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The Yachting Sector Dominica

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The Yachting Sector Dominica

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Executive Summary

Yachting is tourism, and the yachting product is an ideal addition to Dominica's tourism product. This report envisions a sector that supplements current tourist activity while circumventing the issue of limited airlift and hotel accommodation. It is feasible to double yacht arrivals and yachting expenditures within five years. Yachting tourism corresponds to the government's goal of developing community tourism, i.e. 10-20 moorings off a small village will stimulate existing businesses in the community and foster new business, e.g. laundry services, etc.

Despite the absence of reliable data, it is estimated that yachting generates between US\$3-5 million to the Dominican economy. The employment effect is unknown but estimated to contribute 5 to 10% to employment in the Portsmouth area.

Some of the findings include:

- Low level of awareness of the sector
- Limited ownership
- Limited availability of data
- Low visibility in the market
- Good growth prospects
- Need for duty free sale of fuel and yacht spares
- Good reputation of the Indian River Guides

Specific recommendations of the study are:

General

- Develop yachting as an addition to Dominica's tourism product that supplements the current tourism activities while circumventing issues of limited airlift and hotel accommodation.
- Develop yachting consistent with government's policy of small-scale community tourism, i.e. 10-20 moorings off small coastal communities that will stimulate existing and foster new businesses.
- Set as the short-term objective: doubling of yachting revenues/expenditures within three to five years while maintaining the general tourism objectives.

Make Dominica yachting friendly

- Remove the existing confusion to the current clearance system and advise Doyle, Street and Sail Pilot and write letters to All at Sea, Caribbean Compass and Caribbean Yachting and Fishing.

- Remove restrictions on coastal cruise permit or abandon the coastal cruise permit altogether and consider a US\$10 cruising fee.
- Be more proactive in reducing the number of non-clearing yachts and carry out spot checks in collaboration with the coast guard.
- Maintain and advertise the current practice of customs acting as immigration officers.
- Implement a two-week minimum stay for yachtsmen.
- Clarify the “tow a line policy”.
- Promote the establishment of a residential yachting sector and remove duties and consumption tax on the importation of yachts.
- Address the crime problem and investigate the possibility of issuing powers of arrest to selected members of Indian River Guides Association (IRGA) and similar community groups.
- Use the Indian River Guides as role model for other community groups in Dominica.

Ancillary services

Chandleries

- Establish an efficient duty free/consumption tax free system of transient yachts. Establishment of open warehouse system for yacht spares, similar to that of the duty free shops for cruise ship passengers whereby copies of the clear-in certificate would entitle a customer to duty free sale of yachting spares.

Establishment of duty free fuel depot.

- At the current stage of development it is unlikely that any fuel dock will be profitable if it is only geared towards the sale of duty free fuel. On the other hand there is also local demand that would benefit from easier access to fuel. Furthermore, properly maintained fuel docks are less likely to pollute than haphazard methods using jerry cans. Combined operations are possible whereby a copy of the clear-out certificate should entitle the customer to duty free purchase of fuel
- The duty free operations can be facilitated by an open warehouse system for the sale of duty free fuel. A customs bond can be placed for the maximum duty liability on the carrying capacity of the tank. Such a facility can be done with a bank or insurance company. Once the bond is placed duty free fuel can be

delivered to the tank and the sale of duty free and duty paid sales of fuel can be facilitated. Customers wanting to purchase duty free fuel must present a customs clearance proving that their vessel is leaving Dominica within the next 24 hours. Customers wanting to purchase duty paid fuel pay the normal price. At the end of the month all sales must be tabulated and submitted to customs with all supporting documentation. The Customs department can then determine the duty liability on duty paid sales.

- Reduction of duty and consumption tax on pleasure marine vessels

Institution building

Yachting Sector Standing Committee

- Establish a 12-18 month Yachting Sector Standing Committee comprising representatives from the public and private sector stakeholders (see Section VI) to address the challenges facing the sector. The committee should be focused on making recommendations to Cabinet or facilitating solutions where the jurisdiction falls under one of the members of the committee. The committee could also determine guidelines, numbers and suitable locations for the placement of moorings.

Establish a private sector marine trade association

- The marine association's main objective would be to facilitate the development of the yachting sector. The main areas of concern would be promotion, data collection, revenue generation (to fund activities) and facilitation.
- Members would include businesses that enjoy economic benefits from the yachting sector - groceries, restaurants, repair services, car rentals, tour operators, marine supply businesses, internet cafes, laundry services, dive operators, craft shops, moorings operators, etc. Dues could be structured on size of business or importance of yachting to the business.
- Objectives would include promotion, lobbying government, facilitating the industry, revenue generation, collecting statistics.
- Improve external communication to yachtsmen - press releases re new developments in the industry, etc., news updates to monthly publications.
- Improve internal communication to yachtsmen - Dominica Hotel and Tourism Association (DHTA) publication, flyer/brochure with information on mooring locations and fees, membership listing identifying services available at Customs offices.

- Work with DHTA on national awareness programme of yachting sector (in conjunction with existing awareness program) - its economic contribution, job opportunities.
- Partner with DHTA to use their office (once open) as a point of contact for yachtsmen, offering assistance, receiving complaints and compliments.
- Work with the private sector to organise yachting events.
- Lobby government for the placement of navigational aids, approval for moorings, approval for duty-free fuel at waterside, development of yachting policy.

Establish a yachting officer within suitable government division

- A yachting officer should be designated within the Ministry of Tourism or the National Development Corporation (NDC). This person would be responsible for facilitating the development and promotion of this market, liaison with the private sector and act as the focal point for yachting within government.
- Clarification of areas of responsibility between fisheries and Port Authority
- Address user conflict issues in marine parks and other areas
- Issuing of VHF radios for related authorities
- Review fee for length of stay extension

Improvement of data availability

Use the Customs Clearance Form to aggregate on a monthly basis the following:

- No of yacht arrivals (and departures) by length of vessel e.g. (in feet)
 - 20 – 35
 - 35- 45
 - 45- 60
 - 60 – 90
 - >90
- Yacht arrivals by type of vessel e.g. sail or power
- Yacht arrivals by type e.g. bareboat, own, crewed charter etc.
- Yacht arrivals by previous country or port of call
- Yacht departures by next country or port of call
- Length of stay
- Number of crew (including master)

- Nationality of the master
- Carry out a bilingual exit survey to determine market, spending, and length of stay and provide feedback on the product. Use this data to make informed decisions for promotion and product enhancement.

Marketing and promotion

General

- Increase the visibility of Dominica as a yachting destination
- Establish a web site dedicated to yachting or develop a robust yachting page of an existing web site. Information should include general information, customs and immigration arrivals procedures, moorings locations and fees, waste disposal facilities, map, local transport, yacht in-transit shipments, firearms regulations, stay-over extensions, pets, regattas, yacht services, festivals and events, private sector association and its members. This web site could be the site for the private sector association.
- Addition of section on yachting to DHTA and NDC publications. Should include customs and immigration arrivals procedures, moorings locations and fees, waste disposal facilities, map of moorings locations, yacht in transit shipments, firearms regulations, stay over extensions, pets, regattas, yacht services. The above information should also be included on the DHTA web site.
- Improve internal communication to yachtsmen - DHTA publication, flyer/brochure with information on mooring locations and fees, membership listing identifying services available at customs offices.
- Use the VHF to let visiting yachts know what is happening and what is available. A trusted person could coordinate this activity in Portsmouth. Persons being advertised could pay a small monthly fee to be included, e.g. Announce on 16 to switch to 68 for today's activities - Friday night at Fort Young, live band at Cellars, dinner special at Purple Turtle, laundry pick-up at 7:00am, etc.
- Ensure that all web sites and other publications are bilingual.

