Destination Plan
Barceloneta & Manatí
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.

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

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

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

After two successful pilots of the program in Orocovis and Punta Santiago, Humacao, the Bottom Up received an U.S. Economic Development Administration (EDA) grant that allowed FPR to scale the program across 12 additional municipalities. After living in the western part of the island, our Field Team moved to Barceloneta and Manati and lived there for 6 months, getting to know the community and stakeholders of the region, and working closely with them to foster economic resiliency and development. During the second phase of the program, the Destination Planning Team co-created with the community a Destination Plan that included the latest tourism data, a list of the main assets, experiences and services that can be used to draw increased visitor flows to the destination, and a list of recommended community-led projects that would further enhance the inherent potential of the region, making it more attractive, resilient, and hospitable for visitors and residents alike. Today, this Destination Plan is a reality.

What we will present to you in the following pages is the result of an extended collaborative effort in which we have engaged local businesses, community members, nonprofits, municipal governments, and outside experts, like Streetsense. Since the beginning of our work in Barceloneta and Manati, 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 resiliency 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
Foundation for Puerto Rico (FPR) was established as a 501(c)(3) nonprofit organization in 2011 with the aim to create opportunities that drive socioeconomic development in the island, with a focus on the visitor economy. The aftermath of hurricanes Irma and Maria marked Puerto Rico’s most critical moment of the last century. During that emergency, Foundation for Puerto Rico (FPR) redirected all its resources to facilitate immediate response and coordinate initiatives to aid communities island-wide. The situation underscored the need for a strong plan to better endure future natural disasters, the development of resilient infrastructure, and cohesive collaboration that would speed up recovery and growth in a sustainable fashion.

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

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

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

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

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

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

Sincerely,

Annie Mayol
President & Chief Operating Officer
Foundation for Puerto Rico

Destination Plan / Barceloneta + Manati
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.

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.

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**Direct contribution**

The visitor pays directly at:

- Taxi
- Car rental
- Cruiseship
- Airplane
- Bus
- Theater
- Travel Agency
- Shopping
- Entertainment
- Gas
- Hotel
- Bank

**Indirect Contribution**

Which pays for wages, salaries, taxes, profits:

- Chef
- Driver
- Hostess
- Services
- Builder and constructor
- Waiter
- Tourist guide
- Pilot
- Trader
- Other

Induced Contribution

Which subsequently pays for:

- Banks
- Real Estate
- Communications
- Hospitals
- Infrastructure
- Other
- Raw Materials
- General services
- Tourism and supply chain employees
- Services and consumption (by employees)

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 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

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2,3 “Post-Maria Destination Attitudinal Study: Qualitative Analysis on the Traveler’s Perception”, February 2018.
Regional Market Findings

• The North Region/Porta Atlántico competes directly with the San Juan Metropolitan area and the West Region/Porta del Sol.

• North Region/Porta Atlántico can reasonably support approximately 328,100 annual person trips (assuming 6,562,000 total national person trips) and $251 million in annual visitor spending (assuming $5.02 billion total national visitor spending). 4

• The top two types of travelers include budget travelers (over 6.93 million interested in Puerto Rico) and travelers that enjoy national parks (over 1.5 million interested in Puerto Rico). 5

Physical Environment

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

• The region is located approximately 40-50 minutes, or 50-60 kilometers, drive from Metro San Juan and Luis Muñoz Marin International Airport via PR-2 and PR-22, making it an ideal day trip destination.

• As is the case with nearly every region in Puerto Rico, most visitors to Barceloneta/Manatí arrive by automobile. Alternative modes of transit are unreliable or non-existent.

• The lack of taxi/ride-share (including Uber, Lyft, etc.) undermines opportunities to meet the travel needs of the younger visitor who are unable to rent cars—particularly Gen Z or aged under 25 and cannot rent cars.

• The network of regional and local roads is generally in good condition; however, many attractions are not visible from roadways and lack directional wayfinding signage for visitors.

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

• Although Plaza de Recreo in Barceloneta was recently renovated and better designed to support a mix of uses, Plaza Pública de Manatí in the urban center of Manatí is not actively used and is challenged by a number of design choices that reduce visibility, comfort, and permeability of the space.

• During the hurricane, many waterfront assets and coastal public spaces suffered from flooding and have since been rehabilitated for reopening to visitors, although to varying extents.

Business Environment & Destination Drivers

Assets

Our assessment found that the area’s assets offer unique opportunities for activities beyond shopping and entertainment.

• The region is experiencing growth in the production and distribution of agriculture. Many of these farms and agricultural sites have also become dedicated to building a new movement of agro-tourism and voluntourism.

• The region features several ‘under-the-radar’ beaches that, although lesser known to the off-island visitor, continue to attract local beachgoers and visitors that seek out off-the-beaten-path coastal destinations.

• The major shopping and dining offerings visible and accessible to visitors are located primarily along major roadways PR-2 and PR-685, in the urban centers, and at La Boca.

Lodging

• The region has approximately 210 available rooms across formal and informal lodging options. 6

• Due to the limited supply of highly rated formal lodging/hotels in the region, short-term rentals remain vital to enabling the limited number of overnight stays by visitors in Barceloneta/Manatí.

• Given that the region is a convenient day-trip destination from either Metro San Juan or the West region, the lodging supply will likely remain low in the near term owing to limited demand for overnight stays. Therefore lodging is not recommended as a core area of investment.

Administrative Capacity

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

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4 Streetsense, 2020 (based on Tourism Economics 2018 estimates for Puerto Rico)
5 Streetsense, 2020 (based on Conversant Digital Media 2019 data for Puerto Rico)
6 AirDNA Performance Data (Last scraped December 2018); Foundation for Puerto Rico Field Team Hotel Register
• There is municipal interest in advancing visitor economy initiatives. However, there is a gap in tourism training and professional development opportunities for public sector leaders, particularly at the municipality level.

Recommendations

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

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

Region-Specific Strategies: Barceloneta/Manatí

The region-specific recommendations for Barceloneta and Manatí emphasize a set of investments in four interconnected areas that reflect the region’s strategic position as an easily accessible, day trip shopping and entertainment destination that boasts under-the-radar beaches, coastal dining, and as a hub for agro-tourism and voluntourism. For that to happen, improvements must occur in four key areas as follows:

Strategies for growing demand from visitors through branding, marketing, and communications strategies that recognize the region as a destination for its mix of under-the-radar beaches and unique agriculture tourism opportunities are as follows:

• Enhance Digital Marketing of Local Cultural Events and create an integrated digital platform that functions as a master curator of arts and cultural events and programming across the region.

Strategies to improve the supply of offerings through investments in a mix of business and place-based assets, improvements in access and mobility, and capacity building are as follows:

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

• Establish Frutos del Guacabo as the agro-culture hub of the North Region and expand its facilities to include a new retail store/ welcome center and an improved farm-to-table dining room to accommodate more tour groups and offer enhanced experiences.

• Revitalize Playa Los Tubos to enhance the asset for both locals and visitors and build a cluster of activities. The municipality has acquired federal funding to improve the asset, including creating a new public space and reinforcing coastal erosion measures.

• Revitalize the Urban Center of Manatí to create a more welcoming and active ‘downtown’ experience that should include rehabilitating the Old José de Diego School and re-designing the Plaza de Recreo to remove the walls surrounding the Plaza and improve shade conditions.

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

• Connect Coastal Assets and Waterfront Dining Clusters by a Shared Multi-Use Trail allowing both residents and visitors to explore the region by bicycle, other micro-mobility options, or on foot.

Strategies to address administrative and regulatory issues. Major challenges exist concerning the organizations, both public and non-profit, that manage visitor assets. Limited resources to maintain assets in the conditions necessary to meet visitor expectations reflect the organizations’ inability to build and maintain viable business plans and revenue-building strategies that ensure financial sustainability. A destination plan that does not recognize and address these systemic issues is not set up for success. Without the capacity and resources to improve and maintain assets over time, the plan cannot succeed.
• **Establish a coalition of agro-culture tourism assets in the North Region** to gather several organizations —small and large— that are currently or planning to be leaders of agro-culture tourism in the North Region.

### Porta Atlántico Recommendations

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

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

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

#### Capacity Building
- **Expand the North Region voluntourism/group travel opportunities** through the assignment of a region-wide voluntourism coordinator and the expansion of existing group lodging facilities such as Villa de la Central Los Caños.
- **Establish a safe coast pilot program** that educates visitors on the hazards present at each major coastal asset through signage, wayfinding, and online safety listings, and offer rescue services in the case of emergency events.

### Island-Wide Recommendations

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

#### Asset Enhancements

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

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

#### Mobility Enhancements

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

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

#### Business Retention

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

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

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

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

- **Create a training and education program for municipality tourism directors/ coordinators** to align local tourism efforts and equip municipality officials with the know-how to market, brand, and implement successful tourism efforts across the island.

- **Create a data co-operative for tourism assets** as a central data collection, storage, and distribution facility for tourism industry product and destination information from across various geographies.

- **Enable more assets to collect entrance fees** is an important fiscal sustainability strategy necessary that may be difficult to implement for organizations that do not have official non-profit status or lack the tools and know-how that go along with collecting fees.

- **Explore shared services used by non-profit asset managers**, such as grant writing, administrative support, and co-location among 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 (20) electrical service, (21) waste management, and (22) water quality critical to the long-term sustainability of island-wide economic development efforts.

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**Early-Stage Recommendations**

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

- **Renovate historic building** in Manati’s urban center to create a place dedicated for social gatherings, live music, open mic sessions, and a selection of Caribbean literature.

- **Create a Historical Scavenger Hunt** that offers a fun and experiential tour option for visitors.

- **Create Hospedería Verde to offer** visitors and volunteers the opportunity to stay in Semila Farm, learn more about the forest, and participate in eco-friendly activities.
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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. 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.

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). 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”. Compounded by reputational damage to the industry from a number of COVID-19 outbreaks on cruise ships early on in the pandemic, the industry has had to pay off refunds for cancellations and have incurred costs associated with docking ships at ports where ships are quarantined. If these trends continue 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. This was, however, estimated prior to a fuller understanding of methods and rates of transmission and likely did not
account for another surge of transmissions in the Summer/Fall of 2020 that have, in fact, occurred in many of Puerto Rico’s traveler origin markets such as Texas, Florida, and Georgia.

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

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 with 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 Barceloneta and Manati, 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.

Part 1: Field Team Outreach

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

Stakeholder Engagement

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

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

**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 contents 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 November, 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-project 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 agencies
- Non-profit/grassroots/community group leaders
- Entrepreneurs
- Asset managers

**Virtual Community Meeting #2**  
*December 2020*

An interactive virtual 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, polls, and audio features.

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

**Survey and 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 municipal 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) 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 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 completed during a two-day site visit to the region by the Destination Planning Team, remotely through Google Street View. Information was also gathered by the Field Team during a six-month community immersion and feedback from stakeholders.

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

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

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

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

Gap Analysis

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

Administrative Capacity

Following the gap analysis, the report assesses, at a macro-level, the community’s capacity for project implementation. This included an assessment of governance, partnerships, and potential resources. Much of this assessment included conversations with officials at the island-wide level whose support, resources, and collaboration are necessary to support implementation. Stakeholders included Invest PR, Centro Para Emprendedores, Instituto de Cultura Puertorriqueña (ICP), 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. 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. This significant loss of population has rendered the 2010 Census Data obsolete and unreliable.

Census Data

14% Loss of Population
by the end of 2019, as reported by the Center for Puerto Rican Studies

Lodging
Hotel market information frequently relies on Smith Travel Research (STR) which produces the Trend report, the industry standard for hotel performance intelligence. Baseline performance metrics include Occupancy, Average Daily Rates and Revenue per Available Room to track historical and existing market performance. In the markets and regions where the Team conducted lodging assessment, most establishments identified in the regions do not report to STR, rendering the report unreliable.

To address these data shortcomings, the Destination Planning Team utilized a combination of sources including 1) AirDNA data to understand the Airbnb market, 2) stakeholder interviews with local developers and hotels to assess existing market performance, 3) review and booking sites to generate a picture of the volume of visitorship and customer sentiment through an analysis of ratings, and 4) a 2019 Hotel Destinations Report study commissioned by 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.

Puerto Rico Tourism Company (PRTC) Data

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

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

Visitor Estimates

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

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

Market Assessment Overview

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

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

Following the trends assessment, we introduce our customer segmentation methodology, which builds upon but does not duplicate psychographic analysis already produced by PRTC and Discover Puerto Rico, among others. Rather, the Destination Planning Team’s segmentation by age cohort is designed to serve as an accessible tool for local communities to determine the scope and prioritization of potential investments in tourism-supporting assets based on the tastes and preferences of a wide range of potential visitors. Given the demographic composition of current visitors described above, this analysis is limited to tourists from the United States with the means to travel for leisure.

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

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 Barceloneta and Manatí to identify gaps in the region’s offerings. The results of this analysis enabled the region to develop a very strategic set of short-, medium- and long-term project ideas that prioritize investment that respond directly to the needs and interests of the visitors they want to attract.

Global Tourism Trends

While travel and tourism have always been a fixture in people’s lives, increased choice, affordability, and exposure to information about previously inaccessible destinations have elevated their overall role and importance.

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 202015, and is projected to lead to an overall annual decline of between 60% and 80% when compared with 2019 figures.

A $519 billion decline in travel spending in the US this year will translate into a total economic loss of $1.2 trillion in economic output International visits to the US will decline 54% this year, assuming partial opening of borders in the second half of 202016— with marginally larger declines for international visitors from Latin America and Europe, two critical origin markets for Puerto Rico. As for domestic travel from other parts of the U.S., recovery may be quicker. If China’s domestic tourism market is any indicator, the U.S. will likely need to rely on domestic and short-haul travel for initial recovery.17 Especially if international flights remain restricted, financial circumstances of consumers remain challenging as a result of a recession, and if there continues to be a strong desire among travelers to stay local and reconnect with family and friends (52%).18 In Puerto Rico, annual domestic passenger traffic has fallen by 75.9% as of June 2020 when considered on a year-to-year basis according to Grupo Aeroportuario del Sureste, the airport operators for Luis Muñoz Marín International Airport.19

Although there is a lot of uncertainty around the recovery of tourism, for years, travelers have shifted preferences toward 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
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 Region teeming with assets in a wide range of natural assets—coasts, lakes, farms, and forests—offers outdoor adventure experiences that push boundaries alongside opportunities to immerse in local environments, culture, and holistic wellness.

**Group Travel With Purpose (Voluntourism, Educational Learning):** Voluntourism is often referred to as travel that involves volunteer work for a non-profit/mission-driven organization in the destination market. Group travel for volunteer work or educational learning may involve various participants (young and old) and types of activities, including work in agriculture, health care, environmental conservation, education, etc. Despite rising criticism in the media, voluntourism, when done well, can serve to build capacity and knowledge of local organizations and communities in order to sustain long-term change and development in a destination. Most importantly, its intangible benefits include personal development for both travelers and hosts, and expansion of the host organization’s network base that in turn enhances the perception of the asset and promotion/fundraising in the future.

The opportunity for voluntourism in Puerto Rico lies in the younger traveler segment. An attitudinal study conducted post-Maria found that about a quarter of Millennials surveyed were attracted by “…an opportunity to make a difference on the island by volunteering”.\(^{20}\) In Barceloneta/Manatí, the main opportunities for voluntourism lie in the abundance of agro-culture assets, including Frutos del Guacabo, Hacienda La Esperanza, Semila Farm and Atenas Pineapple. While the former two assets are farther along in their development as tourism assets offering a range of tour experiences, the latter two are in early stages of creating a robust set of visitor experiences and are currently expanding their facilities and infrastructure to accommodate visitors. As such, there is a need for volunteer groups to provide manual labor to build facilities on-site and in turn, learn the ins-and-outs of growing sustainable crops and agriculture on the island.

\(^{20}\) *Quantitative Analysis on the Traveler’s Perception, February 2018.*
Ecotourism and Adventure: According to the Adventure Travel Trade Association, adventure tourism consists of travel that includes a combination of physical activity, a cultural exchange, or activities in nature that may be risky or that push travelers’ comfort limits. As such, adventure tourism is often closely connected to ecotourism because the activities that tourists engage in are very similar, such as birding, camping, surfing, or climbing, among others. Many adventure travel companies, such as Natural Habitat Adventures and Intrepid Travel, are tied to climate and environmental advocacy and are leveraging travelers’ desires who are increasingly interested in experiencing and contributing to the redevelopment of destinations that have recently suffered environmental or political distress. However, in recent years, adventure tourism has trended towards disintermediation or the removal of tour operators and agents. Adventure travelers today are more likely to go directly to providers in the destination market, such as Aventura Cueva Ventana via digital platforms.

Eco-tourists, in particular, take trips specifically crafted to engage with nature, to help clean up, conserve, or improve a natural environment, or to simply observe the great outdoors while being careful not to alter the integrity of the existing ecosystem. As a result, these travelers also actively seek out eco-friendly accommodations that make concerted efforts to reduce environmental impacts through participation in recycling/composting programs, farm-to-table dining, energy-efficient lighting, among other initiatives. In 2018, 68% of consumers actively sought out eco-friendly accommodations, up from 65% in 2017.

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

Source: Christopher Burns (Unsplash)
Source: WeTravel (Flickr)

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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 — a 40% increase from the prior year. Although Gen X-ers still make up a large proportion of bleisure travelers, fast-growing age groups 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. In Barceloneta/Manatí, the opportunity for growing Bleisure lies in the cluster of pharmaceutical companies near the intersection of PR-2 and PR-149. These companies, including Bristol-Myers Squibb and Johnson & Johnson, regularly host business travelers to the region and often host events at the Hyatt Place Manatí.

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. 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.

