overcrowding or other unintended environmental impacts.

Permit applications should be kept at a minimum to encourage participation by highly local entrepreneurs, as well as strictly enforced by quota per day to ensure beach capacity is not overloaded by vehicles and crowds.

To ensure a quick and easy process for applicants, the municipality should set up a dedicated 'Balneario de Luquillo Vendor' web page and use simple Google Forms/ online application processes for vendors to regularly apply for a space to conduct business. Specific areas at the beach should be designated for use by vendors to create a cluster of commercial activity. Monthly rosters of vendors should be published online for businesses and visitors to see what's available for the upcoming weeks.

The cluster of beach vendors at the Balneario should serve to further reinforce the area as a coastal dining attraction in Luquillo and should complement the offerings at the Kioskos de Luquillo.

COVID-19 Recovery

Local beach-goers are an important source of domestic tourism for the municipality – especially during the pandemic. During the recovery years, these same island visitors will be the first segment of customers to return to the market, so it is crucial to restore beach destinations such as the Balneario de Luquillo to safely accommodate their return with new and ADA-accessible amenities and to create opportunities for them to dine outdoors safely and in socially distanced settings.

Diagnostic: Why Is This Project Important?

Balneario de Luquillo has been touted as one of the island's best-equipped family beaches that was once also friendly for people with disabilities. Its close proximity to the Kioskos de Luquillo also places it in an advantageous position to leverage visitation and spending. However, at this time, the beach is separated from the Kioskos by physical barriers such as the lack of a bridge and safe walking path (refer to Kioskos de Luquillo project sheet). Additionally, it does not have the most updated infrastructure to attract off-island visitors dining at Kioskos.

While it remains a popular beach for local visitors, basic amenities such as pavilions and gazebos should be improved for this important group of customers, and a greater long-term vision and plan for the beach that considers coastal resiliency measures will need to be developed to elevate its prominence as a local beach destination.

Partners and Resources

- Municipality of Luquillo
- Department of Natural and Environmental Resources (DRNA)
- La Asociación de Pescadores Unidos de Luquillo El Tinglar Corp.
- Asociación de Pescadores El Capitán Corp. de Luquillo

Case Study or Best Practice

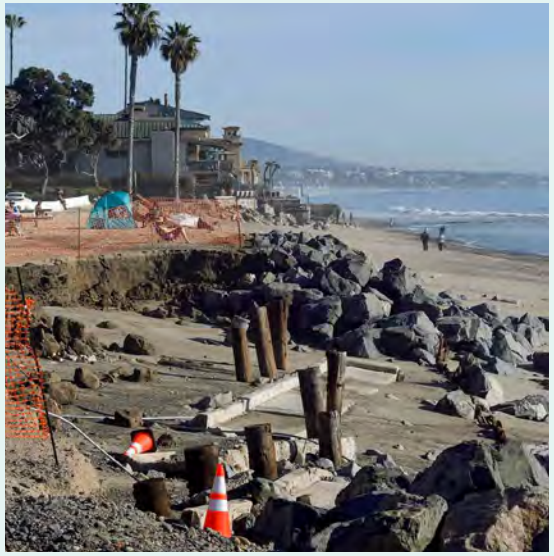
City of Long Beach CA's Doing Business Permit

The program enables two major categories of businesses to operate in any park, beach, or marina with the appropriate permit granted: Food Service or Commercial Recreation. The City considers 'Food Service' concessions range from pushcarts selling hot dogs and to beach concession stands and mobile trucks. 'Commercial Recreation' concessions can range from fitness providers, moon bounce vendors, and boat charter services. A nominal fee of $200-$500 is charged for the use of public property and is typically arranged as a flat fee for small businesses. All documentation requirements, processing framework and contact information for program officers are clearly laid out on the program website maintaining a transparent process for all applicants.

Capistrano Beach Park Master Plan, California

Similar to Puerto Rico, beaches along the coast of California have been faced with a mix of environmental disasters. As such, the California Coastal Commission and the County of Orange in southern California have been supporting efforts in various cities, including the City of Dana Point, to create updated long-term plans for various beaches to address future needs. When completed, these master plans will include robust stakeholder engagement, the completion of a design concept and technical studies to support funding applications, regulatory compliance, and partnership development.