Guadeloupe and Martinique

- Government and private sector familiarisation tour to Guadeloupe and Martinique
- Develop yachting specific events (e.g. small traditional boat races or regattas), linking it with events in Martinique and Guadeloupe) For example, fishermen from Saint Lucia and Martinique have a wooden boat race to Guadeloupe, sponsored by La Mauny Rhum, each year in December. Promote existing

Dominican events, such as the Creole World Music Festival in Guadeloupe and Martinique and develop packages and /or temporary mooring buoys in the festival village. Web sites in French (general recommendation) and establish a bilingual web site with a marine/yachting/sailor's guide for Dominica.

- Explore Martinique and Guadeloupe charter base expansion opportunities in particular relationship building with charter boat companies based there.
- Attendance at Martinique's Festival of the Sea to promote Dominica as a destination, using flyers, DHTA publication Alliance with the French-based charter companies:
 - Familiarisation trip to Dominica for charter boat operators highlighting regulations regarding marine parks, showcase tourist attractions, partner/pair up local tour operators with charter companies. Goal is to formalise arrangements for charter boat visitation to Dominica to ensure that they are 'playing by the book'
 - Create charter packages for Dominica events such as World Creole Music Festival, Carnival
 - Rental of charter boats for events to supplement hotel rooms for large events
 - Familiarisation trip to Guadeloupe and Martinique for private and public sector
 - Sale of fishing licenses locally in Guadeloupe and Martinique to facilitate fishing charters
 - Establish a 'Dominica Desk' or office in Martinique and Guadeloupe to facilitate Dominica interests in these territories including yachting (similar concept to Dominica Desk at V. C. Bird International Airport in Antigua)
 - Addition to charter guide book
 - Jean Michel Cousteau has been invited to Dominica. This visit is an opportunity to have a respected marine expert promote Dominica as a marine destination and/or launch an appeal to both the charter companies and the French public to respect Dominica's laws and regulations with regards to arrivals procedures and protecting the marine habitat. Could be a flyer or video, meetings with charter companies.

Cruisers

- Increase visibility in the market. It may not be necessary at this point for Dominica to consider representation at large boat shows but rather to take advantage of regional events at which Dominica as a yachting destination can be effectively promoted.
- Attendance at the Atlantic Rally for Cruisers (ARC) in Saint Lucia (December) to promote Dominica as a destination, using flyers, DHTA publication.
- Attendance at the Antiguan boat show to promote Dominica as a crewed yacht charter destination.

- Attendance at the Festival of the Sea in Martinique to promote Dominica as a charter destination and to establish relationships with the relevant stakeholders in Martinique.
- Advise relevant publications of the customs and immigration procedures.
- Develop or add yachting information to already existing web sites.

Infrastructure

- Placement of 100+ moorings with a body clearly identified as being responsible for regular maintenance of the moorings and collecting fees. Environmental impact assessment will be required for sensitive areas. Consider placing four to six at Soufrière.
- Label existing “dive” moorings to prevent use by yachts.
- Place a sign in protected areas “No Yacht Anchoring”
- Repair and upgrade of existing dinghy docks
- Remove wrecks in Portsmouth
- Consider the construction of a small-scale marina (20-30 slips) in three-five years if the traffic has increased substantially, possibly at the current Sunshine Village location. But, serious consideration must be given to the seasonality of the sector, i.e. revenue flow will be a challenge in the off-season; the current market that Dominica attracts, i.e. would this market be willing to pay marina fees and the support services that will be required.
- The use of the existing wetlands in the Cabrits area for marine development is not recommended.
- Evaluation of the possibility of converting the Portsmouth cruise ship dock into a finger pier to service yachts. There is a possibility that more revenue could be generated by yachts than by the current usage of this facility. A resident population may also stimulate development of the unused building adjacent to the dock for shops or services for yachts, the relocation of customs and immigration to one location in the building, increase the water taxi usage and draw the yachts away from the unattractive coastline at Portsmouth.
- Placement and maintenance of navigational aids
- Provide facilities for solid waste and oily waste disposal.

- Consider using Sunshine Village as a “One Stop Shop”.
- Complete and maintain existing coastal infrastructure
- Remove vessels from the mouth of Indian River and terminate haul-activities.
- Ensure the availability of water
- Construct fuel docks and instil environmentally sound fuel delivery practices.

1. COUNTRY BACKGROUND

1.1 Background

Located at 15 degrees 20 minutes N and 61 degrees 22 minutes West, Dominica is situated between the French Departments of Guadeloupe in the north and Martinique in the South. Even though the official language is English it shares a common language, Creole, with these islands.

Of volcanic origin, the 751 square kilometres island is mountainous and forests cover up to 60% of the country. Rainfall varies from 1,200 mm on the east coast to 10,000 mm in the centre of the islands (CCA/IRF, 1991).

1.2 Social aspects

Dominica's population was estimated at 71,727 (2001) with a growth rate of zero. Life expectancy at birth is 71.5 years for men and 75.4 years for women. Infant mortality stands at 13.7 per thousand. (CSO Demographics report 2002).

According to the 1999 Labour Survey, the unemployment rate for Dominica stood at 15.7% with unemployment rates of 13.1 and 19.4% for males and females, respectively. Youth unemployment rates are higher and there is also significant variation among the various parishes. (CSO)

1.3 The economy

With an estimated GDP of EC\$710 million or US\$263 million (2001) Dominicans have a GDP per capita of US\$3668.

During 2002 the general economic picture remained one of gloom with a decline in output of the agricultural and manufacturing sectors and a worsening of the government fiscal accounts. After experiencing low growth from 1995 onwards, real GDP stagnated in 2000 and has been in decline since 2001.

The dire situation with respect to government finances will have consequences on practical forward steps with respect to development of yachting. Given the size of the deficit, budgetary consequences of any recommendation need to be carefully evaluated.

Over the last two decades the importance of agriculture has steadily diminished while services have grown in importance as is shown the table below. A large segment of this sector is government services.

Table 1.1
Structure of the Economy

	1981	1991	2001
% of GDP			
Agriculture	31.7	23.8	17.2
Industry	20.3	18.7	22.8
Services	48.0	57.5	60.0
Private consumption	84.8	66.2	61.6
General government cons.	25.4	21.0	23.3
Imports goods and services	78.7	70.0	63.8

Source: World Bank

1.3.1 *The tourism sector*

Although the contribution of hotels and tourism to GDP at EC\$14.9 million is only around 2.5 % of total GDP (current factor costs) this tends to underestimate the total contribution due to the fact that most tourists stay in private homes. Travel contributed US\$48.1 million to the export of services in 2001, thus surpassing merchandise exports as the primary foreign earner for the first time.