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26 Skift’s 2017 U.S. Experiential Traveler Survey.
**Gastronomy:** As food tourism becomes more popular with the growth of Facebook, Instagram, and other social media platforms, destinations are also recognizing the benefit of curating unique gastronomic experiences to attract travelers that are looking to immerse themselves in local cuisine and cultures. From local distilleries and breweries to local cooking classes and farm-to-table dining establishments, food-based activities are becoming an important pillar of experience-based travel.

**Trends in Travel Planning**

With the wide range of information now available online, planning and booking travel is increasingly done through 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. In Barceloneta/Manatí, many businesses are still not listed on crowd-sourced reviews like Google—in fact, 1 in 4 dining establishments assessed in the region were not listed on Google. On the other hand, major assets are well represented on review sites such as Google and TripAdvisor and have thousands of reviews each, including the Premium Outlets, Playa Mar Chiquita, and La Poza de Los Mujeres.

**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.

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.

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. 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, primarily on their smart phone devices. Airlines and cruise ship companies have followed this trend by enhancing connectivity onboard. 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.

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27 Expedia Group, 2016. Traveler’s Path to Purchase.
28 Destinations, 2020. “Update on American Travel in the Period of Coronavirus—Week of May 18th.”
34 The International Air Transport Association (IATA). 2018.
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.\(^\text{35}\) 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.\(^\text{36}\) 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.\(^\text{37}\)

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^{36}\) Go Dominican Republic.  
^{37}\) Visit Mexico.
Global Asset Trends

Mobility

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

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

Lodging

Budget Accommodation: Despite its popularity in Europe, the US has only 3% of worldwide hostel properties and 10% of global hostel revenue. However, the demand is growing, primarily being driven by Millennials, and many who choose hostels or budget accommodation options are, in fact, taking four or more leisure trips annually than other travelers.40 Factors that influence consumer selection of budget accommodation (other than price and value) range from location, the availability of social spaces and collective experiences/communal living, and the ability to avoid reliance on a rented automobile. Before the pandemic, hostels and budget 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.41 While the vacation rental market has experienced significant regulatory pressure because of its impact on an already tight housing supply in many major global cities, the opportunities that the concept has given travelers to stay in places with few or no hotels has made entire regions far more accessible to tourists. Some of the leading vacation rental platforms have also moved to directly compete with upmarket hotel chains by supplying luxury options with key design or distinguishing features. Airbnb, for instance, has created two new lines of rentals for this purpose —Airbnb Plus and Beyond by Airbnb.

40 Phocuswright’s Global Hostel Marketplace, 2014-2018
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\(^\text{42}\), the hotel sector experienced a much steeper decline than all short-term rentals for three major reasons\(^\text{43}\) — 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.\(^\text{44}\)

**Boutique Accommodation**

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

Beyond just boutique hotels, glamping facilities have also grown in popularity as boutique accommodation in recent years. These are outdoor camping sites (tents, cabins, refurbished camper vans) that include more luxurious amenities 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.

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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 Barceloneta/Manati within reasonable travel distance from traditional tourist nodes. Getting away from the tourist hotspots to visit smaller towns can make for budget-friendly, culturally enriching, and less crowded travel experiences. This final factor is critical post-pandemic as travelers remain leery of close interaction with others.

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

Customer segments

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

Families (with children)

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

Generation Z

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

Millennials

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

Generation X

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

Boomers

Born between 1944 and 1964 (or aged 56 to 76), the Boomer traveler values predictability 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.

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Customer Segment

Families
(with children under 18 years old)

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

COVID-19 Sentiment

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

48 “Generation Alpha & Family Travel Trends”. Expedia Group Media Solutions.
49 “Our Family Travel Survey Results are in!”. Emma Sparks. Lonely Planet Kids. May 8, 2018.
50, 51 “Generation Alpha & Family Travel Trends”. Expedia Group Media Solutions.
52 The typical American family is planning a trip to a place in the US where there are activities for everyone in the family. Many parents will spend a vacation week with the kids at an amusement park or somewhere the family can be outdoors. Additionally, with a fear of the kids getting sick, parents will likely choose a hotel with access to resources.

Source: Shutterstock

Mobility & Transit

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

Lodging

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

Attractions

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

Generation Z
(age 25 and younger)

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

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

Mobility & Transit

Gen Z travelers highly value low-cost transportation options that maximize accessibility. The typical Gen Z traveler thrives in locations with transit infrastructure, enabling them to be nimble in their vacation plans. They are interested in quick and on-demand transit options such as rideshare 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.
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%). 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.

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.” 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. Millennials care about the travel-cost, and the environmental impacts of their actions, which has contributed to a growth in ecotourism.

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. With younger generations, newer types of attractions such as ecotourism have grown more popular, and this increased focus on sustainability follows the global trend of intentional travel.
Customer Segment

Generation X

(age 41–55)

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

COVID-19 Sentiment

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

Mobility & Transit

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

Lodging

Gen X-ers are willing to spend more of their budget on their lodging, and this translates not only to higher expectations in amenities but also a higher willingness to pay. Although Gen X-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.62


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

<table>
<thead>
<tr>
<th>Type</th>
<th>Families (with children)</th>
<th>Gen Z (age &lt;25)</th>
<th>Millennials (age 26-40)</th>
<th>Gen X (age 41-55)</th>
<th>Boomers (age 56+)</th>
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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). Between 2011 and 2017, visitation to Puerto Rico increased 24%, with 5.2 million people visiting the island in 2017. 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.

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. 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. 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. 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.
Major Island-Wide Tourism Context

Major Attractions

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

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

Off-island Visitors

Total Inbound Travelers

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

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

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

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

Visitor Profile

In an attitudinal study conducted post-Maria of travelers in Puerto Rico’s target markets, visitors 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.72

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

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

Competitive Positioning

In August 2018, Discover Puerto Rico released a study of eight target markets from which to attract new and repeat visitors.75 This study found that respondents in New York City, Miami, and Philadelphia had the highest share of existing visitors. A healthy percentage of respondents denoted themselves as potential visitors (also places with a high percentage of diaspora residents) —giving all three of these markets the strongest potential for repeat and new visitation. In fact, 25% of Miami respondents expressed the likelihood of visiting Puerto Rico in the next 12 months, with 18% of New York City and 16% of Philadelphia respondents reporting the same.

The study also compared Puerto Rico’s image in these target markets to those of South Florida, the Caribbean at large, Hawai, 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.76 The Destination Planning Team considered these findings in selecting the Samaná Peninsula in the Dominican Republic and the Riviera Maya in Mexico as competitive destinations for the North region.

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

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69 Bureau of Transportation Statistics. 2019
70 Quantitative Analysis on the Traveler’s Perception, February 2018.
72 Quantitative Analysis on the Traveler’s Perception, February 2018.
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. 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. 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”. 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.

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.

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, 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.

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81 Fuel Travel, 2020.
North Region/Porta Atlántico Tourism

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

The North Region/Porta Atlántico competes directly with the San Juan Metropolitan Area, where about 55% of visitors to Puerto Rico primarily stay and with the West Region, where major beach and surf destinations such as Rincón are located. Between two major airports, Luis Muñoz Marín International Airport and Rafael Hernández Airport, its location makes it an ideal day trip destination for visitors entering from both ports of entry. Recent estimates indicate that about 31.5% of visitors to San Juan also visit the North region.85

**Estimated Market Capture**

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

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

86 Estimates by Streetsense made based on Tourism Economics data on Puerto Rico tourism economy from 2018.”
Physical Environment Assessment
Physical Environment Assessment

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

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

The Destination Planning Team, together with FPR staff and Field 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, as well as to engage with stakeholders.

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

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

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

A “low” rating level is assigned if the region does not meet baseline conditions typically expected by visitors.

No circle indicates that the item is not applicable or not available in the region.

### General Mobility Assessment by Mode Type

**Barceloneta/Manati**

<table>
<thead>
<tr>
<th>Type</th>
<th>Utility</th>
</tr>
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<tbody>
<tr>
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</tr>
<tr>
<td>Flight</td>
<td>🟡</td>
</tr>
<tr>
<td>Privately-Operated Tour</td>
<td>🟡</td>
</tr>
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<td>Bus</td>
<td>🟡</td>
</tr>
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<td>⬜</td>
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<tr>
<td>Walk/Bike</td>
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</table>
Access, Mobility & Transportation

Barceloneta/Manati is located approximately 40-50 minutes, or 50-60 kilometers, drive from Metro San Juan and Luis Muñoz Marín International Airport via PR-2 and PR-22 to the North through Dorado and Vega Baja. The region is also accessible via PR-149 to the South from Ciales and Morovis. These highways experience the highest average daily traffic counts in the region of around 20,000+ vehicles. Although major shopping and entertainment assets, including Casino Atlántico and the Premium Outlets, are easily accessible from these highways, the agro-culture assets and farms and coastal zones require some navigation through a mix of single or 2-lane local roads that are in generally good condition —although with lighting issues in certain sections.

Getting to the Region: By Automobile/ Cars

Car Rental

Upon arrival, the automobile is the easiest and fastest mode of transportation for the off-island traveler. For those wishing to explore the island, car rental is a necessity owing to the absence of alternative transportation options. Although there are more than fifteen car rental operators conveniently located on-site at Luis Muñoz Marín Airport and on Expreso 26 near the airport, car rental requirements often restrict rentals for drivers under the age of 25 or include an additional surcharge, squeezing out a growing customer segment —Gen Z (aged 18-25), as well as customers who seek vacations that do not require a car. Given that Barceloneta/Manati is not accessible by many other modes of transportation, this impacts convenience on younger travelers who may be staying in Metro San Juan and looking for alternative day trip destinations within close proximity.

Road Conditions

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

Parking

Parking in the region is convenient and easily available at major assets such as the Premium Outlets, Casino Atlántico, and agro-culture sites (Hacienda La Esperanza, Frutos del Guacabo Atenas Pineapple, etc.). However, the urban centers and coastal zones are less well-served by convenient and accessible parking. In the urban centers, on-street parking is often occupied by local residents and workers while along the coastal zone. The undefined nature of parking lots near beaches results in inefficient parking arrangements by drivers, often resulting in parking in or on ecologically sensitive terrain.

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87 Puerto Rico Department of Transportation and Public Works (based on most recent data points collected within the last ten years by Office of Data Collection and Traffic Analysis).
88 Based on restrictions across various car rental operators and vehicle categories.
Getting to the Region: By Public Transit

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

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

A number of tour bus operators serve the area, particularly to major assets such as the Premium Outlets, Casino Atlántico, Frutos del Guacabo, and Hacienda La Esperanza. These tour buses pick up visitors arriving on cruise ships in San Juan or staying in the Metro area and shuttle them directly to one or more of these assets in a day. Routes and itinerary packages are pre-determined by tour guide operators and range in cost depending on a number of assets visited on the route, length of trip, etc. For those arriving by cruise, transportation by tour bus to the region is typically included in the costs of the selected cruise package.

Getting to the Region: By Rideshare/Taxi

There is currently limited rideshare coverage in the region. Although visitors from Metro San Juan can secure rideshare from San Juan to Barceloneta/Manatí, a 40-minute ride at an affordable cost of about $30 or less, it can be difficult to return to Metro San Juan via rideshare with limited vehicles available in the region. For a more reliable method of transportation, visitors often opt to hire personal drivers or join privately-operated tour buses as previously mentioned.
Getting to the Region: By Bike

Bike infrastructure in Barceloneta/Manati is largely built for recreational purposes as piecemeal bike trails on disconnected properties. The region lacks a comprehensive and safe infrastructure for cyclists. The distance between assets, hot weather conditions, and lack of safe, shaded bicycle lanes make cycling a less viable option as a meaningful mode of transportation at this time. However, recreational cycling can be done via existing bike trails located predominantly along the river on the edge of the two municipalities connecting local sports complex/recreation facilities and nearby coastal assets managed by Para La Naturaleza, where natural environments are being protected from any man-made stress and overcapacity. Given that sections of these trails traverse through difficult terrain, they are more suitable for seasoned mountain bikers, who often travel cross-island or are equipped with the necessary gear and attire for off-the-beaten path trails or to ride on local roads with vehicular traffic.

Getting to the Region: By Walking

The major tourism assets in the region are isolated from one another and are mainly accessible by automobile. However, there are a few notable walkable environments in the region, primarily in the Premium Outlets and in the historic urban centers of Barceloneta and Manati, where tight-knit walkable streets were built before the advent of the automobile. The Premium Outlets open-air shopping venue is pedestrian-friendly and features some best practice complete street strategies such as clearly painted crosswalks, wide sidewalks, and landscaped medians. Although coastal assets are closely located to each other, there is limited connectivity by bike or pedestrian trails. Instead, pedestrians are more likely to drive between beaches for convenience and safety.

Cleanliness and Safety

Cleanliness and safety are significant components of visitor satisfaction. Overall, the coastal zone, agro-cultural sites, and urban centers are well-maintained by property owners and appear welcoming to visitors. According to qualitative reviews of each major tourism asset, exemplary sites that exceed customer satisfaction in cleanliness and safety include the Premium Outlets, Playa Mar Chiquita, La Poza de Los Mujeres, Casino Atlántico, Hacienda La Esperanza, Playa La Esperanza, Playa Los Tubos, and Playa La Cueva de Las Golondrinas. Some of these assets are, in fact, managed by Para La Naturaleza, a national non-profit committed to the conservation of the island’s natural ecosystems. Their stewardship of the major beaches and expertise in maintaining the natural environment has been key to ensuring the highest cleanliness and safety standards for visitors to the region. The Municipality of Manati’s stewardship of Playa Mar Chiquita, especially after the Hurricane, has also been important to visitors’ return to the beach. The asset is now equipped with basic recycling and trash bins and remains relatively clean throughout the week despite its popularity amongst visitors and vendors.

In terms of waste management, business establishments continue to use single-use plastic and styrofoam packaging with regularity. Since January 2020, FPR has been coordinating the distribution of 60-gallon recycling containers and compostable container kits to more than 25 businesses. Each kit was distributed with an informational one-pager that includes a series of suggestions and information necessary to raise awareness about the current situation of solid waste management on the island, to emphasize the importance of taking responsibility for our environment, and to encourage transitioning to products that are less harmful to the environment and health. A QR Code on the one-pager also directed business owners to more educational materials and supplier contact information should they choose to switch to these sustainable packaging options.
Universal Mobility

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

Following COVID-19, a heightened awareness of health and safety amongst travelers suggests that many will be choosing destinations that pose limited risks to their general well-being, including destinations that do not rely solely on travel by public transport or travel by taxi or rideshare. In a survey by Destination Analysts in May 2020, travelers rated traveling by public transport and traveling in taxis or rideshare as some of the most unsafe components of a common travel experience after airport security checkpoints and airplane travel. Although these may be advantages to Puerto Rico in the short term, investment in alternative modes of transportation between and within regions should be prioritized, including micro-mobility options such as e-bikes, e-scooters, or Vespas.

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

From left: Convenient curb cuts at the Premium Outlets in Barceloneta, Handicap parking spaces in the urban center of Barceloneta. Source: Streetsense.

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

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

Plazas

Plaza de Recreo de Barceloneta & Plaza Pública de Manatí: Plaza Pública de Manatí is located in the urban center of Manatí facing the Centro de las Artes and currently hosts a limited number of local community events throughout the year. Beyond these medium-sized events, the plaza is not actively used and is challenged by several design choices that reduce the visibility, comfort, and permeability of the space. The plaza edges are lined by 4-5’ concrete walls that limit the passersby’s ability to see activities and events occurring within the plaza and there are currently limited shaded seating areas for prolonged daytime use. The choice of concrete and hard surfaces throughout the plaza also makes the space uncomfortable for pedestrians to use and reduces stormwater runoff in heavy rainfall events.

On the other hand, Plaza de Recreo de Barceloneta, was recently renovated and better designed to support a mix of uses. The Plaza features a stage for performances and staging areas for large public art installations. The plaza also has climate-appropriate features such as shaded seating areas that encourage locals to linger in the space for longer periods of time. Having more users in the space also ensures ‘eyes on the street’ to increase safety in and around the plaza.

Beaches

Most of the coast and its popular beaches are located within FEMA-designated special flood hazard areas subject to inundation by a 100-year flood (or a 1% annual chance of flooding). During the Hurricane, many of these assets suffered from flooding and have since been rehabilitated for reopening to visitors, although to varying extents. As these places continue to attract crowds and different recreational activities, it is important to consider their long-term resiliency in the face of another natural disaster and also inter-connectedness to create a major waterfront destination for the region as a whole. At this time, beaches are not well integrated, and each is separately managed to varying levels of success.

As leisure trips with outdoor activities and visits to friends and family remain the top general experiences and reasons for travel during and after the pandemic, beaches in the region will be even more important assets for attracting visitors to Barceloneta/Manatí. These expansive outdoor public spaces offer a feeling of safety by ensuring visitors are able to maintain social distancing while recreating.

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91 Destination Analysts, 2020. “Benchmarking Travel Sentiment for the Travel Industry’s Recovery from the Coronavirus Pandemic”
Private Realm

Waterfront Properties
Along the coast, particularly in Barceloneta and the La Boca area, waterfront properties in the 1% annual flood zone need a rehab/rebuild plan of action that clearly delineates strategies for demolition, rehabilitation, or adaptation of properties for long-term resiliency. At this time, there is a significant number of abandoned and run-down properties that dot the waterfront. Not only do they block the views of the ocean from local roads and affect visitors’ experiences in the area, they also limit public access to the water in some instances.

