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YACHTING IN THE EASTERN CARIBBEAN
A REGIONAL OVERVIEW

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Introduction

Many islands, one sea. This could very well be the motto of yachting tourism in the Eastern Caribbean. Much more so than land-based tourism, marine-based tourism is mobile and the multi-island concept is deeply anchored in the region's product. While the islands do compete, there is a mutual dependency because the ability to visit more than one island within a leisurely sailing distance makes the region attractive.

In recent years there has been much anguish about weaknesses in the region's mainstream tourism and calls for a rejuvenation of the product have been frequent. At the same time yachting has been developing in relative obscurity. Unrecognised, its needs and contributions are often discarded as unimportant and of no significance to the region. It was in reflection of this lack of recognition and in awareness of contribution that marine-based tourism makes to the region that the Economic Commission for Latin America and the Caribbean (ECLAC) prepared a proposal that was co-funded by the Government of the Netherlands as "Development of a Subregional Marine-based Tourism Strategy".

Definitions

Working definitions

Throughout the region, the yachting sector is referred to by a variety of names, all of which essentially denote a similar product. Alternative names include the yachting industry and the pleasure - or leisure boat industry or sector. Recreational boating is another concept, which at times is used interchangeably with pleasure boating or yachting. In fact, recreational boating and pleasure boating are wider concepts, as these would also include sailing dinghies and other boats, which are not normally considered yachts. In the Caribbean it could also include pirogues and other similar craft that are used for recreation, semi-professional fishing, and dive and whale watching vessels.

In the context of this study we will define a yacht as a seaworthy vessel in excess of five meters, propelled by motor or sail and categorized a private or charter vessel, mostly used for pleasure.

A cruising yacht is a yacht typically used by its owner for various periods of time. A live-aboard is a cruising yacht occupied by its owner on an almost permanent basis.

In the same context we will define a super or mega yacht as a yacht over 30 meters. At times the boundaries between the larger yachts and small cruise ships, particularly those special purpose vessels such as dive charter boats or the sailing of "traditional" vessels, may be blurred.

An upper limit therefore for a yacht would be a vessel that does not fall under the International Maritime Organization (IMO) definitions, under the International Convention for the Safety of Life at Sea (SOLAS) or the International Code for the Security of Ships and Port Facilities (ISPS). Vessels that comply with those definitions should be considered cruise ships. This may need some further thought to ensure that the larger mega and super yachts or day charter boats would not be classified as cruise ships.

A bareboat yacht is a yacht rented without a paid crew[1] for a fixed period of time. A crewed charter boat is a yacht rented for a fixed period of time whereby the crew is responsible for all aspects of the sailing experience. Crewed yachts tend to be larger than bareboat or cruisers and carry a crew of two people and upwards. They can include mega-yachts and day-sailing yachts.

A marina is any facility that provides wet storage, including moorings, for 10 or more yachts, and offers bathroom, shower and change facilities and receptacles for the disposal of waste.

A boat yard is a facility providing a lifting capability of a minimum of 10 tonnes and land storage and services to marine craft.

The yachting sector, or pleasure boat industry, is defined as the complex of activities that are required to sustain charter boating and cruising in the Eastern Caribbean. It includes the "yachting" establishments as well as "tourist" establishments that are the direct recipients of the yachting tourist expenditures, as well as those establishments that provide goods and services to the "yachting" and "tourist" establishments.

We will follow the World Tourism Organisation (WTO) definition of “tourist”. A yachting tourist is then defined as a person who stays for more than 24 hours but less than twelve months in a particular country outside his or her usual place of residence and whose place of stay is a vessel for most of their stay.

Yachting establishments are those enterprises that cater uniquely or mostly to yachtsmen, and include charter boat companies, marinas and ancillary marine services, such as sail-making, engine repair, marine electronics and out-haul facilities. The distinction between direct and indirect recipients can be blurred. Many yachting establishments, such as marinas and ancillary services, provide goods and services directly to yachtsmen, as well as to other yachting establishments such as charter boat companies and, further confounding the problem, to non-yachting residents and other tourists as well. For example, establishments now catering to the marine sector may be dependent on fishermen and income derived from yachting may only constitute a minor portion of their income.

Tourist establishments are those enterprises that provide goods and services mainly to tourists in general.

[1] For inexperienced sailors a captain may be included.

Problems and challenges

The definitions stated above are working definitions that were used throughout most of the studies. However definitional challenges remain. There remains a need to formalise and standardise the definitions, as already some countries have begun to change policies and legislation. Furthermore definitions also form the basis of measurement, information and management systems. For example there is little or no evidence that yachting tourists are measured in the same way in all countries. In fact in at least two countries yachting tourists are not measured at all because they are considered crew.

The product

The two main charter boat destinations are the Virgins (comprising the British Virgin Islands (BVI), the United States Virgin Islands (USVI) and the Puertorican outer islands) and the Grenadines (Grenada and St. Vincent and the Grenadines). The same areas are also popular cruising areas. Trinidad and Tobago is a main gate to the Latin American mainland and an important hurricane shelter and service centre. In this, the country gets competition from Venezuela and Grenada. Other service centres are St. Maarten and Antigua, both of which are also popular winter destinations (with St. Barths) for mega or super yachts. Antigua and Barbuda also offers more anchorages than any other Leeward island (Doyle). The islands of Martinique and Guadeloupe are popular stops (known for the quality of wine and provisioning) and, in the case of Martinique, a staging area for charter boat trips to the Grenadines, a function it shares with Saint Lucia. The latter is also the Caribbean destination with Antigua and Barbuda since 2003, of the Atlantic Rally for Cruisers (ARC), a popular cross-Atlantic sailing event.

Natural and man-made attractions

The region abounds in natural attractions. To a large extent the same attractions that draw the tourist or the cruise ship visitor also attract the sailor. In addition there are the isolated beaches, the cays and small islands and islets and the marine parks that provided additional stimuli. The region's geographic capital facilitates easy passages between the islands[2] adding to the multi-island experience. Indeed, paraphrasing Ferdinand Braudel[3] writing on sea faring in the Mediterranean, its is very possible for a sailor to travel from an island to another and spend the evening in a tavern at the chosen anchorage or marina.

Sailing conditions vary as indicated by the "required sailing skippers' experience level" required to charter a bare boat. The example is taken from Sunsail, but the Moorings employ similar requirements.

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[2] This is also one of the strengths of the Caribbean cruise ship tourism product.
[3] Braudel

Table 1
Required skill levels (selected countries)

Location	Wind/weather	Navigation	Anchoring/mooring	Bareboat
Antigua and Barbuda	3	2	2	4
BVI	2	1	1	3 - 5
Cuba	2	2	2	4 – 5
Guadeloupe	3	2	2	4
Martinique	3	2	2	4
St. Maarten	2	2	2	4
St. Vincent and the Grenadines	3	2	2	4

Note:
Source: Sunsail

Apart from the anchorages are the marinas. Found throughout the region they are important as a base for charter boats, a temporary place of stay, an alternative to anchoring in bays or as a place for repair and refitting. Depending on purpose, marinas vary in terms of facilities offered. On the one hand, there are the stark "industrial" marinas and boat yards. These have a focus on repair and storage and may offer the barest minima in recreational facilities (bar, shower, toilets). These tend to prevail in Trinidad and Tobago. On the other hand the "recreational" marinas focus on the recreation/holiday experience and offer a wide range of facilities, often similar to those offered by up-scale hotels and resorts. The marinas in Simpson Bay are prime examples of those in the region. Many others, such as the ones in Antigua and Barbuda, are in between. Ownership varies between local (prevalent in Trinidad and Tobago) to foreign, with a few being managed by international marina management firms. An interesting tendency has been the gradual move toward local ownership in Tortola and Falmouth Harbour in Antigua.

