



ANNUAL GENERAL MEETING

November 30, 2021

AGENDA

- **Welcome** Jay Ehrhart, CITA Executive Director
- **President's Address** Marc Langevin, CITA President
- **BOD 2021-2022 Election** Natalie Porter, CITA Secretary
- **CITA Membership & Financial** Markus Mueri, CITA Treasurer
- **Human Capital Remobilization** Michael Tibbetts, CITA Vice-President
- **Q&A**
- **Election Results** Jay Ehrhart
- **Social hour**

CITA BOARD & EXECUTIVES



Jay Erhart
Executive Director



Marc Langevin
President & Dir. for Hotel
Sector



Michael Tibbetts
Vice President & Dir. for Hotel
Sector



Markus Mueri
Treasurer & Dir. for Restaurant
Sector



Natalie Porter
Secretary & Dir. for Land-
based Attractions Sector



Juliet Cumber-Forget
Condominium
& Villas sector



Danielle Wolfe
Condominium
& Villas sector



Joshua Pawlik
Allied sector



Ron Hargrave
Restaurants
sector



Tony Land
Watersports sector



Ash McKnight
Watersports sector



Walker Romanica
Allied sector



Gary Todd
Transportation
sector

CITA



CAYMAN ISLANDS
TOURISM ASSOCIATION

Vision:

The Cayman Islands Tourism Association represents a united voice that advocates for the empowerment and protection of its members and stakeholders, in order to support a diverse, sustainable and thriving tourism industry.

Mission:

Our mission is to unite, protect, and grow our industry by Advocating for our collective interests, Empowering our tourism community through education and information and Engaging our members to listen, support, and collaborate in making the Cayman Islands a leading tourism destination.



PRESIDENT'S ADDRESS



Marc Langevin,
President

- **THE LONG ROAD TO REOPENING**
- **CITA PRIORITIES**
- **ASSOCIATION STRENGTHENING**
- **THE ROAD AHEAD**
- **ACKNOWLEDGMENTS**

THE ROAD TO REOPENING



March 2020

Travel grinds to a halt

Hotels shut their doors as Cayman's leaders take the unprecedented step of closing the islands land and sea borders amid the global threat of the coronavirus. The timeline for the closure is initially estimated at three weeks, but is almost immediately extended as the full extent of the threat posed by the pandemic becomes clear and Cayman goes into a domestic lockdown.



June 2020

Government targets September reopening

As domestic restrictions begin to be eased, government targets September for the initial phase of the reopening of the borders. Premier Alden McLaughlin acknowledges he has "concerns" about the viability of this date. At this point, the only flights in and out of Cayman are the occasional 'air bridge' flights.



August 2020

Reopening pushed back to October

The reopening date is moved to October as cases surge in the US.



December 2020

March target for tourism

Though some flights are coming into Cayman, the border remains closed to most travellers. Then Premier Alden McLaughlin cites the pending arrival of the vaccine as the key to further relaxation of restrictions and predicts that Cayman could have enough people protected against COVID for a March reopening.



February 2021

Reopening pushed back

McLaughlin indicates a target that 90% of the islands over-60s be vaccinated before the borders reopen, pushing back the timeline on reopening. He predicts May as the date this could happen. Government later indicates a target of vaccinating 80% of the population before relaxing quarantine restrictions. It is not clear, at this point, if the target ratio includes children, who cannot be vaccinated.



May 2021

Change in leadership

The election campaign period sees a slowdown in action over the border. After a close election, Wayne Panton is elected as the new premier of the Cayman Islands, leading a team of independents.



July 2021

Phased border-reopening plan announced

At a Chamber of Commerce lunch, Panton unveils a five-phase plan for the reopening of the borders. The plan includes the gradual reduction of isolation requirements, culminating in the removal of quarantine for vaccinated adults on 14 Oct. and sanctioning travel for unvaccinated children (accompanied by vaccinated adults from 18 Nov.).



September 2021

Community outbreak halts reopening

Government puts the reopening plan on pause as health officials confirm the first community cases of COVID-19 in Cayman in over a year. The move is condemned by tourism industry leaders, and a number of businesses, including Rum Point Club, announce temporary closures. At this point, Panton indicates further relaxation of travel requirements is unlikely in 2021.



October 2021

November the new date for 'reopening'

Government sets 20 Nov. as the new date for removing quarantine requirements for vaccinated adult travellers. Work begins to clarify the protocols of how visitors will be managed. Several airlines, including Air Canada, Jet Blue and British Airways, confirm the resumption of commercial flights to Cayman, but others, including American Airlines, delay their return.