Historic Downtown Properties
In the urban center of Manatí, there are many historic buildings that require restoration and rehabilitation. These properties are located within a 0.25 mile radius of the Plaza Pública and are currently in a variety of structural conditions. Restoration of the buildings into mixed-use properties is being considered by grassroots group Barrioization. The group hopes to build upon its experience in rehabilitating older buildings in the area for new, trendy uses, such as its project Libar—a vegan restaurant and communal space in the heart of the urban center.
Business Environment Assessment
### Business Environment Assessment

#### Tourism Assets & Attractions

The basis of a region/destination’s unique strategic position lies in its comprehensive set of offerings. In Barceloneta/Manati, there are over 50 unique assets across the following categories: Cultural, Recreational, Agricultural, Natural, and Shopping/Entertainment. These assets were identified via on-the-ground research by the FPR Field Teams before being further filtered down by the Destination Planning Team to identify top drivers.

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

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

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

Beyond shopping and entertainment, beaches in the region are primarily top-rated tourist assets. Agro-culture sites and farms are also key differentiating factors for Barceloneta/Manati, although they are lesser known and still growing in popularity. The following assessment explores the quality of these destination drivers to the region.

Map of major assets by density of Google reviews. Source: Streetsense
### List of Top Attractions

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<th>Name</th>
<th>Municipality</th>
<th>Type</th>
<th>Total # of Google Reviews</th>
<th>Average Google Rating</th>
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<tr>
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<td>Manatí</td>
<td>Natural</td>
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<td>4.7</td>
</tr>
<tr>
<td>Ruinas de la Central Plazuela</td>
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<tr>
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<td>Manatí</td>
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**TYPES OF ASSETS/ATTRACTIONS**

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

**RECREATIONAL**
- Sporting and hobby facilities
- Adventure sites

**AGRICULTURAL**
- Farms
- Manufacturing/ distilling facilities related to agriculture products

**NATURAL**
- Beaches
- Caves/ caverns
- Rivers/ lakes

**SHOPPING/ENTERTAINMENT**
- Shopping Centers
- Casino
Agriculture/Farms

The region is experiencing growth in the production and distribution of agriculture. Many of these farms and agricultural sites have also become dedicated to building a new movement of agro-tourism and voluntourism. Each has started individual efforts to grow tourism with varying degrees of success. By definition, agro-tourism includes commercial activities on an agricultural site that are conducted primarily for visitors’ enjoyment and that generate supplemental income for the agro-business owner. The following is a summary of initiatives around agro-culture tourism that major assets in Barceloneta/Manatí have established or plan on establishing (pre-COVID-19):

Hacienda la Esperanza

Hacienda la Esperanza is a restored site of one of Puerto Rico’s most prosperous sugar plantations from the 19th Century. The facility is owned and managed by Para La Naturaleza, a non-profit dedicated to the conservation of ecosystems across the island and features the old Sugar Mill and its unique 1861 West Point Foundry steam engine. The site is well-maintained and serves as the informational hub for all things agro-culture in the region. The asset has, over the years, worked closely with other agro-culture assets such as Frutos del Guacabo on joint marketing and continues to distribute tourists to smaller farms in Barceloneta/Manatí.

Hacienda was recently renovated and has amenities that meet the needs of visitors, including new bathroom facilities, ADA-accessible paths and parking spaces, and clear wayfinding/signage to and within the site. Before the pandemic, 2-hour long historic guided tours of the site were only available by direct bookings made online.

Main Activity Type: Self-guided tour (with newly installed informational signage across the asset), historic facility guided tour.

Frutos del Guacabo

Frutos del Guacabo is a decade-old sustainable farm and fresh food distributing hub in the region. In recent years, the business has grown to include several unique agro-culture experiences that are well-received and well-attended by off-island and local visitors. The farm’s relationships with higher-end hotels and restaurants/bars in the Metro San Juan area, including Condado Vanderbilt Hotel, and directly with residents in Dorado (through their community-supported agriculture program) has also cultivated an organic following of visitors from the metro region. Frutos del Guacabo is currently planning to expand its farm-to-table dining and retail businesses on its existing property, with plans to enhance the site and buildings to offer a more comfortable and scenic visitor experience.

Main Activity Type: Farm tour/product tasting, farm-to-table dining, strong relationships with Metro San Juan hotels and tourism distributors (cruise ships).
**Semila**

Semila Farm is a cacao farm that primarily produces and sells grafts and is still in the early stages of developing robust tourism offerings. Given that the farm itself is still in need of critical infrastructure such as water pumps, cacao processing equipment, and a food preparation facility to process and manufacture chocolate, the asset will need significant investment, labor and technical support to turn into a thriving visitor destination. At the time of the site visit, the farm’s owner was the only full-time employee with several volunteers and part-time employees. The farm suffered destruction during the Hurricane and lost many of its staff members who moved elsewhere following the disaster. Given that the asset manager has experience managing and hosting volunteer groups from the post-Hurricane period in which several volunteers helped restore and clean the farm, the asset may continue to grow voluntourism activities in the region while also supporting the stabilization and growth of the asset.

In the urban center of Arecibo, Semila is also developing a new visitor experience at a cultural institution, Casa Trina Padilla de Sanz.

**Main Activity Type:** Educational workshops, farm tour/ product tasting

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**Atenas Pineapple**

Although Atenas Pineapple has been in operation for more than a decade in Manati, with the support of the municipality, the farm has only recently started growing its tourism offerings. Informal tours of the farm are organized and carried out for individuals or groups based on the owner’s availability. The asset manager has expressed interest in developing a formal tour, establishing a reservation system for tours, building a visitor center on-site with an educational gallery and retail component, and training other staff members to conduct the tours — thereby expanding the visitor experience on the farm. The new partners that have joined the business are also looking to establish product partnerships with local rum distilleries to continue to market the brand and drive visitation to the farm.

**Main Activity Type:** Farm tour/product tasting

In addition to these agro-tourism assets in the region, other closely located major farms in Porta Atlántico include Finca Pajuil and Vaca Negra in Hatillo. Both assets provide visitor experiences to tourists and sell unique agricultural products. Vaca Negra boasts a well-maintained and -designed facility and headquarter near the convenient PR-2 highway between Arecibo and Camuy. At the facility, visitors are able to experience a workshop entitled “Make your own Cheese: The Tour”, endorsed by the Puerto Rico Tourism Company.
Coastal Zone/Beaches

The region features a number of ‘under-the-radar’ beaches that, although lesser known to the off-island visitor, still continue to attract local beachgoers and visitors that seek out off-the-beaten-path coastal destinations. Playa Mar Chiquita, Playa Los Tubos and Playa Las Palmas complement more popular coastal assets to the west, creating a mega region of beach and surf destinations.

Playa Mar Chiquita

The second top-rated asset in the region, Playa Mar Chiquita, is a family-friendly beach destination that supports swimming and sunbathing. Since its reopening after the Hurricane, the beach has seen investment from the local municipality. The municipality led the installation of trash and recycling bins, manages waste at the beach, and the office of tourism manages vendors at the beach in a sustainable manner. Local vendors offer a range of products and services — from food and drink to beach rental equipment (chairs and umbrellas) and portable toilets.

Playa Los Tubos

Playa Los Tubos is a long, sandy beach in Manati that supports surfing and diving. It also features an abandoned playground facility that has not been reopened since Hurricane Maria and instead has resulted in a low perception of safety. Qualitative reviews by visitors on review sites noted recurring instances of ‘carjacking and theft’. More recently, however, visitors have discovered a unique and underrated trait of the beach —petroglyphs carved into flat rocks on the beach.

Playa La Esperanza + Playa La Cueva de Las Golondrinas

Playa La Esperanza and Playa La Cueva de Las Golondrinas are part of a larger natural reserve managed by Para La Naturaleza. As a result of tight entry restrictions to the beaches during weekdays, these assets remain pristine and are largely popular amongst locals and their friends and family. At this time, only Cueva Las Golondrinas is accessible on weekdays via private vehicle through an alternative street where there is an area available for parking located 10-to-15-minute walk from the beach.

These beaches are equipped with natural trails for hikers and mountain bikers to encourage the arrival of visitors by alternative modes of transportation and reduce stress on the natural environment. The beaches, however, are at risk of flooding and coastal erosion and feature hazardous terrains for young families and older visitors.
Tourism-Supporting Businesses

The business environment assessment examines the potential for tourism-supported businesses such as shopping and dining clusters to meet the needs and expectations of customers, as well as understanding hyper-local private sector realities. At this time, the major shopping and dining offerings visible and accessible to visitors are located primarily along major roadways PR-2 and PR-685, in the urban centers, and at La Boca.

Anchors/Clusters

Barceloneta Premium Outlets: The Premium Outlets is the number one rated asset in the region. With over 6,000 reviews on Google and an average rating of 4.6/5.0, the asset is an open-air and village-style mall with a mix of national chain retail offerings (including restaurants, clothing & accessories stores, and home goods) and a cinema anchor. Located only a 40-minute drive from Metro San Juan, the asset is a popular day-trip destination for families vacationing on the island.

Although demand for non-essential retail categories (including clothing & accessories) is expected to continue declining following the pandemic, the Premium Outlets’ physical layout and design may be a key advantage for the property’s survival. According to recent surveys conducted by Morning Consult93, more than a quarter of U.S. consumers fear shopping in enclosed malls for at least the next six months due to the pandemic. As such, the mall owner is well-positioned to leverage the outdoor mall to meet consumers’ health and safety standards and preferences for social distancing outdoors.

La Boca: Before the Hurricane, La Boca was a more thriving waterfront dining destination with a strong cluster of restaurants and bars for “chinchorreo” buses. Since the disaster, many properties in the area were destroyed and owners have fled the area leaving abandoned and dilapidated structures scarring the waterfront. Today, only a small number of vendors and restaurants remain in the area particularly closest to the major riverfront public space, serving diners from nearby beaches and lunchtime crowds from employment centers located farther inland.

PR-685: A cluster of restaurants and convenience retail stores along PR-685 primarily serves visitors to Playa Mar Chiquita—the region’s second top-rated asset. In addition, the businesses here also benefit from a large cluster of more than forty short-term rental homes/private rooms in the neighborhood of Los Molinos, where overnight visitors are likely to seek groceries and take-out meals/dining options throughout the day. An Airbnb Restaurant Spending Report from 2017 found that Airbnb guests spent 43% of total spending, on average, in the neighborhood in which they’re staying.94

Gap in Waterfront Dining

At this time, there are limited dining offerings that complement the highly rated coastal assets such as La Poza De Las Mujeres and Playa La Esperanza. Existing dining options for beachgoers are mostly clustered along PR-685, a 20-minute walk from Playa Mar Chiquita in an area with limited sidewalks.

Business Challenges

Lack of Visibility on Digital Platforms: Customers navigate the digital landscape to inform real-time decision making and to navigate retail establishments. Dining offerings in the urban center of Manatí and along PR-685 are among the most reviewed and highly rated by visitors. However, about 1 in 4 dining establishments assessed in the region were not listed on Google. Online listing management allows restaurants to share basic information, including business hours, curate media, capture audiences, manage perceptions and respond to reviews, and provide basic information such as hours, which helps customers plan trips and manage expectations. Among other tools that businesses are not using in the region, social media data management is critical to a scalable business model that helps local businesses capture the spending of new residents as the emerging visitor economy grows.

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

- Rustika Coffee Shop (4.8/5.0)
- Pigs Beer Garden (4.8/5.0)
- El Campesino Bistro (4.8/5.0)
- Pastelillos Lamboy (4.7/5.0)

Limited Operating Hours + Emergency Events: As with much of the rest of the island, before the pandemic, businesses in Barceloneta/Manati were already operating with limited or inconsistent hours throughout the week. With less overall demand for goods and services from visitors during the pandemic and mandatory shutdowns for non-essential businesses, many tourism-supported businesses risk permanent closures without an urgent injection of capital to bridge the gap in revenue.

As of 2019, across the United States, the overwhelming majority of businesses in majority black and Hispanic neighborhoods did not have enough cash on hand to pay for two weeks’ worth of bills.95 In Puerto Rico, a March survey of 450 Puerto Rican businesses found that 85% did not have a contingency fund, and 59% indicated they would not operate beyond a single month with existing capital on hand.96

Unfortunately, in the race to apply for funding, many small and minority business owners and entrepreneurs for whom English is their second language have had trouble accessing accurate information, relying heavily on secondary information in the popular media. And businesses that do not have an existing relationship with banks and SBA lenders face difficulties in accessing emergency capital and getting any reliable financial advice. Early surveys and reports suggest that 90% of small businesses of color have been excluded from SBA’s Paycheck Protection Plan.

These risks also apply during natural disaster events. Even after the Hurricane, many businesses in Barceloneta/Manati are located directly along the coast and at severe risk of coastline erosion and flooding. Anecdotally, more than 80% still do not have emergency plans. FPR continues to foster resilience against future catastrophic events by educating micro-entrepreneurs and small businesses on disaster preparedness, response plans, and the use and installation of basic equipment included in a Business Resiliency Kit distributed by the Bottom Up Field Teams (solar lamps, cisterns, water filters, etc.).

* Based on Google Reviews retrieved January 2020 for dining locations with 10< reviews only
94 Airbnb: Generating $6.5 billion for restaurants around the world” Airbnb, 2018.
96 Survey conducted on March 20 by Colmena66, a program run by the Puerto Rico Science, Technology and Research Trust
Lodging

One of the fundamental pieces of decision-making and of expectations of travelers is lodging. Today, the national landscape of accommodations includes traditional hoteliers and informal lodging, such as Airbnb. In total, the region has approximately 210 available rooms across formal and informal lodging options. There is only one hotel in the region — Hyatt Place Manatí — and it is complemented by a range of short-term rentals clustered by top-rated asset, Playa Mar Chiquita and in the urban center of Manati. Given that the region is a convenient day-trip destination from either Metro San Juan or the West region, the lodging supply will likely remain low in the near term owing to limited demand for overnight stays.

Formal Lodging

Hyatt Place Manatí is a 3.5-star hotel strategically located close to major employers in the pharmaceutical, biotech, and health sectors. With 104 rooms, it constitutes half the region’s supply. It has two meeting spaces that measure a total of over 1,800 SF and can accommodate business travelers in the region.

Informal Lodging

Due to the limited supply of highly rated formal lodging/hotels in the region, short-term rentals remain key to enabling the limited number of overnight stays by visitors in Barceloneta/Manati, particularly for leisure travelers. Currently, the occupancy rate for

<table>
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<th>Municipality</th>
<th>Average Daily Rate</th>
<th>Average Occupancy Rate</th>
<th>Annual Revenue</th>
<th>Total No. of Bookings</th>
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<td>Barceloneta</td>
<td>$87</td>
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<td>Manati</td>
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Summary of informal Airbnb lodging performance. Source: AirDna (Last scraped: December 2018)
informal lodging is low at an average of 38% in Barceloneta/Manati. This is almost half that of island-wide occupancy rates that have historically been above 70%, including the period following Hurricane Maria in 2017. Additional lodging is therefore not recommended. Instead, additional technical support and training around property marketing and/or interior design may help enhance the existing informal lodging supply.

- Total inventory: 56 listings
- Composition: 83% whole apartment and 17% private rooms

Aligned with trends pre-COVID-19, younger travelers will continue to be “much more trusting of Airbnb/vacation home rental safety” compared to older travelers.\(^{97}\)

\(^{97}\) Destination Analysts, 2020. “Update on American Travel in the Period of Coronavirus—Week of May 18th”
Cultural Landscape

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

Despite significant cultural and creative production around the island, it is important to recognize and strengthen the narratives that differentiate the island’s regions. It is also essential to maintain a balance between a shared national culture and regional differences. For example, coastal regions have in common storytelling around the sea, fishing and music, among others. In the central areas, the narratives concentrate on the agricultural, the Jibaro music, and images related to rural life. On the other hand, at the municipal level, there is some consistency in terms of the municipal festivities, religious traditions, the presence of illustrous 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.99

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.99 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.100 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.101 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 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 mentality among 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.

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*Bomba dancing in Old San Juan. Source: Discover PR*
In most cases, a very small portion of such activities has been converted to virtual events. In initial stages, to encourage audiences’ participation, many virtual cultural events and programs were conducted at no cost to the audience. Over the months, producers of cultural events have become more sophisticated and recently have learned to leverage new digital platforms to reproduce the experience of larger concerts, workshops, and exhibitions.

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

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

**Region-Specific Opportunities**

Based on a comprehensive assessment of local NGOs and municipality calendar of events and conversations with multiple stakeholders in the region of Barceloneta/Manatí, 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.

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

Although, at this time, the urban centers of Barceloneta/Manatí each host a cluster of primarily recreational and cultural offerings, these assets are frequently promoted only in Spanish and only on the island, making them popular amongst locals and island-based tourists. These events do not currently drive off-island visitation to the region. The high season for these events is in the Winter and held over Christmas (December) and Velorio de Reyes (January).

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

- **Barrioization**, a non-profit organization, is a key asset in the urban area of Manatí as it integrates sustainability issues in urban development, heritage protection, and business activities with potential for impact towards tourism.
- Potential to turn the former José De Diego School into an [Interdisciplinary Center and Museum](link). It has the challenge of being a historical building that requires restoration.
- **The Manatí Cemetery** is the second oldest in Puerto Rico, dating back to the 19th century. It is important to explore its development as a tourist attraction given its historic significance as the burial ground for Don Antonio Vélez Alvarado, the designer of the flag of Puerto Rico, and other distinguished figures in the history of Manatí. In addition, the wealth, diversity, and characteristics of structures, tombs, and pantheon designs and style in the cemetery are incredibly unique but will require significant stabilization and maintenance.
Organizational Capacity Assessment
Organizational Capacity Assessment

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

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

On-Going State of Emergency

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

The COVID-19 pandemic has also deepened the economic crisis for the island as travel bans were instituted for months, and further restrictions have had to be considered for visitors from two of the island’s largest origin markets —Texas and Florida.