Conceptually, marinas are akin to lodgings[4] in that they provide the space for tourists to stay. In consequence their capacity ought to be added to accommodation supply of any particular country. Indeed in Trinidad and Tobago in the 1990s and in St. Maarten since 1995 most of the increase in accommodation supply stems from expansion in marina berth capacity.

Clustering

Throughout the region one can distinguish between clusters and anchorages. It is the multitude of linked facilities that distinguish clusters from anchorages and moorings. The latter have either no services at all or the range is restricted, often limited to a bar or restaurant. If technical services are available they tend to be incidental to the main business. Portsmouth in Dominica is an example of this. Water taxis or what is called somewhat pejoratively "boat boys" may be available to supply basic services such as tour guiding, garbage disposal and provisioning.

In between are the isolated marinas or yards, which have no major links to other establishments in close proximity. An interesting case is the Blue Lagoon - Indian Bay area in St. Vincent and the Grenadines, which possibly could be described as a semi cluster. Facilities are

[4] Perhaps comparisons with campgrounds or the European vacation bungalow parks are more appropriate

available but not necessarily within easy reach and scattered between other non-marine establishments and housing.

In contrast a single or group of marinas or yards dominates the clusters. These attract other dedicated yachting services such as sail making, engine repair, chandlers, etc., and later ancillary services such as supermarkets, banks internet cafes and so on, which service not only the yachting community but could also service the (tourism) society at large. Eventually such spin-offs may reduce the relative importance of yachting, not unlike what happened to some traditional port cities. Within the Caribbean, Rodney Bay may have undergone such a transition.

In some countries clusters have been planned. Rodney Bay in Saint Lucia and Wickhams Cay in Tortola are two examples. In others, Simpson Bay in St. Maarten, Chaguaramas in Trinidad and English - Falmouth Harbour area in Antigua, or somewhat smaller, such as Bequia in the Grenadines, clusters seem to have developed organically as a result of natural advantages coupled with, often private sector, initiatives and investment.

Obviously the economic, social and environmental impacts of clusters differ from those of anchorages and moorings in that the former tend to generate longer stays, more revenue and inter industry linkages, more employment and more pollution per boat. These aspects will be discussed in more detail in the following sections.

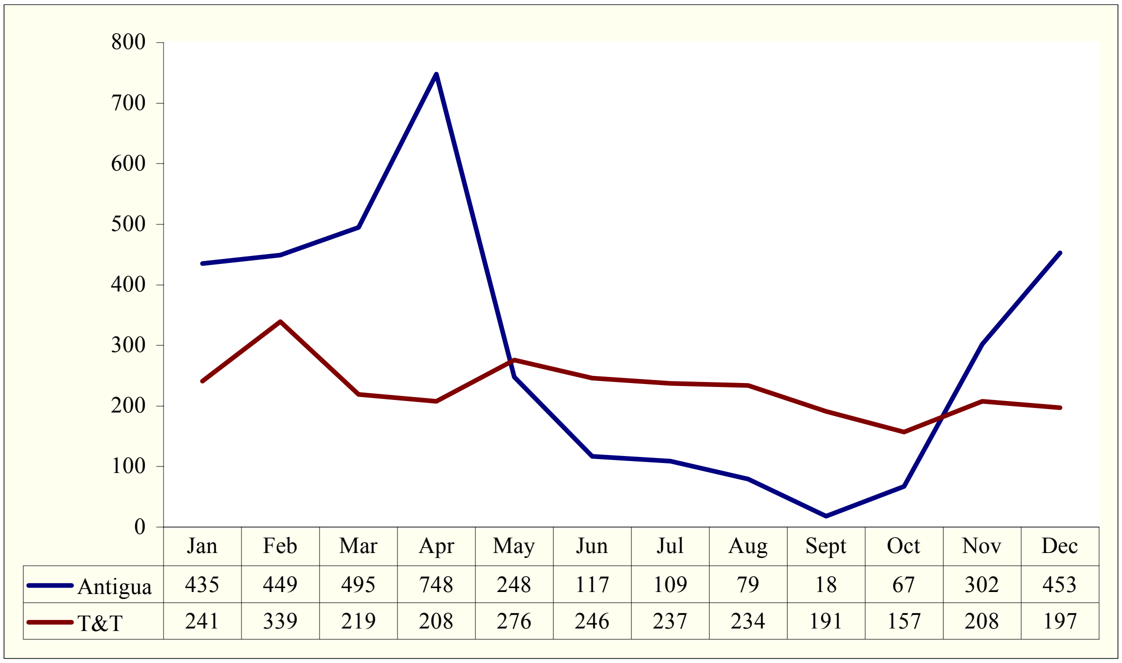
Seasonality

Seasonality in much of the Caribbean is directed by two factors. One, affecting mostly the liveaboards, cruisers and crewed charters, is the hurricane season that runs from June to November. North of 12.40’ insurance is expensive and many sailors either store their vessel or move to a more suitable location. The other factor steering seasonality follows the traditional Caribbean high season/low season pattern and concerns mostly the charter boat market.

Of all the countries Trinidad and Tobago is the least seasonal particularly when yacht population, rather than arrivals are considered and perhaps Antigua and Barbuda the most. Indeed when the yacht population in Trinidad and Tobago is reviewed it shows that, there, the season is anti-cyclical as compared with the rest of the region.

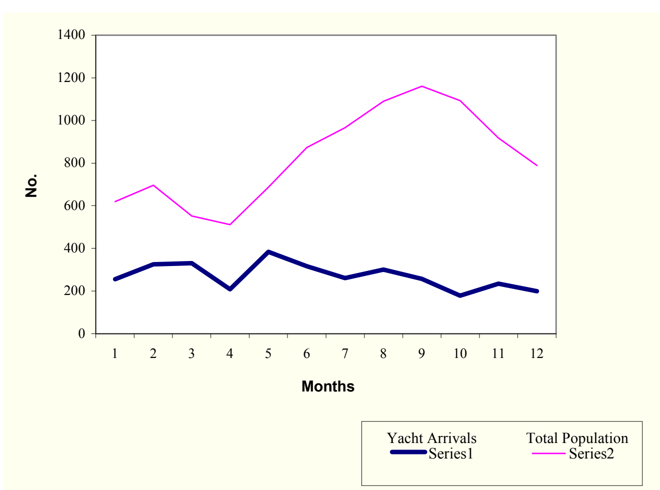
Graph 1
Comparative yacht arrivals (Trinidad and Tobago and Antigua and Barbuda)
1996 - 2001

Indeed if we look at length of stay, or yacht days, the difference is even more pronounced, as in



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Antigua	435	449	495	748	248	117	109	79	18	67	302	453
T&T	241	339	219	208	276	246	237	234	191	157	208	197

Trinidad and Tobago yachts tend to stay until November. The graph below shows the difference between yacht population and yacht arrivals in Trinidad. We notice that yacht arrivals peak in May, the beginning of the hurricane season, while the yacht population peaks in November the end of the hurricane season. While such data is absent for Antigua and Barbuda, personal observations indicate an almost zero yacht population during September - October in that country



If we look by type of yacht we notice that the mega or super yachts are possibly the most seasonal. After April-June all will have left the region. In contrast, bare boats tend to stay although possibly with a reduced number, for the global companies may ship yachts - using specially designed vessels - to other locations such as the Mediterranean. A mode of transport, incidentally that is also used for many mega yachts.

