D16

National tourism strategy and implementation plan for Turks & Caicos

March 2023

TARGET
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Introduction

This report represents "D16 – National Tourism Development Strategy and Implementation Plan" for Turks and Caicos Islands as requested by the TOR.

The new tourism strategy considers that the tourism industry is an essential part of TCI's economic growth and is bringing important revenues, job opportunities and a better quality of life for the local population. In the last 20 years, international visitors (overnight tourists and cruisers) passed from only 166.000 in 2001 to almost 1.6 million in 2019. TCI has been faster than any other country in the Caribbean in catching up with pre-Covid19 night tourist numbers. Overnight tourist arrivals in 2021 already accounted for about 85 per cent compared to 2019, and the first six months of 2022 saw a full recovery from pre-COVID-19 figures. While cruise passenger arrivals in 2022 were only 30 per cent lower than those recorded in 2019.

This report also takes into consideration the most current TCI tourism policies and strategies of TCIG, which are those included in the "*National Tourism Policy and Strategic Implementation Plan for the Turks and Caicos Islands*" (KMPG, 2015) and the "*TCI Tourism Strategic Plan*" (2017). Moreover, other important documents that consider a sustainable development of the tourism industry in TCI are the "*2021 A Citizen's Contract*", "*The Peoples Plan for Progress",* and the "*Draft National Physical Sustainable Development Plan*"[1]. Based on this TCI tourism development, the new National Tourism Development Strategy and Implementation Plan for TCI proposed by Target Euro is based on the new scenario that will be generated with the creation and implementation of the new TCI Destination Management Organisation.

The report examines the country's current tourism industry, identifying priority destinations where their tourism offer can be improved/developed. Furthermore, the strategy organised the country's tourism offer into four different tourism districts, identifying each district with its own portfolio of tourism products. These tourism products complement each other, allowing each district to integrate its offer with that of the other districts. This approach will enable TCI to integrate all its destinations into the tourism offer, facilitating inclusive growth and increased market competitiveness through the diversification of tourism products.

The report is organised into two parts including 13 chapters. **Part 1** focuses on the analysis of the current tourism demand and offers to identify which are the key factors to consider by the development strategy. It also includes the feedback about the potential tourism development of the different TCI destinations provided by the tourism stakeholders met within the field missions of the Target Euro team in TCI-this part ends with a detailed analysis of the positioning of the destination on the internet, including its reputation analysis. **Part 2** is focused on the strategy that tourist stakeholders should implement in collaboration with the TCI DMO to develop new tourism products and enhance the competitive capacity of the existing ones. This part ends with a detailed action plan and key recommendations to consider for its implementation.

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[1] See Report D3-D4-D13 for more details about the tourism policy and strategy of the TCIG

PART 1

ANALYSIS OF THE CURRENT TOURIST DEMAND & OFFER OF TURKS & CAICOS ISLANDS

1 Current Tourism Demand

N.B. For more details, please refer to ANNEX A

1.1 Development of the Tourism Sector on the Turks and Caicos Islands from 1995 to 2020[2]

● The following chart shows the number of tourist arrivals[3] registered on the Turks and Caicos Islands each year between 1995 and 2020. The chart shows an outstanding constant increase from 79,000 arrivals in 1995 to 1,600,000 in 2019. The decline in 2020 is evidently related to the COVID-19 pandemic outbreak.

Figure 1: Development of the tourism sector on the Turks and Caicos Islands from 1995 to 2020[4]
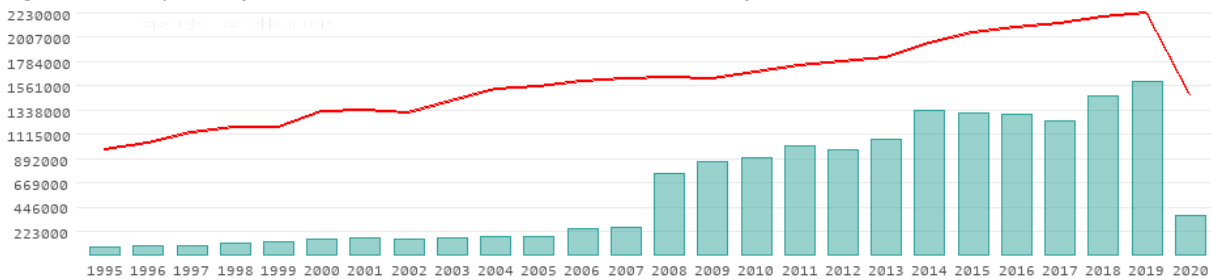
(source: worlddata.info) The red line represents the average of all 21 countries in the Caribbean.

1.2 Revenues from Tourism

● In 2001, tourism revenues amounted to 311.00 million USD which was 86.7 per cent of the gross national product. This corresponds to 166,000 tourists and an average of 1,873 USD per person. Over 17 years, the country's reliance on tourism has decreased noticeably. Before the outbreak of the COVID-19 pandemic, direct international tourism revenues were $825.00 million USD in 2019, which was 68.9 per cent of the gross national product. Thus, each visitor spent an average of $1,695 USD on their vacation in the Turks and Caicos Islands. This means that more tourists have visited in the last 20 years, but they spent much less (almost -$180 per tourist).

Figure 2: Revenues from the tourism sector in TCI from 2001 to 2019[5]
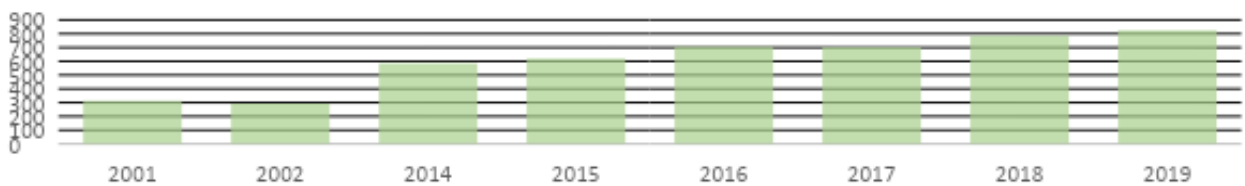
Source: Elaboration of Target Euro with TCIG data

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[2] https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php
[3] Notes: Anyone who spends at least one night in the country but does not live there for more than 12 months is considered a tourist. The number of people passing through within the same day, e.g., crew members of ships or flights, are also not considered tourists in most countries. If the same person travels in and out more than once within the same year, each visit counts again.
[4] https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php
[5] https://www.worlddata.info/america/turks-and-caicos-islands/tourism.php

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1.3   TCI Leads the World in Travel Demand

- According to TripAdvisor Consumer Sentiment Survey[6], T**urks and Caicos Islands continue to lead the Caribbean in tourist arrivals**, and now the world, with TripAdvisor predicting a prosperous fall season for the territory.

- According to TripAdvisor's 2022 fall travel index, released in August 2022, **TCI remains a hot spot for travellers** and is the top overall trending destination for the fall worldwide.

- "Of the locations which have seen the biggest year-on-year increase in searches on TripAdvisor by Americans for travel this fall, **the dreamy Caribbean destination Turks and Caicos is at number one**," the Index outlines.

- TripAdvisor also reported that **TCI had seen the fastest growing demand based on year-over-year growth compared to the fall of 2021**. That is a strong sign, given the territory's already-outstanding performance last year at this time.

- **TCI beat out traditionally leading global destinations** such as Ho Chi Min City, Singapore, London, Bangkok, Italy, and The Netherlands, among others.

- In the top 15 worldwide destinations ranked, TCI was the only Caribbean destination that made the TripAdvisor list.

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[6] The report was based on a TripAdvisor Consumer Sentiment Survey, which collected data from an online survey of over 2,700 consumers. The survey was conducted in partnership with Qualtrics, between July 6, 2022 and July 22, 2022, across six countries: theUS, the UK, Australia, Italy, Singapore, and Japan.
The travel site also looked at site behavioural data sourced from first-party traffic data on the TripAdvisor platform, gathered during the week commencing July 4, 2022, for searches made by U.S. travellers from June 1, 2022, through June 30, 2022 for travel between September 1, 2022 through November 30, 2022.
https://tcweeklynews.com/tci-leads-world-in-travel-demand-tripadvisor-reports-p12680-127.htm

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2   Selected 16 Travel Destinations

N.B. For more details, please refer to ANNEX B

Figure 3: Map of the Turks and Caicos Islands[7]
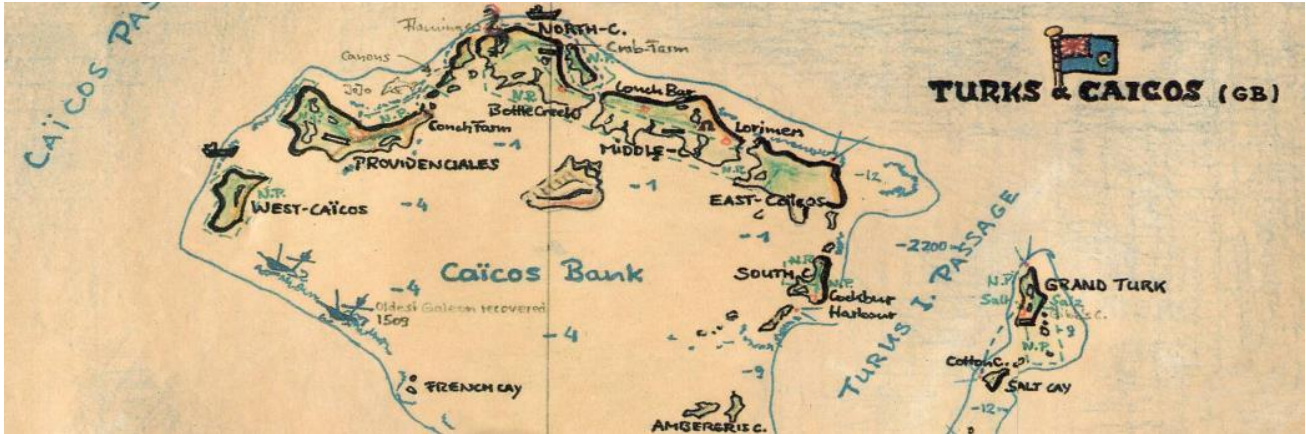
2.1   Methodology and Rationale for Choosing the 16 Islands and Cays

The Turks and Caicos archipelago has 40 main islands and cays. There are an additional 62 named very small cays and rocks. Nine islands in the Turks and Caicos are inhabited.

For the mapping, analysis, and tourism development strategy for Turks & Caicos Islands, we have considered 16 islands, cays, and rocks as being travel destinations with current tourism flows or with a tourism potential:

● The inhabited islands in the Turks and Caicos, in order of population, are Providenciales, Grand Turk, North Caicos, South Caicos, Middle Caicos, Salt Cay, Pine Cay, Parrot Cay, and Ambergris Cay.

● Additional 7 uninhabited islands, cays and rocks: West Caicos, East Caicos, Mangrove Cay, Little Water Cay, Seal Cays Wildlife Sanctuary, Cotton Cay, and Big Sand Cay / Great Sand Cay as they express an interesting tourism present or potential.

2.2   The Selected 16 Travel Destinations

The following are the 16 selected travel destinations in the Turks and Caicos Islands:

1.   PROVIDENCIALES

● Providenciales (Provo)[8], is the main destination in TCI, accounting for more than 90% of the country's tourism infrastructure and demand.

2.   WEST CAICOS

● Formerly known as Belle Island, this 11-square-mile island is protected by the West Caicos Marine National Park.

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[7] Copyright 1993 by Heinz Meder
[8] Visited in May, June, July, August, and October 2022 by consultants of Target Euro

3. MANGROVE CAY

● This scenic mangrove island is the easiest wetland paddling spot to access on Providenciales.

4. LITTLE WATER CAY

● This privately held island is home to the nature reserve of Little Water Cay, also known as 'Iguana Island.'

5. PINE CAY

● This privately-owned island, located between Providenciales and North Caicos has low-density residential development.

6. PARROT CAY

● This 1000-acre island is located east of Providenciales and is a popular destination for celebrities.

7. NORTH AND MIDDLE CAICOS

● These "twin islands"[9] are primarily agricultural areas with limited tourism infrastructure and few visitors.

8. EAST CAICOS

● The largest and uninhabited island in TCI, East Caicos, is home to the outstanding natural wildlife and setting of Bay Cay Island, which is part of the East Bay Islands National Park.

9. SOUTH CAICOS

● This quiet island[10] is supported by small-scale commercial fishing and some tourism.

10. BIG AMBERGRIS CAY / LITTLE AMBERGRIS CAY

● This 1,100-acre private island is home to three luxury resorts, including the Ambergris Cay Resort[11].

11. SEAL CAYS WILDLIFE SANCTUARY

● This wildlife sanctuary is made up of a group of uninhabited cays and rocks.

12. GRAND TURK

● This small tropical island[12] offers a range of water sports, historical sights, and beautiful beaches.

13. SALT CAY

● The smallest inhabited island[13] in TCI, with a population of only 108 people.

14. COTTON CAY

● This privately owned, uninhabited island was historically used to raise cotton and sisal and features plantation ruins and field walls.

15. BIG SAND CAY

● This remote, uninhabited island (also known as Great Sand Cay) is an exceptional location for birdwatching.

16. WATER CAY

● This small island is located off the east coast of Providenciales and features beautiful beaches and clear waters.

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[9] Visited on May 3rd, and on July 26th and 27th 2022
[10] Visited on May 5th and July 28th, 2022
[11] Visited on July 30th, 2022
[12] Visited on May 4th, and July 29th, 2022
[13] Visited on July 30th, 2022

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3   Analysis of the Primary Tourism Services

N.B. For more details, please refer to ANNEX C

The primary tourism services, including transportation, accommodation, and food & beverage, are crucial aspects of a destination. Visitor satisfaction, along with the quality, quantity, and accessibility of these services, play a significant role in encouraging tourists to stay longer and spend more.

Following is a short overview:

3.1   Transports

Arriving at TCI

Most tourists travelling to the Turks and Caicos usually take a plane to Providenciales or cruise ship to Grand Turk. For citizens or legal residents of the United States, United Kingdom, and Canada, obtaining a visa is unnecessary when visiting this destination, making it an effortless choice.

Arriving by plane

Providenciales International Airport (PLS) is the sole airport for international flights into Turks and Caicos, with direct flights from 11 North American cities and connecting flights from major United States east coast cities. British Airways operates trans-Atlantic flights via Antigua, with a layover. Flights to neighbouring Caribbean countries have become more affordable, with added routes and frequent flights offered by Caicos Express, interCaribbean, and Bahamasair.

Arriving by Cruise Ship

The Turks and Caicos have only one cruise ship port, located on Grand Turk Island. All cruise ships destined for the Turks and Caicos dock at this port, and the cruise lines take care of all immigration and customs formalities, making the arrival process straightforward. Typically, tourists stay around six hours before departing. Given the limited time available, it's impractical to visit any of the other primary islands in the country.

Arriving by Yacht

Upon arriving at the TC islands, a yacht must make its first stop at a designated port-of-entry, which includes multiple marinas on Providenciales and Grand Turk, and one each on North Caicos and South Caicos. The harbourmaster at the port of entry can grant permission to enter for one week. Suppose individuals plan to extend their stay or sail among the islands. In that case, they must obtain a Cruising Permit, valid for 90 days, or visit one of the immigration offices located on Providenciales or Grand Turk.

Moving Around in TCI

To move between the islands, small domestic flights and passenger ferries are the primary modes of transportation. Most of the population is concentrated in Providenciales and Grand Turk, which serve as transportation hubs. North Caicos and Middle Caicos are connected by a causeway, making them the only islands in the country linked by road. On the islands, rental cars, taxis, and other vehicles are the primary means of transportation, as no public transport, bus, or train services available. Additionally, large car ferries are absent in Turks and Caicos.

3.2   Accommodation

The Turks and Caicos Islands offer diverse vacation accommodations, each with a unique atmosphere and perspective. Providenciales features large full-service resorts and family-friendly hotels, while Grand Turk offers quaint colonial inns. The sparsely populated islands of North Caicos, Middle Caicos, and Salt Cay have small guest houses and boutique beach hotels, perfect for those who appreciate nature and seclusion.

Table 1: Tourist Accommodation 2020[14]

	Hotels	Condo Hotels	Villas	Other	Rooms
Providenciales	11	29	269	9	4,114
Grand Turk	4	-	10	-	155
South Caicos	2	-	-	-	87
North Caicos	2	-	30	1	124
Middle Caicos	-	-	3	-	13
Parrot Cay	1	-	7	-	106
Ambergris Cay	1	-	-	-	10
Pine Cay	1	-	8	-	38
Total	**22**	**29**	**327**	**10**	**4,647**

TCI accommodation system can be broken down into the following categories:

a)   Condominiums and Mixed Condo/ EP Hotels

The condominium hotels sector has led the development of tourism in the Turks and Caicos. Condominium hotels have increased visitor numbers and helped establish a solid domestic real estate market and repeat

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[14] https://tourismanalytics.com/turks--caicos.html

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tourism. These million-dollar-plus condos offer a high-end luxury product, attracting buyers who intend to live in them, use them as a vacation homes or rent them out.

Condos have always been the backbone of the country's real estate sector, and sales on the island boomed during Covid-19, with mainly US buyers flocking to the islands. Sotheby's reports that 85% of island real estate owners are from North America.

Although condos are individually owned, management companies such as the Hartling Group manage these assets for the owners while operating hotel and grounds operations, food and beverage, spa, and retail. The condo/resort business model is the foundation of the tourism industry in Turks and Caicos, resulting in a high-level product.

b)   Traditional "European Plan" (EP) Hotels and Resorts

The Turks and Caicos Islands attract regional hotel chains, including traditional "EP" hotels and international brands such as Comfort Suites, Preferred Hotels & Resorts, Regent, and Sandals Resorts. The strategic priority is to attract high-end international hotel brands such as Hyatt and Marriott. Ritz-Carlton has also expressed interest in developing in the area.

Most of the available rooms on Providenciales are provided by hotels and resorts, which range from small, boutique accommodations to expansive and luxurious resorts. The other islands in the Turks and Caicos also have resorts and hotels, but they are usually smaller than those found on Providenciales.

c)   Private Villas and Home Rentals

The vacation villa rental category encompasses a range of options, from luxury mansions to partitioned guest houses, which are fully furnished, often with equipped kitchens. However, room service and housekeeping are not included in most rentals other than the largest sites, unlike luxury hotels and resorts. On the positive side, vacation rentals usually offer more space and privacy.