Lack of Tourism Training

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

Municipality tourism directors, for example, should be hired based on proven track record and professional experience in the hospitality industry, 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. In general, the uneven experience of local tourism directors has resulted in lack of cooperation and coordination as further expressed below.

Lack of Coordination Across Different Levels of Government

Across several instances during the process, problems related to lack of communication between levels of government (municipal, local and federal) and across sectors (public, private, and non-profit) were discussed. For example, there are natural and cultural assets under the federal agencies jurisdiction that some local projects are interested in using for visitor’s experiences. In other instances, the lack of cleaning or maintenance of natural, historical, or cultural assets is also related to this lack of coordination between municipal and state government.

Furthermore, in the North Region, even among municipality-level governments, there is a need for increased coordination and cooperation between tourism directors and Porta Atlántico tourism leadership at PRTC. In a region with limited collective offerings, it is especially critical for cross-jurisdiction efforts and initiatives. The tourism offices of both municipalities will need to establish regular meetings to regularly communicate challenges and opportunities, establish some level of transparency in efforts, and to offer each other support especially during emergency events.
Regulations and Permits

There are multiple regulations that affect the performance of cultural projects and business ventures. One of those regulations includes having a production license for events, required for any event with admission’s rights. The production and promotion of cultural events is a regulated practice that requires licensing from the Department of the Treasury and membership in a guild. Such membership involves recurring costs that vary according to the volume of guild revenues. For cultural agents who are not licensed, they must be associated with a collegiate producer through a formal agreement. Other important processes that must be carried out by producers/promoters of cultural events include tax reporting with the Department of Treasury. There are numerous procedures that must be completed before and after each event and are related to the endorsement of tickets before sales and a final settlement after the event, associated with the sales tax’s retention.

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

Limited Access to Capital

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

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

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

Meet the needs and expectations of targeted customer segments
- Which segments are we most or least likely to attract? What investments should be prioritized to attract a specific segment?

Maximize the benefits of resource allocation and capital investments
- Which assets are underperforming across most or all customer segments? What investments should be prioritized to improve the visitor experience for as many customer segments as possible?

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

- A “high” rating level is assigned if a site or asset offers a high level of visitor satisfaction and/or consistently meets customer expectations.
- A “medium” rating level is assigned if the site or asset offers a moderate level of visitor satisfaction and/or frequently, though not always meets customer expectations.
- A “low” rating level is assigned if the asset or offering does not meet the baseline expectations of visitors.

No circle indicates that the item is not applicable or not available in the region.

Barceloneta/Manatí rates “high” in the categories of car rentals and shopping/entertainment offerings; “medium” with respect to natural attractions and lodging with basic amenities; and “low” with respect to walkability, rideshare and taxis.

Existing Performance Rating

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<tr>
<th>Type</th>
<th>Rating</th>
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<tbody>
<tr>
<td>Barceloneta/Manatí</td>
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<tr>
<td>General Mobility</td>
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<td>Flights</td>
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<tr>
<td>Car Rentals</td>
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<tr>
<td>Taxi/Rideshare</td>
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<tr>
<td>Privately-Operated Tour Buses</td>
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<tr>
<td>Walk/Bike</td>
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<td>Public Transit</td>
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<td>General Lodging</td>
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<td>Availability</td>
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<td>Price + Variety</td>
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<td>Amenities</td>
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<tr>
<td>General Attractions</td>
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<td>Natural</td>
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<td>Cultural</td>
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<td>Recreational</td>
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<td>Agricultural</td>
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<tr>
<td>Shopping/Entertainment/Dining</td>
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</tbody>
</table>
Regional Gap Assessment

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

- A “high” priority level is assigned if addressing the issue is critical to improving the experience for the customer segment. Some large or fundamental gaps may require long-term strategies outside of the scope of this effort.

- A “medium” priority level is assigned if improvements would be beneficial, not necessarily critical to attracting more visitors from that customer segment.

- A “small” priority level is assigned if improvements are not critical to attracting more visitors from the identified customer segment.

---

Gap By Priority Level For Barceloneta/Manatí

<table>
<thead>
<tr>
<th>Type</th>
<th>Families (with children)</th>
<th>Gen Z (age &lt;25)</th>
<th>Millennials (age 26-40)</th>
<th>Gen X (age 41-55)</th>
<th>Boomers (age 56+)</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Mobility</td>
<td></td>
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<tr>
<td>Flights</td>
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<td>Car Rental</td>
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<td>Public Transit</td>
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<td>General Lodging</td>
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<td>Availability</td>
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<td>Price + Variety</td>
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<td>Amenities</td>
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<tr>
<td>General Attractions</td>
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<td>Natural</td>
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<td>Agricultural</td>
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<tr>
<td>Shopping/Entertainment/Dining</td>
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</tbody>
</table>
Most notably, improvements to transportation and mobility emerged as critical to customer needs and expectations, including the ease and convenience of arrival and departure to the region and improved mobility and linkages between assets that are not solely reliant on rental car vehicles. Across customer segments, travelers highly value the ability to move between attractions and destinations with ease. In recent years, this desire has grown with the advance of rideshare/mobility apps that allow users to hail or pick up vehicles (cars, bicycles, scooters, Vespas) at a touch of a button. In addition, travelers across customer segments seek out dense or urban destinations that enable safe navigation and exploration on foot. Safety and accessibility, however, is critical for families traveling with small children and for seniors who may have physical impairments, so walkable destinations need to provide safe sidewalks/trails and shared/slow street infrastructure.

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

The region’s relative strength in natural and agricultural attractions should continue to be leveraged by enhancing existing assets in these categories. At this time, many natural and agricultural assets in the region feature difficult terrains and demand physical strength of visitors, thereby affecting the ability of families travelling with young children or seniors to enjoy these offerings. To better meet the needs and preferences of these customer segments, natural and agricultural attractions will need to improve basic infrastructure and amenities, including bathrooms, visitor centers, ADA-accessible paths, wayfinding, and on-site retail/dining.
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 Barceloneta and Manatí, based on visitors with similar interests.

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

Mexico and the Dominican Republic were selected in consultation with FPR due to the similarities in attractions, access, and visitor profile between these countries and Puerto Rico. Travel time between major tourist nodes in these comparable destinations is like that between San Juan and the North Region of Puerto Rico. Once tourists arrive, the activities are similarly focused on natural assets with many additional activities and existing infrastructure geared toward tourists. Recent studies completed by the PRTC identify Florida, the Bahamas, Mexico, and Costa Rica among the top destinations considered by visitors to Puerto Rico. 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 Barceloneta and Manatí with tourism best practices to emulate, we do not mean to suggest that this region’s tourism economy could or should cater to tourists in the same way as those destinations, whose economies were shaped by their own local stakeholders with particular goals and interests. Barceloneta and Manatí’s project ideas, articulated later in this document, reflect the communities’ considerations rather than a desire to emulate these competitive destinations.

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%).

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

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

Although the lodging options in the Riviera Maya are more widely available and varied in quality, price, and location, Barceloneta/Manatí has a competitive advantage in agricultural attractions and shopping/dining.

Comparable Benchmark

**Samaná, Dominican Republic**

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

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

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

In many ways, the high-quality natural coastal assets of the Samaná Peninsula are similar to that of Barceloneta/Manatí. However, the convenience of a walkable downtown area in Samaná is currently missing in Barceloneta/Manatí.
Comparative Existing Performance

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

Mobility

Similar to Riviera Maya and Samaná, Barceloneta/Manatí is located about an hour’s drive away from the International Airport by car. While there are public buses available within tourist nodes of the comparative markets that enable visitors to easily access closely located assets and attractions, local public transit and rideshare options don’t exist in Barceloneta/Manatí. Furthermore, the walkable town areas in Samaná and Playa del Carmen in Riviera Maya allow pedestrians to explore local food and culture on foot safely, a fast-growing preference that is popular among younger travelers who seek customized itineraries and authentic local experiences.

Lodging

Lodging in Barceloneta/Manati falls in the middle of the spectrum across all criteria, but hotels in Riviera Maya and Samaná rate higher on price, variety, and amenities. The availability of hotels in Riviera Maya, ranging from budget to luxury, surpasses that of Barceloneta/Manatí where lodging is limited to one hotel.

Comparative Benchmark Performance

<table>
<thead>
<tr>
<th>Type</th>
<th>Barceloneta/Manatí</th>
<th>Riviera Maya</th>
<th>Samaná</th>
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<td><strong>Mobility</strong></td>
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<td><strong>Lodging</strong></td>
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<td>Availability</td>
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<td>Price + Variety</td>
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<td>Amenities</td>
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<td><strong>Attractions</strong></td>
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</table>
(Hyatt Place Manati) and approximately 105 Airbnb rooms. While the Samaná Peninsula has fewer options available to tourists, it is seeing an increasing number of highly-rated Airbnb options ranging from beachfront bungalows and villas (with private pools and jacuzzis) to condos (with waterfront views and beach access).

**Attractions**

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

While the under-the-radar beaches of Barceloneta/Manati have their own merits and offer recreational opportunities particularly, at Playa Mar Chiquita, these assets lack connectivity and basic facilities that contribute to visitor comfort and safety, including bathrooms/changing areas, designated parking lots, trails, signage/wayfinding, and lighting.
Vision + Strategic Positioning
Vision + Strategic Positioning

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

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

Together, the community vision and strategic positioning generate a coupled approach to catalyze economic development (while maintaining a partnered visitor economy focus) and invite investment within the community vision.

Community Vision Statement

“Manati and Barceloneta will be renowned by their agro-touristic experiences supported by culture, history and revitalized urban centers, where the collaborations between local entities lead the tourist development.”

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

Strategic Position & Brand

The following reflect brand pillars for Barceloneta/Manati:

a. Ideal day-trip destination with an easy drive from San Juan in under an hour
b. Hub of agro-tourism in a variety of farms
c. Opportunity sites for educational voluntourism
d. Local beach destination with under-the-radar lagoons and waterfront dining
e. A destination for all in the family with shopping and entertainment anchors

“Located under an hour’s drive from Luis Muñoz Marín International Airport, Barceloneta/Manati is an ideal day-trip destination for visitors staying in San Juan. A hub of sustainable agro-tourism sites and farms featuring a variety of livestock and crops, the region is prime with opportunities for educational voluntourism. From under-the-radar lagoons and beaches to one of Puerto Rico’s largest shopping outlet mall and casino, Barceloneta/Manati is a destination for all in the family.”
Plan of Action
Plan of Action

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

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**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) Enhancing Visibility and Connectivity between Assets, b) Promoting a collective set of offerings for volunteer, leisure, and business travelers, c) Encouraging sustainable growth of coastal dining offerings and ensuring long-term sustainability of coastal tourism economy, d) Supporting year-round outdoor cultural events and programming, and e) Improving the quality of informal lodging.

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**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 region of Barceloneta/Manati, include:

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

**Barceloneta/Manatí Recommendations**

<table>
<thead>
<tr>
<th>Project</th>
<th>Category</th>
<th>Timeframe</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Establish Frutos del Guacabo as the agro-culture hub of the North Region</td>
<td>(Agro-Culture Supply)</td>
<td>Short</td>
<td>$ $ $</td>
</tr>
<tr>
<td>2. Connect Coastal Assets and Waterfront Dining Clusters by a Shared Multi-Use Trail</td>
<td></td>
<td>Medium</td>
<td>$ $ $</td>
</tr>
<tr>
<td>3. Establish a coalition of agro-culture tourism assets in the North Region</td>
<td>(Agro-Culture Supply)</td>
<td>Short</td>
<td>$ $ $</td>
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<tr>
<td>4. Revitalize Playa Los Tubos</td>
<td></td>
<td>Medium</td>
<td>$ $ $</td>
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<tr>
<td>5. Enhance Visitor Experience at Playa Mar Chiquita</td>
<td></td>
<td>Medium</td>
<td>$ $ $</td>
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<tr>
<td>6. Revitalize the Urban Center of Manatí</td>
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<td>Medium</td>
<td>$ $ $</td>
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<tr>
<td>7. Enhance Digital Marketing of Local Cultural Events</td>
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<td>Short</td>
<td>$ $ $</td>
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</tbody>
</table>

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

**Timeframe:** Short (Less than 5 years), Medium (5-10 years), Long Term (10+ years)
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<thead>
<tr>
<th>Project</th>
<th>Category</th>
<th>Timeframe</th>
<th>Budget</th>
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</thead>
<tbody>
<tr>
<td>1  Build on the Existing Brand and Marketing Efforts of the North Region</td>
<td>(Agro-Culture Supply)</td>
<td>Short</td>
<td>$ $ $</td>
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<tr>
<td>2  Expand North Region voluntourism/group travel opportunities</td>
<td></td>
<td>Short</td>
<td>$ $ $</td>
</tr>
<tr>
<td>3  Create a Regional Waterfront Resiliency and Restoration Program</td>
<td></td>
<td>Medium</td>
<td>$ $ $</td>
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<tr>
<td>4  Establish a Safe Coast Pilot Program</td>
<td></td>
<td>Short</td>
<td>$ $ $</td>
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<tr>
<td>Project</td>
<td>Category</td>
<td>Timeframe</td>
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<tr>
<td>1 Establish a public activation program</td>
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<tr>
<td>2 Small Lodging Financing Fund</td>
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<td>Long</td>
<td>$ $ $</td>
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<tr>
<td>3 Regional Wayfinding - Highway Signage &amp; Pedestrian Signage</td>
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<td>Short</td>
<td>$ $ $</td>
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<tr>
<td>4 Amplify the Region’s Assets on Online Review Sites</td>
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<td>Short</td>
<td>$ $ $</td>
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<tr>
<td>5 Grants for Business Operations and Facade Improvements</td>
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<td>$ $ $</td>
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<tr>
<td>6 Customer Service Training</td>
<td></td>
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<tr>
<td>7 Create a training and education program for municipality tourism</td>
<td></td>
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<td>$ $ $</td>
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<tr>
<td>directors/ coordinators</td>
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<tr>
<td>8 Create a data co-operative for tourism assets</td>
<td></td>
<td>Short</td>
<td>$ $ $</td>
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</table>
# Recommendations Strategy Matrix

**Island-Wide Recommendations (Continued)**

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

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

Timeframe: Short (Less than 5 years), Medium (5-10 years), Long Term (10+ years)
Recommendations
Barceloneta/Manatí
## Establish Frutos del Guacabo as the agro-culture hub of the North Region

<table>
<thead>
<tr>
<th>Category</th>
<th>Place-Based Asset Enhancement (Agro-Culture Supply)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Nido Cultural (Applicant: Frutos del Guacabo)</td>
</tr>
<tr>
<td>Location</td>
<td>Frutos del Guacabo, located in the Tierras Nuevas neighborhood, Piñeiro sector in Manati, carr 686 km 2.3</td>
</tr>
<tr>
<td>Budget</td>
<td>Low (&lt;$50,000)</td>
</tr>
<tr>
<td></td>
<td>Costs will go toward any consultant fees for design and construction, permit fees, purchase of materials for construction, construction labor, purchase of furniture, etc.</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Short Term (Less than 5 years)/Ongoing</td>
</tr>
<tr>
<td></td>
<td>The owners of Frutos del Guacabo have a clear vision for the new spaces at the facility and will need minor technical assistance in producing any construction drawings. The owners’ previous experience in designing and building the existing farm facility, including administrative/ regulatory processes, will be critical in moving forward the project in a timely fashion.</td>
</tr>
<tr>
<td>Risk</td>
<td>As the overall tourism industry on the island is expected to fluctuate and recover slowly over the next couple of years, particularly due to decline in cruise routes (a main distributor of visitors for Frutos del Guacabo) and consumer safety concerns around flying, it is likely that the farm will need to lean more heavily on domestic tourism and ensure its marketing efforts strategically target local groups who are able to co-benefit from the farm’s new facilities.</td>
</tr>
<tr>
<td>Key Performance Indicators</td>
<td>• Annual no. of group reservations</td>
</tr>
<tr>
<td></td>
<td>• Annual sales per square foot at welcome center/ retail store</td>
</tr>
<tr>
<td></td>
<td>• Qualitative positive feedback from diners and customers</td>
</tr>
</tbody>
</table>
Action Items

Frutos del Guacabo is a well-established agro-culture asset in the region that is dedicated to the production and distribution of agricultural products to promote economic development of Puerto Rico. The ten-year old operation has built a strong reputation amongst tourism distributors (cruise companies) and suppliers (restaurants, hotels) across the island in addition to being a key educational facility and food distribution hub for farmers. Most recently, the asset was featured in the documentary “Down to Earth with Zac Efron”.

As it enters a new decade, the organization is looking to expand its facilities to include:

a) new retail store/welcome center
b) improved farm-to-table dining room to accommodate more tour groups and offer enhanced experiences.

This project was submitted by Frutos del Guacabo as part of its participation in FPR’s business support program and the Nido Cultural process.

The existing Dining Room is open-air and sheltered by a metal roof. Although this creates a closer connection between visitors/diners and the livestock and a more authentic farm experience, there have been drawbacks on visitor health and safety, visitor comfort and overall enjoyment — particularly for corporate tour groups, national and international tourists.

As such, Frutos del Guacabo is looking to re-design and construct an improved space to mitigate these drawbacks while still maintaining a dining experience that respects and celebrates the surrounding natural environment.

Overall, this expansion project serves to further root the asset as the leading agro-culture hub for the region and will enable it to connect visitors to other complementary farms and cultural sites in Barceloneta-Manati, which Frutos del Guacabo already has existing relationships with, including Para La Naturaleza and Atenas Pineapple.

Process

• Hire an architectural design consultant and construction team that can design and deliver a food and beverage concept, assess, provide, and install all necessary furnishings and equipment over and above current existing inventory.