Thus countries with a large resident bareboat fleet or a large residential yachting sector appear to be more robust to the effects of seasonality than those where foreign privately-owned yachts and crewed charter boats form the basis of the industry. Hence Antigua and Barbuda with a product depending on foreign-owned mega yachts and foreign privately-owned yachts and crewed charter boats is more susceptible than the British Virgin Islands or Martinique, even though in Martinique the charter destination tends to be the Grenadines and not Martinique itself. Compared to Antigua and Barbuda, St. Maarten may have been positioned better in the market as that island still attracts the smaller privately-owned yachts and does have a fairly large residential bare boat charter subsector. Therefore one may conclude that the spreading of risk and orientation on the several niche markets simultaneously results in a more robust year round performance.

The fleets

Under the above definition of yachts the small sailing dinghies and the much-maligned personal watercrafts, prevalent throughout the hotel sector in the region, are excluded[5]. Of more importance to meeting future demands for trained skills and sustaining the regional yachting community are the sailing classes and small boat operation classes offered by national yacht clubs, coast guards and other entities.

Even when we look at yachts over five meters we notice a bewildering complexity of modes and vessels. There are the day charters and party boats - common to all islands - used mostly by tourists, cruise ship visitors and residents. This category includes sailing vessels, sometimes very sophisticated ones such as former America Cup yachts in St. Maarten, but it also includes the sport fishing and dive boats found in most islands.

Then there are the charter boats. Again one can distinguish a broad category that ranges from bare boats, to crewed charters to the mega yachts. Destinations may include sailing in national waters, multi-island trips or one way trips from one island to the other such as from Martinique to the Grenadines. Forms may include single vessel, flotilla sailing, learning to sail or participation in regattas and other events. Again broadening the product range results in a more stable all year round performance.

The bare boat charter companies range from global (e.g. Sunsail, the Moorings) with multiple basis of operations, to regional to national. The table below shows the islands covered by these businesses. Apart from the Eastern Caribbean, there are also now charter boat operations in Cuba, Belize, The Bahamas and other countries in Central America.

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[5] The use of five meters as a perhaps more common six meters in some countries is to facilitate the duty free importation of yachts such as the J 24 that are used for sailing classes thereby providing for a residential yachting sector and, more importantly, the basis for future captains.

For many, if not all, companies, lease back of yachts is a main source of income. Typically, an investor purchases a yacht through the company which then leases back the yacht for a three to five year period. In this it resembles a time-share property. Fleets have grown considerably as the table below indicates, and the Eastern Caribbean supports well over 2000 bare boat vessels.

Table 2
Estimated charter fleet

Country	Estimated Number of Charter Boats
Antigua and Barbuda	7
British Virgin Islands	1000 +
Dominica	0
Grenada	44
Guadeloupe	na
Martinique	750 +
Saint Lucia	42
St. Maarten	148
St. Vincent and the Grenadines	85
Trinidad and Tobago	0

We note the concentration of charter boats in the British Virgin Islands and in the French Islands as even the charter boats of St. Maarten are all based on the French side of the islands. The concentration in the BVI is of course related to the ideal sailing conditions and a sophisticated product and successful competition with the USVI. The concentration of yachts in the French Antilles is less obvious. Much of it is linked to the “Loi Pons”, which is described in more detail in the St. Maarten and Martinique reports, but essentially is a subsidy rendered to French built boats and operations[6].

The last decades have seen an increase in the length and quality of yachts, although for the bare boat yachts this development may have stopped with operators expanding their catamaran fleets and fitting a higher quality of equipment and services on board. Traditionally crewed charter boats tended to be larger than bare boats, but apart from the super yachts, no clear trends can be distinguished as the larger yachts gradually merge with the mega yachts.

With respect to private yachts we have seen some dramatic developments. While in the 1970s and 1980s yachts were 20 to 45 feet, these days they are larger and more luxurious, which applies particularly to the mega or super yacht sub sector. A dramatic example is reported from St. Maarten. When the Simpson Bay Yacht Club was designed in 1980, the marina was planned for an average size vessel of 40 feet. By 1999 it was necessary to upgrade the facilities because the size of boats was increasing. Indications, described in the St. Maarten report in more detail, are that there will be an increasing demand for services from larger vessels of 80 feet and up, many of which will spend the winter in the Caribbean. The increase in size has implications for facility planning. As the St. Maarten report indicates, with such large vessels it is no longer

[6] One must not forget that the charter boat market in the USVI and BVI got started through similar United States subsidies which applied until at least the early 1980s.

possible to quickly construct a dock. For these size yachts investments need careful planning, substantial investment funds and accurate trend forecasting.

The live-aboard and cruising yachts are mostly privately owned and sailed primarily by the owner. The distinction between live-aboard and cruiser is blurred, although the typical live-aboard tends to be somewhat smaller in size.

Events

The region has a large amount of specific yachting events. There are the international and "big boats", sailing yachts of 60 feet and over, regattas such as the Heineken regatta in St. Maarten or the BVI Spring Regatta and the Antigua Sailing Week[7]. Then there are the transatlantic regattas such as the ARC (Canary Islands to Saint Lucia and now also Antigua)[8] or the Transat from France to Martinique. These transatlantic rallies and the main regattas are of importance because they bring a large amount of racers and cruisers for a long stay to the region. For example the ARC brings in over 200 yachts to Saint Lucia. In addition, there are the interregional regattas such as the Rhoute du Rum; wooden boat regattas like the Antiguan Classic Yacht Regatta or Foxy's Wooden Boat race, sport fishing tournaments, power boat races, special interest regattas like the Moorings Interline, dinghy sailing and last, but not least, the regattas by traditional Caribbean fishing vessels whereby artisinal fishermen from villages compete with each other on a national or (sub) regional basis. Prior to the chartering season, boat shows are held in St. Thomas and in Antigua and Barbuda, with St. Maarten planning one for 2004.

Interestingly, the Antigua Sailing Week is gradually been extended in time by linking other events, such as the Classic Yacht Regatta and now the Big Boat Race, as a long semi-continuous event.

The sailing regattas are mostly conducted under the auspices of national yacht clubs and coordinated by the Caribbean Sailing Association.

The impact of events such as the Antiguan Sailing Week can be clearly discerned in the arrival data in Antigua and Barbuda as shown in Graph 1 above. In Trinidad and Tobago the impact of carnival is a mini peak as is the Jazz Festival in Saint Lucia which has been described as a mini ARC.

The Economic Contribution

The various national reports have all tried to estimate the contribution of yachting to their respective economies. All estimates have been fraught with uncertainty mostly because the very basic background information and data are not available. Interestingly two reports (St. Maarten

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[7] A listing of CSA approved regattas can be found at http://www.caribbeanracing.com/artman/publish/calendar.shtml.