Most vacation rentals are located on Providenciales, and the other islands in the Turks and Caicos typically have rental villas or guest houses as their primary accommodations.

d)   Timeshares

Fractional timeshare ownerships are discouraged, and there are not many current operations.

e)   All-Inclusive Resorts

The Turks and Caicos have nine all-inclusive resorts, five located on Providenciales and the remaining on smaller islands. These resorts usually include dining, on-site activities, and other amenities in their room rate. However, due to these added benefits, the cost of an all-inclusive room rate is often at least twice as much as a comparable room at a typical resort.

f)   Bed and Breakfast Hotels

The high-end bed and breakfast category is experiencing growth due to the potential added value of this investment in the Turks and Caicos.

g)   Homestay and Budget Lodging

Homestays and budget lodgings are the most economical options, with single rooms rented by the accommodation owner. Beachfront properties can be expensive, but due to the small size of the islands in the Turks and Caicos, even remote and inland accommodations are not far from the ocean.

h)   Specialist Hotels for Divers, Weddings, Others

The Turks and Caicos is renowned for miles of exquisite barrier reefs, walls, clear waters, and abundant wildlife. Building on this, TCI specialist dive resorts, have been opened such as the Ocean Club Resort, Beaches Turks & Caicos Resort, Ports of Call Resort (Providenciales), Bohio Dive Resort (now closed, Grand Turk), East Bay Resort, South Caicos Ocean & Beach Resort (South Caicos).

The Turks and Caicos are known for their beautiful barrier reefs, clear waters, and abundant marine life. As a result, several dive resorts have opened, such as the Ocean Club Resort, Beaches Turks & Caicos Resort, Ports of Call Resort (Providenciales), Bohio Dive Resort (now closed, Grand Turk), East Bay Resort, and South Caicos Ocean & Beach Resort (South Caicos), to offer specialised diving experiences.

The High and Low Seasons

The tourism industry in Turks and Caicos follows a seasonal pattern, with the highest prices typically from December to April. From May to November, hotels and resorts often offer special package deals, such as free nights or reduced rates, to attract guests during the off-season. The late summer hurricane season is the least popular time for visitors, and as a result, there are fewer tourists during this time.

3.3   Food & Beverage

The Turks and Caicos Islands offer a diverse range of cuisines and flavours to satisfy foodies. While Providenciales is the primary hub for dining, each smaller island offers a unique perspective on local cuisine.

There are over sixty restaurant options on Providenciales, with many offering a fusion of international and local seafood dishes. The island also has several fine dining options, with renowned chefs creating gourmet meals. Traditional cuisine can be found in authentic Japanese, Italian, French, Mediterranean, Moroccan, Thai, Indian, Jamaican, and other restaurants.

Local food festivals, such as the Conch Festival, provide an opportunity to sample the local cuisine and learn about the island's cultural history. Island Fish Fries are also common and offer a local version of the backyard BBQ.

Hiring a private chef is a great option for vacation villas or larger resort and condominium suites with full kitchens. It's perfect for special dietary or allergy considerations, or if you catch a good catch from a fishing charter.

Deep-sea sport fishing is also a popular activity in the Turks and Caicos, and local restaurants can prepare the catch.

3.4   Shopping.

Shopping in the Turks and Caicos is not as extensive as in other major tourist destinations, but there are unique treasures to discover. The best collection of gift, art, boutique, and souvenir shops can be found on Providenciales and Grand Turk, while the smaller and less-populated islands have limited options, mostly groceries and locally-made arts and crafts.

Luxury items such as watches, jewellery, perfumes, and leather goods are available on Providenciales and Grand Turk. Duty-free products are offered at the Providenciales International Airport and the Grand Turk Cruise Center. Duty-free products are only available to non-Turks and Caicos residents.

Queen Conch shells are popular souvenirs and can be found on many beaches and at shops and markets, but there are restrictions on exporting them.

The art scene in Providenciales is diverse, with many galleries showcasing paintings, prints, sculptures, ceramics, fine art photographs, and more.

Middle Caicos distributes handmade baskets, hats, model sailboats, and authentically Turks and Caicos dolls. These items are made by older members of society using techniques passed down through generations and are woven and carved from locally harvested materials.

Several boutiques in the Grace Bay region and upscale resorts carry soaps and skincare products, including handcrafted soaps from the Turks and Caicos.

4   Outline of Tourism Attractions in TCI

The Visit TCI website[15] provides an exhaustive list of all the attractions in the archipelago. They are categorised as follows:

4.1   Beaches

The Turks and Caicos Islands boast some of the world's most beautiful beaches. While the world-renowned Grace Bay Beach on Providenciales and Governor's Beach on Grand Turk are popular destinations, many smaller beaches are equally stunning.

4.2   Boat Charters & Cruises

Boat cruises and tours are the most popular activity for visitors in the Turks and Caicos, offering an unrivalled way to experience the scenic islands. Many businesses provide excursions in the area and offer charter rentals for a wide range of vessels, from tranquil sailing catamarans to luxurious yachts.

4.3   Historical Attractions

Historical attractions in the Turks and Caicos can be categorised into two groups. The first group consists of the remnants of the salt industry on Grand Turk, South Caicos, and Salt Cay. The second group includes the plantations on the Caicos Islands.

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[15] https://www.visittci.com/things-to-do

4.4   Land Sports and Activities

The Turks and Caicos Islands have an abundance of activities to enjoy both in and on the ocean. However, there are also several land-based sports and activities available, although they are more limited.

Hiking, birdwatching, and nature are popular land-based activities:

Although there are no dedicated trails, there are countless amazing coastal **hiking** locations, with North Caicos and Middle Caicos offering the top hikes. The rugged and wild coasts of Providenciales, South Caicos, and Salt Cay are also great for hiking. Each of the main islands in the Turks and Caicos offers unique and secluded beaches to explore.

Birdwatching is another popular nature activity, with over 200 species sighted in the Turks and Caicos. Saline ponds and mangrove channels are common throughout the islands, providing beautiful environments and wildlife sightings.

Horseback riding is available on Providenciales and Grand Turk, while **donkey riding** is offered on Grand Turk and Salt Cay.

Golf enthusiasts can enjoy the top-rated Royal Turks and Caicos Golf Club, featuring an 18-hole course designed by Karl Litten, located on Providenciales.

For visitors seeking a bit of excitement, guided **ATV and buggy tours** are offered on Providenciales and Grand Turk. Another option for adventure is to take a day trip to North and Middle Caicos, rent a 4x4, and explore the back roads and lesser-travelled trails.

4.5   Natural Attractions

The natural attractions in the Turks and Caicos go beyond just the beaches and can be divided into two main groups. The first group consists of coastlines, wetlands, and mangrove habitats. The second group includes karst process-formed caves, sinkholes, and blue holes.

4.6   Water Sports and Activities

The Turks and Caicos' stunning beaches have established it as a premier location for water sports:

EFoiling / Electric Hydrofoil[16]	Fishing	Flyboarding	Freediving
Hobie Cat Sailing[17]	Jets Skiing	Kayaking	Kiteboarding
Paddleboarding / SUP	Parasailing	Scuba diving	Sea scootering[18]
Snorkelling	Snuba[19]	Subwinging	Surfing
Swimming	Tubing (or banana float)	Wakeboarding	Whale watching
Windsurfing			

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[16] https://flytci.tc/

[17] small and easy to sail unsinkable catamaran sailboats

[18] also known as "underwater scooters" or "Diver Propulsion Vehicles" (DPVs)

[19] combines elements of both snorkelling and scuba diving

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5 Tourism-Based Labour Market and Migration

The economic differences within the Caribbean region that beneficiate only a certain number of countries (finance and tourism in the Caiman islands, the Bahamas, Turks and Caicos Islands, Dutch Islands, and British Virgin Islands; hydrocarbons in Trinidad and Tobago), also cause migrations in the region to follow a geo-economic logic of international division of labour thanks to the new complementarities between the Caribbean economies, although this internal migration in the Caribbean is obscured by the important emigration outside the Caribbean[20].

While half of the Caribbean expatriates migrated to the US, Canada, United Kingdom, other Caribbean Countries such as the Bahamas, the British and US Virgin Islands, as well as the Turks and Caicos Islands are the main **receiving** countries of Caribbean migrants. Since the 1990s, Haiti, Cuba, the Dominican Republic, and Jamaica are the main sending countries[21].

As a result, an important dimension of employment which is relevant for TCI (in line with other Caribbean countries such as the Cayman Islands and British Virgin Islands) is the share of *migrant workers* in tourism versus residents or nationals. The percentage of migrants in the total workforce is esteemed around 60%, with an evident disproportion of Non-Turks and Caicos Islanders workers compared to all employed workers in the country; and, possibly, the share is even higher if considering only the tourism industry and, specifically, the accommodation sub-sector[22].

Each year, thousands of young Haitians try to escape the poorest economy in the Caribbean, where 60 per cent of the population of 11 million people live on less than $2 a day. Several thousand Haitians are thought to be living (legally or illegally) in shantytowns across the island of Providenciales, with an esteemed population of 24,000[23]. This situation poses possible difficulties and conflicts with long-term residents.

The migration status is particularly relevant if one considers the fact that work permit holders are often ineligible for benefits and social assistance measures, as is the case for the Turks and Caicos Islands, and most other Caribbean countries[24].

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[20] Audebert, C. (2011) 'Régionalisme et migrations dans la Caraïbe', in Dubesset, E. and Lucas, R. (dir.), La Caraibe dans la mondialisation: Quelles dynamiques régionalistes ?, L'Harmattan, pp. 23-37
https://halshs.archives-ouvertes.fr/halshs-00805771/file/AUDEBERT_2011_Regionalisme_et_migrations_dans_la_Caraibe.pdf
[21] https://www.migrationdataportal.org/regional-data-overview/migration-data-caribbean
Audebert, 2011; IMF, 2017
https://www.open-diplomacy.eu/blog/migratory-patterns-in-the-caribbean-impacts-and-perspectives-for-caribbean
[22] "Tourism sector in the English- and Dutch speaking Caribbean: An overview and the impact of COVID-19 on growth and employment", ILO, July 2020
[23] https://www.france24.com/en/20190210-tiny-turks-caicos-overwhelmed-haitian-influx
[24] Ibid.

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6 Impressions and feedback resulting from direct interactions with local stakeholders.

N.B. For the list of interviewed stakeholders, please refer to ANNEX D.

Besides the continuous interaction with members of the DMO Advisory Committee, the Target Euro team also encountered a selection of stakeholders in all the islands beyond Providenciales.

The details of their insights, visions, impressions, and feedback concerning a possible change in the tourism development model of the Turks and Caicos Islands are reported in Annex D.

Following are some statements and outcomings:

● Each destination should have its one tourism product. For instance, North & Middle Caicos have a different nature and wildlife than Providenciales, so they should focus on different tourism markets/segments. Local stakeholders in North & Middle Caicos stated they do not want the same development as Providenciales.

● Adventure tourism is considered a priority product for the twin islands of North and Middle Caicos.

● Deep sea fishing is a potentially interesting tourism product for South Caicos, but specific skills are lacking in the destination.

● Ecotourism activities in Grand Turk focusing on Gibbs Cay could be of high potential for the tourism development of this destination. In addition, "unique ecotourism" is a product with great opportunities for many destinations in TCI.

● Some stakeholders suggested that they "get back to the roots" of tourism in Turks & Caicos Islands when in the 70s, it was considered a paradise for divers.

● A great potential exists for many typologies of events: cultural, religious gatherings, etc. Cultural tourism related to the salt industry is also considered of interest, even if the relaunch of the salt industry is considered problematic.

● Inter islands connections should be developed, as it is currently difficult to fly to important destinations in the countries. For instance, the weekly flights to Salt Cay are considered extremely limited.

● Tourism development must be sustainable. Innovative solutions should be considered, especially to reduce costs related to energy and water consumption.

● Finally, part of the stakeholders recommended simplifying processes and authorisation/bureaucracy.

7 Online Research and Analysis on Turks & Caicos as a Tourism Destination

N.B. For more details, please refer to ANNEX E

7.1 Web-Based Research on Keywords Associated with Turks & Caicos

Target Euro conducted web-based research focusing on the findings on the Google web browser (first page with references) concerning Turks & Caicos as a tourism destination.

The following keywords and references resulted related to TCI on Google (web research on 04 Nov 22):

- turquoise waters
- white sand beaches
- Caribbean's best kept secret
- tropical archipelago
- British Overseas Territory
- pristine marine
- overseas territory of the United Kingdom in the West Indies
- bay
- cays
- resorts
- limited local medical care
- caution, crime

Fonts:
https://turksandcaicostourism.com
https://en.wikipedia.org
https://www.visittci.com
https://www.gov.tc (TCI government)
https://www.britannica.com
https://www.beaches.com
https://en.wikivoyage.org
https://travel.state.gov (US gov)

7.2 Analysis of Tourism Packages Offered Online

To help understand how the destination Turks and Caicos is sold online and what kind of packages are available, TE analysed the TCI tour packages that appear on the first page of the Google research browser, by using the keywords "**Turks and Caicos Tour packages**".

In addition, the following keywords were verified:

- "Turks and Caicos Tour package"
- "Turks and Caicos" "Tour packages"
- "Turks and Caicos" "Tour package"
- "TCI" "Tour packages"

The following Google References (excluding announcements/ads) resulted on the **first page** of the Google browser On December 19th, 2022:

1. "Turks and Caicos Tour packages" = **0 references**

2. "Turks and Caicos Tour package" = **0 references**

3. "Turks and Caicos" "Tour packages" = **94,800 references**.

   None of the web references intensified in the analysis relates to tour packages, but rather to excursions, day trips and boat-yacht rentals.

4. "Turks and Caicos" "Tour package" = 58,700 references.

5. "Turks and Caicos" "holiday package" = 26,700 references.

> **At a first glance, the web is not offering classical holiday packages flight + accommodation + transport.**
>
> **This is a significant outcome of the Google research, as it means that almost the entire market is based on tourists looking autonomously for accommodation solutions in Turks and Caicos and consequently finding the most suitable flight connections to reach the archipelago.**

7.3   TCI Digital Marketing Strategy Assessment

● Website

Being the easiest source of information for tourists to find, especially when searching for "Turks and Caicos" on Google, the TCI website https://www.visittci.com/ is a crucial tool and open the door to learning more about the Turks & Caicos Islands.

The menu is rich in entries and pages, providing online users with plenty of information to look through. However, there might be soom for improvement as all those entries sometimes seem redundant. For instance, pages like FAQ, Entry Requirements, and Quick Facts include fairly similar information that could be merged. Tourists looking for information concerning their arrival on the Turks & Caicos islands, the currency, tipping habits, language, telephone, bank specificities, etc., might not always navigate easily through the pages.

In addition, by sharing valuable content which highlights the most attractive features of the islands as well as the list of partners and service providers, the website would become even more useful to tourists.

● Blog

The TCI blog https://turksandcaicostourism.com/blog-turks-caicos-journal/ is a good additional source of information for users, as the articles focus on some aspects of the destination that are not particularly detailed in the rest of the website. By exploring more in-depth the culture, events and activities, the blog highlights the attractiveness of the islands and what visitors can expect over there. However, those interesting contents could be optimised, and their potential enhanced with an SEO strategy that would improve the referencing of the blog posts and a more regular publication calendar to create an expectation from tourists waiting for future articles.

- Social Media

By being present on different social media platforms such as Facebook, Instagram, Twitter and YouTube, the TCI tourist board reaches different demographic segments.

The Facebook account is the only TCI account that is verified. However, on Instagram, another Turks and Caicos account is present and more popular than the official tourist board's one. With 5 times more followers, the Instagram account https://www.instagram.com/turksandcaicos/ is the first one appearing to users when searching TCI-related content.

There is a huge potential for growth in the social media presence, notably on Instagram, since over 1 million posts are tagged with #turksandcaicos.

On Facebook, Instagram and Twitter, the pictures posted are always the same, and it is not possible to identify a clear strategy for each platform. Yet, an improvement could enhance the digital presence of the destination, notably by putting more focus on the description of the posts, which are now quite short and do not call for interaction.

Conclusions on the analysis of digital marketing strategy for TCI

From our analysis, we could not identify a clear digital marketing strategy for the TCI tourist board. Yet, interesting and promising structures are already present and could just be improved by getting inspiration from other tourist board activities.

The website is a great source of information, especially as users can browse through an extensive list of service providers present in the destination. Still, additional content could give real added value to the website by highlighting the most attractive features of the destinations with explanatory texts and high-quality pictures. In addition to that, enriching the list of service providers with an interactive search and booking system would offer a personalised experience to users while promoting tourism stakeholders more effectively. Tourists would get a selection of accommodations or experiences that match their taste, and tourism stakeholders would be more directly promoted to the right target.

A regular posting schedule also seems crucial to structure the blog and social media organisation and encourage users to regularly follow the tourist board's publications. Moreover, having a consistent editorial line and tone would harmonise all contents and strengthen the brand image. The blog is a great source of information as it allows the TCI to mention topics not promoted on the rest of the website. Optimising the articles with SEO techniques would allow the blog to be referenced on Google and shown to more people, attracting more potential tourists to the Turks and Caicos Islands.

More detailed content, including CTA, could be proposed for the social media accounts to enrich the aesthetic pictures that are being shared online and to create more engagement and interaction in-between tourists and the destination. Diversifying the types of content and the topic to broadcast reels and short videos would allow the promotion of the destination as a whole and not only based on sea-related features. Users' content

are reposted, which is already a great way to involve users. A real community could be built with a strategy focused on creating interaction and sharing content suitable for each platform and each target.

7.4   Social Media-Based Reputation Analysis

Methodology:

To carry out a social media-based Reputation Analysis[25] of Turks & Caicos as a tourism destination, Target Euro used data provided by Olery[26] to analyse the Reputation of Turks & Caicos with Data extracted directly from written reviews and mentions on the following social media platforms: TripAdvisor, Google, Expedia.com, Booking.com, Open Table, Hotels.com, Yelp, Orbitz, Facebook, Travelocity, CheapTickets, Agoda, and Holidaycheck.de.

A.   Sentiment Analysis:

Olery uses software that analyses reviews and evaluates the tone, intent, and emotion within each review on social media in 14 native languages to determine **the guest sentiment.**

Two banks of Lexicons are identified:

● Positive/Neutral/Negative keywords

● Sentiment Rating Keywords – e.g., waiter, service

B.   Numerical Rating:

Positive and Negative Sentiment Ratings Keywords are converted into a Numerical Score of 1-10

C.   TES Traveller Experience Score:

Uniting the Sentiment Analysis (A) and Numerical Ratings (B), Olery generates an easy-to-understand *Traveller Experience Score (TES)* on key indicators of the destination.

The analysis – with a date range of 6 months from 2022-07-07 to 2023-01-07 - focuses on three specific categories:

1) Accommodation
2) Attraction
3) Restaurant

The following results regard the entire country of Turks & Caicos, including Grand Turk, Middle Caicos, North Caicos and Providenciales. Data on other islands and cays are not available.

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[25] Online Review status: we analyse a range of reviews tourists leave on online sources such as Facebook, Google, TripAdvisor, Booking.com, and Foursquare. This will provide us with valuable information on how TCI is viewed by its visitors, as well as highlight areas for improvement and additional marketing that will be key areas for the development of the DMO. This information will be provided thanks to an online platform designed by Target Euro called **Toumake.**

[26] Olery is a leading Sentiment Analysis Technology in the Hospitality Industry https://olery.com/ and https://guest-experience.com/

1) Category: Accommodation

As shown in the table, the overall <u>sentiment is 9.0</u> for the category "**accommodation**", based on the tone, intent, and emotion considering reviews on 13 different social media[27]. While the <u>numerical</u> overall is <u>9.2,</u> based on Positive and Negative Sentiment Ratings Keywords.