• Hire an architectural design consultant and construction team that can design and deliver a new retail store/welcome center and install all necessary furnishings and equipment.

• Rebrand and market the farm-to-table dining experiences and associated programming at Frutos del Guacabo and incorporate the new brand in the design of the new space.
COVID-19 Recovery

Frutos del Guacabo demonstrated its business resiliency during COVID-19 with its ability to quickly expand its production of direct-to-consumer offerings as tourism/visitors numbers to the island and region declined. The asset has been quick to redesign its visitor experiences and tours to comply with COVID-19 social distancing and sanitation regulations, including installing sanitation stations, expanding visitor bathrooms, and changing available dining tables to accommodate smaller groups and to ensure easier disinfecting.

The organization enabled order placement by text messaging service and safely delivered orders in designated areas across the island throughout the pandemic. By doing so, the Frutos del Guacabo brand has been top of mind for many local residents who have benefited from the grocery service and should be leveraged in the rebrand and forthcoming marketing of the newly expanded facilities of the farm.

Diagnostic: Why Is This Project Important?

The typical profile of the visitor to Frutos del Guacabo includes the following:

- Seeks eco-friendly experiences and amenities.
- Seeks hands-on outdoor experiences.
- Enjoys unique culinary experiences.
- Family groups
- Professionals and conscious travelers

- Mid to high-income visitors

As such, the facility expansions are critical to enabling live gastronomic experiences and educational opportunities around culinary and agricultural sectors.

Partners & Resources

Frutos del Guacabo has significant experience partnering with major tourism distributors, including cruise companies and tour operators, as well as other tourism suppliers. To support the farm’s facility and programming expansion, the owners will continue to rely on existing partners such as:

- Puerto Rico Tourism Company
- World Central Kitchen
- Ritz Carlton Hotel
- Vanderbilt Hotel
- Para La Naturaleza
- Atenas Pineapple
- Local Guest
- Sociedad Criolla
- Boys & Girls Club
- Borikua Tours

These partners are well established in the North Region and SJ Metropolitan area and will be critical in bringing new visitors to the farm. For additional local programming partnerships, Frutos del Guacabo has also formed new relationships with cultural groups, Cine Semilleros and Historical Scavenger Hunts, who also participated in Nido Cultural. The groups will be exploring future entertainment pieces to complement farm-to-table dining experiences.
Case Study or Best Practice

The Stone Barns Center in New York consists of an agricultural farm, a restaurant (Blue Hill), educational facilities, and a retail store. The center attracts local and international tourists because it clearly illustrates the relationship between the farmer and the chef, demonstrates its respect for biodiversity and self-sustainability, and provides good visitor services and haute cuisine experiences that are completely rooted in the produce of the farm. It is recognized worldwide as a model to be followed by professionals in gastronomy, including by the owners of Frutos del Guacabo, who recently visited Stone Barns in 2019 to better learn about the business model and practices that may be replicated in Puerto Rico.
### Connect Coastal Assets and Waterfront Dining Clusters by a Shared Multi-Use Trail

<table>
<thead>
<tr>
<th>Category</th>
<th>Access and Mobility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team + Key Private Sector Tourism Stakeholder</td>
</tr>
<tr>
<td>Location</td>
<td>Across Coastal Assets (Playa Mar Chiquita — Playa Las Palmas — La Poza de Las Mujeres — Playa Tómbolo — Playa La Esperanza — Hacienda La Esperanza — La Boca)</td>
</tr>
<tr>
<td>Budget</td>
<td>High ($200,000+)</td>
</tr>
</tbody>
</table>

Typical funding sources for the planning and development of multi-use trails can vary from federal or state governments to private businesses and philanthropic foundations. For federal funding, the Better Utilizing Investments to Leverage Development (BUILD) Transportation Grant Program by the Department of Transportation may be a viable source as it gives special consideration to projects that emphasize “improved access to reliable, safe, and affordable transportation for communities in rural areas, such as projects that improve infrastructure condition, address public health and safety, promote regional connectivity or facilitate economic growth or competitiveness.”

Foundations and private sources may also provide funding for pre-construction activities—particularly if their missions are aligned with supporting active transportation, community health, and regional planning. Finally, developers and property owners can construct or pay for trails and donate trail easements or sell them at a discount to make projects feasible.

All project costs will go toward stakeholder outreach and engagement, planning and design, and permitting and construction. Annual maintenance will also be high as more of the trail is built out.
**Timeframe**

**Medium Term (5-10 years for each section of the multi-use trail)**
Each section of the multi-use trail will require the following phases of work:

a) Planning and Design  
b) Cost Estimation  
c) Fund Seeking/Application  
d) Construction

**Risk**

By increasing accessibility and visibility to the coast, it is likely that as visitors are able to leverage these new connections there may also be a rise in weekly visitors to some beaches that are currently limited by natural resource capacity. In order to address natural conservation groups’ concerns of reaching over-capacity of beach assets such as Playa Mar Chiquita, it is critical that a robust study of visitor carrying capacity is conducted for any assets that may be impacted by the development of a trail.

In addition, for a comprehensive network of trails to be developed along the waterfront, a wide range of property owners will need to be identified and invited to planning discussions early in the process to ensure alignment of priorities for the project and to discuss any site limitations that may impact trail development.

**Key Performance Indicators**

- Length of trail completion (in miles)  
- Annual pedestrian use  
- Annual bike use
Action Items

A continuous multi-use trail serves to connect key waterfront assets and communities by allowing both residents and visitors to explore the region by bicycle, other micro-mobility options, or on foot. To be comprehensive and successful, the trail should link all or parts of any other existing multi-use trails in Barceloneta and Manatí (as well as other adjacent municipalities), including those on Para La Naturaleza’s properties, and fill any gaps in the existing network by adding new connections or replacing any unsustainable trail alignments with routes that will remain resilient over time with minimal maintenance.

Owing to various terrains across the waterfront and the risk of flooding in these areas, a variety of materials (natural surface or paved/asphalt), methods of construction, and grades will need to be considered at each section of the trail.

Most importantly, this project aligns closely with the “Plan de Corredor Costero del Norte” created by the Manatí municipality, which is currently being revised. One of the key objectives of its plan is to connect the coastal assets—from Barceloneta to Manatí/Vega Baja—by formalizing mountain bike routes that have been used for years but that are still not legally approved given they pass thru private properties such as farms/tourism assets. At this time, the municipality is still working through these legal issues (particularly by arguing for easements to allow public access) and hopes to collaborate with the DNER to begin creating trail signage.

Process

- Conduct stakeholder outreach and engagement.
- Assess existing routes and trails and identify gaps in connectivity.
- Create a regional trail concept plan and field design report that details a comprehensive network of multi-use trails connecting major coastal assets, the work that needs to be done to construct parts of the trail, and project recommended project phasing.
- Design trail-wide wayfinding/signage and other trail requirements (e.g. striping, crossings, fences/gates).
- Conduct feasibility and impact study to determine any environmental impact and appropriateness of any potential sites to create rest stops/dining and concession areas.
- Upon construction, bids should be accepted from local small businesses for the rental of concession areas. Types of local small businesses that may be prioritized in the bidding process should align with recreation goals along the trail, such as bicycle rentals and interpretative tours.

COVID-19 Recovery

Following the social distancing measures enacted during the COVID-19 pandemic, many locals and visitors have found opportunities in recreating on available trails across the United States that has led to significant increases in visitation to such assets. According to an analysis of 31 trail counters for the week of March 16–22 2020 by Rails-to-Trails Conservancy (RTC), nationwide trail usage increased nearly 200% from that same week in 2019. This trend will likely continue on trails that offer locals and visitors opportunities for physical activity and, most importantly, safe mobility.

Diagnostic: Why Is This Project Important?

The coastal zone in Barceloneta/Manati, with a variety of terrains and passive and active recreation opportunities, is a strong driver of visitation by island and off-island tourists. Playa Mar Chiquita and La Poza de Las Mujeres, in particular, are some of the top-rated visitor assets in the region—each with over 1,000 reviews and an average rating of 4.65 out of 5.0. To enhance connectivity to and between these assets without causing significant environmental impact, it will be crucial to develop a multi-use trail that builds upon any existing trails developed by Para La Naturaleza and encourages more sustainable modes of transportation versus the personal automobile, which is currently the main way visitors are accessing the coastline.
Case Study or Best Practice

The Florida Coast-to-Coast Trail is a continuous paved multi-use trail across the State of Florida from the Gulf of Mexico to the Atlantic Ocean. When completed, it will span approximately 250 miles when completed. Each section of the trail is funded by the State Department of Transportation through its Five-Year Adopted Work Program (AWP) as each project is identified and individual schedules developed based on priorities and the allocation of funds. Funding is committed to each municipality as approved.

Partners & Resources

- Barceloneta and Manatí municipalities
- Department of Natural and Environmental Resources (DNER)
- Property Owners holding sites along the waterfront (e.g., Para La Naturaleza, Municipalities)

Many of Para La Naturaleza’s properties in the region have established trails that enable mountain biking, hiking, and running. Their previous experience and expertise gleaned from developing such trails, as well as their support of a wider network of trails, will be important to the success of this project.

- Natural conservation groups
- Key Private Sector Tourism Stakeholders
### Establish a coalition of agro-culture tourism assets in the North Region

<table>
<thead>
<tr>
<th>Category</th>
<th>Organizational Capacity (Agro-Culture Supply)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team</td>
</tr>
<tr>
<td>Location</td>
<td>Porta Atlántico Municipalities (Arecibo, Barceloneta, Camuy, Dorado, Hatillo, Manatí, Toa Alta, Vega Alta, and Vega Baja)</td>
</tr>
<tr>
<td>Budget</td>
<td>Low (&lt;$50,000)</td>
</tr>
<tr>
<td></td>
<td>An initial grant from a philanthropic foundation or PRTC may be needed to cover costs such as a subscription service to establish a digital hub for sharing resources and communications, meeting materials, consultant training fees, etc. As the coalition grows and formalizes, however, nominal membership fees may be collected annually to cover costs of maintaining operations of the group.</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Short Term (Less than 5 years)</td>
</tr>
<tr>
<td></td>
<td>As recovery from the pandemic wanes, member participation may also decline. Active marketing and communications efforts must be led by members of the coalition who have the greatest capacity in order to keep the momentum going. Regularly recognizing and celebrating the efforts of individual members through member spotlights/ features may also serve as an incentive for members to continue supporting the coalition in its efforts.</td>
</tr>
<tr>
<td>Risk</td>
<td></td>
</tr>
<tr>
<td>Key Performance Indicators</td>
<td>• Total no. of members</td>
</tr>
<tr>
<td></td>
<td>• Annual new member sign-up</td>
</tr>
<tr>
<td></td>
<td>• Attendance rate at member training/ info sessions</td>
</tr>
</tbody>
</table>
**Action Items**

The coalition aims to gather several organizations —small and large— that are currently or planning to be leaders of agro-culture tourism in the North Region. By banding knowledge, information, and resources together through a shared platform and regular convenings, members of the coalition are able to network, build relationships, align tourism priorities, set goals and principles that should be adhered to in order to further a shared mission and achieve the overall success of growing the agro-culture tourism sector.

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

- Emergency Preparedness and Recovery
- Asset Branding & Marketing
- Tourism Distributor Networks
- Visitor experiences or shared tours
- Agriculture Permitting and Licensing
- Event Planning and Organization

Coordinating roles and responsibilities is a key first step to building up this coalition of managers of agro-culture assets and experiences.

**Process**

- Convene stakeholders by distributing flyers and collect contact information.
- Organize initial meeting and establish.

**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 also 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 in communication, aligned in vision and priorities, and therefore willing and ready to support one another in the case of an emergency.

Today, the collaborative programs and sessions held by such coalitions may also be safely conducted virtually through video conferencing tools such as Zoom and Google Hangouts.
Diagnostic: Why Is This Project Important?

According to key stakeholders interviewed, informal relationships have been established between some organizations involved in agro-culture tourism within the region, such as between Para La Naturaleza, Frutos del Guacabo and local farms Atenas Pineapple and Semila, and between Atenas Pineapple and local rum distilleries. However, partnerships and communications are only conducted on an ad-hoc basis and should be formalized through a larger group or coalition that meets regularly with a shared mission of growing agro-culture tourism in the North Region and advocate for support from and coordination with the island’s public and non-profit tourism entities.

Partners & Resources

- Funding and/or Technical Assistance Partners: PRTC, FPR
- Founding members: Frutos del Guacabo, Para la Naturaleza, Atenas Pineapple, Semila Farm, Finca Pajuil Finca Espiral, Visit Rico and other local farms

Case Study or Best Practice

The Culinary Tourism Alliance of Ontario Canada is a provincial member-driven coalition that supports food service, agriculture, viticulture and aquaculture industries in Ontario Canada by providing technical assistance in media relations and trip planning, social media, sourcing, and procurement audits. In addition, the coalition shares industry-wide resources directly to members, offers networking opportunities, and educational workshops and webinars on a variety of industry topics to further its mission of developing world class food tourism destinations. Its current members include a mix of small food tourism businesses, municipalities, and educational institutions involved in studying food systems.
### Revitalize Playa Los Tubos

<table>
<thead>
<tr>
<th>Category</th>
<th>Place-Based Asset Enhancement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Origin</strong></td>
<td>Destination Planning Team + Key Private Sector Stakeholder</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>Playa Los Tubos/ Los Tubos Surf Area (Bo Tierras Nuevas Lote 2)</td>
</tr>
<tr>
<td><strong>Budget</strong></td>
<td>High ($200,000+)</td>
</tr>
<tr>
<td></td>
<td>- According to efforts in many other world-class waterfront cities around the world, ecological restoration and structural and spatial improvement projects have reported high costs as careful engineering studies of the natural environment and its capacities will need to be undertaken prior to any construction. However, FEMA funding may be used to acquire any other adjacent properties through voluntary property buyout.</td>
</tr>
<tr>
<td><strong>Timeframe</strong></td>
<td>Medium Term (5-10 years)</td>
</tr>
<tr>
<td></td>
<td>- Furthermore, most of the strategies included in this project are eligible for Community Development Block Grant (CDBG) funding from the US Department of Housing and Urban Development, either directly or through the State government. CDBG Funds are flexible, available, and designed to meet community needs. The municipality is working to apply for CDBG-DR funding.</td>
</tr>
</tbody>
</table>
**Risk**

The asset is located in a special flood hazard area that is subject to inundation by the 100-year flood. As such, prior to any planning and design efforts for the new public space and construction of any new structures in the area, it is important to measure and assess the risks of coastal erosion.

**Key Performance Indicators**

- No. of events/programs held at the public space annually (+ attendance at the events)
- Vendor permit applications received and approved

**Action Items**

Playa Los Tubos is a beach with an abandoned playground facility that has not been reopened following Hurricane Maria. The beach is faced with challenges related to coastal erosion and lacks accessible bathrooms, dining, or visitor amenities and services despite being popular as an under-the-radar beach for surfers and other recreational activities, including diving. In order to enhance the asset for both locals and visitors and build a cluster of activities, the municipality has acquired federal funding to make improvements to the asset. The following strategies may be undertaken:

- **Revitalize the playground as a new public space.**

  The revitalization of the playground facility as a new public space should include some or all of the following key components: a gateway entry, a safe/accessible parking facility (with clear signage, lighting, and bike infrastructure), a mobile vending zone/market-like space (equipped with solar-powered energy outlets), and visitor comfort stations. The redesign of the space should prioritize elements of sustainability, environmental preservation, and build upon existing infrastructure on-site.

- **Reinforce coastal erosion mitigation measures.**

  In addition to the rip-rap currently being used to protect the shoreline, other strategies that may be considered but will require monitoring and engineering assessment include groins and breakwater (detached and submerged). Given that DNER owns the property, the agency will need to request funding for mitigation efforts.

  At this time, the municipality also proposes the following projects as mitigation measures:

  1. Improve the drainage system to increase
the resilience of PR-685, Playa Los Tubos and Laguna Tortuguero, (2) provide a structure for vertical tsunami evacuation at the Playa Los Tubos Recreational Area, (3) create an educational center for coastal environmental studies at Playa Los Tubos Recreational Area, (4) coral reef restoration from Punta Chivato to Playa Los Tubos, (5) building green infrastructure (coastal ecosystems: trees/forests, reefs, mangroves and wetlands, dunes) and grey (engineering) integration project for beach stabilization.

- **Create anchor attraction**

In addition to facilitating regular beach activities, there is also private stakeholder interest in spearheading and building an anchor attraction that drives traffic to the beach year-round — whether through constructing a cultural museum/facility at the site, a cluster of vending kiosks, or organizing and programming large-scale events.

**Process**

- Engage property owners to ensure the municipality’s vision for the new Playa Los Tubos waterfront area is aligned with that of local stakeholders.
- Contract with vendors to conduct annual monitoring of coastal erosion (rate of erosion and risks) and comply with FEMA funding requirements.
- Hire consultants to plan and re-design the abandoned playground facility to include the key components previously mentioned. New plans and designs should also prioritize ecological restoration and structural and spatial improvements that respect the natural context, increase resiliency against future flooding and erosion, and that enables the public to easily access the waterfront.
- Institute a vendor permit program in the newly designed public space similar to that enforced at Playa Mar Chiquita by the municipality’s office for tourism.
- To kickstart any effort to create an anchor attraction at Playa Los Tubos (for example, a museum or other cultural attraction), the investment and interest of private operators experienced in the tourism business will be critical. A competitive bid or Request for Qualifications should be issued by the local municipality to seek interest, ideas, and plans from such partners to assess market appetite. Government-led efforts may be more difficult to manage in the long-term owing to the high costs of operating and maintaining such attractions and the need for constant innovation with industry trends and consumer preferences.