[8] See http://arc.worldcruising.com/en/. The ARC goes from Las Palmas to Saint Lucia or from Lanzarote to Antigua and Barbuda.

and Trinidad and Tobago) tried to estimate the contribution from a production approach while the others tried to estimate the contribution using the expenditure approach.

The table below sets out the main results from the national studies. Because of the availability of data the BVI is also included.

Table 3
Estimated yachting expenditures (US$ millions)

	Est. expenditures	Expenditure approach	Establishment approach	Year
Antigua and Barbuda	24	V	V	1999
British Virgin Islands	100	V	V	1998
Dominica	3 - 5	V		
Grenada	13 +			
Martinique	8 +	V		
Saint Lucia	18 +	V		2000
St. Maarten	55 +		V	2000
St. Vincent and the Grenadines	12			
Trinidad and Tobago	21 – 25 +	V (Tobago)	V (Trinidad)	1999

Notes: Martinique, Grenada. Excludes air arrivals that charter a vessel in Martinique. Antigua and Barbuda. Mixed approach, and may have involved some double counting establishment approach. Willy-nilly, some indirect effects will be included
Source: ECLAC, CTO

The estimating method largely depended on available data, as project resources did not allow for questionnaire based expenditure estimates and in most countries establishment surveys and input-output tables are lacking.

Charter incomes and charter tourist expenditures are not included for Saint Lucia, Martinique and Grenada and St. Maarten. These are substantial omissions. Even at low annual revenues of US$50,000 per bare boat per year we notice that adjustments of Table 3 would be considerable, particularly for Martinique and St. Maarten, with a possible adjustment of US$ 37.5 million for Martinique.

It is clear that there are major gaps in our knowledge on the economic contribution of marine-based tourism. A meta analysis of past vrisitor expenditure and motivation studies (VEMS) studies may shed some light on those components which draw their clientele largely from land-based tourism (such as diving and other water sports) and possibly on expenditure patterns of those chartering a vessel through charter boat companies.

Because of its narrow focus the BVI economic impact study is by far the most detailed. It is also a study in which visitor expenditure surveys also focused on yachting since not only the airports but also ports were used as survey points. However because of its specific product, it is not clear if visiting yachts and cruisers were included in the survey. However it is the only study in which visitor expenditures were matched by the output of the tourism establishments.

Because of its product, mostly yacht chartering, data from the BVI are not quite comparable with those from the other islands where cruisers or off island based charter boats dominate. Nevertheless the structure of charter boat tourists expenditures is enlightening. The table gives a comparison between expenditures and input structure for yacht chartering and hotels.

Table 4
Expenditures and input structure for yacht chartering and hotels

Input Structure Establishments			**Tourist expenditure**		
	Yachting	**Hotels**		**Yachting**	**Hotels**
Gross output	100	100	Accommodation	59.8	56.3
Interm. Cons	52.6	56.7	Hotel meals/drinks	11.4	12.7
Value added	47.4	43.3	Oth. Meals/drinks	13.2	9.5
- compensation of employees	22.5	29.0	Transport	2.1	7.6
- depreciation	4.4	5.0	Recreation/entertainment	2.8	4.5
- indirect taxes	0.1	2.7	Shopping	9.5	7.7
- operating surplus	20.4	6.6	Other spending	1.1	1.8
				99.9	100.1

Source: ECLAC based on Tourism and Transport Consult International, 2000. Differences due to rounding

The table above also gives an indication of the loss in tourism revenue when charter boats are based in one island while spending much of the time in another island. This is prevalent in St. Vincent and the Grenadines (visited by charter boats based in Grenada, Saint Lucia and Martinique) and to a lesser extent in Dominica (visited by boats based in Guadeloupe) and the British Virgin Islands when visited by boats based in the USVI. In all cases the accommodation component and a large part of the shopping component (for provisioning) will be lost to the destination country. In other words at least 60% to 65% of the potential revenue will be lost. Its goes without saying that this is accompanied with losses in employment, taxation and GDP or balance of payments. Incidentally, the BVI successfully achieved the relocation of charter boat companies and crewed charter boats from the USVI, a process that was aided by sensible BVI policies and official indifference to yachting in the USVI.

A somewhat similar pattern emerges from a breakdown of estimated yacht expenditures in Saint Lucia as is shown by the table below.

Table 5
Estimated expenditures in Saint Lucia

Expenditure Item	Share (%)	Expenditure Item	Share (%)
Marina and other services	42	Handicrafts	1
Food and drink	16	Duty free shopping	3
Transportation	1	Duty paid shopping	9
Entertainment	10	SLASPA	1
Subcontractors	8	Custom duties	1
Utilities	2	Other government fees	5

Source: ECLAC (2002), based on SLTB, Inland Revenue and RBM

It is also interesting to compare the three tourism components with respect to tourism expenditures as shown in the table below.

Table 6
Comparison of tourism expenditures - US$m (selected countries)

	Hotel and other tourism	Yachting Tourism	Cruise ship
Antigua and Barbuda	275	24	9
British Virgin Islands	140.5	99.8	9.6
Grenada	70	13 +	3.3
Martinique	211	7.8 +	4.5
St. Maarten		55 +	

Notes: years correspond to those of Table 3.
Source: ECLAC, CTO

The Human and Social Dimension

Employment

Stemming from the lack of information, employment data remain sketchy. The table below sets out the estimated impact on employment in the participating countries. The estimates in the table below must be considered lower estimates and actual employment, particularly indirect employment, may be significantly higher.

Table 7
Estimated employment in the yachting sectors

Country	Employed	Notes
Antigua and Barbuda	838	
British Virgin Islands	na	
Dominica	na	
Grenada	250	
Martinique	na	
Saint Lucia	350 - 575	
St. Maarten	322 - 483	
St. Vincent and the Grenadines	152	Excludes Grenadines
Trinidad and Tobago	1100 - 1400	

Source: ECLAC based on the country reports

Training and human resource development

There is little formal training available in the region although the community college in the BVI has begun a training programme and Saint Lucia is about to start a programme. Seasonality is a problem and for some countries this makes employment in the sector less attractive.

Some countries draw from migrant workers, while others draw mostly from the local labour force. Particularly in the beginning of the industry different countries used different methods to attract labour. Perhaps the greatest contrast is that between Trinidad and Tobago and St. Maarten. When yachting took off in Trinidad and Tobago in 1991 the country was still in a structural adjustment programme, and because of its industrial and boat building base and high unemployment, the industry was able to draw labour from within. On the other hand, St. Maarten was booming with other tourism activities and had to draw its labour largely from migrant workers, a process that was facilitated by liberal work permit policies. In this respect, St Maarten was similar to the BVI, where the process started much earlier. Interestingly in the BVI, the tourism industry is not an occupation of choice for many “Belongers” as they prefer to work either in the financial or public sector.

The rapid expansion of the industry in Trinidad and Tobago posed problems because with the surge in arrivals from 1995 onwards, too many yachts were looking for services which too few highly skilled subcontractors could supply. The results were predictable in that lesser skilled people entered the market, prices went up and concerns were raised about falling quality standards. Yacht Services Association of Trinidad and Tobago (YSATT) and The Tourism and Industrial Development Company of Trinidad and Tobago (TIDCO) were quick to react and commissioned a training need report in 1998, although implementation of the recommendations has been delayed. The recommendations of that report apply to many, if not all, of the countries of the region and are therefore repeated below.