A severe drop in cruise ship arrivals and the associated loss in receipts could not quite compensate for the increase in tourist arrivals. Because average cruise ship visitor expenditures are low the total visitor expenditure was not as severely affected as this dropped from EC\$104 in 2001 to EC\$97.8 in 2002.

Table 1.2
Tourist indicators in Dominica

Year	Arrivals ('000's)			Visitor expenditure (US\$ millions)
	Stay over	Excursionists	Cruise ship	
1997	65.4	3.3	230.5	48.3
1998	65.5	1.5	244.6	46.5
1999	73.5	3.9	202.0	50.7
2000	69.6	2.7	239.8	48.2
2001	66.4	1.0	207.6	45.4
2002	67.1	2.0	136.9	

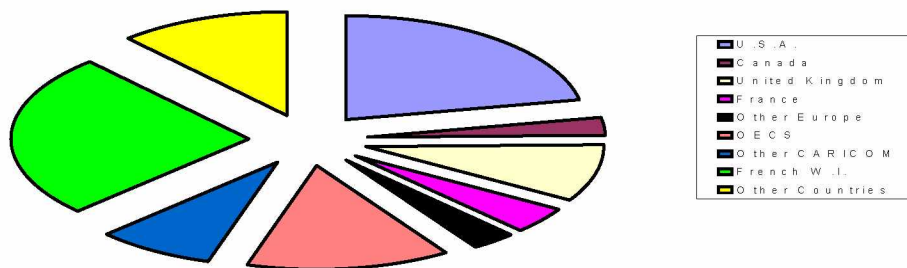
Source: CTO, ECCB

Within the context of the Caribbean, Dominica is a small tourist destination with some 67,100 stay over visitors (2002) and a room capacity of 899 rooms in 2001.

Unlike most other Caribbean countries the summer period attracts some 66% of stay over arrivals. The focus on the summer reflects Dominica's dependence on Guadeloupe and Martinique (25% of tourist arrivals in 2001) and CARICOM (22% of tourist arrivals in 2001) for its visitors. Cruise ship arrivals reflect the usual Caribbean pattern with the winter period being dominant.

The pie chart shows the country of residence for visitors to Dominica in 2001.

Figure 1.1
Origin of Dominica Tourists



Source: CTO

The contribution to tourism expenditure from tourist and other arrivals amounted to an average expenditure of US\$596.39 as compared with US\$27.76¹ for cruise ship arrivals. Therefore, in 2001 the total expenditure of cruise ship arrivals amounted to US\$5.8 million as compared with US\$39.6 for stay over visitors.

An interesting table is the table below which shows average length of stay and average daily expenditure by category of visitor.

¹ This may be inclusive of cruise ship commissions that can range from 30 to 50% of tours and activities arranged on-board. Hence the actual spending in Dominica is likely to be less.

Table 1.3
Visitor Indicators 2000

Category	Ave. length of stay (days)	Ave. daily exp. (ECS)	Total receipts (ECS million)
Excursionists	1	179.6	0.3
Cruise ship	1	73.5	17.6
Stayover			109.5
Hotel holiday	9.1	244.9	34.0
Hotel bus.	11.0	304.0	31.6
Private homes	14.8	37.7	21.8
Students	315.0	95.1	22.2

Source: IMF, 2002

However the data do not include yacht arrivals and yachting tourists. Hence the above data exclude the yachting sector and will need to be adjusted upwards.

1.4 Environmental/Physical

The steep terrain that extends over much of the island evidences Dominica's ruggedness. The Morne Diablotin (1730m) and the mountain range, including Morne Trois Piton, extend to the south of the island and the peaks of these mountains are located less than 7 km. from the coast. Flatter areas are located in the river valleys, the coastal areas of the northeast and an area in the centre of the island. Population and agriculture is concentrated in the flatter areas along the coast, particularly on the leeward side (CCA/IRF), where also the capital, Roseau, and Portsmouth, the second population centre, are located.

Geologically young, the island is volcanic and there are numerous attractions based on geothermal activities. Rainfall and humidity are high which results in lush vegetation in much of the island. Vegetation may comprise over a 1,000 species of flowering plants, ranging from mature rain forests in the interior to swamp and wetlands on the coast. There are several national, Lesser Antilles or West Indian endemic wildlife species, including the national bird the Sisserou, several reptiles and bats. (CCA/IRF)

1.4.1. The marine environment

The Caribbean Conservation Association/Island Resources Foundation (CCA/IRF) Environmental Profile of Dominica (CCA/IRF 1991) states that the coastline is 153 km that adjoins a 715 sq. km coastal shelf. "Currents that can exceed 1 m/sec (2 kn) set westward off the north and south coasts during flood tides. Along the east coast currents divide in the vicinity of Pointe Giraud and flow north and south around the island."² Ebb and flood currents on the west coast set south to south-west and north to north-west, with a flow generally less than 0.4 m/sec. (CCA/IRF, 1991).

² Cambers quoted in IRF/CCA 1991.

Critical habitats such as seagrass beds, coral reefs and mangrove are not extensive. The CCA/IRF report continues; “However good visibility, diverse diving veneers covering steep rock walls, caves and pinnacles combine to make Dominica’s west coast one of the most spectacular diving experiences in the Eastern Caribbean.” (CCA/IRF 1991). Diving also is well regarded as the reefs are considered relatively unspoilt and unique³. There are six or seven licensed dive operations.

Dominica has a deserved reputation as the premier whale watching area in the Eastern Caribbean. Species include Sperm, Pilot, Pygmy, and False Killer whales. Spinner Dolphin, Spotted Dolphin and Bottlenose Dolphin are also frequently seen⁴.

1.4.2 National Parks

Dominica has two marine parks. The Soufrière Scotts’s Head Marine Reserve (SSMR)⁵ and the marine section of the Cabrits National Park. The latter will become a marine reserve in its own right and includes the Toucari and Douglas Bays. Awaiting protective legislation is the Salisbury Marine Reserve. Other, terrestrial parks include Morne Diablotin National Park and the Morne Trois Piton National Park.

1.5 The anchorages

1.5.1 Prince Rupert Bay/Portsmouth

Located at a distance of 16 nm. from the Saintes, the area is the premier yachting centre of the island as evidenced by yacht arrivals and available moorings, dingy docks, engine repair and refrigeration services, laundry’s and internet cafes. As Doyle describes: “The Bay is over 2 miles long and provide anchorages from the Coconut Beach Hotel on the south shore right around to Sunshine Village on the North”, just before the cruise ship dock at the Cabrits National park.

1.5.2 Roseau

Roseau has several mooring areas from the Fort Young Hotel, next to the cruise ship dock (the area most suitable for mega or super yachts) to the Anchorage hotel, which is the most convenient anchorage near to town (Doyle, 2001). Sukies Marine Supplies is the only small chandler in Dominica.

Apart from the above anchorages that are the official points of entry and which have customs and immigration services, there are other possible anchorages. For these a coastal clearance is required.

³ See for example <http://wildsidedestinations.com>.