**COVID-19 Recovery**

As customers and diners become more familiar with eating outdoors because of the pandemic and the move by cities across the world to encourage outdoor restaurants (where rates of transmission are lower), the large new public space and vending zone at Playa Los Tubos will likely be a much-welcomed concept for travelers. This will allow local restauranteurs who may have lost their more costly and permanent brick-and-mortar spaces to meet visitors where they are via a more inexpensive business model — food trucks or carts.

**Diagnostic: Why Is This Project Important?**

Despite the beach’s current underutilization, the asset has existing infrastructure to build upon and unique traits that were recently discovered, including petroglyphs on rocks visible during low tide — offering an opportunity for archaeological tourism. In addition, the under-radar beach is widely used by surfers and divers (due to nearby coral reef) and should be further leveraged as a coastal asset.

**Partners & Resources**

- Municipality of Manati
- Department of Natural and Environmental Resources (DNER)
Case Study or Best Practice

**Rio de Janeiro, Brazil** — Itacoatiara Beach, the surf spot in the Niteroi neighborhood, features mobile food trucks that attract customers to the area all year round.

**Seaside Airstream Row, Florida** — Lined along Highway 30A, the Seaside Airstream Row is a corridor of vintage Airstream trailers that house a variety of food vendors. The cluster of offerings has grown to become a major attraction in the beach-side town of Seaside.

**Street Fare, San Antonio TX** — The food truck park features six vendors at any time with each vendor holding a maximum of a 1-week long agreement with the property owner to ensure constant rotation of food offerings.

A re-imagined Playa Los Tubos featuring multi-use shared trail, food truck cluster, outdoor dining facilities, and wayfinding/lighting elements. Source: Streetsense

Current facilities at Complejo Recreativo Los Tubos. Source: Streetsense

Food truck cluster in beach parking lot. Source: Shutterstock
## Enhance Visitor Experience at Playa Mar Chiquita

<table>
<thead>
<tr>
<th>Category</th>
<th>Place-Based Asset Enhancement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team</td>
</tr>
<tr>
<td>Location</td>
<td>Playa Mar Chiquita (Tierras Nuevas Poniente, Manati 00674, Puerto Rico)</td>
</tr>
<tr>
<td>Budget</td>
<td>High ($200,000+)</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Medium Term (5-10 years)</td>
</tr>
</tbody>
</table>

A significant share of the cost of this project will cover the planning, design and construction of visitor comfort stations that are self-cleaning (example vendor: Exeloo). Annual operation and maintenance of visitor comfort stations will also be high and will require significant support of the municipality.

### Risk

The increased accessibility to the beach and improved experiential offerings will likely drive visitors to the beach at higher rates. In order to address natural conservation groups’ concerns of overcapacity, and to manage the limited size of the Playa Mar Chiquita, it is critical that the beach management plan be revised to take into account additional impacts of the project on the beach and its resources.

Furthermore, the issue may be addressed through mass education and by controlling/regulating the number of visitors to the beach (for example as in Playa Sucia in Cabo Rojo, where there is a limit to visitors in the beach or even El Yunque). Additionally, safety personnel and continued maintenance and sanitation services will be needed to minimize the impact of overcapacity.
Key Performance Indicators

- Annual foot traffic at beach entrance (via pedestrian counters)
- Annual vendor permit applications and approval

Action Items

Playa Mar Chiquita is one of the most touted coastal assets in the region, with over 2,733 Google reviews and an average rating of 4.7/5.0. Its strong standing as a visitor destination has led to the clustering of a number of Airbnbs and short-term rental homes in the neighborhood. To enhance multi-modal accessibility to the beach from nearby accommodation and to ensure it remains a sought-after and sustainable beach destination, there are several infrastructure improvements that need to be achieved aligned with the municipality’s plans for the beach, including:

- **Building visitor comfort stations**

Visitor comfort stations are especially important at Playa Mar Chiquita, where popular activities here include sunbathing and swimming, requiring beachgoers to spend a prolonged period of time enjoying the asset. Despite this, the beach currently only provides 2-3 individual portable toilets on-site for visitors requiring bathrooms. These facilities need to be upgraded and made permanent, preferably with self-cleaning technology and easy redeployment in the case of emergency disaster events.

- **Increasing permit approvals and establishing a weekly roster of vendors for food/drink concession and vending options for beach equipment**

The Municipality’s Office of Tourism has, in recent years, increased accessibility of its vendor permit program, which it enforces at Playa Mar Chiquita. On an average day at the beach, 2-3 different vendors (food and beverage, beach equipment) may be found providing products and services to visitors. Given that the nearest business cluster is located a 10-15 minute walk away (with inconsistent sidewalk infrastructure); these vendors offer a highly convenient offering to beachgoers and should be encouraged in larger numbers and of greater variety.
throughout the week. Permit applications should be kept at a minimum to encourage participation by local entrepreneurs. They should be strictly enforced by quota per day to ensure beach capacity is not overloaded by vehicles and crowds.

- **Improving sidewalks and pedestrian-scale lighting at the beach and between Playa Mar Chiquita and nearby lodging/business clusters**

In tandem with the region-wide multi-use trail project (refer to earlier project sheet), the neighborhood and streets surrounding Playa Mar Chiquita need significant investment to ensure safe pedestrian and bike connections and lighting to increase site accessibility for visitors, which in turn decrease reliance on the automobile and its associated parking requirements, which are difficult to accommodate on the site without disturbing the natural environment. In addition to constructing sidewalks/paved pedestrian walkways, the neighborhood will need to consider lighting strategies that limit adverse effects on local wildlife.

**Process**

Initial steps that should be taken include:

- Seek funding for construction of visitor comfort station via DNER or federal funding from FEMA. Over the course of 2020, FEMA and Puerto Rico’s Central Office for Recovery, Reconstruction and Resiliency, or COR3, approved funding for 1,624 small permanent work projects that help rebuild communities affected by Hurricane Maria.

- Release a request for bid proposals from design and construction teams to provide professional services for the design and construction of a visitor comfort station. This may include the design of prefabricated modular container bathrooms, environmental remediation, rough grading and fine grading of the site, installation of electrical service, water lines, and drainage service, etc.

- Designate specific areas/spaces for vending at Playa Mar Chiquita. Use ground markings/upright signage to designate these spaces and allocate daily quota for vendors.

- Set up a dedicated Playa Mar Chiquita vendor webpage and simple Google Form/online application process for vendors to regularly apply for a space to conduct business.

- Publish monthly vendor rosters online for purposes of businesses and visitors to see what’s available for the upcoming weeks.

**COVID-19 Recovery**

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

**Diagnostic: Why Is This Project Important?**

According to qualitative reviews on Google and TripAdvisor, the highly rated asset meets and exceeds many visitors’ expectations by offering a calm and scenic beach experience. Despite being one of the most visited assets in the region, however, Playa Mar Chiquita lacks basic infrastructure that can increase convenience for customers and encourage longer dwell times, including comfort stations, safe pedestrian lighting and casual dining options.

**Partners & Resources**

- Municipality of Manati
- Key Private Sector Stakeholders (Tourism and Retail/Restaurant Businesses)
Case Study or Best Practice

City of Long Beach CA’s Doing Business Permit 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.
## Revitalize the Urban Center of Manatí

<table>
<thead>
<tr>
<th>Category</th>
<th>Place-Based Asset Enhancement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Origin</strong></td>
<td>Destination Planning Team + Nido Cultural (Applicant: Barrioization)</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td>Manatí, 00674, Puerto Rico (Plaza Publica, Calle Padial #13 de la Calle Padial, #17 Calle Baldorioty)</td>
</tr>
</tbody>
</table>
| **Budget**     | High ($200,000+) — Interdisciplinary Center and Museum at the Old José de Diego School  
Costs will cover both pre-development and development phases.  
High ($200,000+) — Plaza de Recreo  
Costs will cover consultant fees for planning and design, construction cost estimation, and construction labor and fees.  
Low (<$50,000) — Casa Manatuabón  
Given that the project has advanced furthest, the remaining costs cover property renovation (mostly cosmetic) and the purchase of hostel furniture and furnishings. |
| **Timeframe**  | Short Term (Less than 5 years) — Plaza de Recreo  
Short Term (Less than 5 years) — Casa Manatuabón  
Long (10+ years) — Interdisciplinary Center and Museum at the Old José de Diego School |
The greatest risk lies in executing the Interdisciplinary Center and Museum at the Old Jose de Diego School. The project is incredibly complex — from acquiring the property, building conservation and rehabilitation to business model and planning — and despite Barrioization’s strong roots in the community, the organization will require significant technical assistance and expert advisors in real estate strategy and cultural asset management to further understand the feasibility of the project and its long-term solvency.

Property transfer and acquisition from the municipality may also extend the project timeline.

**Risk**

**Key Performance Indicators**

Manatuabón KPI House
- No. of nights reserved.
- No. of linked experiences.

Ecological Offices and Memory Space
- Annual no. of visitors.
- No. of annual members/collaborators.
- No. number of people using the space as their workplace.

Plaza de Recreo
- Foot traffic (via pedestrian counter).
- No. of programs held at the plaza annually (+ attendance at events).
Action Items

The urban center of Manatí is home to a number of cultural assets, including the Plaza and Taboas Theatre. Although these assets and their programs/events do not drive off-island visitation to the region they offer a complementary set of offerings that may extend the dwell time of tourists if well maintained and executed. This is especially important given that the second largest cluster of short-term rentals after Playa Mar Chiquita is located in the urban center of Manatí. To create a more welcoming and active ‘downtown’ experience, the municipality will need to consider the following set of strategies:

- **Rehabilitate the Old José de Diego School**

  Barrioization, a local organization committed to the revitalization of the urban center of Manatí, has expressed interest in rehabilitating the historic José de Diego School as an as an interdisciplinary center and museum, or ‘Space for Ecological Trades and Memory’, where experts in education, tourism, archaeology, architecture, agriculture, design, and planning can come together in a co-working or collective lab. The group has begun talks with the Municipality to acquire the property and is exploring technical studies to rehabilitate the building.

- **Build Casa Manatuabón Bed & Breakfast, an ecological hostel in the urban center of Manatí.**

  Casa Manatuabón B&B is a proposed ecological hostel to be located adjacent to Plaza de Recreo Manatí. The project, also led by Barrioization, will focus on vegan lifestyles (the first of its kind in Puerto Rico) and aims to provide travelers an accessible and affordable ‘live like the locals’ experience in the region. The brand of the hostel will also reflect the cultural and artistic diversity of the North region.

- **Redesign Plaza de Recreo**

  The redesign of Plaza de Recreo—one that includes the removal of surrounding vertical walls that limit visibility onto the plaza—will serve to create an accessible, vibrant, and flexible public space that accommodates a mix of interim and permanent uses for a range of users —locals, visitors, and different age groups. In addition, the design of the space should be responsive to local climate, support stormwater management strategies and local ecology, and preserve any local cultural and historic elements on site. This includes the mural by Cecilia Orta Allende, a renowned black artist of Puerto Rico, that was painted in 1961 and one of few available on such a large scale. The plaza should also pay homage to the creator of the Puerto Rican flag from Manatí, Antonio Vélez Alvarado, and the history of the site as a former cemetery and land belonging to the Tainos and Africans in PR.
Process

Interdisciplinary Center and Museum at the Old José de Diego School
• Collaborate on a property use agreement with the Municipality of Manatí.
• Identify key funding and resources.
• Call for first phase general cleaning (main structure and overall site).
• Cultivate an urban garden on the site.
• Form a Committee for the Rehabilitation of the Structure.
• Design a program for the sustainability operation and management of the space (Barrioization has expressed the need for technical assistance in legal and program operations for the facility once formed. Recognizing that the José de Diego School will become an interdisciplinary center that will function as both a museum/gallery and a coworking space, among others, it will require an operational structure that allows flexibility and is responsive to changes).

Casa Manatuabón
• Ensure all business registrations and incorporation proceedings (with State departments) are complete (whether under Barrioization or other named entities) and register with Puerto Rico Tourism Company.
• Obtain construction permits from the municipality for any structural improvements.
• Complete the rehabilitation and restoration phase of the building.
• Paint walls, buy utilities for rooms.
• Paint the building opposite.
• Develop website and social networks (Facebook, Instagram).
• Create the conditions for the collaborative economy.

Plaza de Recreo
• Issue a bid for placemaking consultants to create a new plan and design for the plaza. As part of this work, consultants, with the support of the Municipality and other grassroots groups, must conduct stakeholder outreach and engagement to create a community vision for the new space and to seek public input on space needs and design preferences. The process may also include design pilots to test any design concepts and community ideas before full construction/execution.
• Identify a management individual/entity to maintain the space and lead programming efforts. This may be an existing role within the municipality or, as with many cases across the country, a partnership of local stakeholders through a grassroots group that dedicates public-private resources to the maintenance of the space.
• Develop a preliminary program for the plaza.

COVID-19 Recovery

During the pandemic, downtowns and urban centers across the country experienced a heightened use of public spaces not only for personal outdoor recreation but to expand restaurant dining occupancy when businesses had to limit indoor store occupancy. Public spaces became the most critical infrastructure in neighborhoods and will likely continue to see increased usage.

Diagnostic: Why Is This Project Important?

A physical assessment of the urban center of Manatí by the Destination Planning Team found several challenges with the design of the main plaza that limited accessibility, visibility, sustainability, and overall activation of the public space which results in perceived safety issues in the urban center.

The edges of the public space that are enclosed by 5ft high concrete walls limit pedestrians’ ability to flow in and out of the space and the choice of material has resulted in mostly impervious surfaces that have consequences on stormwater. The lack of smart landscaping has also created an expansive public space with limited shaded areas for prolonged daytime use.

In addition, a local stakeholder also noted the lack of lighting to illuminate the urban center as a key factor for poor safety in the area and is currently pursuing efforts to form a Community Security Committee to combat these issues.
Partners & Resources

- Barrioization is a local organization with strong roots in the community, dedication to urban center revitalization, and proven experience in developing unique and well-branded tourism and cultural asset — Libar Restaurant, the first vegan restaurant in Manatí. The organization has a pulse on the local community and is a lauded leader in revitalization efforts for Manatí.

- The Municipality of Manatí will also be a key partner. It currently owns and managed Plaza de Recreo and is a key partner to Barrioization for the acquisition of the José de Diego School property. At this time, the municipality has made to rehabilitate the Plaza, and have begun a dialogue with Barrioization as partners for this effort.

Case Study or Best Practice

The following case studies have influenced Barrioization’s vision and concept for Casa Manatubón and the Interdisciplinary Center and Museum at the Old Jose de Diego School:

**The Dream Catcher Bed & Breakfast, Ocean Park, PR**

The only vegetarian hotel in San Juan, focused on wellness tourism, with a tropical aesthetic practice that is nurtured by the memory of Caribbean design.

**Bophana Center, Phnom Phen, Cambodia**

Audiovisual Center located in Phnom Penh, Cambodia dedicated to the restoration, protection and exhibition of Cambodia’s heritage and audiovisual heritage.

**Casa Pueblo, Adjuntas, Puerto Rico**

Community self-management project that is committed to appreciating and protecting natural, cultural and human resources. They have a range of projects and services directed and focused on education and sustainability.
A re-imagined Plaza de Recreo featuring green/stormwater infrastructure, flexible furniture and spaces for plaza users and shaded seating.

Source: Streetsense
Enhance Digital Marketing of Local Cultural Events

<table>
<thead>
<tr>
<th>Category</th>
<th>Marketing, Events and Promotion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Nido Cultural (Applicant: Dimelomio)</td>
</tr>
<tr>
<td>Location</td>
<td>Urban center and coastal assets of Barceloneta and Manati</td>
</tr>
</tbody>
</table>

**Budget**

**Medium ($50,000-$200,000)**

Funding may be obtained by charging arts organizations/ groups for contracted marketing services or through platform sponsorship. A sample contract marketing package that was suggested by the project lead, Dimelomio, amounts to $25,000 annually, as follows:

**For promotion/ marketing of 4 Annual events: 1 EVENT PER SEASON**

- 4 Consulting Services: 1,000
- 4 Curator Services: 6,000.00
- 4 Creation Promotional concept and promotion: 4,000
- 4 Promotional commercial (1 video 15 sec / 1-video 30 sec): 4,000
- 4 Social media / podcast news program: 2,000
- 4 Event coverage for social networks: 4,000
- 4 Video recap (1 minute) 2,000.00
- 4 Photographic services: 2,000 (10 edited photos)

However, in the early years of this project, a sponsorship model may be more likely to achieve as the platform will not have proven market value for potential clients to purchase such high-cost promotional packages. A sponsorship model enables the platform to be paid a nominal fee in exchange for a basic feature of an event, activity, or brand/ organization on the platform. For example, the platform may produce/publish content about the history/ origins of agriculture in the region and in doing so, feature a local event at Para La Naturaleza. However, in initial years, it is important for Dimelomio to select sponsors that align with the business mission to promote and cultivate authentic local art and cultural scene in the region.
**Timeframe**

| Short Term (Less than 5 years) |

**Risk**

Without significant technical support and financial assistance for local artists/arts organizations and cultural institutions, the overall quality and quantity of cultural offerings in the region may not be easily sustained. Any lack of consistency and reliability of events and programs may be detrimental to the overall success of the project as consumer trust is often built upon exceeding satisfaction and repeated satisfaction over time. Therefore, the success of this project is contingent upon the execution of the island-wide project of creating a public activation program that provides funding and technical assistance to local artists and arts groups (refer to Public Activation Program project sheet).