Expatriate counterparts who are skilled in yard management, should be employed on a one-to-one basis immediately to lift the level of middle management and to train present incumbents;
Extension courses in small business management and quality control should be provided to increase the level of skills of middle management, subcontractors and foremen;
A system of part-time training should be introduced immediately to lift the skills of the trades people working in the industry and those coming into the industry over the next few years;
A four-year apprentice scheme should be introduced within the next two years to attract school leavers into the industry and to train them in the various trades;
The short-term courses should be given on a part-time basis using a combination of day release and evening study;
The courses should be arranged to provide vertical articulation from trade to foreman to middle manager;
Certification should be provided for the successful completion of individual models of study and for blocks of courses completed;
Subcontractors should be certified to practice only in those areas and to the attainable level that their expertise permits;
A time limit should be placed on the completion of the prescribed courses for the present incumbents at all levels in the sector to ensure the elevation of trade skills and management practices is sector wide; and
Workshops should be provided for the artisanal sector to expose it to current practices in small boat construction.

Source: Commonwealth Secretariat

Communities dependent on yachting

In Saint Lucia the Rodney Bay Lagoon, Soufrière, Marigot, and Anse La Raye and to a lesser extent Gros Islet are dependent on yachting to some extent. This dependency is particularly strong for Marigot and Anse La Raye. Anecdotal evidence suggests that in Marigot one in three persons is directly engaged in the yachting sector. In Antigua, Falmouth and English Harbour and to a lesser extent Jolly Harbour, depend on yachting. Indeed as the Antiguan report states the Falmouth - English Harbour area may be too dependent on yachting, because the seasonality on the yachting sector there has severe repercussions on all aspects of the social and business life. Even in Dominica with its small yachting sector, Portsmouth depends on yachting as the Dominica report indicates that 5% to 10 % of the employed labour force in that area depends on yachting for at least half of their income. Of course in St. Vincent and the Grenadines the islands of Bequia and Union Island show a high degree of economic dependency on yachting.

In contrast it is difficult to distinguish yachting dependent communities in St. Maarten or Chaguaramas. The latter area was depopulated during the Second World War and links between the closest community, Carenage, with the industry are not known. In St. Maarten the industry has been submerged within the overall tourism industry and it is not possible to identify any specific community depending on the sector. This, incidentally, could also possibly apply to the Rodney Bay area in Saint Lucia where other tourism services and residential upscale housing become increasingly more important.

Best practices

An interesting practice in overcoming the seasonality that characterises marine-based tourism in Antigua and Barbuda is the seasonal movement of labour. It is a dual move whereby high skilled Antiguan labour migrates off-season to work in Newport, Rhode Island and other places in the United States as well as in France. During the Antiguan season this is offset by foreigners seeking seasonal employment in the industry on boats or on land.

Social Impacts

User conflicts

User conflicts between fishermen and yachts

Conflicts between yachts and fishermen are not unheard of throughout the region. Often it happens when yachts anchor in areas that are traditionally used by fishermen to pull a net. On the other hand the policy prohibiting them to "tow a line" seems to be too restrictive as such practices have little or no impact on conservation.

Between dive boat operators and yachts

A few countries, Saint Lucia, Saba and Dominica, for example, do not allow anybody to dive without either a licensed dive guide or dive operator. While there is opposition to this from the cruiser/ live aboard category, the current concerns about the state of the region's coral reefs, safety issues and spear fishing and the collection of lobsters, corals and sponges may justify these restrictions. However similar restrictions should also apply to the mini dive cruise ships which in some countries have untrammelled access to the dive resources without making much of a contribution.

Cruise ships and yachts

When cruise ship operations and yachting occur in distinct locations, such as in St. Maarten, few problems arise and indeed day and dive charter companies may benefit. When yachting facilities and cruise ship docks are in close proximity, conflicts may arise stemming from the new safety regulations that will come into effect in the middle of 2004. The relevant piece of legislation is the IMO ISPS, which is even more stringent.

Problems also arise when cruise ships anchor in prime areas and contribute to overcrowding as may happen in the Tobago Cays and off Tobago. Apart from the environmental impacts, particularly anchoring damage but also smoke stack and possibilities of the pumping of gray water or sewage, the danger exists that low spending cruise ship visitors supplant higher spending yachting tourists, resulting in a loss of income and employment. Such a substitution is a concern that also applies to land-based tourism where the effects are even more serious. The complexity of the matter, however, goes beyond the confines of this study, but ECLAC will carry out a study on cruise ship tourism during 2004-2005.

Local population and yachts

In few locations in the region there are apparent conflicts between members of the local population and marine-based tourism, in particular yachting. This is perhaps most prevalent in Tobago where indeed investments in marine-based tourism have been blocked. Much of it may be linked to a lack of awareness or local management failures blamed on yachting, or as anecdotal evidence suggests, fear for social transformation much akin to that during the incipient days of land based tourism in the 1950s or early 1960s. Often these negative attitudes are linked to sewage disposal or lack thereof. A somewhat unique situation arises in St. Maarten where the bridge at Cole Bay can cause traffic delays during its opening hours.

Harassment

Harassment is a problem ranging from the Grenadines to perhaps Dominica, but it is particularly prevalent around Union Islands, and Wallilabou. Many of those who harass provide useful services, such as garbage removal, provisioning or water taxi services. However cut-throat competition - driven by low incomes, low skills and high levels of unemployment - and a lack of organization and an absence of a feeling of ownership in the industry have resulted in situations that are perceived as threatening. It is not a new problem but it is one that has been allowed to fester.

That useful services are provided and that negative attitudes can be turned around is shown by the examples of Soufrière in Saint Lucia and the Indian River Guides Association in Prince Rupert Bay. It does require concerted effort by tourism and forestry departments to train, organize and transform a group of individuals into a “small business association”. In the Eastern Caribbean it will often require the support from forestry departments as these have experience with organizing land-based tour guides.

Best practices

Indian Rivers Guides Association.

In the beginning of the 1990s Dominica was a destination sailors tried to bypass. Reports of harassment and thefts were common and the Portsmouth - Prince Rupert Bay area had a bad reputation. Since those days much has changed. Following training by the Forestry and Tourism Departments the “boat boys” of Prince Rupert Bay organized themselves in the Indian River Guides Association. This organization does not only provide guided tours along the Indian River but also provide services to yachtsmen. And with little exaggeration they now represent the ancillary yacht services in Dominica and are a critical marketing factor as yachting ambassadors of Dominica.

Managing impacts on natural resources

The national yachting studies have identified a number of environmental issues relating to the yachting sector. This section provides a general overview of these issues, summarizes the most important issues identified for each country or territory, and finally attempts to provide practical solutions to problems and measures to mitigate negative environmental impacts.