⁴ <http://www.avirtualdominica.com/divingdominica.htm>.

⁵ See <http://www.avirtualdominica.com/ssmr/index.html>.
and <http://www.dominicamarinereserves.com>.

Doyle describes additional anchorages at Batali beach, Coulibistri; Castaways, Mero; Layout and off Canefield.

1.5.3 The SSMR

This area is considered to be one of the most beautiful anchorages in Dominica. This marine park does not provide mooring facilities for yachts. This is in contrast to many marine parks, such as the one in Soufrière, Saint Lucia, that provides mooring facilities for visiting yachts. Apart from regulation and capacity control, the mooring fees provide an income to the managing authority.

1.5.4 Douglas Bay and Toucari Bay

Both are components of the marine segment of the Cabrits National Park. The area awaits a zoning plan pending the implementation of a plan to establish the marine section as an independent marine park.

1.5.5 Mooring and anchorage areas

The national consultation identified mooring and anchorage areas as indicated in Table 1.4 below.

**Table 1.4
Identified mooring and anchorage areas in Dominica**

No	Area	Comments
30	All one – Ft. Young	Sukie to get dock, Seaworld to get dingy dock
20	Pottersville - Woodbridge	Nothing North of Woodbridge, official reef area
30	Castaways	Careful with reef area
10	Batali Bay - Salisbury	Left of bay looking seawards as not to impact reef at mouth of bay
30	Coconut beach area	Dingy dock
30	Purple Turtle area	
4 - 6	SSMR	
	Donkey Beach	
	Les Pointe	
	Tarreau	
	Batau bay/ Sunset Beach Club	
	Pointe Round	
	Indian River	
	Portsmouth Beach	
	Toucari Bay	
	Cabrits	
	Douglas Bay	

Source: Dominica Marine Reserve Service, National Consultation on Yachting

1.6 Natural disasters

Like much of the northern Windward and the Leeward Islands Dominica is susceptible to tropical storms and hurricanes. In 1979, Hurricanes David and Frederick devastated much of the island.

The location above 12.40 north has implications for the country's yachting product. As a result of difficulties obtaining affordable insurance, cruisers tend to head south or haul-out during the hurricane season (June-November). This is somewhat less of a concern for vessels based in Guadeloupe and Martinique and bareboat charter companies. Throughout the region charter boat companies (although not necessarily the individual crewed charter boat) have been able to obtain insurance and remain in business, having identified hurricane shelters.

Hurricane shelters are not only for use by the pleasure boats but also for fishing vessels/pirogues and possibly commercial vessels. In Dominica shelters have been identified.

2. THE YACHTING SECTOR

Less than two decades ago Dominica was an island that yachtsmen tried to bypass and avoid. Much has changed but as Doyle (Doyle, 2003) observes, the country has one of the more restrictive yachting policies. Dominica has much to offer with a terrestrial and marine environment that few countries in the subregion can match. Indeed, Dominica is miles ahead of the other islands with regards to conservation of her natural resources and therefore developing a sustainable tourism industry.

Trip reports by yachts that have spent time in Dominica are mostly favourable, stressing the natural attractions of the island and the friendliness of its people (see the trip report of s.v. Lulu in 2000)⁶, although most remark on the numbers of wrecks at Portsmouth.

Albeit somewhat off the beaten track for the cruising community, Dominica is situated between two large French yachting centres, Guadeloupe, at a distance of 16 nautical miles and Martinique, at a distance of 27 nautical miles.

Yachting development in the French islands has benefited from incentive legislation (defiscalisation or Lois Pons) that subsidises yachting development in selected areas of France. Both islands have become thriving yachting centres, with extensive charter and resident yachts and related services. For example, Guadeloupe has around six charter boat companies and offers a range of marine services.

2.1 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 Dominica it could also include those pirogues 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 20 feet propelled by motor or sail that is mostly used for pleasure. In the same context we will define a super or mega yacht as yachts over 100' valued at US\$2 million plus. 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.

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. A bareboat yacht is a yacht without a crew⁷ rented for a fixed period of time. A crewed charter boat is a yacht

⁶ See <http://aboardlulu.com/lulu20000714.htm>.

⁷ For inexperienced sailors a captain may be included.

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.

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.

Following the World Tourism Organisation (WTO) definition of "tourist", we will define yachting tourists as those persons who stay for more than 24 hours but less than 12 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 as many yachting establishments, such as marina 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 tourists as well. For example, many establishments now catering to the marine sector are primarily 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.

A marina is any facility that provides wet storage for 10 or more yachts.

2.2 Visiting yachts

The main port of entry for yachts is Portsmouth. The table below sets out the basic entry data for Portsmouth.

Table 2.1
Yacht Arrivals Portsmouth, by quarter

Year	Q1	Q2	Q3	Q4	Total
2001	707	547	167	251	1672
2002	693	417	166	261	1537
2003	765				

Source: NDC, Portsmouth Police station

Preliminary yacht arrivals indicate the following:

Table 2.2
Yacht arrivals, by month and number of crew or passengers. 2003

Roseau				
Month	No. of yachts	No. of crew	No. of pass.	Crew/pass per yacht
January	81	364	4	4.54
February	52	239	3	4.65
March	64	278	-	4.34
April	53	192	-	3.62
May	39	167	-	4.28
June	31	116	-	3.74
Total Roseau	321	1356	7	4.25
Portsmouth				
January	227			
February	248			
March	290			
April	182			
May	157			
Total Portsmouth	1104			
Total Jan-May				

Source: NDC, Custom and Excise

Based on Roseau clearance data, the average complement per yacht is 4.25 people, ranging from a low of 3.62 to a high of 4.65 persons per yacht. The number of passengers per yacht is extremely low. Since passengers would only apply to crewed charter yachts the data imply that only two crewed charter vessels cleared customs in Roseau in the period January to June. While there are anecdotal indications⁸ that crewed charter vessels tend to bypass Dominica, the number of two crewed charter yachts appears to be low. Another explanation could be that crewed charter vessels declare paying passengers as crew. This could arise from a desire to avoid the departure tax levied on passengers but not on crew (unlikely) or to avoid problems in other, non-Dominican ports, such as the picking up of paying passengers.

The above complement of 4.25 people per yacht excludes data from Portsmouth⁹, which may change the above estimate. However the above compares with the average of 3.95 people per vessel as found in the 1995 Dominica Yachting Survey.

⁸ Mostly from web tour schedules of crewed charter yachts.

⁹ Portsmouth is likely to have a different mix of vessels.

2.3 Push and pull factors

Pull factors include:

- Hospitable people
- A largely unspoilt environment with many environmental attractions, both marine and terrestrial
- Efficient system of tour guides at Indian River
- Location between Martinique and Guadeloupe
- World Creole Music Festival
- Bilingual

Push factors include:

- Incidence of crime against yachtsmen, accompanied by the feeling that nothing is being done to solve the problem
- Unclear customs procedures
- Little to no visibility in the market
- Restrictive policies to access marine attractions
- Lack of service facilities, e.g. moorings, dinghy docks, etc.
- Lack of ancillary services such as fuel and water docks, laundromats, internet cafes etc.
- Unsightly appearance and a sense of neglect of the most yacht-friendly anchorage, i.e. the wrecks, the entrance to Indian River

2.4 Events

While Dominica does not have specific yachting events there is the World Creole Music Festival¹⁰. This festival (31 October to 2 November 2003) attracts a large number of visitors and hotels tend to be fully booked throughout this period. Anecdotal evidence¹¹ indicates that already the festival serves as a pull factor with a few boats entering Portsmouth specifically to attend events. In Saint Lucia, the Jazz Festival has developed as a strong pull factor for yachts from Martinique and it is recommended that Dominica attempts to develop the World Creole Music Festival as a similar pull factor for yachts from Guadeloupe and Martinique.