November 2021

Government sticks to its guns

Despite community cases rising to unprecedented levels, government keeps to its reopening date. Lack of air lift, the inability of children to travel and stringent testing requirements mean demand is initially low. Nonetheless, hotels and villas prepare to welcome the first genuine tourists to arrive on Cayman's shores in more than 20 months.



PRESIDENT'S ADDRESS

CITA PRIORITIES

(communicated on December 2, 2020)

PRIORITY 1

RE-OPENING PATH TO TOURISM

Communication with the community and Government

Cooperation with CIG to develop and implement protocols for testing, health monitoring, operating, tracing, isolation and vaccination.

Collaboration with WORC on a remobilization strategy

Partnering with DOT to relaunch destination marketing and airlift

Identifying financial support for Tourism related businesses in regard to pension, work permit fees, duties, business fees, loans, etc.

PRIORITY 2

TOURISM PRODUCT & SERVICE

Reset the vision and priorities for Brand Cayman supporting:

Stay-over tourism

Cruise tourism

Destination

Review and advocate SEAC tourism recommendations.

Support hospitality education, training and promotion of careers in the industry.

PRIORITY 3

REVIEW THE CITA MODEL

Reposition of Purpose:

Review CITA's mission statement

Empowerment of sector members

Redefine membership value:

Evaluate the effectiveness of membership communications

Financial Independence:

Review organisational model

Seek fundraising opportunities

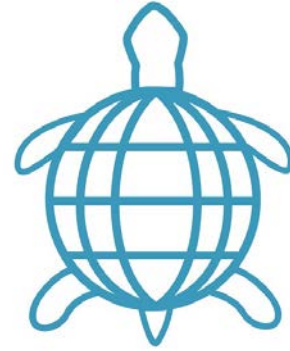
Identify sponsorship opportunities

CITA's INFLUENCE ON THE REOPENING PLAN

- **Determination of a credible opening date**
- **Collaboration with CIG in developing protocols supporting the reopening**
- **Removal of the QR code certification restriction for vaccine verification**
- **Modifying the regime of the LFT (2-5-10) testing for arriving passengers**
- **Removing the regulation on employee LFT testing obligations**
- **Pushing for an enlargement of allowable group size for events**
- **Collaboration with Cayman Airways to add more flights**
- **Review of the PCR testing sensitivity**

CITA's ONGOING PRIORITIES TO REBUILD OUR INDUSTRY

- 1. Prompt announcement of a credible target date for Phase 5 of reopening**
- 2. Remove key hurdles:**
 - **Allow unvaccinated visitor children to travel with their parents without quarantine**
 - **Reduce the regime of lateral flow tests for visitors**
 - **Simplify and expedite the travel authorization process**
- 3. Address urgently the shortage in Tourism workers, especially in food and beverage positions, recreation and diving operations.**
- 4. Address shortage in air arrival capacity**
- 5. Build trust with our business partners, airlines, travel advisors and meeting planners.**
- 6. Support the return of cruise ship tourism , and the repositioning of this important industry.**
- 7. Engage of private sector in the review of protocols and regulation through the upcoming phases of reopening.**
- 8. Review of the current PCR testing standard and quarantine policies**
- 9. Financial support and relief in the form of CIG fee reductions, stipends, grants, and loans.**



C I T A

Board of Director Election

Natalie Porter

BOARD OF DIRECTOR ELECTION

UNCONTESTED DIRECTOR POSITIONS

ALLIED SECTOR:

- ***Philippe Mewani*** (Diamond Marquis)
- ***Joshua Pawlik*** (Jacques Scott)

ATTRACTION SECTOR:

- ***Walker Romanica*** (Cayman Spirits)

CONDO & VILLAS SECTOR:

- ***Juliet Cumber-Forget*** (Cayman Villas)
- ***Danielle Wolf*** (Caribbean Club)

HOTEL SECTOR:

- ***Marc Langevin*** (The Ritz-Carlton)

RESTAURANT SECTOR:

- ***Markus Mueri*** (Abacus & Karoo)
- ***Ron Hargrave*** (Tukka)

TRANSPORTATION SECTOR:

- ***Gary Todd*** (Budget)

SISTER ISLANDS SECTOR:

- ***Michael Tibbetts*** (Clearly Cayman)