Overview of environmental issues related to the yachting sector

The environmental issues identified in the national studies fall into the following categories:

Liquid waste disposal

Extensive literature is available on the effects of discharging untreated or inadequately treated sewage in the marine environment. Nutrient loading (eutrophication) is known to promote the growth of planktonic algae, resulting in increased water turbidity, as well as growth of macro-algae which compete for space with benthic marine invertebrates such as corals. Eutrophication is especially problematic in the tropical marine environment where nutrient levels are naturally low. The disposal of raw sewage can also lead to unacceptable levels of Coliform bacteria, which may cause a health hazard to humans. While these effects have been relatively well documented, little information is known about the *relative* impact of yacht sewage disposal. The general assumption is that, in areas that lack proper sewerage and sewage treatment systems and where untreated household and/or hotel sewage is discharged directly or indirectly into near shore waters, the relative impact of yacht sewage is small or even negligible. However, this may not be the case in bays or lagoons where flushing is poor. In such areas the visual impact of solids from sewage is clearly unacceptable to swimmers.

Although most modern yachts are equipped with holding tanks, the USVI is the only territory in the region to have a legal requirement for vessels to hold waste in such tanks and provide pump out and sewage treatment facilities.

Solid waste disposal

Similar to liquid waste disposal, the contribution of the yachting sector to solid waste disposal is small compared to the production of land-based solid waste. The problem relating to solid waste disposal by yachts comprises three elements: waste reception, transport, and treatment. Of those elements, only the first - waste reception - is unique to the yachting sector. Transport and treatment of solid waste from yachts is no different than that of land-based solid waste. Adequate receptacles for solid waste from yachts are not always available at the various anchorages, resulting in improper disposal. Treatment of solid waste on small islands continues to be unsatisfactory. Proper landfills are not always in place and recycling is often not an option because of the small volume of waste produced.

Pollution from marinas and boatyards

Pollution from marinas and boatyards may include hydrocarbon pollution from accidental spills (of fuel or oil), pumping of contaminated bilge water, two-stroke engines, and solvents; pollution from coolants, acids and surfactants; and waste from land-based operations. Pollution by heavy metals is another problem associated with marina and boatyard operations, in particular from the use of tin-based anti-fouling paints, which have not yet been banned from most Caribbean countries and territories.

The table below gives an overview of potential pollutant sources and pollutants from marine operations (modified after Saint Lucia Yachting Study).

Table 8
Pollutant sources and pollutants from marine operations

Use/Activity	Pollutant Type
Marina/boatyard operations	
Boat scraping/painting/cleaning	Hydrocarbons
	Heavy metals
	Nutrients
	Sediments
	Solvents
	Acids/alkalis
	Other organic compounds
	Surfactants
Engine repairs/maintenance	Hydrocarbons
	Solvents
Dry storage	Acids
Maintenance dredging	Sediments
	Heavy metals
	Hydrocarbons
	Other organic compounds
Boating	
Sewage discharge	Nutrients
	Bacteria
Galley wastes	Plastics
	Paper
	Aluminum
	Food scraps
Vessel maintenance	Hydrocarbons (used oil)
	Oil filters
	Batteries
	Paint
	Other hazardous material
Recreational activities	Fishing line
	Other floatable devices

Impact on marine ecosystems from yachting infrastructure development

Yachting infrastructure includes marinas, boatyards, docks and jetties, as well as their ancillary facilities and services. The development of yachting infrastructure usually requires some alteration of the coastline, which may vary from high-impact dredge and fill operations to low-impact small jetty construction. Such development may result in serious habitat destruction and loss of biologically and economically important wetlands, as well as changes in existing patterns and resulting erosion/accretion problems.

Impact from anchoring and boat groundings

Anchors and anchor chains cause serious damage to reef corals and will uproot sea grasses. While most yachts people are well aware of the poor holding of coral and sea grass bottoms, damage continues to occur because of lack of experience and/or insufficient knowledge of an area. For the same reason the number of boat groundings on coral-covered bottom also continues to increase. The risk and extent of damage from anchoring and boat groundings increases with the increasing number of mega yachts in the region.

Illegal fishing and collecting of marine organisms

Some impact - usually a limited impact - occurs from illegal fishing and collecting activities by yachts people. Such activities typically include illegal spear fishing, collecting of lobster and conch, or collecting of corals and shells as souvenirs. The degree to which such activities take place have to do with a number of factors: ignorance about local rules and regulations, denial of local rules and regulations, and the risk of being caught and the severity of penalty for committing the offence.

Over-crowding

Over-crowding at yachting destinations, anchorages in particular, is not just an environmental issue; it is also a social issue. Over-crowding, or the *perception* of overcrowding is very much dependent on the characteristics of a particular setting and its environmental qualities. Overcrowding may result in a loss of scenic values and the loss of quality experiences. The perception of overcrowding is influenced by the type of yachts people visiting a destination. For example, bareboat charters will usually have a higher “crowding threshold” than cruisers. There seems to a need for a “range” of anchorages to satisfy the expectations of different types of yachts people and to ensure that they all have a quality experience.

Negative impact of coastal and marine environmental degradation on yachting

One aspect that has little or nothing to do with the impact *from* yachting, but that can have a serious impact *on* the yachting sector, is environmental degradation of the coastal zone in general. Such environmental degradation may include loss of scenic values, decline in water quality, litter, and degradation of marine ecosystems such as coral reefs. The degradation is usually related to impacts of development and over-exploitation of resources and not necessarily related to the yachting industry. Yet environmental degradation will negatively influence the selection of a destination by yachts people.

Best practices

Solid waste guide Trinidad:

The table below shows the solid waste management standards as being practised by a yard in Trinidad and Tobago. As compared with the rest of the Caribbean this country has advantages that arise from a hydrocarbon-based economy and an industrial structure that allows for recycling or other means of disposal of wastes. Most of the other countries have neither the technical skills nor an economic size to allow for recycling. In many countries the management of all oily wastes, including stemming those stemming from land-based transportation, is problematic.

Table 9
Waste handling policy

Waste Type	Waste Container Type	Method of removal	Comment/ Disposal method
Recyclables			
Glass	Carib glass eco bin	Remove/replace bin	Recycled at Carib Glassworks
Paper	Poly bag – shredded	Remove bag	Recycled at various paper recyclers
Steel/Iron	--	--	Company may sell externally
Solid waste			
Wood	General container	General bin	--
Organic waste	-do-	-do-	
Box	-do-	-do	--
Liquid hazardous waste			
Waste oils	Tank/drum	Suction	High temp incineration
Others	Drum	Drum removal	High temp incineration, drum disposal
Solid hazardous waste			
Filters	Fixed drum with poly bag and cover	Poly bag removal	High temp incineration
Batteries	Na	Na	Recycle into new batteries
Plastics/paint cans	General container	General bin	No systems in Trinidad for plastics/paint cans
Oily rags	Fixed drum/ poly bag and cover	Poly bag removal	High temp incineration
Fluorescent light bulbs	Unbroken in box or wrapped in card board	Box removal	Cement encapsulation prior to bury in specific landfill

Source: IMS

The British Virgin Islands has established a programme to place mooring buoys throughout the territory. These are rented out to yachtsmen for a fee of US$25 per night. Government charges a licence fee of US$200 per buoy per year.

At a smaller scale the Soufriere Marine Management Area (SMMA) in Saint Lucia has placed mooring buoys at its marine park. Apart from a source of revenue and a means of using water taxi operators, who used to give harassment problems, the buoys are also used to control capacity. Hence the mooring buoy policy meets four objectives, namely prevention of anchoring damage, capacity control, source of revenue and a way to involve residents of the community in income generating activities.