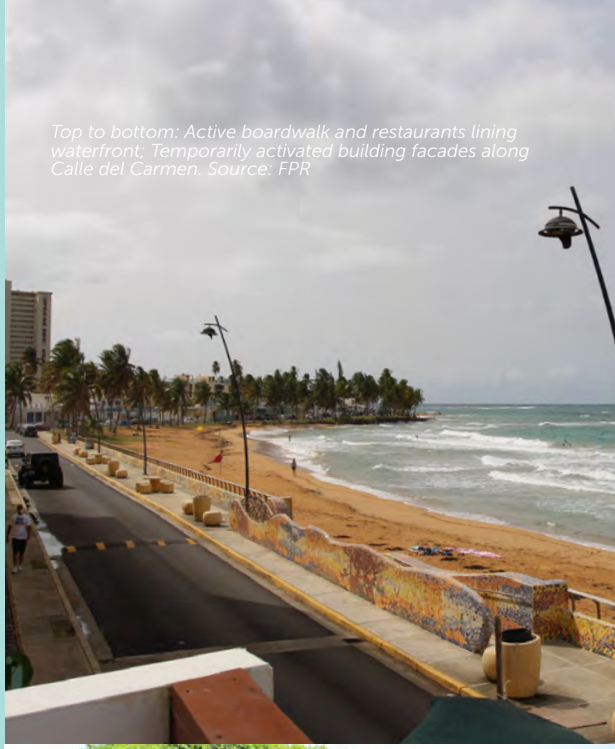
Permitted beach-adjacent food trucks parked in Long Beach. Source: Yelp



The former site of a seaside basketball court at Capistrano Beach damaged by storms and high tide from 2018-2021. Source: Orange County Register (Jeff Gritchen)

3 Improve connectivity between Playa La Pared and Urban Center of Luquillo

Category	Place-Based Asset Enhancement
Location	Plaza Pública de Luquillo, Calle Del Carmen + parking lot, and Calle Herminio Díaz Navarro
Origin	Destination Planning Team
Budget	Demolish/rehab abandoned properties on Calle Del Carmen: **High ($200,000>)** Enhance the condition of the waterfront parking lot: **Medium ($50,000-200,000)** Design a shared street/woonerf along Calle Herminio Díaz Navarro: **High ($200,000>)** 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 State government. Community Development Block Grant Disaster Recovery Program (CDBG-DR) funds are flexible, available, and designed to meet community needs and often prioritize urban center revitalization. Another potential source of funding includes the National Endowment for the Arts' Grants for Arts, which supports projects that encourages projects that use the arts to "unite and heal in response to current events". Grants are provided to various organizations with small, medium, or large budgets and from rural to urban communities.
Timeframe	Demolish/rehab abandoned properties on Calle Del Carmen: **Medium Term (5-10 years)** Enhance the condition of the waterfront parking lot: **Short Term (<5 years)** Pilot a shared street/woonerf along Calle Herminio Diaz Navarro: **Short Term (<5 years)**
Risk	The rehabilitation of private properties along Calle Del Carmen will require coordination and participation with multiple landowners. This process may be time-consuming if the local municipality has not already established contact and built a relationship with the local property owners. The project site's close proximity to the coastline, within a 1% Annual Chance Flood Hazard zone, poses risks to flooding. As such, the re-design of the parking lot and the woonerf/shared street will need to heavily incorporate flood mitigation measures and prioritize the use of permeable materials and heavy vegetation/landscaping.
Key Performance Indicators	The place-based improvements aim to combine Playa La Pared and the Urban Center of Luquillo as a coastal dining and cultural destination for visitors to the region. The following metrics should be monitored to measure the success of each component of the project collectively: • No. of food truck permits issued annually at the waterfront parking lot • No. of pedestrians on the woonerf (via pedestrian counters) • Self-reported sales of waterfront businesses on Calle Herminio Diaz Navarro



Top to bottom: Active boardwalk and restaurants lining waterfront; Temporarily activated building facades along Calle del Carmen. Source: FPR