CONTESTED DIRECTOR POSITIONS

WATERSPORT SECTOR (2):

- ***TONY LAND*** (Divetech)



- ***ASH MCNIGHT*** (GoPro Cayman)



- ***TROY LEACOCK*** (Crazy Crab)



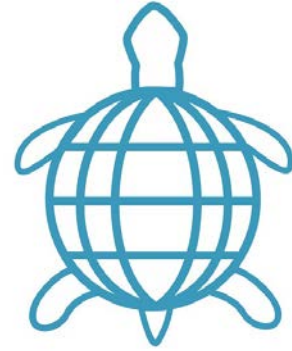
HOTEL SECTOR SECTOR (1):

- ***Leonardo Mariotti*** (Palm Heights)



- ***Sharlene Brenkus*** (Wyndham)





C I T A

Treasurer Report

Markus Mueri



Cayman Islands Tourism Association Treasurer's Report

Cash on Nov. 2020 KYD 12,260
US\$ 114

Cash on Nov. 2021 KYD 18,733
US\$ 15,000

Outstanding Restaurant Month KYD 11,000

<u>Membership Fees</u>	<u>2020 - 2021</u>
Received	KYD 36,200
Outstanding	KYD 30,400

CITA Fund Raiser Events :

SEASPICE	US\$ 36,730
Golf Tournament	US\$ 11,875
Restaurant Month	US\$ 11,000



Operational cost of CITA is CI\$ 120,000 per annum
Incl. salary, rent, utilities, licensing, operational, facilitation

CITA Membership Community support

SEASPICE Raffle

- ARK: US\$ 16,617
- Feed our Future: US\$ 16,617

2500 Christmas Turkey Meal 2020

*2500 Turkey meals estimated value **KYD 25,000***

- Cooked by: Morgan's, ABACUS, Tukka, GOH, Wharf, the Ritz-Carlton
- Distribution: Foodbank, The ARK, Feed our Future, Meals on Wheels
- Sponsored: Progressive, Fosters, Kirks, Island Supply

HSA Vaccination Staff Surprise

***KYD 2,700** donated by Members*

Gift certificates donated by CITA Members to thank the HSA staff for hard work in getting the Cayman Islands vaccinated.