Challenges

Lack of awareness

Tourism in the Caribbean region is facing many challenges as the Caribbean Tourism Organization (CTO) pointed out in one of the background papers for the Heads of Government Meeting on Tourism (Bahamas, December 2001). Some of these challenges are also faced by the yachting sector and will be briefly described below. However one major challenge is the lack of understanding and recognition of the yachting sector as a viable component in the region's tourism product. Indeed yachting was not referred to at the Heads of Government meeting. A major reason is that many countries do not consider yachting as tourism.

While progress has been made, in many, if not all, of the countries that participated in the Marine-based Tourism (MBT) project, much work still remains to be done. Awareness is just reaching government officials but there are still no national awareness programmes. National tourism awareness programmes focus on hotel tourism or on cruise ship visitors, rarely if at all on yachting. Visibility, of course, has much to do with it as most yachting tourists spend their time sailing or remain on the water edge. Sometimes the lack of awareness results in indifference and is neutral in its effects as was the case with the yachting sector in St. Maarten until quite recently. In other cases the lack of awareness results in hostile or counter-productive attitudes. For example in some areas, like Tobago, negative perceptions abound and societal ills are blamed on yachting visitors[9]. In the case of Tobago the hostile feeling has resulted in under-investment of facilities as income-generating opportunities are deliberately ignored. In other cases lack of familiarity by immigration officials has resulted in more onerous immigration procedures as evidenced by past practices in, for example, Antigua and Barbuda or Saint Lucia, a situation both countries are trying to address. Hostile reactions by police officers following the reporting of crimes by yachtsmen, as is frequently reported in Union Island, results in bad publicity and eventually in a decline of stopovers.

Regional organizations also have little or no awareness of the yachting sector. For example while CTO has ministerial committees for hotels and cruise ships it does not have a similar committee for yachting or marine based tourism. Telling may be a remark from a senior Caribbean Development Bank (CDB) official "yachting is just a bunch of rich guys of no interest to the region". For a region that professes to focus on high-income tourists such a comment is inconsistent and counterproductive.

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[9] A good example of the lack of awareness resulting in hostility and bias is

Lack of data and information

One of the reasons for the lack of awareness is the dearth of data and information while a lack of awareness pre-empts interest in collecting data and information. CTO has been in the forefront in developing national and regional tourism statistics but it has focused its efforts primarily on stay-over tourism and, to a lesser extent, on cruise ship tourism. Despite the progress that has been made, a recent report concludes that data shortcomings do not really allow for a thorough assessment of cost and benefits, or assist in the private and public sector decision making process[10].

These observations apply even more to yachting tourism. Regional leadership has been lacking and there are no common applicable definitions, little differentiation between crew and passengers and few visitor expenditure and motivation studies. In short simple questions on number of arrivals, contribution to GDP, balance of payment effects, employment, demographic profile of the yachting tourists and so on cannot be answered.

Prior to establishing a data and information system, insight must be gained on possible uses of this information, as is shown in the table below. Clearly awareness building is an important but indirect benefit, that emanates from the main purposes of such a data and information system.

Table 10
Information and data as needs

Purpose	Data Required	Require for what	Required by Whom	Instrument
Balance of Payments, GDP, employment	Arrivals, average length of stay, average expenditure	Economic and statistical reports, investment planning, policy	Central banks, statistical/ economic agencies, private sector	Customs clearance forms, Immigration, VEMS
Input structure	Financial data from businesses involved in the industry	National accounts, investment planning, policy	Private sector, statistical offices	Establishment survey
Market intelligence	Demographic profile, customer satisfaction	Tourism promotion, marketing and product development, policy	Private sector, tourism marketing	VEMS, Customs, Immigration
Investment	Vessel data, visitor data	Marina investment, facility investment	Private sector	Customs, market surveys

In countries that have a uniform product the data collection procedure is, in theory, straightforward. For example in the BVI, chartering dominates. Typically charter boat tourists arrive by air, although they may arrive by ferry, and join a locally based charter boat or privately-owned crewed charter boat. In that case information will be collected and those tourists

[10] ARA, 1996.

will be included in the annual tourism statistics[11], even though the place of stay may not be indicated. In the BVI the product is mostly chartering and as stated above, data are collected through the ordinary immigration statistics. The situation is less clear with respect to those who arrive by yacht. Furthermore many yachts chartered in the BVI visit the USVI. Clearly double counting is a real possibility. However given the dominance of chartering in the BVI the inclusion or exclusion of cruisers or live-aboard is not going to make much difference to the estimate of the economic contribution.

While in the above example the collection of visitor data through immigration is the prime information source, the situation differs for Trinidad and Tobago. Here the product consists of privately-owned yachts and yacht arrival data are available and collected through the customs clearance forms. However because the complement is considered as crew, crew data are not collected.

We notice that in both countries the source of information is administrative data. We also observe that the relevant primary variable is yacht arrivals in Trinidad and Tobago and charter tourist arrivals in the BVI.

For countries with a mixed product, that is domestic-based, charters and cruisers, the choice of the relevant variable is much more complicated. Here the complications arise from yacht arrivals. Like the BVI a charter boat may visit other countries. In fact for countries like Martinique, Saint Lucia, Guadeloupe and possibly also for St. Maarten and Grenada, visiting other countries is the norm. (Yachts visit the Grenadines for Martinique and Saint Lucia and possibly Grenada, Dominica for Guadeloupe and Anguilla or St. Barths for St. Maarten). Here the use of yacht arrivals as a variable would result in overestimating arrivals, a conclusion borne out by analyzing arrival data from Saint Lucia. A change in the customs clearance form may be required to address the issue.

Sources of data are mostly administrative with the customs clearance form potentially the most useful. The eastern Caribbean countries subscribe to a regional database, which could provide a large amount of aggregated data. These aggregated data were made available for the ECLAC Trinidad and Tobago report. There is no reason that such data could not be provided on a regular basis to all Eastern Caribbean countries.

An additional problem is the lack of use of common industry-wide definitions, whereby definitions, depending on the user, may differ even within a country, let alone throughout the region. In fact the definitional problems go beyond the region as there is no evidence that organizations such as the IMO and the WTO use a common set of definitions.

[11] And possibly in airport VEMS surveys

Safety and Security

Crime

Dealing with the crime issues remains, as in the entire tourism industry, an important issue. This deals both with crimes committed against yachting tourists as well as crimes committed by yachting tourists. The latter includes the non-clearance of vessels - resulting in a loss of government revenue, but also smuggling of weapons, liquor and drugs, insurance fraud and theft and robbery. According to custom officials, the smuggling of drugs is not a major problem although one reads about yachts being arrested several times a year. The non-declaring of weapons is more frequent particularly in the gateways to Latin America where piracy is more common. Penalties can be severe.

The other issue is crimes committed against yachting tourists. While the Eastern Caribbean is undeniably seeing an increase in crime, which is mostly linked to the subregion acting as a gateway for the export of illegal substances to North America and Europe and a reciprocal import of weapons, most serious crime is not committed against tourists. Nevertheless, complaints about lack of interest by police officials and lengthy legal procedures do arise frequently.