Action Items

To better knit the urban fabric, the following investments aim to improve the pedestrian experience, encouraging cross-visitation between the two sections of Luquillo and promoting overall foot traffic:

- Demolish/rehab abandoned properties on Calle Del Carmen
    - Demolition by Neglect Ordinance
- Enhance the condition of the waterfront parking lot
- Design a shared street, or "woonerf" along Calle Herminio Díaz Navarro

Process

Demolish/rehab abandoned properties on Calle Del Carmen

To rehabilitate or restore underutilized 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 work closely with local artists to expand the movement of grassroots murals (similar to that of "Santurce es Ley" and "Culebra es Ley") on targeted buildings to mask destroyed façades. The murals should be well-lit by decorative lighting and should be changed seasonally to create a district-wide attraction for locals and visitors. Through this effort, the municipality may be able to gain trust and support of property owners to partner on long-term restoration or tear-down of these properties.

However, without the support and participation of property owners, 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.

Enhance the condition of the waterfront parking lot and activate with food truck program

Stretching 200 feet between the north eastern corner of Plaza Pública and the waterfront, the open lot critically impacts the experience for pedestrians traversing between the two assets. At the time of the assessment, the lot appeared in disrepair — paving has been destroyed from flooding and appears unmanaged. As such, capital improvements to enhance its appearance while also integrating flood mitigation features will hugely contribute to the public realm and drive greater cross-visitation.

The following steps will need to be considered in the re-design of the lot:

First, install permeable asphalt pavement for the parking area. The parking lot should include designated drop-off/pick-up zones and parking spaces clearly demarcated with line paint and traffic lanes within the parking lot to allow easy navigation. The design of the parking lot should also incorporate lighting and green infrastructure such as vegetated swales, increasing landscape to a paved area, and planter boxes for residents to grow local vegetation.

As part of the reconstruction, several truck parking spaces for mobile vendors should be equipped with solar-powered energy outlets to create a mobile zone, accompanied by temporary furniture such as picnic tables, string lighting, and signage to attract visitors.

To manage the utilization of these spaces, the municipality should partner closely with existing businesses on the waterfront and other local entrepreneurs looking to test or expand their offerings through a food truck permit program. The permit program will allow the management of a consistent roster of parked mobile vendors offering diverse cuisine and food concepts that are not competitive to existing businesses on the waterfront.

Design a shared street, or "woonerf" (a Dutch term for a living street shared by pedestrians, cyclists, and cars), along with Calle Herminio Díaz Navarro

The popular waterfront street provides visitors an uninterrupted view of the beach from a mix of restaurants, bars, and increasingly food trucks. This opportunity may be better leveraged by supporting increased pedestrian traffic volumes on a shared street or "woonerf". Shared streets are curbless public spaces designed on a public right-of-way to enable all modes to share the roadway — pedestrians, cyclists, electric scooters, and in some cases, vehicles (although the design may deemphasize vehicles).

Although temporary designs may be implemented in the near term through a pilot program (see call-out box), for a permanent construction project, the first step will require an existing site condition analysis, traffic analysis

and engineering studies, and professional schematic concepts, designs, and construction drawing.

COVID-19 Recovery

Many restaurant districts across the world experienced growth of outdoor dining during the pandemic as operators struggled to find safe ways to continue serving customers with social-distancing measures in highly ventilated environments. In the coming years, this expectation for outdoor dining will likely remain high as the practice becomes normalized especially as cities leverage these spaces to creative unique experiences for visitors. Given the accommodating climate in Puerto Rico, year-round outdoor dining will be a crucial strategy to support small local businesses.

As economic conditions remain challenging nationally for the next 2-4 years, micro-food and beverage entrepreneurs will likely be strapped for start-up capital, and mobile trucks will instead help ease entry to market compared to paying for rent on brick-and-mortar restaurant spaces.

Diagnostic: Why Is This Project Important?

Playa La Pared is a growing cluster of informal dining businesses that complement existing, highly-reviewed restaurant anchor Boardrider's Surf Bar and Grill. On weekends, food trucks frequently park on Calle Herminio Díaz Navarro or to the north of the beach to cater to local beach goers. This project serves to further support this informal economy in the urban center of Luquillo to kickstart a downtown revitalization movement — providing them enough space with utilities and a complementary public realm that attracts foot traffic to these businesses and that functions as a space for arts and culture offered by groups such as Artesanos del Este, Inc.