By combining the overall sentiment and numerical ratings, the resulting <u>Traveller Experience Score (TES)</u> related to accommodation in Turks and Caicos is an <u>exceptional 9.1.</u>

The highest rating relates to the location (9.6).

2) Category: Tourist Attraction & Services

The *overall sentiment* is <u>9.4</u> for the category "**Tourist Attraction & Services**", covering <u>68 different categories</u> <u>of tourist attractions and services</u>[28] ranging from "*4WD, ATV & Off-Road Tours*" to "*Water-skiing & Jet-skiing*" and is based on <u>reviews on three different social media</u>[29]. While the *numerical* overall is <u>9.5.</u>

By combining the overall sentiment and numerical ratings, the resulting Traveller Experience Score (TES) related to tourist attractions and services in Turks and Caicos is an <u>outstanding 9.5.</u>

The top 10 attractions and services result being the following (9.9 rating):
- Bike Tours
- City Tours
- Cultural Tours
- Food & Drink
- Historical & Heritage tours
- Motorcycle tours
- Shark Diving
- Speed Boat Tours

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[27] Sources: TripAdvisor, Google, Expedia.com, Booking.com, Open Table, Hotels.com, Yelp, Orbitz, Facebook, Travelocity, CheapTickets, Agoda, and Holidaycheck.de

[28] The detailed list of the 68 attractions and services is included in Annex E.

[29] Sources: TripAdvisor, Google, Facebook

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- Swimming with Dolphins
- Vespa, Scooters & Moped Tours

3) Category: Restaurant

NUMERICAL OVERALL ★	SENTIMENT OVERALL 💬	TES SCORE 📊	NUMBER OF REVIEWS 〽
8.9	9.3	9.1	1933
1.7% ↑ From previous period	1.1% ↑ From previous period	1.5% ↑ From previous period	-19.6% ↓ From previous period

The *overall sentiment* is 9.3 for the category "**Restaurant**", based on reviews on 5 different social media[30]. While the *numerical* overall is 8.9. The resulting Traveller Experience Score (TES) related to restaurants in Turks and Caicos is an excellent 9.1.

Ambience is considered the most valuable aspect of restaurant experiences in TCI (9.3).

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[30] Sources: Google, TripAdvisor, Open Table, Yelp, Facebook

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8 SWOT Analysis

This section has been based on the analysis of the current tourism demand and offer of TCI and considering the different meetings held by the Target Euro team with the major tourism stakeholders in the country. The aim is to outline the main strengths, weaknesses, opportunities, and threats to be considered for the identification of the tourism development strategy and implementation plan for TCI.

The Target Euro team uses the SWOT analysis as a strategic planning technique to evaluate the strengths, weaknesses, opportunities, and threats of TCI as a tourism destination. The acronym SWOT stands for:

- **Strengths**: Internal factors that give an advantage to the destination, such as strong reputation, unique tourism assets, and skills

- **Weaknesses**: Internal factors that could limit the destination's success, such as lack of resources, ineffective processes, or poor tourism organisation

- **Opportunities**: External factors that the destination could exploit, such as new markets, emerging technologies, or changes in customer preferences

- **Threats**: External factors that could pose a risk to the destination, such as increased competition, economic downturns, or regulatory changes

This SWOT analysis will help identify areas where the destination could improve its performance and develop strategies to capitalise on its strengths, mitigate its weaknesses, take advantage of opportunities, and manage its risks.

S Strengths	**W** Weaknesses	**O** Opportunities	**T** Threats
• World-renowned luxury destination, with high-end resorts and amenities that cater to affluent travellers. • Extraordinary natural beauty with wonderful beaches and clear waters. • Proximity to the USA, making it easily accessible for North American travellers.	• Limited international air connectivity with only a few airlines offering regular flights to and from Providenciales • Very limited internal air connectivity from Provo to other islands in the country • Limited tourism products diversification (mainly focused on sea/water activities) • Limited collaboration between stakeholders of the different tourism destinations • Limited entertainment opportunities offered to cruise passengers (with consequently limited economic impact generated) • Very limited tourism development in many destinations in TCI. The Country has limited local tourism infrastructure outside of the high-end resorts (in Provo), which can make it difficult for visitors to explore the islands independently.	• The different islands in TCI offer opportunities for developing new tourism offerings, such as cultural or adventure tourism, to attract a wider range of visitors. • The increasing popularity of eco-tourism presents an opportunity for the islands to showcase their pristine natural environment and attract environmentally conscious travellers. • The development of the international airport in Provo and the plan to reorganise the airport infrastructures in other islands in TCI promoted by the TCI Airports Authority could expand air connectivity to the different TCI destinations making them more accessible to travellers. • The new tourism organisation promoted by the TCIG with the creation of the Smart DMO and the new Department of Tourism Regulations represents a concrete action to make the TCI tourism ecosystem more competitive, sustainable and resilient. • The organisation of a data-driven Market Intelligence Unit within the Smart DMO represents a clear competitive advantage for TCI over all its competitors in the Caribbean region.	• High Regional competition from other destinations that offer similar natural attractions and tourist offers and are investing heavily to strengthen the tourism industry. • Vulnerability to natural disasters such as hurricanes, which can disrupt tourism and cause long-term damage to the local economy. • Economic instability in key source markets such as the United States and Europe could reduce demand for tourism to TCI, and more in general to all the Caribbean region. • Concerns related to health and safety, such as the COVID-19 pandemic, can discourage travellers from visiting the islands.

PART 2

STRATEGY FOR FUTURE DEVELOPMENT OF TOURISM IN TURKS AND CAICOS ISLANDS

9 TCI National Tourism Development Strategy

As already said, tourism is the major driving force of the Turks and Caicos Islands economy, accounting for 65% of GDP in 2021. The TCIG is currently undertaking a transformation of the TCITB into a smart DMO and DTR (Department of Tourism Regulations within the Ministry of Tourism) that will be completed by June 2023. This transition is expected to improve the efficiency and effectiveness of the tourism ecosystem in TCI and the current National Tourism Development Strategy has been designed taking into consideration this new organisation of the TCI tourism ecosystem.

9.1 Objectives of the Strategy

Considering the current situation of the tourism ecosystem in TCI, tourism stakeholders should pursue stabilising TCI's long-standing and excellent positioning in the international tourism markets.

The <u>quantitative objectives</u> of the TCI tourism development strategy for the next ten years are based on the projections carried out by the Target Euro team considering the scenario with the DMO and are as follows:

1. Increase in the number of visitors:

Total visitors in 2019: 1.6 million, of which:
Overnight tourists: 0.49 million
Cruise passengers: 1.11 million

<u>Strategy's objectives</u>:
Total visitors in 2032: **3.15 million**, of which:
Overnight tourists: 1.10 million
Cruise passengers: 2.05 million
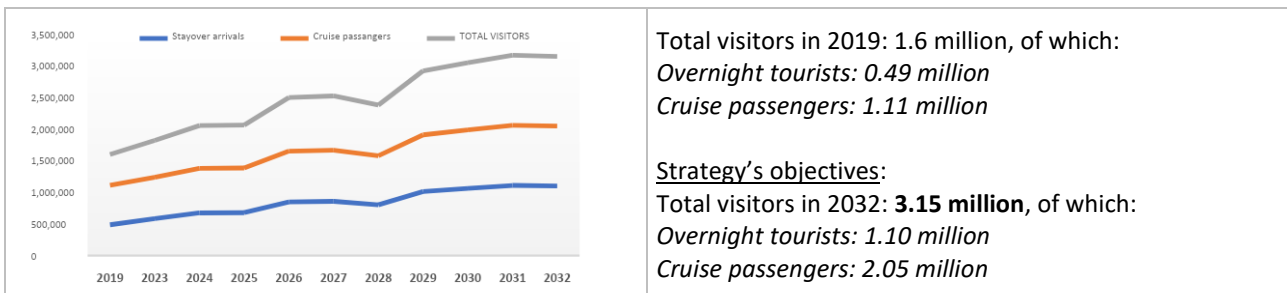
2. Increase in tourism revenue:

Total international tourism receipts for travel items in 2019: US$ 825 million.

<u>Strategy's objectives</u>:
Total international tourism receipts for travel items in 2032: **US$ 1.7 billion** (It is around US$ 640 million more than the expected situation without DMO), of which:
- *Hotels & restaurants: US$ 1.33 billion*
- *Other tourism services: US$ 0.37 billion*

Average Expenditure per person in 2019: US$ 1,695

<u>Strategy's objectives</u>:
Average Expenditure per person in 2032: **US$ 1,548**
It is important to stop the progressive reduction of tourist spending, which started before the COVID-19 crisis, and to stimulate tourists to spend more on activities.

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3. Development of tourism infrastructure:

Accommodation rooms 6,143 / 4,647 / 4,008	Total registered accommodation rooms in 2019: 4,008 Total registered accommodation rooms in 2020: 4,647 Strategy's objectives: Total registered accommodation rooms in 2032: **6,143** *Most of the additional 1,500 accommodation rooms are expected to be developed in destinations outside Providenciales.*
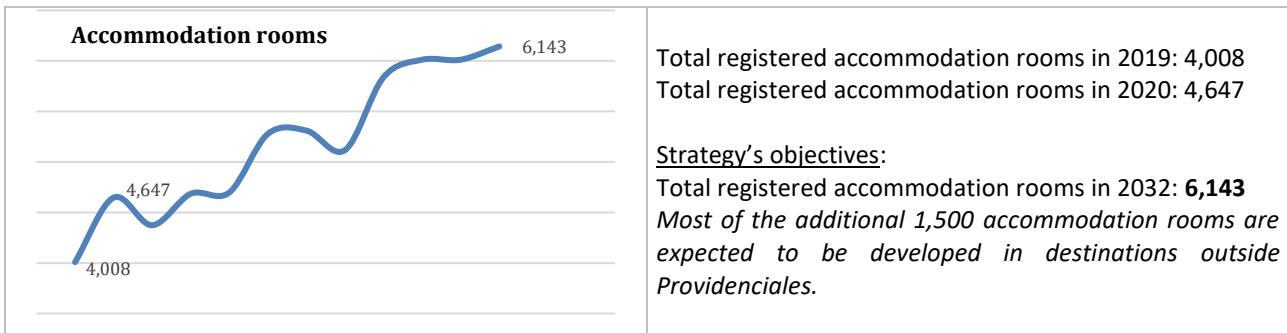
4. Improvement of the visitor experience:

Scores — Overall: Rating 9.1 (1.1%), Benchmark 8.6 (0.0%); Sustainable Travel: Rating 8.3 (-5.5%), Benchmark 8.8 (6.9%)	Overall sentiment score[31] in 2022: 9.1/10.0 Sustainable travel score in 2022: 8.3/10.0 Strategy's objectives: Overall sentiment score in 2027: 9.6/10.0 Sustainable travel score in 2027: 9.5/10.0
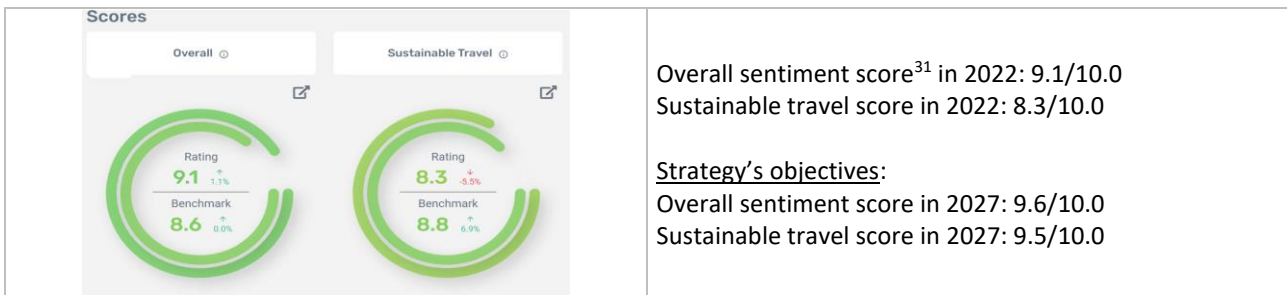
Finally, important <u>additional objectives</u> of the tourism development strategy are as follows:

- Improve/develop the connectivity from Providenciales to all other tourism destinations in the Country. This is specially referred to as air connectivity.
- Diversify the current offer of tourism products and strengthen the existing ones to diversify the current tourism segments and markets.
- Consolidate the current major markets of origin of the tourism demand to TCI, USA, Canada and UK, and increase the share in new potential markets in Europe (Germany, Italy, France, Spain, Benelux, etc.), Latin America (Brazil, Colombia, Chile, Argentina, etc.) and Caribbean region.
- Improve the quality of working conditions and increase the number of job opportunities for the TCI population.

9.2   Structure of the Strategy and Action Plan

For an easy understanding of the action plan and its activities and how they are connected with the Strategy, the following conceptual map summarises the logical steps composing the development strategy.

The **pillars** are the foundations of the tourism development strategy, and they are directly connected with the tourism development objectives of the strategy.

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[31] Database for year 2022 has been provided by Orely.com and they are based on the social networks and tourism booking platforms analysis carried out from August to December 2022.

Each pillar has one or more **strategic lines** that address specific tourism development issues. These strategic lines will guide the tourism stakeholders towards the pillars. In addition, each strategic line is linked to specific **outputs,** which represent the Strategic Interventions that will allow the strategy to clearly identify the specific **activities** that tourism stakeholders must carry out to implement the tourism development strategy.

9.3   Development Pillars for the TCI Tourism Ecosystem

Based on the outputs of the SWOT analysis, the tourism development strategy for the Turks and Caicos Islands is based on three development pillars as follows:

1.   Inclusive growth
2.   Sustainability
3.   Competitiveness

These three pillars aim to facilitate the current TCI tourism ecosystem to become more sustainable, resilient and competitive in the regional and international tourism market. The new DMO will follow these pillars that the TCIG is launching in 2023.

1.   Inclusive Growth

It mainly refers to the need to extend the development of the tourism ecosystem to other destinations in the country, generating economic development opportunities, especially for local populations. The diversification of tourism supply through the development of emerging tourist destinations in the TCI is an important theme of the national tourism strategy.

2   Sustainability

Sustainability refers to the need to promote tourism development that is socially, economically, environmentally, and culturally sustainable in the long term. Social and economic development must find a compromise with the need to preserve and enhance TCI's world-class natural and cultural heritage assets.

3   Competitiveness

Tourism is a highly dynamic industry, influenced by exogenous and endogenous factors that continually challenge the competitive capacity of the tourism stakeholders of a destination towards its target markets. Consequently, public and private stakeholders in TCI must activate those processes to stimulate and to ensure that all tourism businesses can maintain their competitive capacity in the market.

9.4   Strategic Lines and Outputs

Considering the above three pillars (inclusive growth, sustainability, and competitiveness), the logical framework to define the outputs that will drive the definition of the Action Plan and related Specific Actions (SA) of the tourism strategy are linked to the following **Strategic Lines (SL)**:

Figure 4: Conceptual Map with the Outlines of the TCI Strategy

[PILLAR 1] INCLUSIVE GROWTH
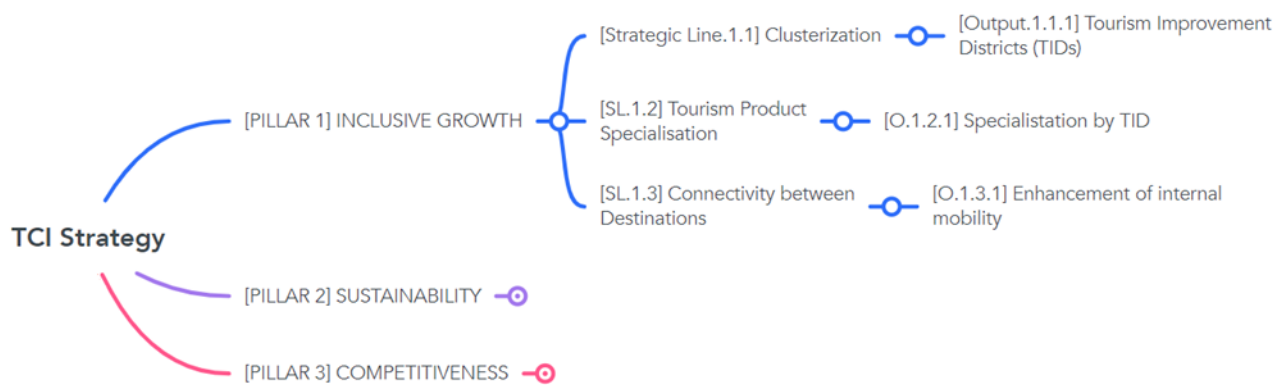
Pillar 3 "Inclusive Growth" has three Strategic lines and each one with a specific output as follows:

CLUSTERISATION [STRATEGIC LINE.1.1]

Tourism Improvement Districts (TID) [Output 1.1.1]

Grouping of islands to set up 4 DESTINATION clusters: Tourism Improvement Districts (TID). This means grouping islands with similar characteristics, culture, natural resources, and attractions to create a unique and compelling tourism experience for visitors. By doing so, tourists are encouraged to stay longer, explore more, and spend more money on the local economy. Collaboration among stakeholders, including the government, private sector, and local communities, is crucial to achieving successful cluster-based tourism development.

TOURISM PRODUCT DIVERSIFICATION [STRATEGIC LINE 1.2]

Specialisation by Tourism Improvement District [Output 1.2.1]

Cluster-based tourism development allows for creating specialised and diversified products in each TID that cater to the different interests and preferences of travellers. For example, grouping based on their cultural heritage (e.g., salt production) to promote cultural tourism. This approach also facilitates sharing resources, knowledge, and expertise among different islands within the cluster, leading to greater efficiency and sustainability in tourism development.

CONNECTIVITY BETWEEN DESTINATIONS [STRATEGIC LINE 1.3]

Enhancement of internal mobility [Output 1.3.1]

To strengthen the overall tourism ecosystem and launch new tourism products, TCI needs to improve internal mobility and enhance connectivity between the various tourist destinations and islands. This can be achieved by investing in the development of efficient transportation systems, improving the road, airport, and port infrastructures, and enhancing new sustainable means of transportation such as electrically assisted bicycles and electric vehicles (EVs).

[PILLAR 2] SUSTAINABILITY

To further establish TCI as a leading destination for ecotourism, green tourism, and sustainable tourism, it is crucial to implement measures and initiatives focusing on sustainable development. This will involve prioritising the conservation of environmental and cultural resources, which are integral to the unique and special identity of the islands.

In addition, the development of new tourist segments, as "product looking", will require preserving the islands' natural, cultural, and social environments. This will add value to the experiences offered to visitors and provide them with the freedom to explore and enjoy the islands while minimising negative impacts.