VACCINATION DRIVE SUPPORT

Raffle for all vaccinated on island to support the Vaccination effort

- **Gift Certificate prices: US\$ 15,000**
- **CASH PRICE: US\$10,000**

and the winner for the cash price is.... Esther Tatum

Looking forward

- **Seaspice 2022 (save the day)**

19 March 2022

- **Welcome back KITTIWAKE**

CITA will resume Kittiwake license fees in June 2022

Target: \$50,000

- **Membership Drive 2022:**

Target: 200 Members/ \$80,000

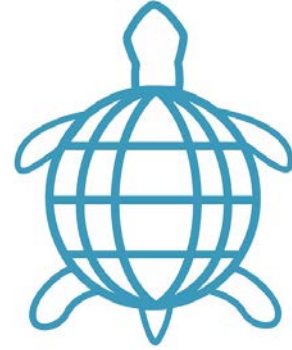
SPONSOR ACKNOWLEDGMENT

R3 Foundation

Mikonos

Marriott Beach Resort



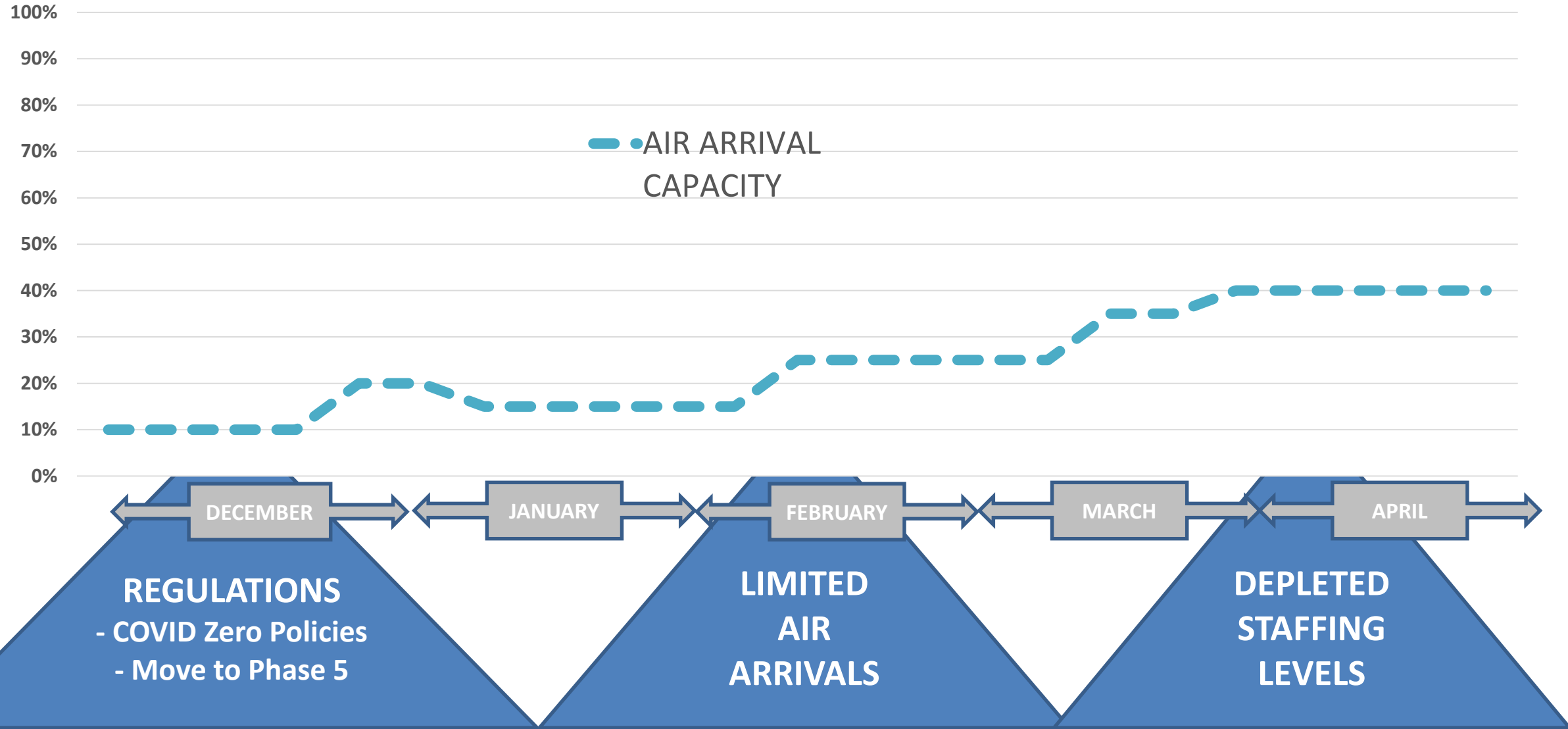