Furthermore, these projects will serve to build on and expand the popularity of the municipality's Festival del Tinglar and Festival de Platos Típicos, typically held in the urban center's Plaza de Recreo, and is closely aligned with the proposed build-out of the NE network of trails (outlined in the following project sheet) which includes a section of connector trails between Playa La Pared and the urban center.

Despite being located less than 500 feet away from each other, two key assets in Luquillo — Playa La Pared and the urban center — remain disconnected for many visitors and pedestrians.

The disconnect is a function of the poor maintenance and activation of the surrounding public realm, including streets and sidewalks, resulting in low perception of safety and vibrancy.

Partners and Resources

- Municipality of Luquillo
- Local business owners, residents, and civic/cultural organizations

Case Study or Best Practice

City of Cambridge Food Truck Program

Initiated in 2018, following recommendations from a Citywide Retail Strategic Plan, the Food Truck Program provides an attractive, low-cost option for first-time business owners — particularly women and minority-owned operators — starting new concepts. Applicants must be licensed and permitted by the city (business certificate, vehicle registration, fire and inspection), and insured, to be eligible for the program. The Food Truck Permits are distributed for different tiers of participation — regular vendors at public locations, occasional one-time vending at public locations, and regular/one-time vending at private locations with landlord agreements — and for varied shifts (4-6 hours). Applicants are awarded based on a fair and transparent point system.

Precedent Projects: Temporary Shared Streets

Temporary shared street projects may be implemented with the support of local volunteers and arts/culture groups such as Artesanos del Este, Inc. and the use of low-cost construction materials including removable paint, lightweight bollards/traffic cones and outdoor furniture. Communities around the world have elected for tactical and temporary shared streets to get stakeholder buy-in, test design concepts, and to build the case for any traffic and parking changes.

Willoughby Street in downtown Brooklyn began as a temporary shared street and is now being reconstructed as a permanent shared street. Source: Downtown Brooklyn

Broadway (between W 37th and 38th Street), a major roadway in Manhattan, NYC, began as a seasonal shared street. Source: NYC DOT

Precedent Projects: Living Art Gallery

Street art projects may also be implemented with the support of local volunteers and arts/culture groups. Often, living art (art that is temporary in nature and changed by season for viewing by public) is clustered in a single neighborhood/district to offer visitors an exciting outdoor activity that is convenient and accessible. Living art may be used to mask deteriorating infrastructure or historic buildings and may be executed with low-cost materials.

Living art on the facades of buildings along Calle Cerra in Santurce. Visitors and international artists are drawn annually to Santurce es Ley, a street art fair held on the street. Source: Bienvenidos Puerto Rico

Culebra es Ley, an urban art movement breathing new life to buildings on the island. Source: backpackovalija.com

4 Implement the North-East Trail Network

Connect El Yunque National Forest with communities and natural protected areas in the North-East of Puerto Rico

Category	Access and Mobility
Location	**Route 1:** Las Croabas - Reserva Natural Las Cabezas de San Juan - Parque Nacional Seven Seas - Reserva Natural Corredor Ecológico del Noreste **Route 2:** Reserva Natural Corredor Ecológico del Noreste - Comunidad Sabana - El Yunque National Forest **Route 3:** Reserva Natural Corredor Ecológico del Noreste - Centro Urbano de Luquillo - Parque Nacional La Monserrate - Comunidad Playa Fortuna **Route 4:** Comunidad Playa Fortuna y Estuario del Río Mameyes - Río Mameyes - El Yunque National Forest *An additional route in Río Grande - Route 5: El Verde-Scenic Byway/PR-186 (PR-186 is a designated scenic route within the Forest and State-designated scenic byway outside the Forest. This route will help disperse recreation users in the Forest and reduce traffic along PR-191, which in turn will help to improve the adjacent sensitive ecosystems affected by over-use.)*
Origin	USDA-Forest Service Conservation Trust of Puerto Rico/Para la Naturaleza Coalición Pro-Corredor Ecológico del Noreste
Budget	Implement NE Region trail network: **High ($200,000>)** The partnership has not engaged in detailed cost estimation for the full build-out of the trail network; however, the project will be a massive undertaking for the communities in the East Region and will require complex coordination of funding from cross-sector partners.
Timeframe	Implement NE Region trail network: **Long Term (10 years>)**
Risk	The partnership's main challenge is the need for initial funding to complete field research, planning, design, and construction. Furthermore, Puerto Rico does not have a volunteer maintenance network for hiking trails as there is for mountain biking trails and in other jurisdictions. Funding could also be used for alliance and capacity building towards this end.
Key Performance Indicators	• Length of trail build-out (in miles) • Annual increase in trail users (via pedestrian counters) • Annual increase of user reviews – 3 stars and above (via Google Maps)