Overall, the success of TCI as a sustainable tourism destination depends on preserving its natural and cultural capital, which is a key element that defines the islands and makes them unique. Therefore, it is essential to continue to focus on sustainable development and promote responsible tourism practices that prioritise the conservation of the islands' natural and cultural resources. This will ensure that TCI continues to attract tourists who appreciate the beauty and diversity of the islands and who value sustainable tourism practices.
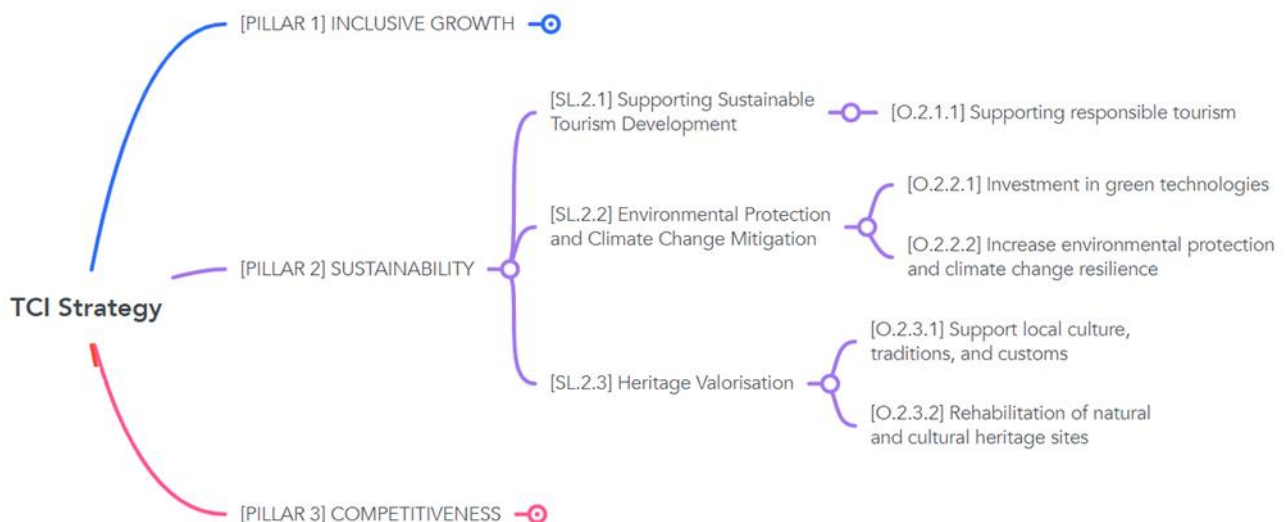
Pillar 2, Sustainability, has three Strategic Lines and five Outputs as follows:

SUPPORTING SUSTAINABLE TOURISM DEVELOPMENT *[STRATEGIC LINE 2.1]*

Supporting sustainable tourism development involves taking action to ensure that tourism activities and businesses are environmentally, socially, and economically sustainable over the long term. By adopting sustainable practices and initiatives, TCIG could ensure that tourism in TCI continues to provide economic, social, and environmental benefits for current and future generations. This strategic line includes the following outputs:

Supporting Responsible Tourism [Output 2.1.1]

Encouraging responsible tourism is important for promoting the sustainable tourism development of Turks and Caicos, minimizing negative impacts on the environment and the local population.

TCIG should promote a tourism development that is mindful and respectful of the local environment and culture, and finding ways to support sustainable tourism practices.

ENVIRONMENTAL PROTECTION AND CLIMATE CHANGE MITIGATION [STRATEGIC LINE 2.2]

Environmental protection and climate change mitigation are critical for the sustainability of the tourism industry. In TCI, the tourism industry is closely linked to the natural environment, and its activities can significantly impact natural resources, ecosystems, and climate change. This strategic line includes the following outputs:

Investment in green technologies [Output 2.2.1]

Renewable sources produce only a low% of the total amount of Turks & Caicos electricity. This mix of energy sources heavily affects the Jamaican balance of payments.

To reduce the country's dependence on imported fossil fuels, which dramatically increased last year, a shift to green energy should be fostered and to renewable energy generation, such as photovoltaic, solar, and hydrogen.

Increasing environmental protection and climate change resilience [Output 2.2.2]

The tourism industry can profoundly impact the environment, and it is essential to take steps to minimise these impacts and foster sustainable tourism. This involves implementing a range of actions that can help mitigate tourism's negative effects on the environment and promote sustainable practices in the industry. These actions can help create a more sustainable tourism industry that benefits the environment and local communities.

HERITAGE VALORISATION [STRATEGIC LINE 2.3]

Tourism valorisation of cultural heritage assets refers to using cultural heritage resources and attractions to create tourism products and experiences that generate economic, social, and cultural benefits for local communities and visitors. Many destinations use the valorisation of the natural and cultural assets as a powerful tool for driving economic development, preserving cultural and natural heritage, and promoting sustainable tourism. This strategic line includes the following outputs:

Supporting local culture, traditions, and customs [Output 2.3.1]

To let tourists fully appreciate and experience the TCI destinations, it is important to support and promote the local culture, traditions, and customs.

Rehabilitation of natural and heritage sites [Output 2.3.2]

Heritage valorisation aims to preserve, rehabilitate, and promote the natural and cultural assets of the TCI destinations while simultaneously providing economic benefits to the local community.

[PILLAR 3] COMPETITIVENESS

Fostering competitiveness in the Turks and Caicos tourism ecosystem is important for attracting tourists, improving the quality of tourism products and services, encouraging innovation, driving economic growth, and maintaining sustainability. By striving to be more competitive, destinations and businesses can benefit themselves and the wider tourism industry.
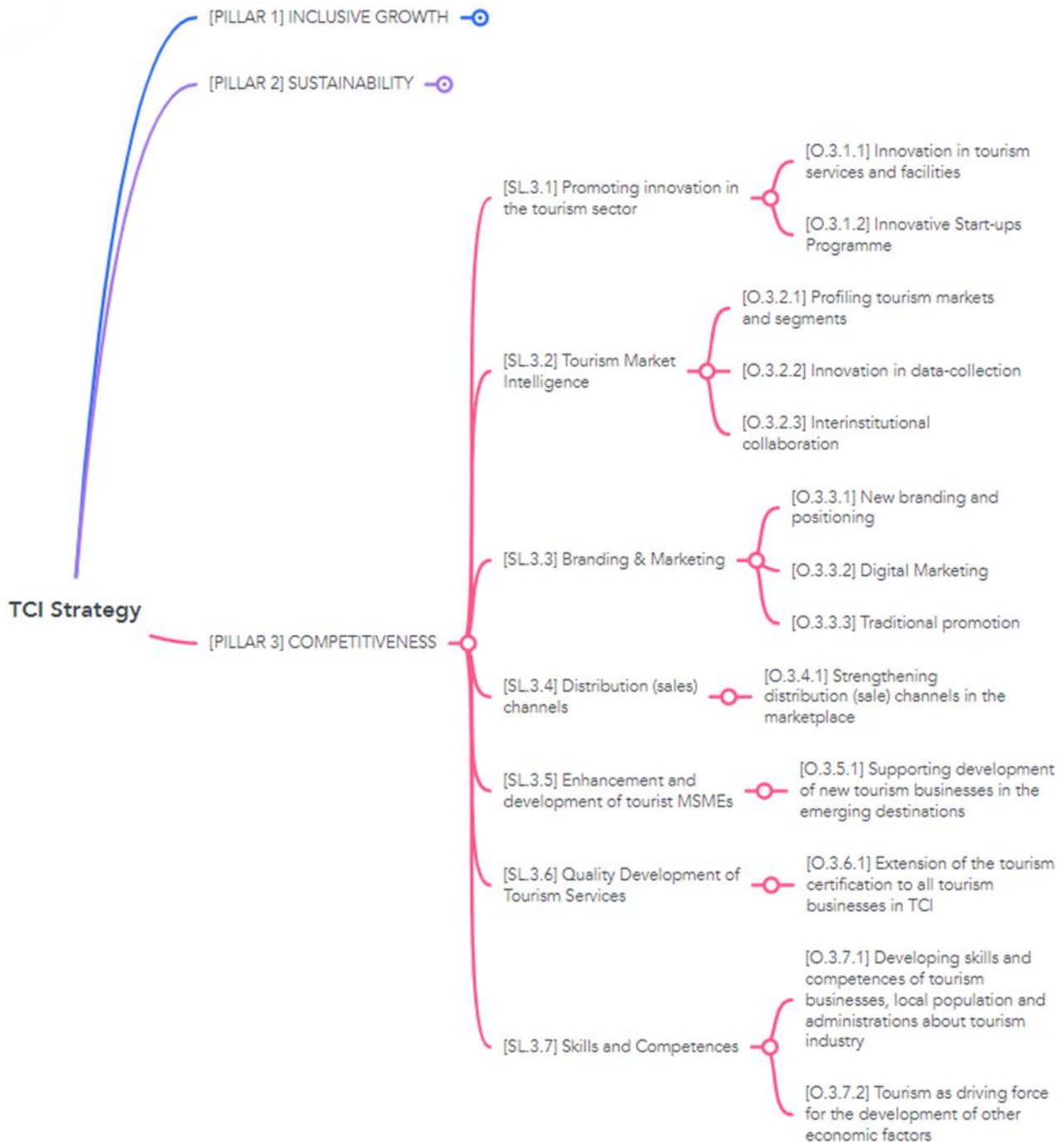
Pillar 3, Competitiveness, has seven Strategic Lines and thirteen Outputs as follows:

PROMOTING INNOVATION IN THE TOURISM SECTOR [STRATEGIC LINE 3.1]

The tourism industry is a highly dynamic industry that is constantly evolving and changing its characteristics. Several factors contribute to this dynamic nature of the industry, including changes in consumer preferences,

advances in technology, and shifts in global economic and political conditions. For this reason, the long-term sustainability of the tourism industry should be supported by the TCIG stimulating innovation in the tourism sector to assist businesses operating in this industry to be prepared to adapt to these changes to remain competitive and successful. The outputs of this strategic line are as follows:

Innovation in tourism services and facilities [Output 3.1.1]

Innovation in tourism products, services, and accommodations is crucial for creating a competitive edge in the global tourism market and attracting new segments of tourists to TCI. Introducing new and captivating tourism offers, TCI can re-enforce its strong brand image and offer a unique experience to visitors.

To foster innovation in the tourism sector of TCI, both public and private actors should introduce new, fascinating, and exciting tourism products, services, and accommodations to the international market. This is particularly important for creating specialised tourism clusters that cater to the diverse interests of visitors.

To attract new market segments, it is crucial to offer a range of new services that appeal to tourists interested in specific types of tourism products. This can be achieved by re-designing existing services or introducing entirely new ones. These new services should be closely linked to the innovative tourism products being developed.

It is recommended that one or more islands in TCI focus on developing accommodations that meet the unique needs and expectations of these new tourists to diversify the tourism supply chain and attract new segments. For example, to appeal to visitors interested in outdoor adventure and ecotourism, new typologies of accommodations, such as glamping, can be designed to suit their specific requirements.

Innovative Start-up Programme [Output 3.1.2]

Revamping the tourism industry through innovation is a critical to the Innovative Start-up Programme. One of the primary objectives should be to support technology start-ups that can bring about significant changes and advancements in the tourism sector.

TOURISM MARKET INTELLIGENCE [STRATEGIC LINE 3.2]

Relying on market intelligence is an important to any effective marketing strategy. It allows businesses to stay up-to-date on changing market conditions and consumer behaviour behaviour, and make informed decisions about how to best reach and engage with their target audiences.

TCIG and tourism businesses can better understand the needs and preferences of different market segments and tailor their products, services, and marketing messages accordingly. It will also allow stakeholders to identify untapped markets or niches and create targeted marketing campaigns that resonate with specific audiences. Finally, tourism market intelligence will be extremely important for assessing the real impacts generated by the tourism industry in terms of quality of economic development and environmental preservations in TCI. The outputs of this strategic line are as follows:

Profiling of tourist markets and segments [Output 3.2.1]

Profiling of tourist markets and segments aims to understand the behaviour, preferences, and characteristics of different types of tourists. To achieve this, a Tourism Observatory should be organised to collect and analyse data on tourist markets and segments. The collected data can be used to assess new tourism markets and segments, enabling the development of targeted marketing strategies to attract these tourists.

Innovation in data collection [Output 3.2.2]

Innovation in data collection involves agreements with international tourism digital platforms and promoting the digitalisation of the tourism industry. This initiative will provide access to a wealth of information on tourist behaviour, preferences, and characteristics, which can be used to improve the targeting and effectiveness of marketing efforts.

Interinstitutional Collaboration [Output 3.2.3]

Interinstitutional collaboration is extremely important to achieve the goals of tourism development. This includes the organisation of a permanent inter-ministerial roundtable to facilitate cooperation and coordination between different government agencies involved in the tourism sector.

BRANDING AND MARKETING [STRATEGIC LINE 3.3]

Branding and marketing are essential elements of the tourism industry, as they play a key role in attracting visitors and promoting destinations, products, and services. TCI should develop a unique identity and personality related to its products, allowing it to distinguish itself from other destinations in the Caribbean region and create a positive image in the minds of visitors. A strong brand can help attract visitors, build loyalty, and differentiate a destination or product from its competitors. The outputs of this strategic line are as follows:

New Branding and Positioning [Output 3.3.1]

Output 3.3.1 focuses on developing new branding and positioning for the Turks and Caicos Islands as a tourism destination. The primary goal of this initiative is to create a distinct and recognisable identity that sets the destination apart from its competitors.

Digital Marketing [Output 3.3.2]

To enhance the digital presence of TCI and promote its growth as a tourism destination, a new *digital marketing strategy* should be developed. This strategy should prioritise the following goals, which will guide the global digital activities and ensure consistent and effective actions:

- Enhance the quality of the user's online experience and the information available on the website.
- Raise awareness about TCI as a tourism destination.
- Streamline the booking process and effectively highlight local providers.
- Foster engagement with tourists, both current and potential, to build a strong community.
- Implement a robust after-trip process to increase positive word-of-mouth and encourage repeat visits.

By focusing on these goals, the new digital marketing strategy can improve the visibility and reputation of TCI as a top tourism destination. The enhanced user experience, increased awareness, and efficient booking process will attract more visitors to the destination. In contrast, the community-building and after-trip process will foster loyalty and encourage repeat visits.

Traditional Promotion [Output 3.3.3]

Incorporating traditional tourism promotion actions to attract tourists to Turks & Caicos should still be considered in the Branding and Marketing Strategy. This can be achieved through actions such as Print Advertising, Television and Radio Advertising, Trade Shows and Exhibitions, Public Relations, Direct Mailing, and Tourist Information Centres.

DISTRIBUTION CHANNELS [STRATEGIC LINE 3.4]

The importance of distribution channels in the tourism sector cannot be overlooked. By exploiting these channels effectively, tourism businesses can reach a wider audience of potential customers, improve the customer experience and optimise the distribution of their offers, resulting in increased revenue and growth. The outputs of this strategic line are as follows:

Strengthening distribution channels in the tourism marketplace [Output 3.4.1]

Strengthening distribution channels is crucial for destinations and businesses in the tourism industry of Turks and Caicos Islands to reach their target market, increase revenue, and reduce risk. By utilising OTAs and social media platforms, building relationships with travel agents and wholesalers, and investing in technology, TCI destinations and businesses will expand their distribution channels and grow their businesses and tourism flows.

ENHANCEMENT AND DEVELOPMENT OF SMMEs [STRATEGIC LINE 3.5]

The enhancement and development of SMMEs in the tourism industry are important for promoting economic growth, diversifying tourism offerings, increasing competitiveness, fostering community involvement, and promoting sustainability. In particular, by providing support and resources to SMMEs, TCIG will help the tourism industry become more inclusive and sustainable, benefiting local communities and visitors alike. The output of this strategic line is as follows:

Supporting development of new tourism businesses in the emerging destinations [Output 3.5.1]

The government of TCI should promote the establishment and growth of good-quality micro and small enterprises throughout all the islands, particularly those that are not located on Providenciales and, to some extent, Grand Turk.

To encourage the emergence and success of such businesses within a fair, competitive environment, it is crucial to foster networking principles and provide financial support targeted at investments in infrastructure, machinery, equipment, and digital technologies.

QUALITY DEVELOPMENT OF TOURISM SERVICES [STRATEGIC LINE 3.6]

Quality development of tourism services is essential for the tourism industry to remain competitive, attract and retain customers, maintain a positive reputation, promote sustainable tourism development, and increase revenue. By investing in quality development, TCIG could help tourism businesses enhance the overall customer experience and contribute to the long-term success of the TCI tourism industry. The outputs of these strategic lines are as follows:

Extension of the tourism certification to all tourism businesses in TCI [Output 3.6.1]

The extension of tourism certification to all tourism businesses will benefit the industry, the businesses themselves, and the customers. It will improve quality standards, increase competitiveness, provide resource access, and enhance customer satisfaction.

SKILLS AND COMPETENCIES [STRATEGIC LINE 3.7]

The development of skills and competencies in the tourism industry is essential for providing high-quality customer service, improving productivity and efficiency, staying competitive, fostering innovation and creativity, and promoting sustainable tourism development. TCIG should help tourism businesses to invest

in employee development with the aim to enhance the overall tourism experience and contribute to both the long-term sustainability and competitiveness of the tourism industry in TCI. The outputs of these strategic lines are as follows:

Developing skills and competencies of tourism businesses and local population about the tourism industry [Output 3.7.1]

To establish successful and well-managed businesses related to new tourism products, accommodations, and services, it is imperative to implement education and vocational training programs. These programs should be mandatory for start-ups and a commitment to ongoing education for those already in the industry. This will ensure sufficient quality and competence across the tourism sector.

To achieve success in the tourism industry, more is needed to simply rely on market intelligence and new product development. Public administrators must also provide support, knowledge, and policies to facilitate capacity building. This will enable the industry to keep pace with evolving trends and remain competitive.

Tourism as a driving force for the development of other economic sectors [Output 3.7.2]

To foster economic growth and development in tourism, a Tourism Integration Initiative similar to Jamaica's "Tourism Linkages Program" should be implemented. This initiative aims to link the tourism economy with other sectors, such as craft industries, creating a symbiotic relationship that benefits multiple areas of the local economy.

10   Action Plan and Specific Actions

Based on the logical framework to define the tourism development strategy, the three targeted outcomes (sustainability, inclusive growth, and competitiveness), and the related Strategic Lines (SL), the Action Plan has been designed based on the following series of <u>Specific Actions (SA)</u> to be implemented to achieve the expected Outputs:

[PILLAR 1] INCLUSIVE GROWTH

1.1   Strategic Line: Clusterisation

1.1.1   Output: Tourism Improvement Districts (TIDs)

1.1.1.1   Specific Action: Organisation of permanent local committees

Over the past 30 years, destinations have developed Tourism Improvement Districts (TIDs) as an innovative model for financing DMOs. TIDs are geographical areas characterised by specific integrated tourism offers developed mainly in the UK and the USA. For example, the Target Euro team identified 193 TID destinations in 18 States in the USA in 2021, and 12 additional States were implementing a TID in at least one city.

TIDs are programmes that involve a partnership with government organisations and local private businesses, where private businesses opt-in to fund or co-fund tourism budgets in their areas. As we will see in the chapter dedicated to the financial model of the DMO (Chapter 7), the voluntary contributions coming from the private sector and the compulsory tourist levy to be paid by all overnight tourists visiting TCI will represent the main source of financial sustainability of the DMO in the long term that will finance activities to develop the tourism industry in each TID.