The Department of Fisheries indicates that much of the billfish fishing originating in Guadeloupe and Martinique use the waters of Dominica to fish. If fuel deliveries can be overcome the Department of Fisheries, NDC and the private sector could consider promoting an annual tag and release billfish competition.

¹⁰ <http://www.worldcreolemusicfestival.net/>.

¹¹ Cobra, personal communication.

2.5 Media

Yachtsmen tend to be conversant with the short wave, VHF and Internet and some do prepare detailed trip reports on their experiences, positive experiences and gripes. Most important is news shared among yachtsmen by short wave and VHF radio. This is particularly significant for the sharing of bad experiences, theft and other crimes. The impacts of this efficient system tend to be underestimated by government officials since few government tourism agencies have direct access to either VHF or short wave radio.

Box 2.1

For example in the earlier referred to trip report of Lulu a radio conversation on two boardings and the theft of a dingy from another boat resulted: “ The large harbour emptied of sailboats faster than you could say - Donzi. By around 10 am, we were one of the few left.” The report continues: “Announcing this second round of boardings over the Net was inescapable. And Mel did so with great reluctance, but our primary allegiance belongs to the safety of the boating community.”

On the other hand are the web sites that are established by Dominican entities. Not surprisingly, few, if any, focus on yachting (apart from the availability of moorings), but quite a few focus on diving and whale watching. In common with most of the Commonwealth Caribbean, the web sites tend to be solely in English¹². Notable exceptions to this are avirtualdominica.com (bilingual) and abcDominique (in French).

Apart from the French web site Sailpilot¹³ there is little or no readily and easily accessible information about yachting in Dominica. Therefore Dominica yachting has little or no visibility in the Internet market.

It is recommended that Dominica establish bilingual web pages highlighting yachting facilities. Examples could be the web pages of Trinidad and Tobago¹⁴ or of the Antigua Marine Trade Association.

There are two regional monthly boating papers in English and one in French. All are freely distributed throughout the region. Of the former, All at Sea is based in St. Maarten and the Caribbean Compass¹⁵ is based in Bequia, Saint Vincent and the Grenadines and has a correspondent in Dominica. The French one, Caribbean Boating and Fishing, is based in Guadeloupe. All should be required reading for government yachting officers.

¹² In contrast the web sites of Spanish and French speaking countries tend to offer multiple languages.

¹³ <http://www.sailpilot.com>.

¹⁴ <http://www.boatersenterprise.com>.

¹⁵ <http://www.caribbeancompass.com>.

Finally there are the boating and cruising guides that give detailed information about the islands. There are the commercial ones such as the Doyle Cruising Guides, but also increasingly the guides provided by national entities such as marine trades associations, national tourism authorities or others. Examples are the Boaters Guide for Trinidad and Tobago¹⁶ (both web based and in print), Saint Lucia, Grenada, Antigua and Barbuda or St. Maarten or the bilingual yachting guides in Martinique and Guadeloupe. It is recommended that the private sector in Dominica take the initiative in developing a Dominica Marine Guide. The NDC has made an initial effort in its recent publication but the publication needs wider circulation and should be available in French.

¹⁶ The Boaters Guide in Trinidad charges a small fee for incorporating an entry.

3. DOMINICA'S YACHTING IN THE CONTEXT OF NATIONAL SUSTAINABLE DEVELOPMENT

3.1 Infrastructure

3.1.1 Ports of entry

Dominica has four official ports of entry: Roseau, Portsmouth, Woodbridge Bay and Demi. The first three are located on the west coast, while Demi is located on the eastern coast. The latter is not considered suitable for yachts. A new fishing port is under construction in Marigot on the East Coast.

Berthing facilities for cruise ships are located at Roseau and Cabrits, however both facilities are unattractive and appear to be under-maintained. The fisheries complex located in the capital can accommodate smaller vessels within the sizes of 26 feet to 40 feet, but the entry and storage capacity is very limited. Presently none of the ports can supply fuel or electricity for visiting yachts.

3.1.2 Boatyards

There are no boatyards in Dominica. The Coast Guard has a small launch pad which can facilitate the launching of small speedboats in and out of the water. The location is restrictive and the launch area is in need of urgent repairs.

3.1.3 Moorings

Several moorings are available along the west coast, from Scott's Head to Cabrits. Some are restricted for diving use only while others are available for visiting yachts. The moorings are placed in an ad hoc fashion with no visible fairway and markings. The highest concentration of moorings available for visiting yachts is in the Cabrits Portsmouth area. Records indicate there are 47 installed pins for moorings in Cabrits, however only 25 have buoys that are functional. Moorings are also located off Fort Young Hotel, the Anchorage Hotel, Castaways and a few other locations. Concerns have been published by yachtsmen in regional yachting papers regarding the state of maintenance of existing mooring buoys as shown in the box below.

Box 3.1

Dear Compass,

I wanted to send your readers a warning to be doubly aware of mooring conditions at Roseau, Dominica and the Pitons in St. Lucia.

We had occasion to take one of the moorings at Roseau, Dominica. These moorings are privately owned, are reasonably priced and are very convenient for a visit to downtown Roseau. Mooring usage at Roseau is not mandatory. A Beneteau 50 took a mooring next to us and within an hour, I happened to notice their boat drifting across our bow, headed for the beach with the mooring ball still attached. I was able to jump into our dinghy and alert the crew, who were all below getting ready to head ashore for dinner. They quickly fired up and moved to a safer location. I then dragged their mooring ball to the pier. Upon further inspection it was revealed that about a foot of the 3/8" chain at the bottom had deteriorated and stretched to about 1/8" diameter until one of the links had finally broken. Early the next morning, a diver was dispatched to inspect the other five or six moorings and he discovered that all the other moorings were in the same condition! I was assured that all the moorings would be repaired or replaced.

Source: Caribbean Compass, names removed by ECLAC

3.1.4 Ancillary services

Ancillary services in this report refer to all services required by yachts, excluding berthing, haul out, and chartering.

Few ancillary services are available for visiting yachts in Dominica. Most of the services requested by visiting yachting traffic are facilitated by the Indian River Guides operating in Portsmouth, and Sukie Marine Supplies and the Anchorage Hotel operating in Roseau. Services provided by the Indian River Guides are limited to basic provisioning, tours, garbage disposal and basic communications. Igna Mitchell and the Kool Air and Electrical Company provide mechanical and refrigeration services respectively in Portsmouth. Sukie in Roseau is a one stop yachting agent providing basic services ranging from provisioning to yacht spares. However most of the business depends on fishermen. The present importation of ship spares is efficient. However, there are no duty-free chandlers or fuel docks operating on the island. The current method of providing fuel is primitive, inconvenient and fraught with danger of hydrocarbon pollution.