Action Items

Para la Naturaleza, the USDA-Forest Service, and a diversity of project partners are working towards the development of 13 miles of a ridge to reef trail network that would connect El Yunque National Forest to other protected areas and communities in the region, promoting connectivity while expanding local economic opportunities and increasing public access to trails, points of interest and other nature-based activities. One of the project's guiding principles is that the trail system should be an instrument of social and economic development in gateway communities and support conservation objectives in those areas.

This network includes a combination of rural trails and multi-use urban connections and the development of supporting visitor infrastructure, including key amenities such as viewpoint lookouts, appropriate trail lighting, and wayfinding/signage. The network would offer visitors the opportunity to visit all of Puerto Rico's life zones and a variety of ecosystems, as well as experience urban and rural communities and places of interest. Furthermore, this project is highly complementary to a number of other projects presented in this Destination Plan, such as creating greater access to waterfall assets, growing SAVE tourism opportunities, and improving connectivity between Kioskos de Luquillo and Balneario de Luquillo.

Process

Through a cost-share agreement, Para la Naturaleza and the Forest Service developed a partnership with allies and stakeholders and completed a conceptual plan[93] of the trail network that delineates four regional trail routes. The collaborative working group, which includes the municipalities of Luquillo and Fajardo, DRNA, and other community-based organizations, signed a Memorandum of Understanding (MOU) with technical assistance from the National Parks Service (NPS) Rivers, Trails and Conservation Assistance Program (RTCA). Their current work plan includes a) Legal research and draft bill to protect from liability, private landowners who accept recreational trail easement through their property; b) project branding; c) development of a website for public education and fundraising d) landowner outreach; e) continued stakeholder outreach; and involvement.

Depending on available funding, the partnership might need to select the first route to be designed and constructed. This process should be open to community stakeholders to ensure transparency and public buy-in to the project, and, long-term participation in the maintenance of the trails.

The working group will need to engage in a formal procurement process to select a design-build team that will be tasked with creating development plans and any construction drawings of the first regional trail in the proposed network. The selected team will be expected to combine fieldwork research for the collection of data with trail planning, design, and development strategies. The types of skills required by the team will include AutoCAD, GIS, terrain analysis, and general trail design theory and practice.

Fieldwork Research

- Collect spatial data for the target route, including GPS coordinates, delineation of trail segments, and identification of improvement sites.
- Collect data on important physical features, identify potential viewpoints, and locate stream crossings, vegetation types, and other trail features.

Planning, Design + Build

- Ongoing public participation meetings
- Land ownership research to identify the full landscape of property owners
- Prepare schematic engineering and environmental plans
- Produce architectural design plans, construction drawings
- Develop complete project cost estimate that includes all required services, costs, and contingencies
    - Provide projected revenue under private operator and/or public operator for trail facilities and services
- Provide total project phasing plan
- Project construction and administration

All the sections of the NE trail network proposed by local organizations. Source: Para La Naturaleza

[93] *Plan conceptual para el desarrollo de un sistema de veredas que conecte el Yunque con las comunidades y las áreas naturales protegidas en el noreste de Puerto Rico (2019), Estudios Técnicos Inc. https://issuu.com/cristinaeti/docs/plan_conceptual_de_veredas_noreste_diciembre_de_20*

COVID-19 Recovery

According to the trade organization Outdoor Industry Association, economic sectors associated with outdoor recreation are growing faster than the national economy as a whole, particularly in regions where employment and economic opportunities in other sectors have declined. Core to the success of outdoor recreation is trail infrastructure which, according to 2018 estimates, accounts for more than half of outdoor recreation economic activities, creating nearly 3.5 million jobs in mainland United States[94] — particularly in small, rural communities (note: a similar metric for the US territories is not currently available).