<u>The TCI DMO intends to set up the following **four** TIDs in TCI,</u> each one totally different from the others:

- **TID 1:** Providenciales / West Caicos / Mangrove Cay / Little Water Cay / Parrot Cay
- **TID 2:** North Caicos / Middle Caicos / East Caicos
- **TID 3:** South Caicos / Ambergris Cays / Seal Cays
- **TID 4:** Grand Turk / Salt Cay / Cotton Cay / and Lesser Cays

Each TID should be organised as a permanent voluntary local committee representing each of the 4 TIDs grouped based on geographic criteria.

The DMO TCI will use the TIDs to manage the tourism destinations in collaboration with local tourism stakeholders, taking permanently into consideration their needs and expectations into consideration. In particular, the main characteristics of the TIDs in TCI will be as follows:

- *Specialised focus*: TIDs focus specifically on improving the local tourism industry rather than addressing a broader range of community needs. The Tourism Development Strategy for TCI prepared by the Target Euro team includes the tourism product specialisation for each TID.
- *Collaborative governance*: the DMO will be governed by a board of representatives from private and public stakeholders. In addition, the private sector representatives in the DMO board will be TCI associations and individuals representing each TID.
- *Local control*: TIDs allow local businesses and other stakeholders to take control of tourism-related issues and initiatives rather than relying solely on the government or other outside organisations.
- *Flexibility*: TIDs can be created and operate in a variety of ways, depending on the specific needs and goals of the community.

Based on these characteristics, each TID in TCI will be characterised by its own tourism offer that should complement the other TIDs in the Country. This diversification will allow the country to diversify its current tourism markets and segments, attracting more overnight tourists and increasing the economic impacts on the national economy.

In addition, the use of the TIDs by the DMO makes possible a higher focus on the development of the entire tourism ecosystem in TCI, not only based on the promotion activities but also on the development of those infrastructures, facilities and services that will be essential to diversify the tourism offer and include other TCI destinations into the national tourism offer. So some of the expected benefits of TIDs that the DMO will manage include:

→ *Increased tourism in all destinations in TCI*: By collectively funding and managing tourism-related activities and improvements, TIDs can help to attract more visitors to the different areas and boost the local economy.

→ *Improved infrastructure and amenities*: TIDs can use their funds to improve local infrastructure, such as sidewalks and public transportation, and to add amenities such as tourism circuits, visitor centres, public art, etc.

→ *Higher property values*: TIDs can also have a positive impact on property values as a result of the improved infrastructure, amenities, and increased tourism.

→ And of course, *increased marketing*: the DMO will use its funds to increase marketing and promotion efforts promoting both the country as an all, but also activating punctual promotional activities for each TID, which can help to attract more visitors and boost visibility for local businesses.

1.2 Strategic Line: Tourism Product Diversifications

1.2.1 Output: Specialisation by Tourism Improvement Districts (TIDs)

1.2.1.1 Specific Action: Organisation of the new tourism product portfolio

For each TID, Target Euro has identified 1 or 2 **PRIORITY Tourism Products** and other **SECONDARY** Products, either being already *present* or with a *potential* for development.

N.B. For details on Tourism Products please refer to ANNEX F

This Tourism Improvement District (TID) totals over 30,000 inhabitants.

Figure 2: Map[32] of islands and cays which are grouped as TID 1
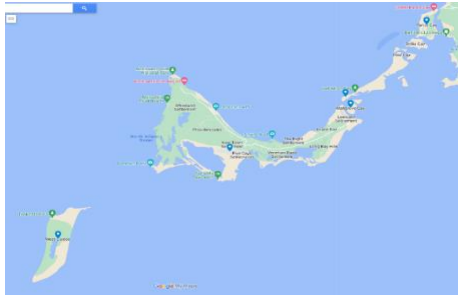
TOURISM PRODUCTS

This TID expresses many tourism products with different levels of potentiality.

PRIORITY Potential & Present Tourism Products in TID 1 are the following:

A.   LUXURY TOURISM

The priority tourism product LUXURY is based on a combination of **SIX (6)** products:

A.1	**Sun & Sea**
A.2	**Shopping & Entertainment**
A.3	**Nautical tourism: Sailing, Boating & Yachting**
A.4	**Culinary tourism: Foodies**
A.5	**Golf**
A.6	**Incentives**

B.   WATER-BASED SPORTS

The second priority product for TID 1 is based mainly on the huge variety of water-based sports and activities which are already offered in Providenciales. In fact, with some of the finest beaches in the Caribbean, it's no wonder that the Turks and Caicos excel as a water sports destination:

B.1	Scuba diving / Deep Sea Diving	B.2	Kiteboarding / Kitesurf[33]	B.3	Kayaking / Canoeing	B.4	SUP / Stand-up paddleboarding
B.5	Snorkelling	B.6	Freediving	B.7	Jet ski	B.8	Windsurfing
B.9	Surfing	B.10	Parasailing	B.11	Wakeboarding	B.12	Semi-submarine
B.13	Tubing / Banana boat	B.14	Swimming	B.15	Snuba[34]	B.16	E-Foiling[35]
B.17	Subwinging[36]	B.18	Flyboarding	B.19	Sea scootering		

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[32] Adaption created with My Google Maps

[33] There are currently no laws or regulations against kiteboarding on any beaches in the country. Due to the spectacular setting and safe environment, any kite newcomers to the Turks and Caicos should start at Long Bay Beach, regardless of skill level. https://www.visittci.com/north-caicos-middle-caicos/things-to-do/kiteboarding

[34] Snuba is often referred to as hookah diving and is a fun and interesting way to explore shallow reefs. This unique water sport combines elements of both snorkelling and scuba diving.

[35] EFoil, short for Electric Hydrofoil, is an electric powered motorised surfboard.

[36] consists of a rider being dragged at slow speed underwater behind a boat while holding onto a small-winged board.

SECONDARY Potential & Present Tourism Products in TID 1 are the following:

C.   **Shark watching**

D.   **MICE tourism: conferences**

E.   **Event Tourism**

F.   **"Soft" Ecotourism**

G.   **Fishing tourism**

TID 2: North Caicos / Middle Caicos / East Caicos

This Tourism Improvement District (TID) totals around 2,700 inhabitants.
Figure 3: Map[37] of islands and cays, which are grouped as TID 2
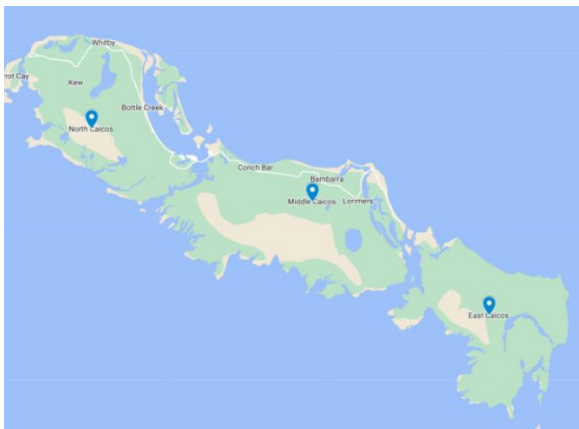
TOURISM PRODUCTS

The feasibility of the development of the tourism products of TID 2 depends on a crucial variable: the **STATUS QUO** scenario vs. the **ALTERNATIVE** scenario:

a)   The **STATUS QUO SCENARIO** refers to the present situation of connections between Providenciales and North Caicos, based on water-based connections (boats…) and, possibly, private aircraft.

b)   The **ALTERNATIVE** scenario is based on creating a land-based connection through a highway connecting Providenciales with North & Middle Caicos, then Middle Caicos with East Caicos and, finally, East Caicos with South Caicos. Following a Florida Keys-style development, this scenario would radically change the tourism development model of North & Middle Caicos as it probably would follow the already existing successful model of Providenciales.

PRIORITY Potential & Present Tourism Products in TID 2 are the following:

a)   **OUTDOOR ADVENTURE**

The priority tourism product **OUTDOOR ADVENTURE** is based on a combination of **FIVE (5)** products in the *status quo* scenario for North & Middle Caicos:

1.   Hiking / Trekking

2.   Birdwatching

3.   Cycling / Biking

4.   Off-Road exploring

5.   Glamping

North & Middle Caicos: Priority Product in status quo scenario

OUTDOOR ADVENTURE

Cycling / Biking   Hiking / Trekking   Off-road by 4x4 & motorbikes

Birdwatching   Glamping

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[37] Adaption created with My Google Maps

b)   CLIMATE NEUTRAL ECOTOURISM

The priority tourism product **CLIMATE NEUTRAL ECOTOURISM** is based on a combination of **FIVE (5)** products in the *status quo* scenario.

SECONDARY Potential & Present Tourism Products in TID 2 are the following:

C.   **Sun & Sea**
D.   **Water sports**
  D.1   *Kayaking*
  D.2   *Stand-up paddleboarding / SUP*
  D.3   *Kiteboarding / Kitesurf*
E.   **Photography**
F.   **Fishing**
G.   **Plantation tourism**

1.2.1.1.1   TID 3: South Caicos / Big Ambergris Cay / Little Ambergris Cay / Seal Cays

This Tourism Improvement District (TID) totals around 1,200 inhabitants.

Figure 4: Map[38] of islands and cays which are grouped as TID 3
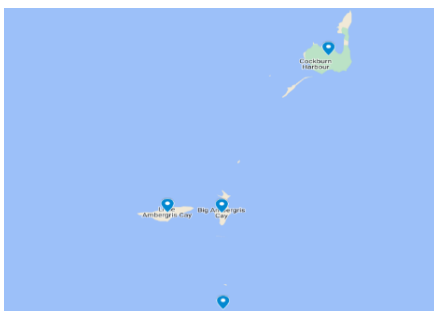
TOURISM PRODUCTS

This TID expresses many tourism products with different levels of potentiality.

1.   PRIORITY Potential & Present Tourism Products in TID 3 are the following:

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[38] Adaption created with My Google Maps

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South Caicos

FISHING

- Deep sea fishing
- Big fish
- Bone fishing
- Fly fishing
- Fishing tournaments
- Fishermen's local community / Community-Based Tourism

A. FISHING TOURISM

The priority tourism product FISHING is South Caicos based and includes various typologies of fishing.

B. DIVING

C. LUXURY

2. Other SECONDARY Potential & Present Tourism Products in TID 3 are the following:

D. BOATING & SAILING
E. HISTORY OF THE SALT INDUSTRY
F. SUN & SEA
G. BIRD WATCHING
H. WHALE WATCHING
I. SHARK WATCHING
J. ECOTOURISM

TID 4: Grand Turk / Salt Cay / Cotton Cay / Big Sand Cay

This Tourism Improvement District (TID) totals over 5,000 inhabitants.

Figure 5: Map[39] of islands and cays which are grouped as TID 4
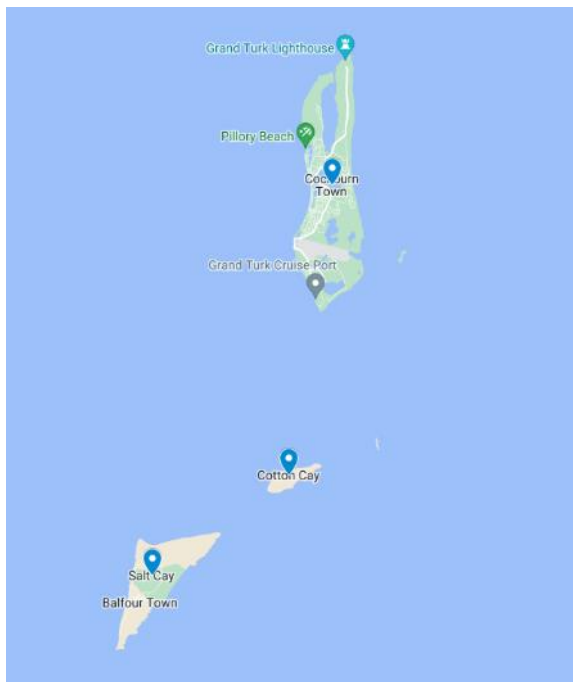
TOURISM PRODUCTS

These islands and cays are physically distant from the other islands, as they are separated by the "Columbus Passage"[40]. Therefore, they partially specialise in tourism products different from the other TCI TIDs:

1.   PRIORITY Potential & Present Tourism Products in TID 4 are the following:

A.   DIVING

B.   CRUISE

C.   WHALE WATCHING

D.   ECOTOURISM

2.   Other SECONDARY Potential & Present Tourism Products in TID 4 are the following:

Other Secondary Potential & Present Tourism Products:

E.   BIRDWATCHING AND NATURE PHOTOGRAPHERS

F.   THE OLD SEA SALT INDUSTRY & PLANTATION RUINS

G.   WELLNESS & SPA

H.   DEEP SEA FISHING

I.   COMMUNITY-BASED TOURISM (CBT)

J.   SUN & BEACH

K.   GEOTOURISM

L.   MICE: SPORTS AND BUSINESS EVENTS

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[39] Adaption created with My Google Maps

[40] representing a passage over 7,000 feet deep inside the archipelago that connects the Atlantic Ocean to the Caribbean

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Recap TIDs tourism product specialisation by cluster

Destination 1 Specialisations

LUXURY

WATER SPORTS

Destination 2 Specialisations

OUTDOOR ADVENTURE

CLIMATE NEUTRAL ECOTOURISM

Destination 3 Specialisations

FISHING

DIVING

LUXURY

Destination 4 Specialisations

DIVING

CRUISE

WHALE WATCHING

ECOTOURISM
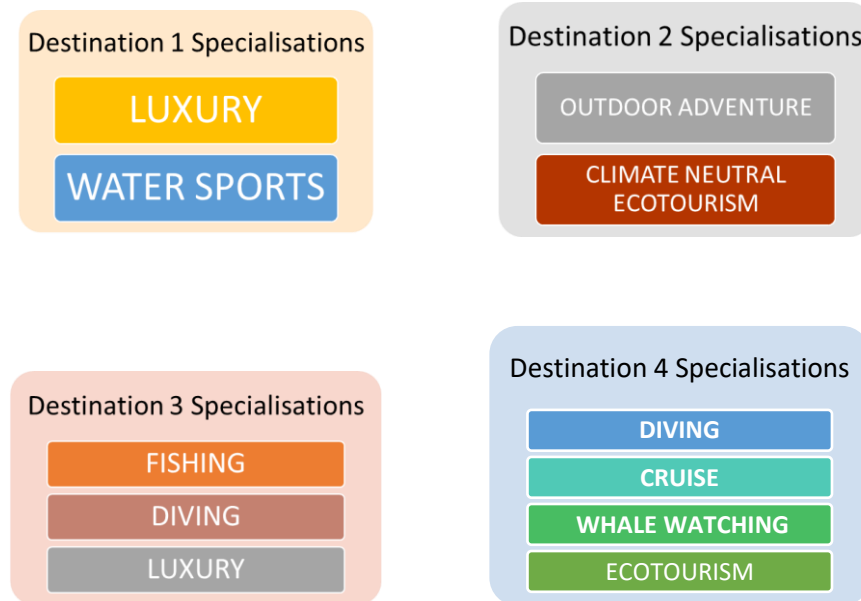
Two additional tourism products are transversal to all 4 TIDs:

→ **Sun & Beach**
→ **Film tourism & Film Commission**

Based on the priority "specialisations" of the islands, the following **10 TOP PRIORITY** tourism products can be outlined:

Figure 6: priority tourism products

LUXURY
Providenciales, Ambergris Cays
South Caicos

WATER-BASED SPORTS
Providenciales
Grand Turk

OUTDOOR ADVENTURE
North & Middle Caicos

ECOTOURISM
East Caicos, Salt Cay
North & Middle Caicos, Seal Cay, Providenciales

FISHING
South Caicos
Salt Cay, Grand Turk, Seal Cay

DIVING
Grand Turk, South Caicos
Salt Cay, Seal Cay

CRUISE
Grand Turk

WHALE WATCHING
Salt Cay, Grand Turk

SUN & BEACH
All islands

FILM COMMISSION
All Islands

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• Middle Priority

Boating, yachting & sailing	•"Big South" Regatta of South Caicos •Yachts charters
MICE	•Incentives •Events: Sports, Cultural
Water-based sports	•Snorkelling •Kayaking
Golf	
Community-Based Tourism	
Bird watching	•Pink flamingos
Sea wildlife watching	•Whales •dolphins, stingrays/eagle rays, starfishes
Geotourism	

• Low Priority

MICE	•Business Meetings •Conferences
Photography	
Cultural	•Historical Plantations
Water-based sports	•Jet ski •Kiteboarding / Kitesurf
Shopping & Entertainment	
Gourmet / Foodies	
Land wildlife watching	•Reptiles - snakes, iguanas •Wild donkeys •Blue land crabs

1.3   Strategic Line: Connectivity between destinations

1.3.1   Output: Enhancement of internal mobility

1.3.1.1   Specific Action: Development of the airport infrastructures

This specific action focuses on developing airport infrastructure in TCI. This includes completing the airports of the "minor" islands, such as North Caicos, South Caicos, and Salt Cay.

The completion of airport infrastructure in these islands is essential to improve their connectivity with the rest of the country (especially Providenciales, the international arrival hub) and promote their growth as tourism destinations. This will not only enhance the tourism offerings of the islands but also support local businesses and create new job opportunities.

By investing in "minor" airport infrastructure development, TCI can become more accessible to tourists and increase its competitiveness as a tourism destination. Additionally, the completion of airport infrastructure in the "minor" islands will help distribute tourism's economic benefits more evenly across the region.

The TCI Government has been investing in the development of the airport infrastructure to improve the travel experience for visitors and to support the growth of the tourism industry. In addition, in collaboration with the TCI Airport Authority, it is actually promoting the:

- expansion and modernization of the Providenciales International Airport;
- upgrading of smaller airports;
- introduction of new air routes.

1.3.1.2   Specific Action: Incentives for developing new sustainable means of transportation.

Incentives for developing new sustainable means of transportation for tourism purposes are designed to encourage businesses and individuals to invest in sustainable transportation options that are environmentally friendly and have a lower carbon footprint.

The tourism industry is a significant contributor to greenhouse gas emissions, with transportation being one of the largest sources. Therefore, promoting sustainable transportation options is essential to reduce the industry's environmental impact.

By providing incentives, such as tax credits or subsidies, for developing sustainable transportation options for tourism purposes, the government can encourage businesses and individuals to invest in these alternatives. These incentives can help offset the costs of implementing new technologies and make sustainable transportation options more affordable and accessible.

The benefits of sustainable transportation options are not limited to environmental factors but can also enhance the tourist experience. For example, electric vehicles, bikes, or scooters can provide tourists a unique and sustainable way to explore a destination, reducing traffic congestion and improving air quality.

Incentives for developing new sustainable means of transportation for tourism purposes can help reduce the environmental impact of the tourism industry while promoting innovative and unique tourism experiences for visitors.

[PILLAR 2] SUSTAINABILITY

2.1 Strategic Line: Supporting sustainable tourism development

2.1.1 Output: Destination Enhancement Fund

2.1.1.1 Specific Action: Creation of a tourism Destination Enhancement Fund

The creation of a "tourism destination enhancement fund" in TCI can have numerous benefits for the preservation, valorisation, development, and promotion of the natural and cultural heritage assets of the region.