The level of ancillary services in Dominica is very basic, and presently not sufficient to service a yachting industry. There is somewhat of a vicious circle in that current demand is not sufficient to sustain profitable operations. However, because facilities are limited there is little inducement for a yacht to extend its stay.

3.2 Communities dependent on yachting

Yachting services (though limited) are concentrated in two main areas:

1. Portsmouth
2. Roseau

The coastal community of Portsmouth provides restaurants, provisioning, touring and basic technical services for visiting yachts. The main agents in that area are the Indian River Guides who are organized and display the only real ownership of the yachting industry in Dominica.

In Roseau: Fort Young, Anchorage Hotel and Sukie provide basic amenities such as moorings, boat spares and provisioning for visiting yachts. Portsmouth offers more services to visiting yachts while Roseau has scattered, unfinished facilities, which provide basic moorage.

3.3 Stakeholders

3.3.1 Government institutions with an interest in yachting

3.3.1.1 Customs

Customs is a yachting tourist's first encounter with the country. Therefore, apart from the enforcement functions inherent in the Customs and Excise Division, the department also functions as a visitor's welcome.

Customs service is available at the four official ports of entry. The customs department is facilitating yacht clearances, with a 72-hour clear in and out permit. Unlike many other Caribbean countries, customs allows yachts to anchor or tie to a mooring and then proceed by dinghy to the customs office. Also, a visit to customs will often render a visit to immigration unnecessary as customs can and does act as agents of the immigration service. There are no clearance fees into Dominica.

These measures are very yachting friendly and it is unfortunate that this initial positive experience is counteracted by the coastal clearance permit requirement. This permit is very yachtsman unfriendly because it requires yachtsmen to declare in advance each bay they intend on visiting and how long they intend to visit the bay. The inconvenience is exacerbated if there is an unexpected change in plan. Due to a lack of a VHF radio in the customs department the yachtsman must come ashore, locate a telephone and call to advise customs of the change in his itinerary.

The role of the customs department must be re-examined with the objective of facilitating a yachting sector in conjunction with the execution of the department's enforcement responsibilities. The coastal permit system is too restrictive and inconvenient. The customs department needs better communication equipment to facilitate the clearance of visiting yachts. The present system of clearance in the four official ports of entry does not encourage

compliance. Customs procedures must be re-examined to ensure they are hassle free and less complicated.

Another function of the Customs and Excise Department is the collection of duties and other related charges such as the consumption and environmental taxes. Although in-bond facilities are not available (see section 3.1.1.4) the importation of yachting spares is efficient and yachtsmen can clear the goods within a day.

Duties and associated charges on imported yachts are prohibitive at around 45-55%. Therefore it is small wonder that the actual collection of revenues from this source is low. When faced with a similar situation the Government of Saint Lucia drastically decreased the restrictive duties on the importation of pleasure vessels and subsequently experienced an increase in revenue as the number of vessel imported increased significantly. While the Dominican situation is not quite comparable to Saint Lucia, government may wish to consider adopting a similar measure (possibly leaving only the environmental tax) with the aim of developing a residential yachting sector, which would also strengthen the foreign yachting sector and increase government revenue.

3.3.1.2 Immigration

Dominica's Immigration Act allows a maximum length of stay of six months for visiting yachts. The average length of stay for visiting yachts persons is one week or less. Immigration is available during working hours at Portsmouth and Roseau, however the ports at Demi and Woodbridge do not have a permanent immigration presence.

Often the Customs and Excise Department will perform immigration functions while clearing a yacht¹⁷. This practice goes a long way to a one-stop facility.

The current Immigration Act allows a visiting yachts person a maximum stay of six months with the appropriate documentation: a valid ticket, copy of yacht manifesto, and proper identification. The current fees for an extension of stay is EC\$50 for less than a month, and EC\$100 for more than one month. Enforcement capabilities are restricted due to the lack of resources and manpower.

3.3.1.3 Fisheries Department

The Fisheries Department of Dominica is a key player within the yachting sector with respect to its roles as the agency responsible for marine conservation, issuer of diving and fishing licences and the development of the fisheries infrastructure. The department has the resources to deal with user conflicts at marine parks and can be critical in identifying safe anchorage points. The responsibility for sustainable development can complement the development of yachting facilities at Portsmouth and Roseau. There is an excellent opportunity for the Fisheries Department and a game fishing association to develop a certified fishing competition, which can

¹⁷ Immigration needs to be visited for extension of stay or when a visitor is not leaving with the same yacht.

market the island. A more flexible approach in enforcing the “NO TOWING A LINE” is needed by the department.

Some sailors regard the prohibition of diving without the presence of a licensed diving operator as overly restrictive and it has been argued that this practice serves as a disincentive for (extended) yacht arrivals. Doyle argues strenuously against this restriction. On the other hand since spear fishing and the collection of corals are illegal, the dive restrictions may be considered as a resource protection measure.

- Dominica Marine Reserve Service

The Dominica Marine Reserve Service is responsible for the development of the marine reserves in Dominica. The SSMR, in conjunction with the Dominica Marine Reserve Service, has developed a zoning plan for the Scotts Head Marine Park and the Park is managed under the auspices of Local Area Management Authority (LAMA).

3.3.1.4 Port Authority

The Dominica Port Authority administers the official ports of entry, with special emphasis on managing imported cargo and cruise ship arrivals. The Port Authority does not have a defined role in the facilitation of visiting yachts nor does it have an inventory of installed moorings. The new security arrangements for ports and harbours under the revised International Convention for the Safety of Life at Sea (SOLAS) and International Code for the Security of Ships and Port Facilities (ISPS) arrangements will force the Port Authority to undertake stringent measures and establish exclusion zones for cruise ships and large vessels, which may have an implication for the free passage of yachts and other small craft. This requirement alone will necessitate a more stringent adoption of exclusive zones. Indeed, given the low level of use of the cruise ship dock in Cabrits the authority may wish to evaluate whether the additional investments needed to make the cruise ship dock compliant to the new safety and security measures would garner the necessary returns on such investments.

The Dominica Port Authority plays a vital role within the cruise industry of Dominica. Based on this present mandate, this body is a key player in the development of the yachting sector. The development of coastal infrastructure, the installation of safe moorings, installation of navigational lights and the modification of cruise berths to accommodate visiting yachts can be spearheaded by this entity. All the official ports of entry need to have a port officer, ensuring a greater degree of control.

Currently there are no harbour dues or related fees charged to yachts.

3.3.1.5 National Development Corporation and the Ministry of Tourism

By and large yachting has not been a visible component of Dominica’s tourism product and promotion. However as the data in section 4 indicate, yachting is a viable component of the country’s tourism product and strategy.

The Ministry of Tourism and the NDC need to be more proactive in developing marketing strategies to attract French yachts from Martinique and Guadeloupe. The World Creole Music Festival is an excellent opportunity to market the island as a yachtsman-friendly destination in the very short term. The NDC could explore the possibility of installing moorings at the site of the festival to encourage increased yachting traffic during late October and early November.