As Puerto Rico's economy continues to recover post-pandemic, the implementation of the NE Region trail network may present a key opportunity to sustain the productivity of the outdoor recreation economic sector and provide jobs to locals across the various municipalities.

Diagnostic: Why Is This Project Important?

The East Region features a matrix of open space, protected lands, developed lands, and agricultural areas covering the Luquillo Mountain range, the Northeast floodplain, and a coastal zone. However, at this time, the important protected areas, including El Yunque National Forest, the Northeast Ecological Corridor Reserve, Cabezas de San Juan Nature Reserve, and Espíritu Santo Nature Reserve, are not well-connected through low-impact trails. Visitors currently need to drive between these assets to individually access them — resulting in high volumes of vehicular traffic at each of these protected areas. The lack of connectivity between these assets has also resulted in unequal annual visitation numbers. The high rates of annual visitors (upward of 600,000 pre-pandemic) to the northern sections of El Yunque National Forest may be better distributed to other key natural protected areas via more accessible and low-impact trail routes.

Partners and Resources

- Conservation Trust of Puerto Rico/Para la Naturaleza
- Coalición Pro-Corredor Ecológico del Noreste
- Department of Natural and Environmental Resources (DRNA)
- ECOSOL
- Municipalities of Fajardo, Luquillo, and Río Grande
- USDA-Forest Service
- Asociación de Acampadores de Puerto Rico, Inc.
- Vitrina Solidaria
- Alianza Comunitaria Pro Desarrollo Sustenable de Sabana
- Department of Transportation and Public Works (DTOP)

Case Study or Best Practice

The Mountain-to-Sea Trail network of North Carolina offers a comparative case study albeit at a much larger scale spanning 1,200 miles across 37 counties. Today, about 700 miles of footpath have been constructed by a myriad of local partners agencies working in coordination with state-level experts. The Mountain-to-Sea trail also allows visitors to experience range of natural habitats — from the Smoky mountains to coastal swamps and barrier islands.

In addition to local contractor agreements (procured through open RFP processes) to build out sections of the trail, the non-profit organization Friends of the Mountains-to-Sea Trail also provides funding, programming, and volunteer support to build and maintain sections of the network.

The Mountain to Sea Trail is made possible by volunteers and volunteer organizations that have built and maintained trails across the network. Source: Roots Rated (Ann Hendrickson)

[94] *Bureau of Economic Analysis. (2019). Outdoor Recreation Satellite Account, U.S. and Prototype for States, 2017. US Department of Commerce. https://www.bea.gov/system/files/2019-09/orsa0919_1.pdf; Pattni, K., Smith, E., Saladino, C., & Brown, W. E. (2020). The Outdoor Recreation Economy in the Mountain West.*

5 Grow retail, dining, and entertainment options in urban center Fajardo

Category	Place-Based Asset Enhancement
Location	Fajardo urban center
Origin	Destination Planning Team
Budget	Storefront improvement and business support program for local businesses: Medium ($50,000-$200,000) Create network of lanes for micro-mobility options: High ($200,000>)
Timeframe	Storefront improvement and business support program for local businesses: Short Term (<5 years) Create a network of lanes for micro-mobility options: Long Term (10 years>)
Risk	The agreement of property owners for any façade and storefront improvements will be critical to the success of the program. As such, the municipality will need to conduct robust outreach and engagement in the early phases of this project to inform property owners of potential opportunities and to get buy-in prior to executing any changes to private property.
Key Performance Indicators	• Length of cycling network constructed (total no. of miles) • No. of businesses participating in business support program • Total grant amount provided to local businesses for technical support

Top: Alcadía de Fajardo. Bottom: Plaza de Fajardo. Source: FPR

Action Items

The growth of the retail, dining, and entertainment options in Fajardo will require the following investments:

- Façade and storefront improvements
- Business support and retention programs
- Streetscape improvements

To be successful, the revitalization of the urban center will need to focus on two main goals: a) Growing a strong cluster of commercial activity and programming, and b) Enhancing accessibility to support alternative modes of transportation to and around the urban center.