C I T A

The Roadblocks to Rebuilding Tourism

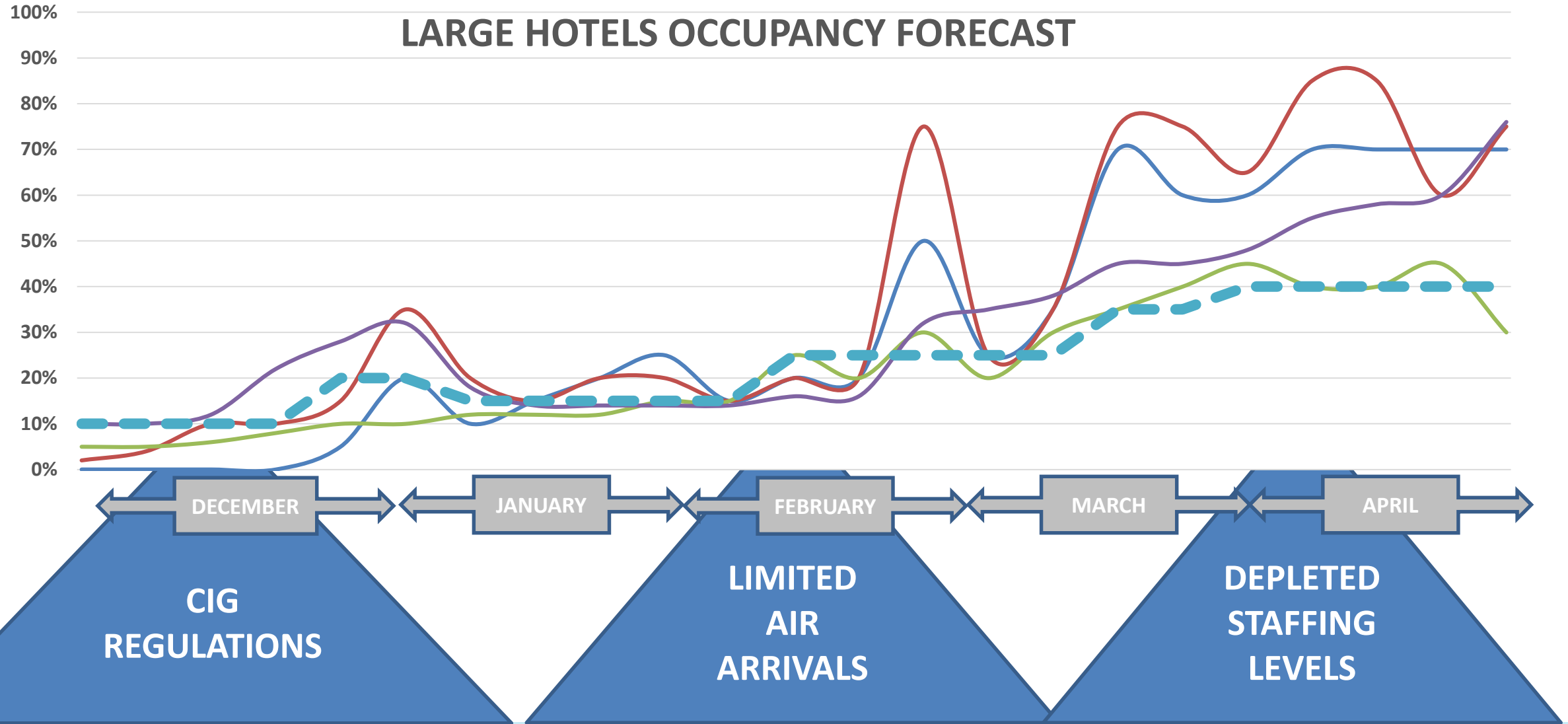
Michael Tibbetts

The Roadblocks to Rebuilding Tourism

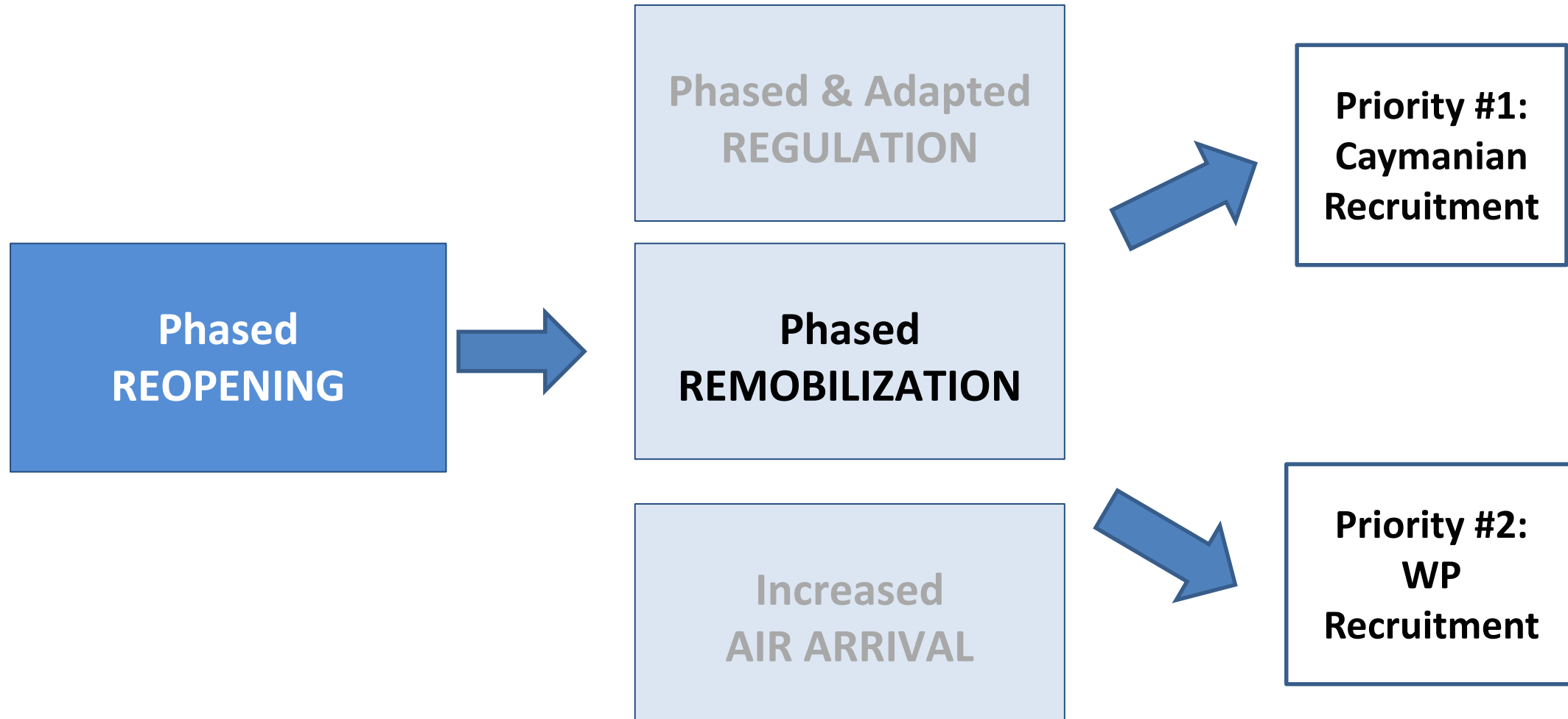


The Roadblocks to Rebuilding Tourism

LARGE HOTELS OCCUPANCY FORECAST



CRITICAL & CONCURRENT PRIORITIES



Key Findings from the MOT-DOT Survey of Stipend Recipients

PRE COVID-19 EMPLOYMENT
Did you primarily serve stay-over visitors or cruise visitors?

STAYOVER



64%
PERCENTAGE

2000
OF PERSONS

CRUISE



36%
PERCENTAGE

1107
OF PERSONS

Not Employed

49%
SHARE

1,537
COUNT

Employed

51%
SHARE

1,570
COUNT

Tourism Sector

	Female	Male
Accommodations - Hotels	638	318
Accommodations - Other	140	34
Airport Services	31	46
Attractions	64	65
Food Services (Restaurants, Bars, Catering)	148	99
Other Activities/ Entertainment	17	34
Retail	268	60
Transportation - Car Rental	22	24
Transportation - Cruise Tender		17
Transportation - Other	6	8
Transportation - Public Buses	6	21
Transportation - Taxis	131	139
Transportation - Tour Operators	62	131
Travel Agency	11	2
Watersports	119	377
Other	45	24
Total	1,708	1,399

1,130

247

496

DO YOU WISH TO WORK IN THE SAME JOB POSITION YOU HAD PRIOR TO COVID-19?
Return to Pre-COVID position