ISPS

The ISPS, which goes into effect in the middle of 2004, is intended to increase security at ports. At this point in time the implications of this legislation on marinas, particularly those that cater for mega yachts and mini cruise ships, are uncertain and need to be further investigated

Hurricane shelters

Seasonality in the region is to a large extent determined by the hurricane season. Effective management of hurricane shelters, including regulations and proper moorings, could facilitate the easing of insurance rates if countries can make a case that hurricane protection has improved. The disasters at Simpson Bay, largely avoidable with a proper management structure, in St. Maarten in the 1990s did much damage to the industry

Product development and marketing

Perhaps the greatest challenge is the realisation and acceptance of the need for the islands to enter into strategic alliances, since the main competition is not a neighbouring island but other sailing destinations such as the Mediterranean. It is a challenge that has been overcome for a long time by the cruise ship operators who market a range of destinations and islands as a single product. A regional private sector body (see below) in combination with the CTO or with those governments that have an interest in yachting could be a powerful voice to promote marine-based tourism in the region.

Institutional development

No regional private sector body

It is stated above that the lack of awareness remains a formidable challenge. Within the region there is no private sector body comparable to the Caribbean Hotel Association (CHA). As a result marine-based tourism or yachting have little impact when regional tourism agendas are set and their interests are rarely taken into consideration. This is also reflected in the structure of the CTO which has hotel and cruise ship standing committees, but no marine-based tourism or yachting standing committee.

Lack of inter-island collaboration

This is linked with the concept that the Eastern Caribbean is, for marketing purposes, one entity. Regular consultations between the USVI and BVI and Puerto Rico on the management of marine-based tourism in the Virgins are rare if non-existent, the recent arrest by a USVI-based sport fishing vessel, fishing in a USVI-organized sport fishing tournament, but using BVI territorial waters, is but one example. Likewise consultations between Grenada and St. Vincent and the Grenadines on the management of the Grenadines are equally rare or non-existent. Additionally, there are no consultations between these islands and Saint Lucia and Martinique, whose clients use the Grenadines, to address issues such as non-clearing by yachts, illegal spear fishing and other issues. It is also observed that there are no consultations between Antigua and Barbuda and St. Maarten and St. Barths on mega or super yachts. Consultations between Guadeloupe and Dominica and between Trinidad and Venezuela or even Tobago are other areas where consultations may strengthen the product and facilitate management.

The mega or super yachts

The increase in the number of large yachts will pose several challenges to the region. In part they are being met in islands such as Antigua and Barbuda, St. Maarten and St. Barths. Indications are that the number of large yachts will increase significantly over the next decade, which will have implications for the region.

It is anticipated that many of the large yachts will spend the winter season in the Caribbean with the Mediterranean and the United States east coast as popular summer destinations. Facility planning becomes more difficult and construction more expensive. Over-dependence on large yachts may worsen seasonality as already is happening in Antigua and Barbuda. Also in servicing and supplying these yachts, opportunities may differ from those of the smaller yachts. For instance the complexity of equipment requires highly skilled technical service staff; many yachts have long-term service contracts that, by and large, could eliminate Caribbean-based operators and servicing such yachts may require investment in equipment that may not be attainable for under capitalized businesses. On the other hand, it will open up opportunities for upscale and high quality provisioning and other services.

Towards a Regional Policy and Strategy

Common elements

A regional strategy should look toward the common elements that are shared among most Caribbean countries. While the ECLAC studies focused on the Eastern Caribbean, marine-based tourism has a bearing throughout the region. National, regional and global recognition of marine-based tourism is still lacking and a regional strategy could easily become overly ambitious. As an initial step, however, it may be advisable to focus on a few aspects that can be implemented within a short-term stage and form the basis for future work. Much of the strategy, obviously, is already implicitly referred to in the previous section on challenges.

Institutional development

Establishment of a regional private sector organization.

A regional private sector marine trade organization (MAC) should, from a private sector point of view, be of the highest priority. The tasks of such an organization should include raising awareness at all levels; regular consultations with CTO and other regional organizations, such as the regional associations of custom and police officials or port authorities, with respect to joint promotion and raising policy issues; the establishment of a code of conduct for sailors and the operation of marinas and charter boat companies; the setting of safety standards with respect to search and rescue; occupational health and fire fighting; the planning of hurricane shelters and cooperating in establishing training requirements. In many respects the CHA would be a natural ally since both organizations are primarily focused on Caribbean-based accommodation establishments. Furthermore the Caribbean Association for Sustainable Tourism (CAST), which is linked with CHA, has already gained experience in raising environmental issues among CHA members.

Establishment of national marine trade organizations

The private sector in those countries where they do not as yet exist should establish national marine trade associations. The objectives and tasks of such an association would be very similar to those of the MAC but would be focused on national issues, and also include liaison with national government.

Establishment of government marine based tourism focal points.

For those countries that have not done so the establishment of government marine-based tourism focal points should be high on the agenda.

Establishment of a standing committee on marine-based tourism within the CTO

At the Trinidad and Tobago consultation, the Minister of Tourism noted the absence of a marine-based tourism committee within the CTO while similar committees existed for hotel and cruise ship tourism. Governments should promote the establishment of such a committee within CTO.

Awareness programmes

A regional strategy needs to focus on increasing the understanding of the role of marine-based tourism as part of the region's tourism product. Target groups would include the public at large as well as public servants and regional organizations operating in the Caribbean. The public at large, including the media remains largely unaware if not hostile to marine-based tourism. In St. Vincent and the Grenadines authorities have begun to introduce yachting as an aspect of tourism in its educational awareness programmes aimed at primary and secondary schools, an example that countries of the region should follow.

A MAC in collaboration with the CTO could prepare an annual overview of the sector.

Address the definitional issues

One of the objectives of focusing on definitional issues would be to assist in the classification and standardisation of variables to develop an information strategy. A second objective would be for use in legislation particularly in incentive legislation, regulations addressing fee structures or regulations pertaining to vessel registration and safety.

ECLAC and some countries, such as Saint Lucia and St. Vincent and the Grenadines, have begun to address the definitional problems but consultations between tourism authorities, marine and port authorities, the statistical offices and ministries of legal affairs will be required if harmonized definitions are to be developed. It will be necessary to draw on the international community for agreement on definitions, particularly on CTO, IMO and WTO.

Address data and information issues

The objectives of the strategy would be to increase understanding of the industry and to inform decision-making in the short, medium and long term.

A wide range of data is available through administrative sources such as immigration or customs, but in many countries such data are not processed and consequently not used. For example, customs collects a wide range of data through the custom clearance forms. Much of these data are computerized through the Caribbean Customs Law Enforcement Council. Aggregated data could be made available on a regular basis in much the same way as was done in the preparation of the Trinidad and Tobago report.

Such administrative data needs to be supplemented by dedicated VEMS surveys to supply additional demographic and foremost, expenditure data and by establishment survey data.

Establish a Code of Practice for marina and charter boat operators

The IMO Code of Conduct for the Prevention of Pollution from Small Ships in Marinas and Anchorages was perhaps the first regional effort to establish some operating practices and guidelines. Much of these have been expanded upon by a recent United States Environmental Protection Agency (EPA) document on the control of non point sources of pollution from marinas and recreational boating and other relevant technical documents. The proposed MAC should take a lead role in developing a code of conduct of its members and through the national marine trade associations, should make adoption of such a code of conduct compulsory to its members.

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