It is also recommended that the NDC visit French charter companies in Guadeloupe and Martinique to ensure Dominica is not bypassed due to insufficient promotional material and negative perceptions. These visits could be used to provide support to already-established packages, create new packages that focus on the areas that Dominica wishes to promote, establish partnerships with ground tour operators and car rental companies, provide promotional material, establish a mechanism for the sale of fishing licences by the charter companies and to reiterate the need for visiting yachts to clear in on arrival at Dominica. The Indian River Guides have already established relationships with several of these companies and can be excellent ambassadors in exploring this market.

3.3.1.6 Maritime administration

The Maritime Administration of Dominica is a most efficient marine-related entity operating in Dominica. This department is housed in the Ministry of Finance and is charged with the responsibility of the full development of the maritime sector, drafting maritime policy and ensuring that the island fulfils its obligations under the United Nations Law of the Sea charter.

The division is very well structured and can be a crucial partner in dealing with the challenges of the yachting sector. This regulatory body is ideally located to spearhead dialogue with the Port Authority, fisheries, local water-based organizations and the Coast Guard. The well-developed commercial ship registration can compliment the yachting sector, and facilitate a marriage of services with the off shore-banking sector. The ship registration activity in Dominica is an investment in the future yachting sector for the island, and like the Cayman Islands, offers potential for the future for (mega) yacht registration.

3.3.1.7 Other government institutions

The Coast Guard (search and rescue), Ministry of Finance and local government agencies are all stakeholders. Village councils are already represented in LAMA.

3.4 Private sector

3.4.1 Private sector yachting association

Perhaps the greatest lacuna in the institutional framework is the lack of a private sector organization geared towards promoting the interests of the yachting sector. As a result, the sector has low visibility, a lack of awareness within government and its interests have not been considered in the conservation and development of the marine environment. Region wide,

countries with strong private sector associations have been better able to take advantage of the demand for yachting than those countries where a private sector association is lacking. Therefore the establishment of a private sector association should be seen as a high priority item for the private sector.

3.4.2 Indian River Guides

The Indian River Guides represent the ancillary yacht services in Dominica. These young men are a critical marketing factor for the yachting sector in Dominica. However, their organization must be given stronger recognition by: law enforcement agencies, the NDC and the Port Authority. Presently, the Indian River guides are the yachting ambassadors of Dominica. The management of mooring facilities in Portsmouth can be handled by these guides, based on their current interaction with the charters from Martinique and Guadeloupe. The guides should also be given some participatory role in developing a similar organization in Scott's Head and Roseau.

3.4.3 Coastal Communities

The current and envisaged model of yachting development in Dominica, that is, low impact, low density tourism spread along the west coast, would enable many of the coastal communities to take advantage of the available opportunities. During the consultation it was recommended that the Indian River Guides model be transferred to other coastal communities when the demand arises. In view of the bad press that "boat boys" have in Saint Lucia and in particular in Saint Vincent and the Grenadines, this is a recommendation that is strongly supported.

3.4.4 Traditional tourism services

Many of the pull factors attracting yachts to Dominica are the same as for other tourists. Therefore existing services, apart from hotels, complement the yachting product. Traditional tourism services are associated in the DHTA and that organization could possibly consider establishing a marine/yachting arm to facilitate the establishment of an association as referred to in section 3.2.1.

3.5 User conflicts

During this study, evidence of user conflicts surfaced in areas zoned as marine reserves. The Fisheries Department, Lama and Port Authority all share different views regarding the use and zoning of specific shoreline areas. There is an urgent need to articulate policies to ensure proper coastal zoning.

Because the yachting sector is small, its interests were and are not represented in the zoning plan for the SSMR, which may have resulted in the current exclusion of yacht moorings in the area. The Water Sports Association (see above) is essentially a diving lobby and its interests may conflict with those of the yachting community.

Like all other countries of the region, possible conflicts may arise between yachtsmen and fishermen, particularly when inconsiderate anchoring conflicts with beach seining or other forms of net fishing.

While not necessarily a user conflict, there is vagueness about the specific authority and responsibilities between the Port Authority and fisheries with respect to the installation of moorings and development jetties, dinghy docks and finger piers on the sea shore.

Overall, the present conflict between users stems from the lack of sufficient infrastructure in key areas and the lack of understanding and appreciation for the yachting sector.

Just as fishing and diving activities are managed to ensure sustainability so, too, will yachting activities require management, e.g. appropriate trash disposal facilities, proper signage regarding use of moorings, monitoring of yacht activities and enforcement of the laws and regulations.

3.6 Product development and promotion

Dominica's yachting sector has great potential due to its geographical capital. The island's location between Martinique and Guadeloupe sells it as a convenient stop-off for French charter vessels. Also, the island's location within the arc of islands makes it very accessible to yachts cruising the Caribbean. The present eco-tourism thrust based on the superb whale watching and a vibrant dive product taps into the yachting tourists natural inclination for the marine environment therefore making it an ideal yachting destination.

Several marketing niches can be distinguished. The cruiser (also referred to as live aboard) sails the Eastern Caribbean particularly during the winter months and leaves during the hurricane season, is an adventure- or eco-tourist by definition. Doyle indicated that many such visitors only stay three days as a consequence of immigration and customs regulations (see section 3.3.1.1 above). For this niche, the marketing objectives include a clarification of the customs regulations, an increase in the number of yachts actually visiting the island, an increase in the length of stay and increasing the average expenditure per day or per visit.

These objectives can be met as follows:

- Clarifying the immigration and customs regulation with Doyle for the next edition of the Leeward Cruising Guide;
- Sensitising customs officers to explain the regulations to yacht clearing in;
- Creation of a flyer with yachting information to be made available at the clearance points;

- The addition of a ‘yacht page’ to existing web sites to include information on Customs and Immigration procedures, moorings locations, available yachting-related services, links to visitor websites, etc.;
- The creation of a ‘Dominica yachting’ website with the above information.

A second and a third niche would be yachting activity originating in the French islands - the resident yachts and the charter boats based in Guadeloupe and Martinique. Here the strategy could include stimulating weekend traffic, short-term visits to coincide with national events and arranging a familiarisation visit for charter operators to educate them about the attractions Dominica offers, form relationships with tourism service suppliers and reiterate the need for vessels to clear in and out as per existing regulations. In this case, the marketing objective would not be so much an increase in length of stay but rather more visibility in the market resulting in more visits and increased expenditures per day.

A fourth niche would be a residential yachting sector. This niche requires development, possibly by targeting the expatriate and offshore community and day sail charters. However, onerous duties may pre-empt such efforts. Saint Lucia faced similar problems and there was a myriad of government charges that characterised the yachting operations in there. Apart from the high duties and consumption taxes the policy towards the importation of yachts was handled inconsistently, as there were no clear guidelines. By cabinet decision 937 of 2001 to lower the import duty and remove the consumption tax, cabinet made the importation of yachts a lot less complicated, which resulted in revenue increase of 200% within a year. The cabinet conclusion is appended in Appendix 3.