**Key Performance Indicators**

- Total site engagement
- Annual total sponsorship fees collected
- Total attendance/participation at featured events

**Action Items**

This project serves to spotlight the efforts of artists, cultural groups, and arts organizations in the region by creating an integrated digital platform that functions as a master curator of arts and cultural events and programming across the region. The platform will feed content on the latest and upcoming in regional arts and culture across a website and multiple social media apps to reach the widest audience, including locals and visitors.

Content should include reporting and media coverage of cultural events, promotional content, and suggested itineraries for travelers, for example, “Churches to visit in Manati over Lent week”.

**Process**

- Create and continuously update an inventory of local cultural events and anchor destinations across the annual calendar.
- Set up a brand and website for the local cultural event platform.
- Create a local cultural event digital campaign, in partnership with Discover Puerto Rico.
- Create offering packages: promotion, consulting, and generation of content of specific cultural events.
COVID-19 Recovery
Given the circumstances of COVID-19 and its impact on consumer confidence, domestic tourism will be an even more important segment to leverage. As such, it will be critical to heighten digital marketing efforts for arts and cultural tourism in the region to these groups, including suggesting themed itineraries for diaspora travelers “Y tu abuela dónde está?” and creating routes/itineraries with important Puerto Rican historic sites and agro-tourism assets where social distancing is easier to accommodate in large open spaces and farms.

In addition, virtual events may also be offered as an alternative through the platform to drive marketing for the region in the long-term as the island reopens to visitors. At this time, many cultural organizations and artists have slowed down on programming and events given the limitations of in-person gatherings during the pandemic.

Diagnostic: Why Is This Project Important?
Travelers from across customer segments are increasingly looking for local recommendations and new learning opportunities. Gen X travelers, in particular, seek experiences that they may not have been able to have when they were younger, and Millennials are more likely to pick “live like local” experiences. As such, it is important to find ways to promote local cultural programs, festivals, and experiences to visitors online across a range of platforms so that they are able to explore options and build them into their personalized itineraries. After all, the path to purchase for travelers has become incredibly complex as digital platforms continue to influence travel decision-making.

In addition, this project is also critical to building local social infrastructure and giving domestic tourists and diaspora travelers more opportunities to better understand their own heritage and reconnect with local culture.

Partners & Resources
Project lead Dimelomio is a group of cultural bloggers with an established presence in San Juan and other parts of the island. The group is committed to documenting and creating cultural content about local music and entertainment, and has experience curating and creating original visual/video content across various social media platforms (Facebook, Instagram) and organizing paid Airbnb experiences for visitors. To successfully execute the project, Dimelomio will require the partnership of key local stakeholders, including native businesses, organizations, and artists that generate cultural activity, in addition to support from the municipality and its tourism office. These partners may be key sponsors of the project and users of the cultural marketing platform.

Initial collaborators that Dimelomio has built relationships with over recent months include the following groups that have established regular programming monthly or annually in the region (pre-COVID-19):
- Barrioization in Manatí
- Arecibo 1515 in Arecibo

Case Study or Best Practice
Time Out is a media and leisure business comprising of websites, mobile, social media, print and live events with presence across cities around the United States and the world. Its platforms’ content highlights the best of arts and culture in each location/destination, covering everything from food and drink, culture, art, music, and theater.

In New York, for example, Time Out curates a weekly list of events and activities for a variety of audiences (including those looking for free things to do or things to do outdoors) and serves as the go-to resource for both locals and visitors seeking cultural opportunities.

Upcoming NYC events
- The Book of Mormon
- The Winter Jazzfest guide
- SummerStage 2019 guide

Source: TimeOutNY
Recommendations

North Region/
Porta Atlántico
1. **Build on the Existing Brand and Marketing Efforts of the North Region**

<table>
<thead>
<tr>
<th>Category</th>
<th>Marketing, Events and Promotion (Agro-Culture Demand)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team</td>
</tr>
<tr>
<td>Location</td>
<td>Porta Atlántico Municipalities (Arecibo, Barceloneta, Camuy, Dorado, Hatillo, Manati, Toa Alta, Vega Alta, and Vega Baja)</td>
</tr>
<tr>
<td>Budget</td>
<td><strong>Medium ($50,000-$200,000)</strong></td>
</tr>
<tr>
<td></td>
<td>Costs may cover consultant fees for the creation of the plan and production of conceptual marketing collateral. Execution of the plan and any marketing/advertising strategies adopted from the plan will incur additional costs that will be estimated by the consultant through the strategic planning process.</td>
</tr>
<tr>
<td>Timeframe</td>
<td><strong>Short Term (Less than 5 years)</strong></td>
</tr>
<tr>
<td></td>
<td>This project will need to be established immediately to ensure a COVID-19-responsive brand.</td>
</tr>
</tbody>
</table>
As customer preferences shift and travel patterns change in the near term following COVID-19, the brand for the North Region will also need to consider short- and medium-term goals and values. Over the next two years, as domestic US tourism bounces back more quickly than international travel, the brand developed for the North Region should seek to prioritize island residents and families and be particularly relatable and/or attractive to American visitors from target areas such as NY-NJ, Florida, and Texas.

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

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

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**Risk**

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**Key Performance Indicators**

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

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**Action Items**

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

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

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

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

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

**COVID-19 Recovery**

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

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

**Diagnostic: Why Is This Project Important?**

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

**Suggested Strategic Position for the North Region:**

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

**Partners & Resources**

Critical to the success of the re-branding of the North Region is the leadership of Discover Puerto Rico and PRTC. Its existing staff capacity, expertise in branding and marketing, and past/ongoing efforts to promote the island (including 2019 Voy Turisteando campaign launched by PRTC) as a whole to visitors, place
Case Study or Best Practice

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

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Organizational Capacity/Place-Based Asset Enhancement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team + Community Stakeholders</td>
</tr>
<tr>
<td>Location</td>
<td>Semila Farm, Atenas Pineapple, Frutos del Guacabo, Finca Pajuil, Para La Naturaleza, Villa de la Central Los Caños, Iglesia Metodista De Piedra &amp; Other Historic Churches, Finca Espiral &amp; other local farms</td>
</tr>
<tr>
<td>Budget</td>
<td>Low (&lt;$50,000)</td>
</tr>
<tr>
<td></td>
<td>Infrastructure is in place at Villa de la Central Los Caños, in addition to new ‘glamping’ facilities that were recently erected on-site to expand the overnight stay capacity of volunteer groups and other visitors. (Note: Although volunteer groups may be staying at Villa de la Central Los Caños, they may also support volunteer work at various other participating assets including Semila Farm, Atenas Pineapple, Frutos del Guacabo, Finca Pajuil, Para La Naturaleza and Iglesia Metodista De Piedra).</td>
</tr>
<tr>
<td></td>
<td>Costs will mainly cover administrative time to seek qualifications from partner operators and managers for the site.</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Short Term (Less than 5 years)</td>
</tr>
</tbody>
</table>
The most critical risk of this project is finding a volunteer program coordinator that is mission-aligned with local agro-culture and faith-based assets and that is not driven by profit and instead focused on creating safe, affordable, and productive volunteer opportunities for both participants and local assets.

At this time, Villa de la Central Los Caños can only accommodate overnight stays for a limited group size. There are currently eight villas (each with 3-4 rooms) and an additional set of permanent tents. During peak volunteer seasons (Summer), the demand for accommodation for volunteer group lodging may exceed the Villa’s availability. As such, partnerships with local bed-and-breakfasts or boutique lodging assets may need to be established for peak seasons.

The agro-culture and faith-based assets are all located a distance away from each other. Therefore, it will require transportation operator partners for groups staying at the Villa to be able to access these sites daily.

- Occupancy rate
- No. of group reservations
- No. of completed volunteer projects
- Total no. of volunteer hours logged at each participating asset
Action Items

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

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

Process

Villa de la Central Los Caños

- Create a private-public partnership agreement for the management and operations of the Villa, or consider lease agreements to a private operator. To ensure the Villas continue to be competitively maintained according to industry standards and expectations of group travelers, it is important to have operators and property managers with hospitality backgrounds and experience in running large-scale accommodation facilities such as the Villas.
- Enhance reservation systems at Villa and marketing. At this time, reservations are largely accepted only through a municipality hotline, which is inaccessible and inconvenient for the international traveler and even more so for non-Spanish speaking groups who are unable to clearly communicate by phone with municipal operators. The Villas will need to upgrade its reservation capabilities to an online-based system that can easily be accessed around the country and world, and the Villas will also need to be digitally marketed to group travel operators and non-profit/mission-based organizations through virtual tours of the facilities.
- Identify volunteer needs and volunteer projects.
- Create year-round volunteer programs.
- Hire/Train facilitators and/or partner with professional group tour operators.
- Establish a partnership between Villa and volunteer group organizers.
COVID-19 Recovery
Following the pandemic, volunteer group travel may be slow to start given the high risk of transmission when traveling and engaging in activities within close proximity of others. As such, it will be important for agro-culture and faith-based assets, and the Villas, to incorporate safety standards and market/communicate cleaning/safety efforts to potential group travelers.
For example, volunteer activities conducted outdoors may easily adhere to social distancing guidelines, and the Villas should be conducting comprehensive cleaning, and enabling flexible cancellations and self-check-in procedures.

Diagnostic: Why Is This Project Important?
An assessment of national tourism trends found that group travel with a purpose has grown in significance in recent years. In fact, one in four American travelers (27%) reported plans to volunteer on a trip, with Millennials being the segment that is more likely to travel abroad to participate in volunteer activities.
Although Discover Puerto Rico currently works to coordinate group travel with a handful of non-profit and mission-driven organizations in Puerto Rico, many of these existing volunteer group partners are not located in the North Region despite the area’s abundant opportunities in agriculture and food system education and cultural and faith-based institutions. This project should serve to complement the existing efforts by

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

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

Case Study or Best Practice

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

Finca Pajuil, Hatillo PR
Finca Pajuil currently organizes and welcomes volunteer and art student groups to participate in educational programs and practices in addition to supporting manual labor efforts on the farm. Similarly, Semila Farm has hosted volunteer groups to help with the maintenance of the grounds and to offer basic planting/grafting support given the limited staffing capacity of the organization.
3. **Create a Regional Waterfront Resiliency and Restoration Program - La Boca, Barceloneta**

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

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

Action Items

One of the key brand pillars and competitive advantages of the North Region/ Porta Atlántico is its under-the-radar beaches. Despite its importance in tourism development for the region, the coastal assets have suffered from and may continue to be at risk to natural disaster events. As such, it is critical for the region’s leaders to band together to establish a regional waterfront adaptation, resiliency, and restoration program that includes a suite of projects and policies that serve to protect the region’s valuable natural resources even as tourism grows and strengthens. This project serves to reinforce earlier recommendations made by a range of consultants, including Estudios Técnicos, Inc. (2019)\textsuperscript{104}, to develop regional climate action plans that coordinate efforts and development of programs and policies related to climate adaptation and mitigation across jurisdictions. This type of concerted regional planning and programming will only serve to strengthen applications to Federal funding.

Process

As previously recommended by Estudios Técnicos, Inc. (2019)\textsuperscript{104}, there are a number of planning and regulatory tools that should be adopted in the North Region as waterfront adaptation strategies, including:

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

\textsuperscript{104} Estudio sobre la integración de estrategias para la adaptación y el desarrollo de resiliencia en la planificación de usos de terrenos. Estudios Técnicos, Inc., 2017.
To execute the above efforts, municipalities in the North Region will first need to assess and map properties at risk along the waterfront to determine priority sites and zones, as well as bring together stakeholders (particularly property owners) to ensure consensus-building and visioning for the waterfront. High-risk sites and zones that are identified should then be prioritized for receiving any incentives and technical support to implement any/all of the above tools mentioned, including funding for property demolition and non-structural stabilization strategies, including public art mural on interim abandoned sites.

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

**COVID-19 Recovery**

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

**Diagnostic: Why Is This Project Important?**

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

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

**Partners & Resources**

- Department of Natural and Environmental Resources (DNER)
- Office of Emergency Management
- Puerto Rico Climate Change Council
- Municipalities
- Cámara de Desarrollo Económico y Empresarial de Arecibo
- Para La Naturaleza
- Ruta Alterna 681
- P.A.S.E.(Piratas Aliados Sirviendo en la Emergencia)
Case Study or Best Practice

Demolition Program
The original Road Home program in New Orleans provided federal cash grant to property owners affected by Hurricane Katrina to rebuild or sell homes that were severely damaged, or to rehabilitate properties to facilitate elevation in flood prone areas. Administered by the State, the program disbursed over $9 billion in awards to local residents and property owners. Although the program was later criticized for discriminatory impacts, the program helped fight blight after the Hurricane and may be an important model for the North Region.

Interim Public Art Projects on Abandoned/ Vacant Waterfront Sites
As part of the Gentilly Resilience District Art Project, the Arts Council of New Orleans conducted trainings for local artists interested in getting involved in co-creating public art for public spaces near London Avenue Canal. During Hurricane Katrina, many of the homes in the neighborhood were submerged by more than six feet of water and are currently undergoing a range of adaptation and resilience efforts. These artist trainings aim to educate artists on environmental resilience, stormwater management, and community history so that they may then develop public art proposals that directly align with the topic. A selection committee consisting of a combination of art, design, and resilience professionals was established to select winning proposals that will each receive grants to be used toward the implementation of the final artwork.
## Establish a Safe Coast Pilot Program

**Category**  
Organizational Capacity

**Origin**  
Destination Planning Team

**Location**  
Porta Atlántico Municipalities (Arecibo, Barceloneta, Camuy, Dorado, Hatillo, Manatí, Toa Alta, Vega Alta, and Vega Baja)

**Budget**  
High ($200,000+)

PTTC has, in the past, provided funding for lifeguards under Blue Flag Program efforts. Other ways that funding may be raised include through charges levied on visitors (in tandem with parking fees near beaches) or via visitor donations and local business sponsorships. Costs of the program might include wages and training for lifeguards on duty, beach equipment, and signage production and installation.

**Timeframe**  
Short Term (Less than 5 years)/Ongoing

**Risk**  
A major risk for a lifeguard program is the case of liability. Beachfront property owners, in particular, are only liable for incidents and injuries happening between the shore to the high-tide line. As such, the local government will have to bear liability for any incidents and injuries past the high-tide line.

**Key Performance Indicators**
- Total no. of new signage installed
- Total no. of part-time lifeguards hired
- Annual no. of reported injuries/ deaths in open water
- No. of positive visitor statements on beach safety on crowdsourcing review sites (e.g., Google and Yelp)
Action Items

A safe coast program aims to increase aquatic safety for residents and visitors to North Region’s under-the-radar beaches. Despite being less popular when compared with major surf destinations to the west and resort beaches closer to San Juan, the North Region does feature a number of unique coastal assets such as Poza del Obispo in Arecibo and Poza de las Mujeres in Manati (other major beaches in the North Region include Cueva Del Indio, Playa Mar Chiquita, Playa Los Tubos, Playa La Cueva De Las Golondrinas, and Playa Caza y Pesca) that each offer a mix of passive and active recreation opportunities. However, as with many beaches/coastal areas of Puerto Rico, these assets may have harsh conditions and pose a danger to uneducated tourists or visitors with disabilities.

To protect beachgoers in the North Region, municipalities will need to make concerted efforts to educate visitors on the hazards present at each major coastal asset through signage, wayfinding, and online safety listings, and offer rescue services during emergency events in the form of lifeguards on-duty.

Process

- Municipalities to convene to identify beach safety priorities and determine joint beach guidelines (with support of advisors from DNER, PRTC, and Puerto Rico Sea Grant).
- Conduct an assessment of ADA-accessibility of key beaches and identify structural improvements required to comply with ADA regulations.
- Contract and design new North Region Safe Coast signage that aligns with any existing beach signage, including that produced by Para La Naturaleza for Playa La Cueva De Las Golondrinas.
- Select high-risk beaches to benefit from pilot signage and lifeguards, and ADA-compliance improvements.
- Hire and train the first batch of North Region lifeguards who will be rostered across selected high-risk beaches of the region to carry out lifeguard duties for a year. Training for North Region lifeguards must meet national standards determined by the United States Lifesaving Association.
- Assess the success of pilot program at the end of the first year to determine program modification/expansion.

COVID-19 Recovery

As previously mentioned, coastal assets that offer expansive outdoor spaces will be critical in the immediate post-COVID-19 travel era as travelers seek socially distanced recreation options. Travelers will also be on the lookout for health and safety guidelines across destinations, including at beaches. In the immediate years following the pandemic, beach safety signage created as part of the program may also include ‘social distance markers’ along the length of beaches.

Diagnostic: Why Is This Project Important?

Physical assessments conducted by the Field Team and Destination Planning Team at a number of key beaches/waterfront attractions in the North Region, including Cueva del Indio, found that many of these assets feature
dangerous terrain and current/tide conditions that have not been mitigated by clear safety signage or lifeguards on-duty, placing many tourists at risk when visiting these assets. In addition to anecdotal information provided to us by the ticketing manager at major asset, Cueva del Indio, around annual reported injuries on-site, a recent study by Sea Grant College Program also found that there is one open-water drowning every twelve days in Puerto Rico associated with “rough surf, rip currents, and jagged rocks that are very prominent on many of Puerto Rico’s beaches.”

Safety and security have always been indispensable conditions for travel and tourism. Without active reassurance of safety, visitors may be discouraged from entering a site or repeating a visit.

**Partners & Resources**

- Department of Natural and Environmental Resources (DNER)
- Municipalities
- Property owners who provide access to the beach, including Para La Naturaleza in Manati.
- Puerto Rico Sea Grant may be able to provide strategic assistance in setting up the program in the North Region, given its ongoing efforts to implement a lifeguard program on high-risk beaches throughout the island.
- PRTC will be a key partner given their vested interest in ensuring visitor safety, especially following recent natural disaster events and the COVID-19 pandemic.