NO

13% | 416

YES

87% | 2,691

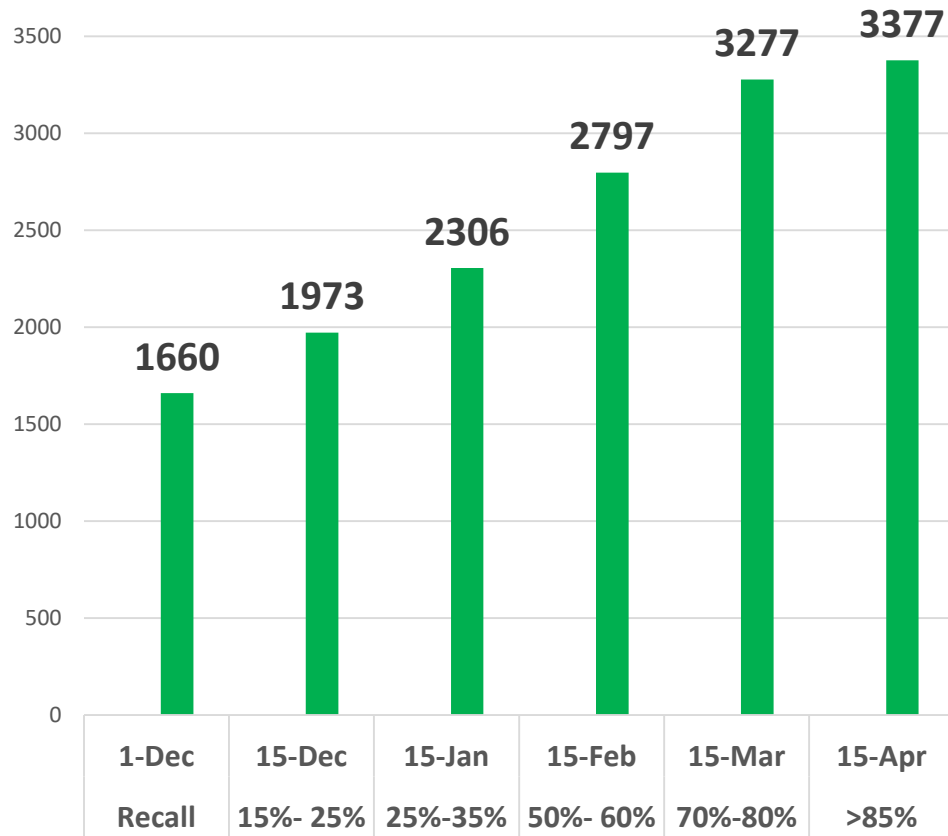
TOTAL

3,107

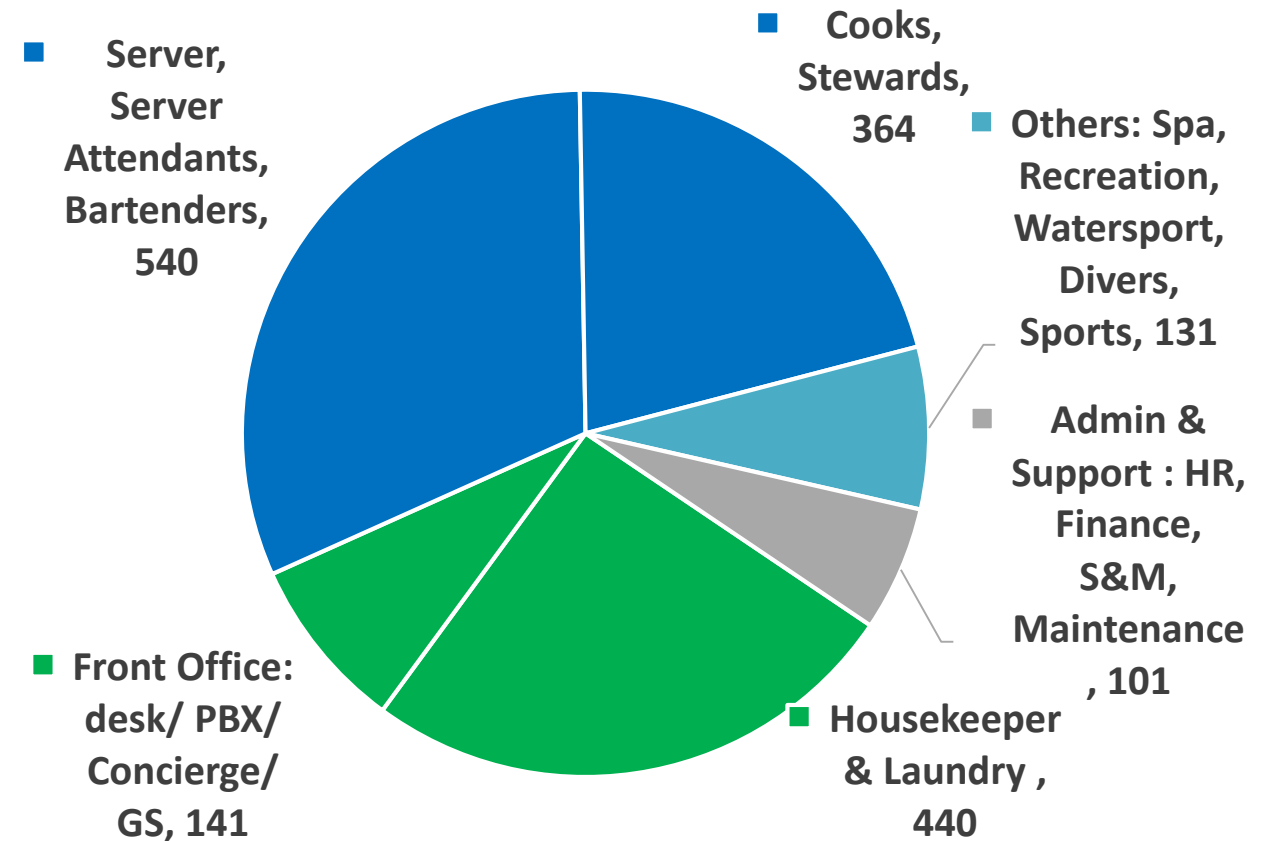
Forecasted Remobilization Needs

(Data gathered from 75% of accommodations & major tourism-dependent restaurants)