Given that there are currently limited quality dining and shopping options for visitors to the area, the municipality will need to incubate and support the growth of small local businesses with offerings that meet the taste and preferences of marina users and other customer segments. This is a critical first step that will help seed other ambient and anchor entertainment offerings in the urban center that will rely on foot traffic and patronage at local restaurants and businesses.

At this time, visitors are primarily arriving by car or driving through the area since there is limited opportunity to safely access the urban center by any other modes (cycling and walking included). During community meetings, stakeholders reported the lack of or incomplete sidewalks and bike networks create an unsafe environment for visitors to walk/bike from surrounding marinas and neighborhoods. To enhance accessibility and promote active transportation, the municipality will need to implement streetscape improvements and create sidewalks and bike lanes (shared or separated) to better connect the marinas, surrounding neighborhoods, and the urban center.

Process

Façade and storefront improvement program

The appearance and existing conditions of a place set the stage for a positive experience for visitors. Although the buildings fronting the Plaza are in good condition, many other properties on side streets need repair and rehabilitation. Similar to the effort in Luquillo, the municipality will need to work closely with property owners to rehabilitate or restore underutilized properties.

For properties that require significant restoration, the municipality should consider a demolition by neglect ordinance as previously described. In less extreme cases, the municipality should offer grants and technical assistance to either property owners or tenants to improve façades and any commercial storefronts. The program should serve to bridge any financial gap between the property owner and tenants by offering grants for repair work (structural/utility/ code compliance), equipment installation (especially for food and beverage and experiential tenants), and aesthetic/ beautification storefront efforts. Grants should be structured to require a match from the applicant (either the property owner or the tenant) of the total construction costs up to a designated amount per applicant.

Business support/retention program for local businesses

Existing businesses, particularly those that directly cater to and serve visitors (e.g., souvenir stores, food and beverage) that continue to choose Fajardo as a choice market for consumers, should be supported by the municipality. This support should complement physical improvements to properties and focus on providing technical support such as branding/marketing, legal, and business operations/financing.

Working closely with national-level organizations with experience in lending small business support, such as SBA, or with a business incubator at the anchor institution Interamerican University, the municipality should establish micro-grants for qualified business owners to use for technical assistance. A pre-qualified list of professional advisors and consultants should be established by the municipality to ensure high-level support is provided to program applicants.

Implement streetscape improvements and create a network of lanes for micro-mobility options

To expand and enhance access to Fajardo urban center from neighboring anchor institutions, neighborhoods, and the marinas, the municipality, with support of transportation planning consultants, will need to develop a comprehensive mobility plan for the area that balances needs across multimodal transportation systems and that optimizes the existing street networks. The plan will need to recognize emerging new mobility technologies that can further support the efficient and, most importantly, safe movement of customers, bicycles, personal vehicles, freight, and other means of transport in the area. Other places

in Puerto Rico, including Condado, San Juan, have already seen challenges due to not planning ahead and accommodating changes in mobility patterns.

This consultant's scope of work should consist of an assessment of existing transportation conditions in the area, including fieldwork and data collection if data is unavailable, stakeholder engagement, and scenario planning to forecast future travel demand and travel patterns to anticipate any changes in travel mode and infrastructure impacts of that change — i.e., any streets/corridors/sidewalk improvements.

COVID-19 Recovery

The pandemic highlighted the importance of domestic tourism to circulate spending during times of crisis and in the case of Fajardo, domestic tourism is highly supported by marina users. Although the impact of the pandemic on yacht charters have returned mixed results in 2020, nautical tourism remained resilient as it enabled tourists to maintain social distancing on individually chartered boats while exploring new destinations.

As such, the municipality should continue to leverage spending from this niche group of visitors and domestic tourists by offering a unique docking experience at the urban center of Fajardo with active and vibrant streets that offer high-class dining and recreational activities on land. According to the Tourism Office of Fajardo, marina visitors often seek excursions available in the area, with many long-distance travelers staying/docking between 1-2 weeks.