This fund should be used for the following purposes:

- Provide a reliable and sustainable source of funding for the conservation and preservation of the natural and cultural heritage assets of TCI. These assets are crucial for tourism as they attract visitors and enhance their experience.
- Support the development and promotion of new tourism products and experiences that are based on TCI's unique natural and cultural heritage assets. This can create new economic opportunities and diversify tourism product offerings, attracting a wider range of visitors.
- Enhance the capacity and skills of local communities to participate in the tourism industry, fostering the sustainable development of the sector and providing long-term benefits to the local economy.

The TCI Government should delegate the new DMO to use the Fund to implement all the activities described above.

2.1.1.2 Specific Action: Awareness campaign to tourists and the local population about responsible tourism practices.

Numerous destinations are promoting responsible tourism practices to minimise environmental impact, preserve cultural heritage, and support local communities. Tourists are being encouraged to participate in these responsible tourism practices by reducing plastic waste, conserving water, and minimising their carbon

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footprint. Additionally, TCI will provide information about the Tourist Guest Fee, which all tourists are required to pay upon arrival.

The goal of these efforts is to raise awareness among tourists about the importance of responsible tourism practices and the impact they can have on the environment and local communities. By encouraging responsible tourism practices, destinations like TCI can minimise the negative impact of tourism while promoting sustainable tourism development that benefits both tourists and local residents.

2.2   Strategic Line: Environmental protection and climate change mitigation

2.2.1   Output: Investment in green technology

2.2.1.1   Specific Action: Develop initiatives and measures to encourage investments in green technologies.

Encouraging investments in green technologies in tourism can have numerous benefits, including reducing the carbon footprint of the industry, enhancing the tourist experience, and promoting the adoption of sustainable practices. Now renewable sources produce only a low% of the total amount of Turks & Caicos electricity. This mix of energy sources heavily affects the Jamaican balance of payments.

To reduce the country's dependence on imported fossil fuels, which dramatically increased last year, a shift to green energy should be fostered and to renewable energy generation, such as photovoltaic, solar, and hydrogen.

To encourage investments in green technologies in tourism, initiatives and measures can be developed that provide fiscal advantages and infrastructure support.

One way to provide fiscal advantages is through tax credits or other incentives for businesses that invest in green technologies. These incentives can offset the costs associated with implementing new technologies, making them more financially feasible for businesses.

Additionally, infrastructure support can be provided to encourage the adoption of green technologies. This can include the installation of electric vehicle charging stations or the development of renewable energy infrastructure. Such initiatives can make it easier for businesses to transition to green technologies and promote the use of sustainable energy sources.

2.2.1.2   Specific Action: Training and support of start-ups in green technologies.

The specific action aims to provide training and support to start-ups operating in green technologies. This action is designed to equip start-ups with the necessary knowledge and skills to develop and implement sustainable business practices. The training and support provided will cover various aspects of sustainable business practices, such as resource management, waste reduction, and energy efficiency. Through this action, start-ups can improve their environmental performance and reduce their carbon footprint.

In addition to providing training and support to start-ups, the specific action also targets large hospitality companies. These companies will be able to benefit from the expertise of start-ups in the field of green technologies. Large hospitality companies can learn about the latest sustainable practices and technologies by collaborating with start-ups and implementing them in their operations. This collaboration can also lead to developing new sustainable products and services, which can help these companies stay competitive in the market.

The training and support of start-ups in green technologies for large hospitality companies is an important step towards achieving sustainability in the hospitality sector. By promoting sustainable practices and technologies, this action can contribute to the reduction of environmental impacts and the development of a more sustainable and resilient industry.

2.2.2   Output: Increase environmental protection and climate change resilience actions

2.2.2.1   Specific Action: Development of a "green infrastructure" programme applied to the tourism industry.

This action involves the development of a program that promotes sustainable practices in the tourism industry. This includes the implementation of green technologies such as renewable energy sources, the reduction of energy and water consumption, and the adoption of waste reduction and recycling strategies. By creating a "green" destination, TCI can attract different types of visitors interested in "green" and sustainable tourism and create new job opportunities in the green technology industry.

2.2.2.2   Specific Action: Implement short-term initiatives to mitigate the effects of rising sea levels and floods.

This action focuses on implementing short-term solutions to mitigate the effects of climate change on TCI's tourism industry. This includes the development of natural and architectural water barriers to protect the coastline from the impacts of rising sea levels and floods. Water drainage systems can also be implemented to manage water runoff and prevent flooding in low-lying areas. These initiatives can help to reduce the risk of damage to tourism infrastructure and protect the natural environment.

2.2.2.3   Specific Action: Create a circular economy programme applied to big cultural and sport events.

This action involves the development of a circular economy programme applied to large cultural and sports events, such as music concerts, football/cricket/athletic events, etc. This programme would focus on reducing waste, promoting recycling, and ensuring that the events are environmentally sustainable. By promoting circular economy principles, the programme can help to reduce the environmental impact of these events and promote sustainable practices in the tourism industry.

2.2.2.4   Specific Action: Short-term initiatives to mitigate the effects of hurricanes.

This action involves implementing short-term solutions to mitigate the impact of hurricanes on the tourism industry. This includes developing infrastructure, facilities, and equipment for tourism enterprises to reduce damage caused by hurricanes. The initiative can also enhance opportunities for natural and open-air tourism by promoting activities that are less impacted by hurricanes, such as hiking and wildlife watching and for greater enjoyment of the sea, the main tourist attraction of TCI.

2.2.2.5   Specific Action: Programme guaranteeing of good quality water and a secure water supply.

This action focuses on developing a programme to guarantee good quality water and a secure water supply for tourists. This includes reducing water consumption by water-efficient technologies and protecting water reserves from the impact of salinization of coastal water sources as well as by launching awareness campaigns. By ensuring a reliable and high-quality water supply, TCI can enhance the tourist experience and promote sustainable tourism practices.

2.2.2.6 Specific Action: Programme to combat the reduction of marine natural resources and coral reefs.

This initiative focuses on developing a programme to combat the reduction of marine natural resources and coral reefs. This includes the regeneration of marine resources such as mangroves and coral reefs (Example: Coral Reef Gardner Program - see Punta Cana project) and involving local fishermen in a sustainable tourism development model. By promoting sustainable fishing practices and protecting marine ecosystems, TCI can ensure the long-term sustainability of the tourism industry.

2.2.2.7 Specific Action: Programme to combat environmental problems.

This initiative involves the implementation of a programme to combat environmental problems such as waste management, plastic in the sea, sewage, and the cleaning of beaches. This includes developing waste management strategies, promoting recycling, and implementing measures.

2.2.2.8 Specific Action: Programme to introduce sustainability standards.

Developing a programme to introduce sustainability standards in tourism is crucial for TCI to maintain a sustainable and competitive tourism industry while protecting the environment and providing economic benefits to local communities.

To develop a programme to introduce sustainability standards in tourism, the following steps can be taken:

- Establish a sustainability task force consisting of stakeholders from the tourism industry.
- Conduct a sustainability assessment to identify areas that need improvement.
- Develop sustainability standards that are specific to TCI's tourism industry.
- Establish a certification program to recognize tourism operators that meet the standards.
- Provide training and education to ensure the successful implementation of the standards.
- Promote sustainability standards to raise awareness and position TCI as a leader in sustainable tourism.

2.3 Strategic Line: Heritage Valorisation

2.3.1 Output: Supporting local culture, traditions, and customs

2.3.1.1 Specific Action: Interpretation and documentation (Natural and Cultural Heritage assets)

Interpretation and documentation of natural and cultural heritage assets is a crucial aspect of preserving and promoting the rich heritage of Turks and Caicos. This action aims to document and interpret natural and cultural heritage assets, which include landscapes, ecosystems, cultural landmarks, historic buildings, and artefacts. Documentation involves gathering information, researching, and cataloguing the assets to create a comprehensive record. This record serves as a valuable resource for understanding and appreciating a place's natural and cultural heritage.

TCIG could launch a national concourse involving all schools in the country to investigate on the heritage of natural and cultural assets in the country. The competition could be organised by themes (e.g. architecture, industrial heritage, fishing tradition, etc.) and schools could be invited to produce a detailed story telling for each theme.

2.3.1.2 Specific Action: Promotion of new gastronomic events

Promoting new gastronomic events can be an effective way to promote local culture, traditions, and customs. This action involves creating new food-related events that showcase the local gastronomic heritage, such as historical salt production, traditional recipes, and local ingredients. Promoting these events makes it possible to attract food enthusiasts and tourists interested in experiencing the local cuisine and culture.

The historical salt production in Turks and Caicos is an excellent example of how gastronomic events can be used to promote local culture and traditions. Salt production has been an essential economic activity in the country for centuries, often associated with local customs and traditions. Creating food-related events showcasing the history and traditions of salt production, such as salt festivals, can help promote this activity's cultural significance and attract tourists interested in learning more about it.

Similarly, promoting local traditional recipes and ingredients can help to preserve and promote local culture and traditions. Creating food-related events that showcase local dishes, such as food fairs and culinary tours, can help promote a place's culinary heritage and attract tourists interested in experiencing local cuisine.

In addition to promoting local culture and traditions, gastronomic events can also contribute to the economic development of a place. By attracting tourists and food enthusiasts, these events can create new economic opportunities for local businesses, such as restaurants, cafes, and food producers.

2.3.1.3   Specific Action: Involvement of Local Communities

Involving the local community in cultural activities to promote and preserve local traditions and customs. This can be achieved through organising cultural festivals, art exhibitions, and workshops where local people participate and share their knowledge and skills with visitors.

An awareness programme could be launched addressed to the local population on the possibilities of economic improvement through tourism offered in their islands to reduce the massive internal migrations from all the islands towards Providenciales.

2.3.2   Output: Rehabilitation of natural and heritage sites

2.3.2.1   Specific Action: Rehabilitation of the salt marshes in Grand Turk and Salt Cay

The rehabilitation of salt marshes in Grand Turk and Salt Cay in collaboration with the TCI Heritage Trust (Agency under the TCI Ministry of Tourism) is a crucial action for preserving and promoting the cultural and environmental heritage of the Turks and Caicos Islands. Salt marshes are an essential part of the coastal ecosystem, providing habitat for many species of plants and animals. They also have significant cultural and historical significance, as salt production has been an important economic activity in the region for centuries.

The rehabilitation of salt marshes involves restoring degraded salt marsh areas to their natural state. This can be achieved through a range of activities, such as removing invasive species, planting native vegetation, and creating drainage channels. The rehabilitation process helps to improve the ecological functioning of salt marshes and restore their habitat value.

In addition to ecological benefits, the rehabilitation of salt marshes can also provide opportunities for cultural and educational activities. For example, the creation of an interpretation centre can help to educate visitors about the cultural and historical significance of salt production in the region. This can include exhibits, interactive displays, and guided tours that showcase the history and traditions of salt production.

The rehabilitation of salt marshes can also include the creation of facilities that support cultural and environmental activities. For example, the construction of observation decks and bird-watching areas can provide opportunities for visitors to observe the diverse flora and fauna of the salt marsh ecosystem (e.g. pink flamingos). These facilities can also support the development of eco-tourism, which can provide new economic opportunities for the region.

[PILLAR 3] COMPETITIVENESS

3.1 Strategic Line: Promoting innovation in the tourism industry.

3.1.1 Output: Innovation in tourism services and facilities

Based on the diversification of the tourism products (see Output 1.2.1), TCIG should promote investments to facilitate innovation of tourism services and facilities. Specific activities are as follows:

3.1.1.1 Specific Action: Diversification and innovation of tourism services

To diversify the tourism supply chain and to attract new market segments, a series of new services should be set up or re-designed to attract the typologies of tourists related to the new and priority tourism products.

New tourism products also require the set-up and diversification of new, specific, and innovative services connected to the new products.

Services connected to LUXURY:

Yacht rentals
Facilitate the settlement in Turks & Caicos of at least one company renting a superyacht (from 24 to 40 metres) and, possibly, also at least one megayacht (from 40 metres – 130 ft).
The number of "normal" yachts (10 to 24 metres) should be increased.

Services connected to OUTDOOR ADVENTURE:

Open Air Recreational Vehicles
If a sort of Florida Keys Road connection will be realised between Providenciales and North Caicos, this would open a market connected to open air-related Recreational Vehicles (RV), such as Truck Campers and Motorhomes would be possible to be developed.
This market potential would increase with a multiplier effect if Middle Caicos were connected by road to East Caicos.

Services connected to ECOTOURISM:

East Caicos
The not inhabited East Caicos offers a high potential for becoming a **unique climate neutral / zero-impact ecotourism destination** through a series of interventions:

- Map, signalise and systemise the old railroads' trail, or at least a part of it, to create opportunities for hiking/trekking (only with expert guides).
- Valorise the over 1000s wild donkeys.
- Set up watching towers and other hidden watch points to get close to flamingos and other unique birds: Cuban crows, West Indian whistling ducks, Bahamas woodstar hummingbirds, warblers, mangrove cuckoos, several types of herons and egrets, and ospreys)
- Train guides to organise exploration tours to encounter reptiles and snakes (land wildlife watching)
- Organise sea wildlife watching: whales, dolphins, sting and eagle rays, starfishes.

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- East Caicos' <u>Unique Selling Position</u> as a unique climate neutral / zero impact ecotourism destination through:
    - o Energy & waste passive cottages (zero impact)
    - o Specialised ecotourism guides
    - o Hybrid or full electric motors driven boat connections (from Middle and South Caicos)

<u>Salt Cay</u>

Salt Cay is generally ready to become a real ecotourism and Community Based Tourism (CBT) destination, as many services are already organised. It should focus on positioning and branding itself as an ecotourism paradise. Possibly it should attract investments for developments related to Glamping typologies of accommodation structures.

Services connected to FISHING:

<u>South Caicos</u>

Investment in boats suitable for comfortable deep-sea fishing is required.

Services connected to UNDERWATER WONDER:

Except for Providenciales which offers quite innovative services to explore the underwater world beyond scuba diving and snorkelling, such as snuba, freediving and paddleboarding / SUPing, the other islands are not equipped to offer these innovative services.

Especially Grand Turk, South Caicos and Salt Cay should develop these services and, possibly, create new ones to explore the magic of the underwater world, also for people with low or no skills to do scuba diving or snorkelling, e.g.:

Seawalking:

Sea walking is a new way to explore the sea with little to no experience spending time under the sea.

The concept allows for walking on the seafloor while feeling relaxed and at ease with the surroundings, as breathing is normal.

This also allows those who are not certified to scuba dive to have a similar experience of seeing the ocean from below. Adventurers get to wear a helmet that is fed fresh air from the surface so they can be anxiety free as they explore the beautiful marine life around them.

Sea walking has some technical aspects, including equalising, as one must do in scuba diving. The good part is that since one is wearing a helmet and no messy snorkel gear, one can still wear eyeglasses and breathe normally like they would above water. And those who can't swim don't even need to, since they're walking.

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<u>Submersible rides:</u>

Various destinations have adopted innovative submarine rides. Some submarines go completely underwater, while others go half in, half out, to bring tourists close to marine life in the wild in the most comfortable manner possible.

An interesting, good example is the Triton DeepView 24, built by Florida-based luxury submersible company Triton Submarines, launched at the Vinpearl complex in Hon Tre Island, Vietnam, in 2022:

Measuring 15.4 meters (50.5 feet) long, the Triton DeepView 24 is described as "virtually silent, entirely non-polluting and producing no carbon or effluent emissions." The 24-seat vessel, which can reach depths of up to 100 meters (328 feet), features a transparent acrylic hull, providing an incomparable underwater experience for those on board. Passengers can view shipwrecks, reefs, and marine life, as well as a diver show devised to raise awareness around environmental issues during the 30-minute dives[41].

<u>Services connected to SALT-BASED CULTURE:</u>

<u>Salt Cay, Grand Turk</u>

2. Relaunch the salt industry as an economic activity and a tourism attraction, including new services such as wellness.

<u>Services connected to FILM COMMISSION:</u>

The main initial ten steps to set up a "TCI Film Commission" are:

<u>Phase 1: Short-Term Implementation</u>

- <u>Set up</u> the "TCI Film Commission" division in the new DMO: hire specialised staff (2 people), and determine operating policies as its main functions are the "one-stop-shop" and marketing for attracting productions.

- Develop a Brand for Film Turks & Caicos. To reasonably compete, and to access a percentage of this multi-billion-dollar global industry, the Turks and Caicos needs to establish an impactful and memorable brand for the Turks and Caicos Film Commission and to leverage it through a multi-pronged marketing strategy to attract productions:
  - o Possible brand Name: name Film Turks & Caicos / Film TCI or other
  - o Logo and Brand Identity: clean, professional, memorable, and convey some information about the Turks and Caicos that would be attractive to the target markets.

- Develop brand Marketing Tools:
  - → Website and Digital Film Commission Platform containing information and resources that must be available online for potential clients to access at any time:

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[41] https://edition.cnn.com/travel/article/transparent-tourist-submarine-launches-at-vietnam-resort/index.html

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- o Locations Photo Library
- o Production Directory
- o Production Guide
- o Visa and Work Permit Guidelines and Applications
- o Customs clearances
- o Business and Services Directory
- o Film Permit details and Application
- → Social media platforms, banners, etc.
- Commission the development of Film Commission software for company operations (MovieSite or ReelScout).
- Compile production incentives package based on existing offers and concessions within the legislation, and add waivers for customs fees and work permit fees, for 1 - 3 years. Develop digital film permit.
- Compile local stakeholder database.
- Compile locations database.
- Develop TCI Film Production Partnerships:
  - o Compile special service offers for film, television and commercial productions from hotels, airlines, restaurants, water sports, etc., especially by working with TCIHTA.
  - o Bring together the members of the network and formalise partnerships with MOUs.
- Develop initial marketing and advertising plan to launch Film TCI in international target markets (New York, London, Los Angeles, Cannes), and locally in TCI, in partnership with TCI International Film Festival.
- Plan and execute local and international launch activities and advertising plans for Film Commission TCI, according to the initial launch marketing plan.

This first phase represents a testing phase with a moderate financial effort for its development and needs to be accurately assessed in terms of successes, challenges, and lessons of Phase 1. In fact, Relevant adjustments need to be made before embarking on Phase 2 and Phase 3, which are more demanding.

3.1.1.2   Specific Action: Product innovation addressing new typologies of accommodation.

→ **N.B. For details on new typologies of accommodation, please refer to ANNEX G**

To diversify the tourism supply chain and to attract new market segments, such as outdoor adventure and ecotourism, one or more islands of the Turks and Caicos should start developing and setting up new typologies of accommodation in line with the needs and expectations of the typical tourists of these segments, especially focusing on glamping style accommodation solutions.

Glamping is where glamorous accommodation meets traditional camping. Glamping offers accommodations and facilities that are luxurious compared to camping, to give travellers the best of both worlds.