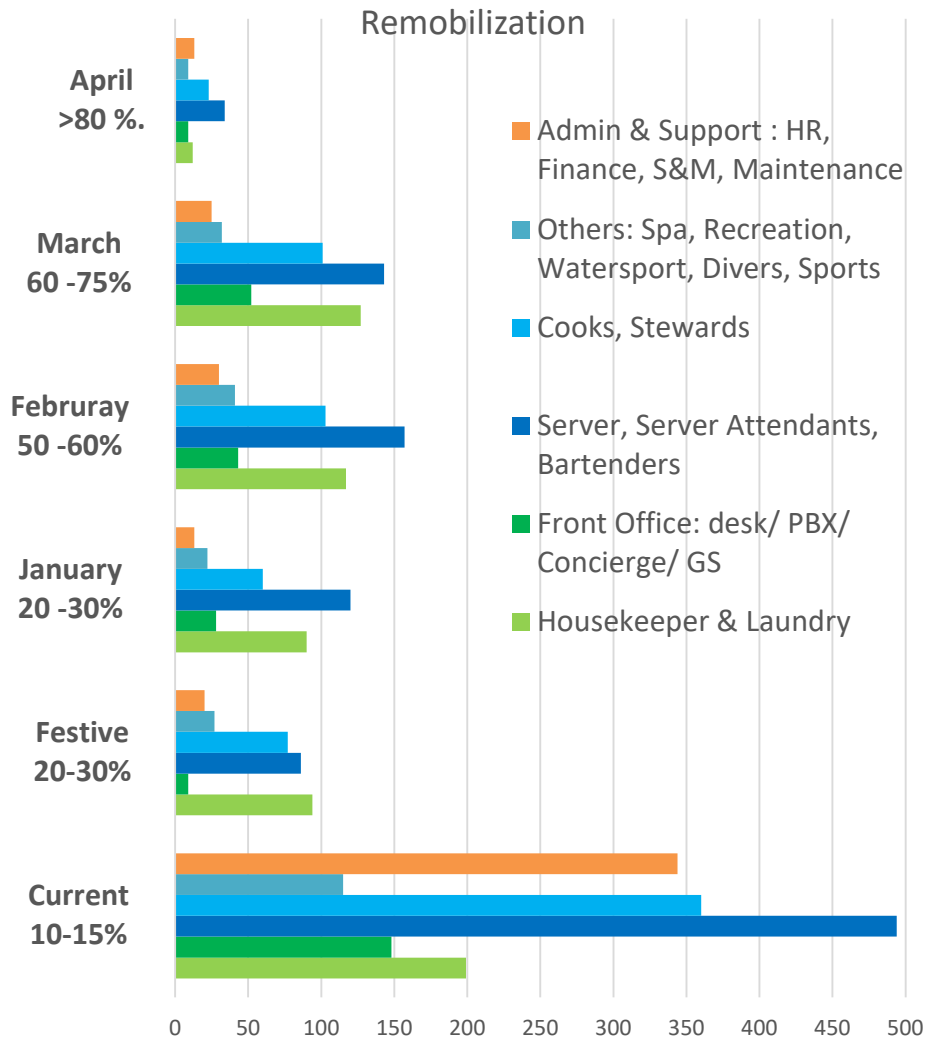
Total Employment in the Tourism Sector



Remobilization Needs by Position



THE REMOBILIZATION CONUNDRUM

[illegible]

904

813

Next Steps for Remobilization

PRIORITY 1 (immediate):

➤ EMPLOYMENT DRIVE FOR F&B, CULINARY & RECREATION POSITIONS FOR CAYMANIAN STATUS ONLY

- Assessment of the local talent pool
 - Available positions posted to Jobs Cayman
 - Jobs fair for F&B and Culinary planned for this week
- Assessment of potential training opportunities

➤ **A FAST TRACK WORK PERMIT PROCESS FOR SPECIFIC POSITIONS IS NEEDED *given the lack of Caymanian applicants***

PRIORITY 2 (January-March):

➤ TOURISM CAREER OPPORTUNITY FAIR FOR ALL POSITIONS

- Assessment of the local talent pool
- Assessment of potential training opportunities

PRIORITY 3 (Long term):

➤ INVEST IN HOSPITALITY EDUCATION

- Scholarship Incentive for International School.
- Development of an International Students on Island.

CITA



CAYMAN ISLANDS
TOURISM ASSOCIATION

Q&A



ELECTION RESULTS



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THANK YOU