Storefronts across the urban center are in mixed conditions. This barbershop storefront is clean and well-maintained and features a unique brand identity. Source: Flickr (Ard Hesselink)

Diagnostic: Why Is This Project Important?

Located less than a 5-minute drive to the marina cluster, between the waterfront and PR-3, the urban center of Fajardo has the potential to further meet the needs of nautical tourists who are located within close proximity if the right set of dining and cultural offerings are available. Customers are highly driven by relational and functional proximity, and because stores allow them to save time and better manage their time through more opportune visits. As such, the location of the urban center is ideal for businesses hoping to meet the needs and preferences of the marina users. In fact, the volume of vehicular traffic passing through the area daily ranges between 15,000-30,000. Although nautical tourists, and specifically marina users, are a seasonal customer base, these customers are "upper or upper-middle class, mainly high-ranking professionals and investors" with generally high disposable incomes whose spending is currently being taken away by shopping centers along PR-3/PR-53.

Their stopover in Fajardo often means they remain close to the marina and venture out to restock supplies for the next leg of their travel and may be purchasing groceries and medical supplies, etc., or taking a break from the water. The urban center's convenient location is therefore an asset that should be leveraged to distribute spending by this wealthy customer base.

Although the urban center of Fajardo is not currently a top-rated destination for visitors to the region, its location between major marina facilities and neighborhood shopping centers, Del Este Shopping Center, place it in a strategic position to leverage visitation not only from locals but regular marina users and the municipality has been taking action toward revitalizing the urban center.

In recent years, municipality representatives estimate that around 95% of buildings in the urban center have been painted, structures have been converted into residential use and storefronts have been improved. However, there is still much to be done in the physical environment and in educating business owners on fundamentals such as digital marketing. Until these fundamental improvements are made, it will be challenging for the urban center to appear attractive to customers and various other anchor businesses and performance troupes/event organizers.

Partners and Resources

The Municipality of Fajardo will be a key champion for this project. Currently, the municipality manages the plaza and has continued to ensure year-round programming, including an annual outdoor art exhibition that attracts local visitors to the area. The municipality should also work closely with residents and business owners.

Anchor institutions, Inter-American University, and UPR may also be key partners. The Inter-American University daytime population provides a strong repeat visitor base for the urban center with over 1,500 undergraduate students and its close proximity to the urban center (10 minute-walk from Plaza de Fajardo).

Art located in Plaza de Fajardo. Source: FPR

Case Study or Best Practice

Downtown Alliance Small Business Technical Assistance Grant

The Downtown Alliance provided over 20 small businesses the opportunity for one-on-one technical assistance consultations with a pre-qualified Retail and Dining consultant. The goal of the program was to assess existing business operations and leverage opportunities to better prepare businesses for the on-going crisis. Consultations with the business specialist consisted of 45-minute to 1-hour work sessions with retail and restaurant business owners. Businesses then received action guides tailored to the needs of the businesses (including content on branding, marketing, interior architecture, etc.).

Downtown West Palm Beach Mobility Plan

The vision of the Downtown West Palm Beach Mobility plan was to create a "safe, reliable, and complete" transportation system for everyone through creating streets and networks complete for all modes. The plan outlined a mode shift goal for the year 2040 of a) no increase in driving and b) 14% mode shift from driving to other modes, including walking, bicycling, and transit. The plan outlined key projects, policies, and programs to achieve these goals, including a combination of walkway, bikeway, transit, roadway, and parking management projects.

Mobility strategies proposed and implemented through the Downtown West Palm Beach Mobility Plan. Source: Alta Planning

Conclusion

Conclusion

The Destination Plan provides a set of a comprehensive and strategic starting points for investment and policies aimed at improving 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, which in turn leads them to a more sophisticated understanding of how the visitor economy works. Starting with projects that enable communities to see tangible success helps builds 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.

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? Options include Destination Planning Team, Community, Nido Cultural, FPR, local organizations, 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?

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Destination Plan

Thank You

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Foundation for Puerto Rico

BOTTOM-UP
DESTINATION RECOVERY INITIATIVE