According to Tents Xpert, the glamping market in the United States is expected to reach a revenue of about $1 billion by 2024. And there's no sign of slowing down. According to Grand View Research, the glamping industry is projected to surpass $5.4 billion by 2028 evidencing that the global glamping market size is huge.

This impressive growth is fuelled by travellers' desire to stay in unique accommodations, while still having access to amenities and services that are not necessarily provided by a traditional camping business.

Glamping is *not only limited to tents and caravans*: from treehouses to tiny houses, various types of accommodation are also regarded as glamping. The following are some of the most common:

a) Yurts[42]	b) Tipis[43]
c) Treehouses	d) Tiny houses
e) Bubble domes[44]	f) Luxury glamping tents
g) Eco-lodges	h) Train carriages
i) Caravans	j) Eco-Pods

Examples of Glamping

3.1.2   Output: Innovative start-up programme

3.1.2.1   Specific Action: Support technological start-ups for innovation in the tourism industry

This specific action to encourage the development and implementation of innovative technologies that can improve the tourism industry's efficiency and sustainability. This involves identifying and supporting technological start-ups developing innovative solutions for the tourism industry, such as mobile applications, e-commerce platforms, and data analytics tools.

By supporting technological start-ups, TCI decision-makers can leverage the creativity and innovation of the start-up community to identify and develop new solutions for the tourism industry. These solutions can help improve tourism operations' efficiency and effectiveness, increase customer satisfaction, and promote sustainable tourism practices.

Some ways that decision-makers can support technological start-ups include providing funding and mentorship, offering access to data and research resources, and facilitating collaboration between start-ups and established tourism operators. By providing these forms of support, decision-makers can help to overcome the challenges that start-ups often face, such as limited resources and a lack of industry connections.

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[42] A round glamping tent.
[43] Traditional, triangular native American tent.
[44] Transparent pods.

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3.1.2.2 Specific Action: Annual Smart Tourism Hackathon (*within the Caribbean Smart Tourism Conference*)

Organising an Annual Smart Tourism Hackathon as part of the Caribbean Smart Tourism Conference would represent an important event for promoting innovation and creativity in the tourism industry. By bringing together technology enthusiasts and experts in the tourism industry, the hackathon provides a platform for developing new and innovative solutions that can improve the customer experience, promote sustainable tourism practices, and enhance the competitiveness of the tourism industry. Additionally, the hackathon provides networking and collaboration opportunities among participants and industry stakeholders, which can lead to further development and implementation of the winning solutions.

During the hackathon, participants are challenged to develop technology-based solutions that address specific challenges facing the tourism industry, such as improving the customer experience, promoting sustainable tourism practices, and enhancing tourism operations. Participants work in teams to develop prototypes and pitch their ideas to a panel of judges, who evaluate the solutions based on their innovation, feasibility, and potential impact on the tourism industry.

The hackathon typically runs for a day or two, when participants have access to technology resources, mentorship, and industry experts who can provide guidance and support. The event concludes with a presentation of the winning solutions, which are typically recognised with prizes and opportunities for further development and implementation.

3.2 Strategic Line: Tourism Market Intelligence.

3.2.1 Output: Profiling of tourist markets and segments

3.2.1.1 Specific Action: Organisation of a Tourism Observatory

Organising a Tourism Observatory for TCI is important for informing decision-making, monitoring tourism performance, identifying opportunities and challenges, promoting sustainable tourism, and supporting industry development. By collecting and analysing data on tourism trends and visitor behaviour, decision-makers can make informed decisions that support the long-term sustainability and growth of the tourism industry.

Here are some of the key steps involved in setting up the TCI Tourism Observatory:
- Define the objectives and scope of the observatory. This involves determining what information the observatory will collect and analyse, who the target audience will be, and what the expected outcomes are.
- Identify stakeholders who will be involved in the observatory, such as tourism operators, government agencies, academic institutions, and industry associations. These stakeholders can provide valuable input on the design and implementation of the observatory.
- Determine the data sources that will be used to collect the information needed for the observatory. This can include surveys, interviews, and data from tourism operators, government agencies, and other sources.
- Design data collection tools that are tailored to the objectives of the observatory. This can include survey questionnaires, interview guides, and data collection forms.

- Develop a data analysis plan: Develop a data analysis plan that outlines how the data collected will be analysed and presented. This should include a clear methodology for analysing the data and generating reports.
- Build the infrastructure needed to collect, store, and analyse data. This can include software tools for data analysis, data storage systems, and staff to manage the data.
- Train staff on data collection and analysis techniques, as well as the objectives and scope of the observatory.
- Launch the observatory and begin collecting and analysing data. Regular reports should be generated and distributed to stakeholders to inform decision-making and policy development.

3.2.1.2 Specific Action: Assessment of new tourism markets and segments

Assessing new tourism markets and segments through market intelligence is a critical action for tourism operators and decision-makers. By gathering and analysing data on tourism trends, consumer behaviour, and market conditions, it is possible to identify new opportunities for growth and development in the tourism industry. By developing marketing strategies that are tailored to the identified new tourism markets and segments, decision-makers can effectively target new customers and increase the competitiveness of the tourism industry.

- Conduct Market Research to Learn More About Potential Tourists from Established Markets Based on New Tourism Products
  Market research is essential for understanding the needs and preferences of potential tourists from established markets, such as the US, Canada, and the UK. By studying and analysing data on new tourism products launched and promoted in these markets, tourism businesses and policymakers in TCI can gain insights into the motivations and interests of potential tourists.

- Conduct Market Research to Learn More About Potential Tourists from Emerging Markets Based on New and Established Tourism Products
  To tap into potential markets, such as Japan, Germany, France, and Russia, tourism businesses and policymakers in TCI need to understand the unique needs and preferences of potential tourists from these areas. Conducting market research on both established and new tourism products can provide valuable insights into the motivations and interests of potential tourists from these markets.

- Learn from Competitors and Best Practice Cases Through Market Intelligence
  Studying competitors, and best practice cases is essential for tourism businesses and policymakers in TCI if they want to stay ahead of the curve. Market intelligence can provide valuable insights into the strategies and tactics used by competitors the best practices in the tourism industry. By learning from competitors and best practice cases, tourism operators can identify opportunities for improvement and innovation and develop strategies to enhance their competitiveness in the market.

3.2.2 Output: Innovation in tourism data collection

Innovation in tourism data collection is an important area for tourism operators and decision-makers who want to improve the accuracy and efficiency of their data collection efforts. By leveraging new technologies and analytical tools, it is possible to gain valuable insights into tourist behaviour and preferences, as well as identify new opportunities for growth and development in the tourism industry.

Here are some of the ways innovation is being used to enhance tourism data collection:

- **Mobile data collection** by using mobile devices, such as smartphones and tablets, to collect data in real time. This approach can improve the accuracy and efficiency of data collection, as well as enable data to be collected in remote or hard-to-reach locations.
- **Sensor-based data collection** by using sensors, such as GPS devices and motion sensors, to collect data on tourist behaviour and movement patterns. This approach can provide valuable insights into the preferences and behaviour of tourists, as well as enable real-time monitoring of tourist activity.
- **Social media data collection** by analysing data from social media platforms, such as Twitter and Instagram, to gain insights into tourist behaviour and preferences. This approach can provide valuable insights into the opinions and perceptions of tourists, as well as enable real-time monitoring of trends and events.
- **Big data analytics** by using advanced analytical tools and techniques to analyse large volumes of data. This approach can provide valuable insights into complex patterns and relationships within tourism data, as well as enable real-time monitoring and decision-making.
- **Machine learning** by using algorithms and statistical models to analyse data and make predictions. This approach can enable tourism operators and decision-makers to identify patterns and trends within data, as well as predict future outcomes and behaviour.

3.2.2.1 Specific Action: Agreements with international tourism digital platforms.

Agreements with international tourism digital platforms offer significant advantages for tourism businesses and destinations in TCI. They can enhance visibility, as these platforms usually have a broad user base and can increase exposure to various potential customers. They can also increase bookings through their integrated booking systems, which makes it easy for customers to book travel and accommodation, resulting in increased sales and revenue. Additionally, these platforms have advanced marketing and advertising capabilities that can improve targeting and increase brand awareness. Moreover, these agreements provide access to valuable data and analytics that can help analyse customer behaviour, identify trends, and make informed decisions about marketing and operations. Overall, these agreements can boost competitiveness and support long-term growth and development in the tourism industry.

3.2.2.2 Specific Action: Promoting the digitalisation of the tourism industry.

Promoting digitalisation in the tourism industry is essential for remaining competitive and meeting modern travellers' needs and expectations. By enhancing digital infrastructure, developing digital marketing strategies, adopting digital payment systems, integrating smart technologies, and providing digital training and support, tourism businesses and destinations in TCI can ensure long-term success in the tourism industry.

3.2.3 Output: Interinstitutional collaboration

Interinstitutional collaboration is crucial for tourism development, as it enables different government agencies and stakeholders to work together towards a common goal.

Following are some ways to promote interinstitutional collaboration in tourism development:

3.2.3.1 Specific Action: Organisation of a permanent inter-ministerial roundtable.

One way to promote interinstitutional collaboration is to establish a permanent inter-ministerial roundtable. This can bring together representatives from different government agencies and stakeholders to discuss issues related to tourism development, share information, and coordinate efforts.

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3.2.3.2   Specific Action: Developing joint tourism policies and strategies.

Interinstitutional collaboration can also involve developing joint tourism policies and strategies. By working together, different government agencies and stakeholders can align their efforts and resources towards a common vision for tourism development.

3.2.3.3   Specific Action: Sharing resources and expertise.

Interinstitutional collaboration can also involve sharing resources and expertise. This can include sharing data, knowledge, and best practices to improve decision-making and enhance the effectiveness of tourism development efforts.

3.2.3.4   Specific Action: Coordinating tourism development projects.

Interinstitutional collaboration can also involve coordinating tourism development projects. This can help to ensure that resources are used effectively and that different projects are aligned towards a common goal.

3.3   Strategic Line: Branding and Marketing.

3.3.1   Output: New branding and positioning

3.3.1.1   Specific Action: Conceptualisation and design of a new tourism brand

The conceptualisation and design of a new tourism brand for Turks and Caicos can help to enhance the destination's reputation and attract new visitors. Starting from the existing "Beautiful by Nature" brand, here are some examples of how to develop a new tourism brand for TCI focusing on new products in addition to the pristine beaches and crystal-clear waters, which are already excellently positioned in the international markets, such as culture, outdoor adventure, nature and wildlife:

- Unique Selling Point: <u>Rich culture and history</u>.
  Brand Promise: "*Discover the soul of Turks and Caicos, where the past meets the present, and the local culture shines*."
- Visual Identity: A logo that incorporates elements of local art and architecture, along with vibrant colours and patterns.
- Messaging Strategy: A public relations campaign that highlights the destination's rich cultural heritage, featuring interviews with local artists, musicians, and historians.

- Unique Selling Point: <u>Adventure and outdoor activities.</u>
- Brand Promise: "*Unleash your inner explorer in Turks and Caicos, where every adventure is a memory to cherish*."
- Visual Identity: A logo that incorporates imagery of adventure and exploration, such as a compass or a mountain peak.
- Messaging Strategy: A digital advertising campaign that promotes the destination's outdoor activities, such as snorkelling, scuba diving, and hiking, featuring high-energy videos and photos.
- Unique Selling Point: <u>Nature and Wildlife.</u>
- Brand Promise: "*Experience the untamed beauty of Turks and Caicos, where nature and wildlife thrive in perfect harmony*."
- Visual Identity: A logo that incorporates imagery of the natural surroundings, such as palm trees, tropical birds, or marine animals, along with earthy tones and textures.
- Messaging Strategy: A content marketing campaign that highlights the destination's natural attractions, such as the protected marine reserves, the nature trails, and the birdwatching opportunities. The campaign could feature blog posts, social media content, and video content that showcases the natural

beauty and diversity of the destination. Additionally, the messaging could emphasise the destination's commitment to sustainability and responsible tourism, which would appeal to travellers who are interested in eco-friendly travel.

Once the new tourism product-related brand(s) has been developed, they should be implemented across all touchpoints, including marketing materials, signage, and digital platforms. This will help to create a consistent and cohesive brand experience for visitors.

3.3.2 Output: New branding and positioning

3.3.1.2 Specific Action: Digital Marketing Plan

→ **N.B. For more details, please refer to ANNEX H**

To improve the TCI digital presence and make the destination grow, and based on our analysis of the current activities conducted by the tourist boards, the following 5-year digital marketing strategy & plan has been designed. This plan is structured around five goals that lead global digital activities and ensure consistent and efficient actions.

1. **Improve the quality of the user's experience and of the information available online:**
   → redesigning the website with improved content and fluid navigation,
   → enriching website pages and social media with detailed descriptions about experiences in the TCI,
   → writing and sharing at least 500 blog posts over the next five years.
2. **Raise awareness about the destination:**
   → doubling the number of followers on social media accounts,
   → increasing website visits by 100%,
   → generating qualitative content to be massively shared with travellers (i.e. YouTube videos, Instagram Reels)
3. **Facilitate bookings and highlight local providers efficiently:**
   → creating a booking system on the TCI website,
   → having local stakeholders involved through fee participation,
   → providing informational content on the tourist board's digital platforms for travellers to use
4. **Create a link with tourists (potential, current and past) and build a strong community:**
   → increasing social media community with qualitative leads and committed followers,
   → enhancing interaction with travellers,
   → federating travellers around the tourist board, "TCI Beautiful by Nature"
5. **Increase word-of-mouth and a good after-trip process:**
   → **Create** a post-trip survey to keep track of customers satisfaction,
   → reaching 90% of travellers' satisfaction,
   → inspire travellers to create social media posts with a hashtag specific to the tourist board (#BeautifulByNature).

3.3.3 Output: Traditional Promotion

Traditional tourism promotion actions are those that have been used for years to attract tourists to a destination. Although these traditional promotion actions can be effective, innovation and creativity are necessary to stay competitive and attract new visitors. The use of technology, personalization, collaborations,

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sustainability, and experiential marketing can help tourism destinations stand out and create unique and memorable experiences for tourists.

3.3.3.1   Specific Action: Printed material

Brochures, flyers, and advertisements in travel magazines and newspapers can be effective in promoting a destination to potential tourists.

3.3.3.2   Specific Action: Television and Radio

Commercials on local and national television and radio stations can reach a broad audience and create awareness about the destination.

3.3.3.3   Specific Action: Trade Shows and Exhibitions

Attending travel and tourism trade shows and exhibitions is an effective way to network and promote the destination to travel agents and other tourism professionals.

3.3.3.4   Specific Action: Public Relations

Building relationships with journalists and media outlets can result in positive coverage and exposure for the destination.

3.3.3.5   Specific Action: Direct Mail

Mailing promotional materials, such as postcards or brochures, to potential tourists can be a cost-effective way to reach a targeted audience.

3.3.3.6   Specific Action: Tourist Information Centres

Tourist information centres can provide information and assistance to visitors, as well as promote local attractions and businesses.

3.4   Strategic Line: Distribution channels.

3.4.1   Output: Strengthening distribution channels in the marketplace

Strengthening distribution channels is crucial for businesses in the tourism industry to reach their target market, increase revenue, and reduce risk. By utilising OTAs, and social media platforms, building relationships with travel agents and wholesalers, and investing in technology, businesses can expand their distribution channels and grow their business.

3.4.1.1   Specific Action: Design of new tourism circuits and packaged holiday proposals

Designing new tourism circuits in Turks and Caicos, which involve creating fresh travel routes and itineraries that highlight the unique features and attractions of various destinations, can help in generating new packaged holiday proposals. This process involves identifying and mapping out key points of tourist interest, designing transportation routes, selecting suitable accommodation options, and developing effective marketing materials to promote the new circuit to potential visitors.

The primary objective of designing new tourism circuits is to diversify the range of experiences on offer in Turks and Caicos and encourage tourists to explore different islands in the country. Currently, there is a lack of packaged holiday offerings for TCI that are available through online channels for direct purchase by

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consumers (B2C) or through intermediaries such as tour operators, online travel agencies (OTA), and business-to-business (B2B) channels.

Designing new tourism circuits presents an opportunity to address this gap and expand the range of options available to visitors planning their trips to Turks and Caicos. This can be achieved through the creation of customized packaged proposals for both Business-To-Business,B2B and Business-to-Consumer/B2C markets.

For B2B markets, packaged proposals should include special rack rates and packages for corporate retreats, team-building events, and conferences.

For B2C markets, packaged proposals could include pre-designed travel packages that cater to specific interests and demographics, such as adventure travel, wellness travel, or family travel. Additionally, proposals could incorporate unique and authentic experiences that are not easily accessible to independent travellers, such as local food tours, cultural events, or outdoor activities.

3.4.1.2   Specific Action: Organisation of educational and familiarisation trips

The organisation of familiarization (FAM) Trips in Turks & Caicos will provide an opportunity for travel agents and tour operators to visit the country and experience its attractions and amenities first-hand.

3.4.1.3   Specific Action: Organisation of the first International Luxury Caribbean Travel Fair

Organising a potential Caribbean luxury tourism trade fair and show in Turks and Caicos serves as a valuable platform for industry stakeholders to network, showcase their offerings, share knowledge, and promote their destinations, ultimately contributing to the growth and development of the luxury tourism sector.

3.4.1.4   Specific Action: Re-enforce cooperation with organised tourism intermediation channels.

Re-enforce cooperation with organised tourism intermediation channels: Tour Operators, Online Travel Agencies / OTA, etc., through direct contacts, participation in tourism trade workshops, etc.

3.5   Strategic Line: Enhancement and development of tourist MSMEs.

3.5.1   Output: Supporting development of new tourism businesses in emerging destinations

The government structure of TCI should promote the establishment and growth of high-quality micro and small enterprises in the emerging islands beyond Providenciales and Grand Turk. To support the birth and sustainability of businesses in a competitive system, principles of networking must be developed, and financial assistance should be provided to invest in infrastructure, machinery, equipment, and digital technology.

By encouraging the growth of micro and small enterprises in emerging islands, the TCI government can stimulate economic development and create new job opportunities in underdeveloped areas. Networking principles can facilitate cooperation between businesses, allowing them to leverage each other's strengths and resources. Additionally, financial assistance can provide the necessary resources for businesses to invest in infrastructure, equipment, and technology, improving their productivity and competitiveness.

3.5.1.1   Specific Action: Special fund for tourism MSMEs development

The establishment of a special fund to support the development of tourism MSMEs can provide a range of benefits to these businesses and contribute to the growth and sustainability of the tourism industry. By providing financing, capacity building, marketing and promotion, infrastructure development, and support

for innovation, MSMEs can become more competitive and contribute to the overall success of the tourism sector.

The fund should especially support the tourism SMMEs to overcome their often limited commercialisation capacity through the assistance to MSMEs to develop e-commercialization tools, and shared digital commercialisation platforms; by organizing and facilitating their participation in tourism fairs, workshops, educational tours, etc.

3.5.1.2   Specific Action: "Innovation Reward" Programme.

The "Innovation Reward" Programme encourages private sector investments in the TCI tourism industry by providing incentives for innovative ideas and developments throughout the archipelago. The programme aims to stimulate new investments in the tourism sector, which can create new job opportunities, diversify the economy, and enhance the overall visitor experience.