**Case Study or Best Practice**

Although the State of Hawaii does not provide lifeguards, it elected to contract with each City and County’s Safety Divisions to place their own lifeguards at key beaches. Each City/County then determines its own lifeguard schedules and hiring/training practices; however, all lifeguards must be certified by the Hawaiian Lifeguard Association, and rescue services must be made available throughout the week from 9am-5pm across Hawaii.

The Hawaiian Lifeguard Association established the Hawaii Beach Safety website that consolidates all information pertaining to aquatic safety within a single portal so that both locals and visitors are able to easily access real-time water conditions online from anywhere so that they are able to make informed trip decisions.

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Recommendations

Island-Wide
## Establish a Public Activation Program

<table>
<thead>
<tr>
<th>Category</th>
<th>Marketing, Events and Promotion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team</td>
</tr>
<tr>
<td>Budget</td>
<td>Medium ($50,000-$200,000) - assuming by region</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Short Term (Less than 5 years)</td>
</tr>
<tr>
<td>Risk</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 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)

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**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.

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Public art in Mérida, Mexico. Source: Jeremy Martin (Flickr)
Small Lodging Financial Fund

Provide additional funding to existing small hotel operators

<table>
<thead>
<tr>
<th>Category</th>
<th>Place-Based Asset Enhancement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Community</td>
</tr>
<tr>
<td>Budget</td>
<td>High ($200,000+)</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Medium Term (5-10 years) to Long Term (10+ years) / Ongoing</td>
</tr>
<tr>
<td>Risk</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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.

**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).
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

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/](http://www.vatc.org/tdfp/)

Source: Unsplash
### Regional Wayfinding

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Access and Mobility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team</td>
</tr>
<tr>
<td>Budget</td>
<td>Medium ($50,000-$200,000)</td>
</tr>
<tr>
<td></td>
<td><em>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.</em></td>
</tr>
<tr>
<td>Timeframe</td>
<td>Short Term (Less than 5 years)</td>
</tr>
<tr>
<td>Risk</td>
<td>Low - Tourism-oriented directional signage is common and an accepted form of directional signage for visitor destinations in many places.</td>
</tr>
<tr>
<td>Key Performance Indicator</td>
<td>• Total count of new signs directing visitors to local businesses and increase sales and visitation</td>
</tr>
</tbody>
</table>

### 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
Action Item

Provide training and one-on-one technical assistance to businesses that enable them to claim their business listings on a variety of popular review sites, including TripAdvisor, Google, Facebook, and Yelp.

Become a Google My Business Partner. Google has developed a new program that provides customized support to agencies that can maintain client business listings on their behalf. Agency partners receive a personalized dashboard that enables them to track and update basic business listing information, including a business’ location, hours and services.

Structured Data Websites. A well-designed website uses “structured data”, which refers to the standardized format of providing information on a page and classifying content. When data is properly structured on a website, a user who searches for a business (for example, “best dinner in Aguadilla”) will see results that include both listed and unlisted businesses.

Process

- Explore partnerships between merchants’ associations and local educational institutions that bring together technically savvy students - either at the high school or college level - to provide technical assistance in exchange for credits.

Diagnostic: Why Is This Project Important?

For most visitors, the decisions they make that inform where they go, where they stay, and what they do after arrival 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.

25% of the region’s local assets are not listed on Google according to a recent survey conducted by Streetsense (2020).

Example of a ‘rich’ local business listing based on a user query. Source: Google.
Grants for Business Operations and Facade Improvements

Provide financial assistance to business owners to enhance business sales.

<table>
<thead>
<tr>
<th>Category</th>
<th>Business Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team</td>
</tr>
<tr>
<td>Budget</td>
<td>Medium ($50,000-$200,000)</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Medium Term (5-10 years)</td>
</tr>
<tr>
<td>Risk</td>
<td>Medium - A permanent fund requires multiple partners to coordinate and share resources.</td>
</tr>
</tbody>
</table>

**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 crowdsourcing platforms, revolving loan funds, or matching grants. The specific uses for the funds should be defined (i.e., point of sale technology, facade improvements, expansions, or equipment acquisitions). Partners such as Kiva could support matching grants. 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.
Customer Service Training

Provide training to local workers employed in the tourism economy and managing tourism assets.

<table>
<thead>
<tr>
<th>Category</th>
<th>Business Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Key Stakeholders; Destination Planning Team</td>
</tr>
<tr>
<td>Budget</td>
<td>Low (&lt;$50,000)</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Short Term (Less than 5 years) to Medium Term (5-10 years)</td>
</tr>
<tr>
<td>Risk</td>
<td>Low</td>
</tr>
<tr>
<td>Key Performance Indicator</td>
<td>• Total number of participants in the workshops</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Organizational Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team</td>
</tr>
<tr>
<td>Budget</td>
<td>Low (&lt;$50,000) - annualized</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Short Term (Less than 5 years)</td>
</tr>
<tr>
<td>Risk</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 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 curriculums 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
## Create a data co-operative for tourism assets

<table>
<thead>
<tr>
<th>Category</th>
<th>Organizational Capacity</th>
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<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team</td>
</tr>
<tr>
<td>Budget</td>
<td><strong>Medium ($50,000-$200,000) - annualized</strong>&lt;br&gt;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.</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Short Term (Less than 5 years)</td>
</tr>
</tbody>
</table>
| Risk              | **Medium**<br>-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.
Support assets by developing a fair and equitable fee model for entrance.

### Entrance Fees for Sustainable Asset Management, Employment, and Improvements

<table>
<thead>
<tr>
<th>Category</th>
<th>Organizational Capacity</th>
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</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team</td>
</tr>
<tr>
<td>Budget</td>
<td>Low (&lt;$50,000)</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Medium Term (5-10 years)/Ongoing</td>
</tr>
<tr>
<td>Risk</td>
<td>Medium</td>
</tr>
</tbody>
</table>

- 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
### Shared Services

Support shared operational services amongst small organizations working in the visitor economy

<table>
<thead>
<tr>
<th>Category</th>
<th>Organizational Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Community</td>
</tr>
<tr>
<td>Budget</td>
<td>Medium ($50,000-$200,000)</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Long Term (10+ years)</td>
</tr>
<tr>
<td>Risk</td>
<td>Medium - This project requires coordination with multiple providers and identifying sources of funds to support the participating organizations.</td>
</tr>
</tbody>
</table>
| 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/](https://www.vatc.org/grants/leverageprogram/)
Fiscal Sponsorship for 501(c)(3) Status

Fiscal sponsorship to enable organizations to access 501(c)(3) status exemptions.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Origin</td>
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<tr>
<td>Budget</td>
<td>Low (&lt;$50,000)</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Long Term (10+ years)</td>
</tr>
<tr>
<td>Risk</td>
<td>Low</td>
</tr>
<tr>
<td>Key Performance Indicators</td>
<td>• Total value of funds raised through fiscal sponsorship program</td>
</tr>
</tbody>
</table>

Action Items

Identify organizations or create a fiscal-sponsorship organization to support local non-profits. In addition, provide training to participating organizations so they may better understand compliance requirements and processes.

Process

- Identification of organizations and initiatives with the need of fiscal sponsorship for new projects that could impact the visitor economy
- Identification of existing organizations that provide fiscal sponsorship.
- Assess the feasibility of creating a 501(c)(3) entity to provide fiscal sponsorship to projects in the visitor economy.

Diagnostic: Why Is This Project Important?

Most non-profit organizations in Puerto Rico do not have formal 501(c)(3) tax exemption status. For this reason, they cannot apply for funding from foundations and government programs. They are also not eligible for tax exemptions from sales and property taxes.

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

Partners & Resources

- Local Philanthropic Foundations

Case Study or Best Practice

A written agreement should be outlined between the fiscal sponsor organization and the sponsored non-profit organization. The agreement should specify the responsibilities of the fiscal sponsor including recordkeeping and legal compliance, and the administrative fee that the sponsored organization will provide to its fiscal sponsor for these services. For a sample of a written agreement, refer to this resource from the National Council of Non Profits.

Source: Shutterstock
**Technological Tools to Enable Sales of Products and Entry Fees**

Provide technological tools to facilitate customer services and visitor experiences

<table>
<thead>
<tr>
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<tr>
<td>Budget</td>
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<td>Long Term (10+ years)</td>
</tr>
<tr>
<td>Risk</td>
<td>Low</td>
</tr>
</tbody>
</table>

**Key Performance Indicators**

- Total number of businesses participating in the program
- Perceived benefit of improvements by participating businesses
- Increased recorded sales from related activities

**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.

**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.

**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*
Electrical Service

Ensure long-term local resilience of electrical services

<table>
<thead>
<tr>
<th>Category</th>
<th>Infrastructure</th>
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</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Destination Planning Team</td>
</tr>
<tr>
<td>Budget</td>
<td>High ($200,000+)</td>
</tr>
<tr>
<td>Timeframe</td>
<td>Long Term (10+ years)/Ongoing</td>
</tr>
</tbody>
</table>

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 cents per kilowatt hour, compared to 13.17 cents in the United States.106

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

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Fallen power lines and damaged roads following the aftermath of Hurricane Maria. Source: Flickr.
Waste Management

Ensure sustainable waste management practices and reduction of plastics/ styrofoam products and packaging

<table>
<thead>
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<tr>
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<td>Long Term (10+ years)/ Ongoing</td>
</tr>
</tbody>
</table>

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).

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.
**Water Quality**

*Improve water quality through investments in sewage treatment*

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</tr>
</tbody>
</table>

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**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**

Recommendations
Early-Stage
The following recommendations in this section were presented to the Destination Planning Team by local community stakeholders through the Nido Cultural Process. Although these strategies present opportunities to attract new visitors and leverage new spending in the region, they are early ideas that will require significant support and reinvention following the impacts of COVID-19. Many key elements that will enable the full execution of the strategy have not been uncovered and will require further exploration.

1 Renovation of historic building for independent bookstore, cereal bar and restaurant.

<table>
<thead>
<tr>
<th>Category</th>
<th>Place-Based Asset Enhancement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin</td>
<td>Nido Cultural (Applicant: Mr. Franco Bauzá)</td>
</tr>
<tr>
<td>Location</td>
<td>Calle McKinley #30 Manatí, Puerto Rico</td>
</tr>
</tbody>
</table>

Librería Franco Bauzá is a proposed cultural space that includes an independent bookstore, cereal and coffee bar, and a restaurant that will offer artist clients a place dedicated to social gatherings, live music, open mic sessions, a selection of Caribbean literature, amongst other international titles.

The facility will transform La McKinley Street in downtown Manatí by building a destiny for bibliotherapy unlike any other in the area. Its main mission is to promote the McKinley street and start engaging with businesses in the urban center of Manatí, joining the current movement that wants to see the Main Street prosper once more.

Collaborations between local businesses are therefore key to the success of this project, including featuring local products and services at the asset from other businesses in Manatí (such as Pastelillos Lamboy, products from the “Plaza del Mercado” of Manatí, etc.).
Partners & Resources
A key partner on the project has been identified: Hacienda Vega Grande, an established coffee farm in Jayuya. Hacienda Vega Grande’s culinary expertise will be critical for the coffee bar experience at the Librería. Other partners include a local brewery, another food and beverage expert who will be able to customize gastronomy offerings at the asset.

Risks
The major risk as of this moment is the impact the pandemic will have on both the local and international economy. Despite some project delays that resulted from the pandemic and closure of operations and businesses island-wide, Mr. Franco Bauza has moved forward with phase 2, which includes cleaning and rehabilitation of the historic building. To engage with neighbors and local businesses, Mr. Franco Bauza will also be surveying them to determine the exterior design of the building.

Currently, La McKinley is in a state of disrepair following destruction from the Hurricane, and the more recent entry of national chains, such as Walmart and other stores at the Premium Outlets, have taken away spending from the historic center. Small businesses will likely continue to struggle to attract visitors with competition from other more convenient retailers.

Other risk factors are the perception of crime and safety in the historic urban center that discourages pedestrians and visitors from the area, and inconvenient parking areas for customers.

Case Study or Best Practice
Libros AC (San Juan, PR); Casa Norberto (San Juan, PR)

Source: Michal Parzuchowski (Unsplash)
Historical Scavenger Hunt (HSH)

Historical Scavenger Hunt (HSH) is an experiential and fun way to engage tourists in historical, cultural, and educational tours (face-to-face and/or virtually) in Manati. The “gamification” takes tourists through the town through a clue search experience with stops along the tour to better learn about the region’s history. In HSH, the tourist experiences the event, has an active role where he discovers the story and builds his interpretation of that event in history. In addition, it seeks to promote a “call to action” where participants collaborate in rebuilding the town.

Category
• Marketing, Events and Promotion

Origin
• Nido Cultural ( Applicant: Odette Piñeiro)

Location
• Urban center of Manati

Partners & Resources
Potential collaborators include:
• Centro del Estudiante y Maestro Investigador, Corp. (CEMI)
• Municipality of Manati
• Manatíenos Creators Group
• Cultural Center of Manati (collaborate with facilities)
• University of Puerto Rico Utuado
• Para La Naturaleza (collaborate with the facilities, tours and cultural stories)
• Manati Office of Tourism
• PRTC (Porta Atlántico Office)
• Empresa Destino Online
• Barrioization

Risks
The pandemic has shifted many visitor experiences to virtual or contactless experiences to ensure social distancing and high sanitation standards. As such, the tour will need to consider the changing consumer preferences that will follow even after the pandemic.

Case Study or Best Practice
History Detectives Special Investigations (Europe, United States)
Hospedería Verde

Incorporated since 2014 and certified by the Department of Agriculture, Semila is an agro-business located in Barceloneta. Following the agro-forestry system, this farm has plantations of cocoa, coffee, breadfruit, bananas, and other fruits and vegetables. The model used promotes food security, soil conservation and farmer sustainability. One of Semila’s pillars is education. In its Cacau Tour, visitors are taught the process of growing plants in a garden nursery, integrating multiple crops in the field, and chocolate tasting, among other things. In the past years, many visitors and volunteers have mentioned their interest in spending the night in places where they can be connected with nature. However, at the moment, most of the lodging accommodations are far from agro-tourism assets.

The creation of the Hospedería Verde aims to meet this demand and offer visitors and volunteers the opportunity to enjoy their visit for a longer time, learn more about the forest and carry out activities where they can connect with nature. This project is complementary to the region’s agro-tourism offers since Semila farm is close to the other agricultural assets mentioned in the plan.

**Process**
- Hire consultant services for the design of the lodging structure.
- Obtain required construction permits and begin construction of lodging facilities.
- Recruit staff for Hospedería Verde.
- Promote and market the lodging.
- Seek integration and collaborations with other agro-tourism assets of the region.

**Partners & Resources**

Potential collaborators include:
- PRTC (Sustainable Tourism Office)
- FPR
- Barceloneta Municipality
- Innovation Grant for the Agricultural Development
- Farm Service
- Farm Credit
- Puerto Rico Agro-businesses
Conclusion
Conclusion

The Destination Plan provides a set of a comprehensive and strategic starting points for investment and policies to improve the assets that make each region unique. These improvements are based on an assessment of the gaps that exist between the assets themselves and the expectations of individual customer segments. The approach is comprehensive because growth in the visitor economy is a complex process that cannot be accomplished through a single project. Much like a three-legged stool — if one of the legs is broken, a project cannot succeed. For successful long-term efforts, a comprehensive approach is critical.

The projects outlined here are also incremental and focused on existing assets by design. Many of the short and medium-term projects in the plan are starting points to help communities build their ability to take on simple projects, leading them to a more sophisticated understanding of how the visitor economy works. Starting with projects that enable communities to see tangible success helps 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**

<table>
<thead>
<tr>
<th>Category</th>
<th>Marketing, Events + Promotion; Place-Based Asset Enhancement; Infrastructure; Access and Mobility; Business Support; Organizational Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Street address of the project or area of coverage</td>
</tr>
<tr>
<td>Origin</td>
<td>Where did the project originate from? You may select one or more options: Destination Planning Team, Community Meetings, Nido Cultural, FPR, National Agency, i.e. PRTC Porta del Sol Plan, or other</td>
</tr>
<tr>
<td>Budget</td>
<td>These budgets are formulated based on industry experience and comparable project budgets. <em>Low Budget</em> (Under $50k), <em>Medium Budget</em> ($50k - $200k), <em>Large Budget</em> ($200k +)</td>
</tr>
<tr>
<td>Timeframe</td>
<td>How long will the project take to implement? <em>Short Term</em> (Less than 5 years), <em>Medium Term</em> (5-10 years), <em>Long Term</em> (10+ years)</td>
</tr>
<tr>
<td>Risk</td>
<td>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.</td>
</tr>
<tr>
<td>Key Performance Indicators</td>
<td>What are the project’s anticipated impacts on the visitor economy – cultural, social, economic – and identify catalytic/ transformative nature of the project?</td>
</tr>
<tr>
<td>Action Item</td>
<td>Description of the project</td>
</tr>
<tr>
<td>Process</td>
<td>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.</td>
</tr>
<tr>
<td>COVID-19 Recovery</td>
<td>How will this project mitigate the impacts of COVID-19 and/or help the region recover from the pandemic?</td>
</tr>
<tr>
<td>Diagnostic</td>
<td>How did the market assessment findings lead us to this project?</td>
</tr>
<tr>
<td>Partners and Resources</td>
<td>Who are the potential partners and champions of this effort?</td>
</tr>
<tr>
<td>Case Study/Best Practice</td>
<td>What local/regional/national/international examples are similar to the project being proposed or that may inspire the current project?</td>
</tr>
</tbody>
</table>
Destination Plan

Thank You

For more information, contact Foundation for Puerto Rico
787-773-1100 / foundationforpuertorico.org

Prepared by: streetsense.

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