The "Innovation Reward" Programme will be designed to provide financial support and other incentives to private sector investors who introduce new ideas, technologies, and approaches to the tourism industry in TCI. This could include investments in new tourism products, services, or infrastructure and innovations in marketing, branding, and customer engagement.

The programme will be open to local and international investors and will prioritise projects aligned with the TCI's sustainable tourism development goals. Successful applicants will receive financial assistance and other support, such as business mentoring and network access, to help them launch their projects and achieve their business objectives.

3.6   Strategic Line: Quality development of tourism services.

3.6.1   Output: Extension to the tourism certification to all tourism businesses in TCI

3.6.1.1   Strategic Action: Quality Assurance Programme implemented by the Department of Tourism Regulations

The strategic line for developing high-quality tourism services in TCI aims to enhance the overall visitor experience by ensuring that all tourism businesses meet industry-specific quality standards. Extending tourism certification to all tourism businesses is critical to achieving this goal.

By implementing a Quality Assurance Programme, the Department of Tourism Regulations can ensure that all tourism businesses maintain the high-quality standards set by the industry. This programme can consist of developing specific guidelines and standards, conducting regular inspections and audits, and providing training and support to businesses for improving their quality standards.

Extending tourism certification to all tourism businesses can bring numerous benefits to the tourism industry, businesses, and customers. Firstly, certification ensures that businesses meet quality standards and follow industry best practices, enhancing the tourism industry's overall reputation and making it more appealing to travellers seeking high-quality experiences. Secondly, certification can differentiate businesses from competitors and increase their customer base. Thirdly, certification can provide businesses with access to resources, training and support that can improve their operations and profitability in the long term. Lastly, certification can improve customer satisfaction by ensuring that businesses meet or exceed their expectations.

3.7 Strategic Line: Skills and Competences.

3.7.1 Output: Developing skills and competencies of tourism businesses and local population about the tourism industry

3.7.1.1 Specific Action: Training Programmes

To achieve an adequate level of quality and to create well-managed business related to the new products, accommodation, and services, it is necessary to set up a system of training courses. The courses should represent a must for start-ups and a commitment to updating those who are already in the business.

Launch of education and vocational training Programmes

Launch of education and vocational training Programmes for accommodation, TOs, HORECA, special interest services, and others: e.g., in ecotourism, outdoor and adventure tourism, nature hiking, etc..

English for new foreign workers

Launch English-focused training programmes for target seasonal migrant workers (who often do not know English, being Spanish-speaking, Creole, etc.).

Capacity Building Training Programmes

The market intelligence operated by the DMO, the new tourism products, new services, and more in general, the new development strategy, must be accompanied by support, knowledge, and policies by the public administrators to be successful. This activity should include training sections for all public officers working at the Ministry of Tourism and other TCI Ministries and Authorities linked to the tourism ecosystem in the country.

3.7.1.2 Specific Action: Technical assistance and mentoring for tourism SMMEs.

This specific action aims to provide technical assistance and mentoring to tourism SMMEs to help them establish and grow their businesses in the tourism industry. This assistance can include support for business planning, financial management, marketing, and other essential skills needed for success in the tourism sector.

Providing technical assistance and mentoring to tourism SMMEs can also have a positive impact on the local economy by creating new job opportunities and generating income for local communities. By developing the skills and competencies of the local population, this action can help to build a sustainable tourism industry that benefits everyone involved.

3.7.2 Output: Tourism as a driving force for the development of other economic sectors

3.7.2.1 Specific Action: Tourism Integration Initiative.

To achieve in using tourism as a driving force for the development of other economic sectors in TCI, a Tourism Integration Initiative will be implemented, similar to Jamaica's "Tourism Linkages Program." This initiative aims to link the tourism economy with other sectors, such as handicrafts, agriculture, and manufacturing, to create new economic opportunities and diversify the local economy.

This initiative encourages tourism businesses to source goods and services locally, creating a demand for local products and services. This can stimulate growth in other sectors of the economy, which can lead to job creation and income generation for local communities.

Moreover, this initiative can promote the preservation of local culture and traditions by encouraging the use of locally made products in the tourism industry. This can enhance the visitor experience by offering authentic and unique products and experiences, while also supporting local businesses and communities.

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11   Summary of the Action Plan and timing

Pillars, Strategic Lines, Outputs and Specific Action of the Action Plan

PILLARS	STRATEGIC LINES	OUTPUTS	SPECIFIC ACTIONS
1. Inclusive Growth	1.1 Clusterisation	1.1.1 Tourism Improvement Districts	1.1.1.1 Organisation of permanent local committees
	1.2 Tourism Product Specialisation	1.2.1 Specialisation by TIDs	1.2.1.1 Organisation of the new tourism product portfolio
	1.3 Connectivity between destinations	1.3.1 Enhancement of internal mobility	1.3.1.1 Development of the airport infrastructures
			1.3.1.2 Incentives for developing new sustainable means of transportation
2. Sustainability	2.1 Supporting Sustainable Tourism Development	2.1.1 Supporting responsible tourism	2.1.1.1 Creation of a tourism destination enhancement fund
			2.1.1.2 Awareness campaign to tourists and local population about responsible tourism practices
	2.2 Environmental Protection and Climate Change Mitigation	2.2.1 Investment in green technologies	2.2.1.1 Develop initiatives and measures to encourage investments in green technologies
			2.2.1.2 Training and support of start-ups in the field of green technologies
		2.2.2 Increase environmental protection and climate change resilience	2.2.2.1 Development of a "green infrastructure" programme applied to tourism industry
			2.2.2.2 Implement short-term initiatives to mitigate the effects of the rise of sea level and floods
			2.2.2.3 Create a circular economy programme applied to big cultural and sport events
			2.2.2.4 Short-term initiatives to mitigate the effects of hurricanes
			2.2.2.5 Programme guaranteeing of good quality water and secure water supply
			2.2.2.6 Programme to combat the reduction of marine natural resources and coral reef
			2.2.2.7 Programme to combat environmental problems
			2.2.2.8 Programme to introduce sustainability standards
	2.3 Heritage Valorisation	2.3.1 Support local culture, traditions and customs	2.3.1.1 Interpretation and documentation (Natural and Cultural Heritage assets)
			2.3.1.2 Promotion of new gastronomic events
			2.3.1.3 Involvement of Local Communities
		2.3.2 Rehabilitation of natural and cultural heritage sites	2.3.2.1 Rehabilitation of the salt marshes in Grand Turk and Salt Cay

PILLARS	STRATEGIC LINES		OUTPUTS		SPECIFIC ACTIONS	
3. Competitiveness	3.1	Promoting innovation in the tourism sector	3.1.1	Innovation in tourism services and facilities	3.1.1.1	Diversification and innovation of tourism services
					3.1.1.2	Product innovation addressing new typologies of accommodation
			3.1.2	Innovative Start-ups Programme	3.1.2.1	Support technological start-ups for innovation in the tourism industry
					3.1.2.2	Annual Smart Tourism Hackathon (within the *Caribbean Smart Tourism Conference*)
	3.2	Tourism Market Intelligence	3.2.1	Profiling tourism markets and segments	3.2.1.1	Organisation of a Tourism Observatory
					3.2.1.2	Assessment of new tourism markets and segments
			3.2.2	Innovation in data-collection	3.2.2.1	Agreements with international tourism digital platforms
					3.2.2.2	Promoting digitalisation of tourism industry
			3.2.3	Interinstitutional collaboration	3.2.3.1	Organisation of a permanent inter-ministerial roundtable
					3.2.3.2	Developing joint tourism policies and strategies
					3.2.3.3	Sharing resources and expertise
					3.2.3.4	Coordinating tourism development projects
	3.3	Branding & Marketing	3.3.1	New branding and positioning	3.3.1.1	Conceptualisation and design of a new tourism brand
			3.3.2	Digital Marketing	3.3.2.1	Digital Marketing Plan
			3.3.3	Traditional promotion	3.3.3.1	Printed material
					3.3.3.2	Television and Radio
					3.3.3.3	Trade Shows and Exhibitions
					3.3.3.4	Public Relations
					3.3.3.5	Direct Mailing
					3.3.3.6	Tourist Information Centres
	3.4	Distribution (sales) channels	3.4.1	Strengthening distribution (sale) channels in the marketplace	3.4.1.1	Design of new tourism circuits and packaged holidays proposals
					3.4.1.2	Organisation of educational and familiarisation trips
					3.4.1.3	Organisation of the first International Luxury Caribbean Travel Fair
					3.4.1.4	Re-enforce cooperation with organised tourism intermediation channels
	3.5	Enhancement and development of tourist MSMEs	3.5.1	Supporting development of new tourism businesses in the emerging destinations	3.5.1.1	Special fund for tourism MSMEs development
					3.5.1.2	"Innovation Reward" Programme
	3.6	Quality Development of Tourism Services	3.6.1	Extension of the tourism certification to all tourism businesses in TCI	3.6.1.1	Quality Assurance Programme implemented by the DTR (Ministry of Tourism)
	3.7	Skills and Competences	3.7.1	Developing skills and competences in the tourism industry	3.7.1.1	Training program
					3.7.1.2	Technical assistance and mentoring for tourism SMMEs
			3.7.2	Tourism as driving force	3.7.2.1	Tourism Integration Initiative

Timing

OUTPUTS	SPECIFIC ACTIONS	2023	2024		2025		2026		2027		2028	
		2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half
1.1.1 Tourism Improvement Districts	1.1.1.1 Organisation of permanent local committees	X										
1.2.1 Specialisation by TIDs	1.2.1.1 Organisation of the new tourism product portfolio	X	X	X								
1.3.1 Enhancement of internal mobility	1.3.1.1 Development of the airport infrastructures	X	X	X	X	X	X	X	X	X		
	1.3.1.2 Incentives for developing new sustainable means of transportation			X	X	X	X	X	X	X		
2.1.1 Supporting responsible tourism	2.1.1.1 Creation of a tourism Destination Enhancement Fund	X	X	X	X	X	X	X	X	X	X	X
	2.1.1.2 Awareness campaign to tourists and local population about responsible tourism practices		X	X	X	X	X	X	X	X		
2.2.1 Investment in green technologies	2.1.2.1 Develop initiatives and measures to encourage investments in green technologies			X	X	X	X	X	X	X	X	X
	2.1.2.2 Training and support of start-ups in the field of green technologies			X	X	X	X	X	X	X	X	X
2.2.2 Increase environmental protection and climate change resilience	2.2.2.1 Development of a "green infrastructure" programme applied to tourism industry				X	X	X	X	X	X	X	X
	2.2.2.2 Implement short-term initiatives to mitigate the effects of the rise of sea level and floods				X	X	X	X	X	X	X	X
	2.2.2.3 Create a circular economy programme applied to big cultural and sport events				X	X	X	X	X	X	X	X
	2.2.2.4 Short-term initiatives to mitigate the effects of hurricanes				X	X	X	X	X	X	X	X
	2.2.2.5 Programme guaranteeing of good quality water and secure water supply		X	X	X	X	X	X	X	X	X	X
	2.2.2.6 Programme to combat the reduction of marine natural resources and coral reef		X	X	X	X	X	X	X	X	X	X
	2.2.2.7 Programme to combat environmental problems		X	X	X	X	X	X	X	X	X	X
	2.2.2.8 Programme to introduce sustainability standards		X	X	X	X	X	X	X	X	X	X

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OUTPUTS	SPECIFIC ACTIONS	2023	2024		2025		2026		2027		2028	
		2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half
2.3.1 Support local culture, traditions and customs	2.3.1.1 Interpretation and documentation (Natural and Cultural Heritage assets)	█	█	█								
	2.3.1.2 Promotion of new gastronomic events			█	█	█	█	█				
	2.3.1.3 Involvement of Local Communities	█	█	█	█	█	█	█	█	█	█	█
2.3.2 Rehabilitation of natural and cultural heritage sites	2.3.2.1 Rehabilitation of the salt marshes in Grand Turk and Salt Cay			█	█	█						
3.1.1 Innovation in tourism services and facilities	3.1.1.1 Diversification and innovation in tourism services		█	█	█	█						
	3.1.1.2 Product innovation addressing new typologies of accommodation		█	█	█	█						
3.1.2 Innovative Start-ups Program	3.1.2.1 Support technological start-ups for innovation in the tourism industry				█	█	█	█	█	█	█	█
	3.1.2.2 Annual Smart Tourism Hackathon (within the *Caribbean Smart Tourism Conference*)				█	█	█	█	█	█	█	█
3.2.1 Profiling tourism markets and segments	3.2.1.1 Organisation of a Tourism Observatory						█	█	█	█	█	█
	3.2.1.2 Assessment of new tourism markets and segments		█	█	█	█						
3.2.2 Innovation in data-collection	3.2.2.1 Agreements with international tourism digital platforms			█	█	█						
	3.2.2.2 Promoting digitalisation of tourism industry						█	█	█	█	█	█
3.2.3 Interinstitutional collaboration	3.2.3.1 Organisation of a permanent inter-ministerial roundtable	█										
	3.2.3.2 Developing joint tourism policies and strategies		█	█	█	█	█	█	█	█	█	█
	3.2.3.3 Sharing resources and expertise		█	█	█	█	█	█	█	█	█	█
	3.2.3.4 Coordinating tourism development projects						█	█	█	█	█	█
3.3.1 New branding and positioning	3.3.1.1 Conceptualisation and design of a new tourism brand	█	█									
3.3.2 Digital Marketing	3.3.2.1 Digital Marketing Plan		█	█	█	█	█	█	█	█	█	█

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OUTPUTS	SPECIFIC ACTIONS	2023	2024		2025		2026		2027		2028	
		2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half	1° half	2° half
3.3.3 Traditional promotion	3.3.3.1 Printed material		■	■	■	■	■	■	■	■	■	■
	3.3.3.2 Television and Radio		■	■	■	■	■	■	■	■	■	■
	3.3.3.3 Trade Shows and Exhibitions		■	■	■	■	■	■	■	■	■	■
	3.3.3.4 Public Relations		■	■	■	■	■	■	■	■	■	■
	3.3.3.5 Direct Mailing		■	■	■	■	■	■	■	■	■	■
	3.3.3.6 Tourist Information Centres		■	■	■	■	■	■	■	■	■	■
3.4.1 Strengthening distribution (sale) channels in the marketplace	3.4.1.1 Design of new tourism circuits and packaged holidays proposals		■	■								
	3.4.1.2 Organisation of educational and familiarisation trips			■	■	■	■	■	■	■	■	■
	3.4.1.3 Organisation of the first International Luxury Caribbean Travel Fair				■	■	■	■	■	■	■	■
	3.4.1.4 Re-enforce cooperation with organised tourism intermediation channels				■	■	■	■	■	■	■	■
3.5.1 Supporting development of new tourism businesses in the emerging destinations	3.5.1.1 Special fund for tourism MSMEs development				■	■	■	■	■	■	■	■
	3.5.1.2 "Innovation Reward" Programme				■	■	■	■	■	■	■	■
3.6.1 Extension of the tourism certification to all tourism businesses in TCI	3.6.1.1 Quality Assurance Programme implemented by the DTR (Ministry of Tourism)	■	■	■	■	■	■	■	■	■	■	■
3.7.1 Developing skills and competences	3.7.1.1 Training program			■	■	■	■	■	■	■	■	■
	3.7.1.2 Technical assistance and mentoring for tourism SMMEs			■	■	■	■	■	■	■	■	■
3.7.2 Tourism as driving force	3.7.2.1 Tourism Integration Initiative					■	■	■	■	■	■	■

12   Impact of tourism growth on the labour market and migration

If tourism continues to grow, this will also impact the labour market which in TCI is heavily dependent on migrant workers, mainly from Haiti, Dominican Republic, and Venezuela.

A planned increase should be accompanied by policies for migrant workers, regarding:

1) <u>Housing</u> (e.g.,[45]):

   • Offer workers assistance in finding housing in the local market, or where this is not feasible, offer employer accommodation.

   • Commit to the provision of accommodation that adheres to the UN's seven principles of adequate housing as a requirement for all employees and subcontractor employees.

   • Limit the number of workers in a room, and ensure sufficiently proper, and well-maintained water, sanitation, and cooking facilities.

   • Ensure sleeping quarters are air-conditioned and well-ventilated.

   • Ensure that workers have access to leisure activities.

   • Ensure that adequate and decent housing does not cost the worker more than a reasonable proportion of income.

2) <u>Health care and/or insurance</u>

3) <u>Temporary work visa programmes</u>

   This would also reduce illegal immigration.

4) <u>Social protection.</u>

   Extension of social protection to migrant workers and their families in fields such as education.

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[45] Institute for Human Rights and Business. https://www.ihrb.org/

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13   Final recommendations

To diversify its tourism offerings and ensure sustainable growth, TCI needs to take a comprehensive approach that engages multiple stakeholders in environmental protection, climate change mitigation, and cultural heritage valorisation. The following recommendations can be implemented to achieve these goals:

- Develop a public-private transport system to cover specific lines and networks, engaging both public and private transport providers to create a cohesive and efficient system.

- Encourage investment in green technologies by offering fiscal advantages and supporting start-ups in green technologies, specifically for large hospitality companies.

- Valorise local culture, traditions, and customs through shows, socialisation moments, and other events to attract different types of visitors and promote cultural exchange while preserving the islands' unique identity.

- Launch a "green infrastructure" program to promote sustainable tourism and implement short-term initiatives to mitigate the effects of sea level rise, floods, hurricanes, and water salinisation.

- Re-enforce the image of TCI as a safe and secure tourist destination by creating tourist police units that can help and protect visitors.

- Develop Tourism Improvement Districts (TIDs) characterised by specific integrated tourism offers managed collaboratively by a board of representatives from private and public stakeholders.

- Clusterisation by a grouping of islands can enhance the tourism industry by leveraging the strengths of each island and creating a more diverse and attractive tourism product.

- Set up new typologies of accommodation, such as glamping, and enhance glamping style developments through a Glamping Programme to facilitate private entrepreneurs to invest in glamping types of accommodation.

- Invest in market intelligence to gain insights into potential tourists from consolidated and new markets.

- Create a 5-year digital marketing plan to improve its digital presence, raise awareness about the destination, facilitate bookings and create a strong community, increase word-of-mouth, and ensure a good after-trip process.

- Develop packaged proposals for both B2B and B2C and strengthen cooperation with organised tourism intermediation channels like tour operators, online travel agencies, etc.

- Focus on infrastructure development, including completing the ports and airports of the minor islands, developing internet infrastructure and creating awareness programs for the local population.

- Encourage the start-up and reinforcement of good quality level community micro and small enterprises in all the islands beyond Providenciales and provide financial aid and ongoing technical assistance and mentoring.

- Launch education and vocational training programs for accommodation, tour operators, HORECA, special interest services, and others, and launch training programs focusing on English for tourists. Capacity-

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building programs should also be launched for public administrators working directly or indirectly with tourism.

By taking a comprehensive approach to sustainability, engaging multiple stakeholders, and implementing these recommendations, TCI can become a sustainable and attractive destination for tourists, while also ensuring the conservation of its natural, cultural, and social environment.

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