4. SOCIO-ECONOMIC IMPACTS

4.1 Yachting expenditures

Because of the lack of data and information any estimate remains tentative. Rather than a point estimate attempts have been made to establish a range.

Table 4.1
Assumptions, 2002

Variable	Medium estimate	Low estimate	High estimate
Ave. length of stay	3 days	2 days	4 days
Ave. complement	4 people	3.5 people	4.5 people
No of yachts 2002	2700	2700	2700
Ave daily expenditure pp US\$	45	25	75
Estimated expenditures USD 000's	1,458	472.5	3,645

Source: Mission estimates

However the Customs and Excise Division estimates that up to half the yachts visiting Dominica¹⁸ do not clear customs. If this is correct the estimates made in the above table could possibly be doubled. Therefore the mission's estimate of yachting expenditures ranges from US\$ 473,000 to US\$7.3 million as shown in the table below. This is a very wide range with widely different policy implications.

Table 4.2
Yachting expenditures, 2002
US\$ 000s

	Original estimate	With full correction for non-clearance	Mid-point estimates
Pessimistic	472.5	945	709
Conservative	1458	2916	2187
Optimistic	3645	7290	5468

Source: Mission estimates

The conservative estimate is based on daily expenditures lower than those estimated in the 1995 survey and on an average complement slightly lower than the empirical Roseau data. Both variables are very much dependent on the product mix since cruisers/liveaboards tend to stay longer but spend less than bareboat charters and have a lower complement.

The optimistic scenario is based on an average expenditure of US\$75 per day, a slightly larger complement and an average length of stay of four nights. Again how realistic this scenario is depends very much on the product mix.

¹⁸ Dominica is not unique in this. St. Vincent and the Grenadines experience similar problems.

The pessimistic scenario is based on average expenditures of US\$25 per day, an average length of stay of two nights and a complement of 3.5 people. Even the limited available data suggests that these variables are overly conservative.

After reviewing the three scenarios the Economic Commission for Latin America and the Caribbean (ECLAC) team considered that expenditures are likely to hover somewhere between the conservative and optimistic scenario resulting in an estimate of between US\$3-5 million per year.

At the same time the estimate of approximately US\$7.3 million can easily be used as a target that is achievable in the short term. The tables above indicate that such a target can be achieved with only small changes in the variables.

4.2 Employment

The data limitations are even more severe for employment. Also for many direct employment categories yachting income constitutes only part of their income. Indirect employment is almost impossible to estimate, as most of a yachtsman's expenditures are similar to those of terrestrial tourists.

The Indian River Guides (about 25 people) are dependent on yachting for at least 50% of their income. Also there are a few taxis that largely depend on the yachting visitor. In addition it is estimated that restaurants and souvenir shops depend on yachting for about 50-60% of their income, the remainder of the clientele being taken up by Ross University and cruise ships. Therefore it is estimated that between 50 and 100 people obtain at least half their income from the yachting sector.

The above indicates that perhaps some 5 to 10% of the employed labour force in St. John/ St. Peter may depend on yachting for at least part of their income. Given the high unemployment rate in Dominica this percentage is not insignificant and bodes well for the envisaged development as stated below.

No efforts were made to estimate the employment effect of yachts mooring in the Ft. Young - Anchorage Hotel area. Here employment effects are much more diffused as there is no single establishment that depends on yachting for more than 10% of its income.

4.3 Government revenue

No analysis was undertaken on the direct revenue effects. As indicated earlier, apart from overtime fees, there are no clearance fees or harbour dues. With respect to yachting expenditures more detail is necessary to estimate the direct revenue components.

Government may wish to consider the imposition of a US\$10 cruising permit fee while abandoning the restrictions of the coastal cruising permit. Based on the reported number of

cleared yachts, 2700 in 2002 this would have contributed about US\$27,000 to government revenue. A short-term target of US\$50,000 per year is recommended.

In the medium term government may wish to consider implementing harbour or navigation dues of approximately US\$8-10 per yacht. However, such fees should only be imposed if the basic navigational aids become available.

In view of the low level of revenues received by government from the importation of yachts, government may consider the waiving of import duties and consumption on such imports. Only the environmental levy would remain.

5. ENVIRONMENTAL IMPLICATIONS

Environmental impacts can arise from current and future yacht visitation levels and indirectly through services offered to yachts. The former includes waste, toxic bottom paints, anchor damage and the illegal removal of marine resources such as coral.

The latter includes impacts associated with construction of jetties and moorings, fuel and possible habitat loss. Much of these impacts can be avoided by applying strict guidelines for the construction, operation and management of marine facilities.

5.1 Mooring buoys

Mooring buoys serve several functions and according to their use and environmental considerations the type of buoy may differ.

- Capacity control. This applies when space is not an immediate problem but management decides to reduce vessel capacity because of other reasons (often environmental)
- Increase in capacity as vessels on a mooring buoy use less space than when at anchor
- Source of revenue. This can be direct when entities charge a fee for the use of a mooring or indirect if business provides a mooring for customers.
- Environmental protection by negating anchorage damage to sensitive habitats such as coral reefs or sea grass beds.
- Safe anchorage is less than optimal conditions
- Easier for a yachtsman.

In many countries mooring buoys are used in an attempt to achieve multiple objectives concurrently. In all cases the collection of revenue is an important consideration. Revenue collection methods and rates vary. Often it is private sector entities or marine parks which may or not pay a “royalty fee” to government.

By and large, revenue collection methods by the private sector or marine parks may be the easiest to implement although it can be argued that royalty fees could be considered at a later date. Also, operators should have some responsibility for maintaining the integrity of any mooring system. Traditional types of mooring systems using heavy blocks are not recommended as these have limited holding power and frequently damage the sea bottom floor. The box below describes an incidence in the Roseau area which could and should be avoided.

Concerns about liquid waste disposal in open anchorages and marinas are widespread throughout the region. The available evidence points to land-based sources of pollution as the major contributors to sewage pollution.

Solid waste disposal, oily wastes and waste oil are more problematic and all facilities should have separate waste collection bins with the oily wastes possibly being burnt at a suitable location¹⁹.

With further development, management of pollution becomes more important and more stringent measures may be required. Nevertheless, with the construction of jetties and finger piers the operators should consider adopting a voluntary code of practice based on the International Monetary Fund (IMO) code of conduct²⁰, the Trinidad code of conduct for solid and liquid wastes or future regional developments. A model for a solid waste handling policy is shown in the table below:

Table 5.1
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

¹⁹ It is recommended that if vehicle oils are being collected similar disposal methods be used for yacht oily wastes.

²⁰ IMO, 1997.

6. PROBLEMS, STRUCTURAL WEAKNESSES AND CHALLENGES

6.1 Unclear customs and immigration procedures and the coastal clearance certificate

In principle, the current mechanism (yachts can clear in and out with one visit to customs if staying for a maximum of three days) is very yachting friendly. However this very measure is creating confusion in the yachting community as it is interpreted that the preferred length of stay of a yacht is the very same three days. This confusion is compounded by the coastal clearance certificate whereby yachtsmen must indicate where they will stay during the entire period of their visit to Dominica. This requirement is very restrictive as often yachtsmen will not be certain where or how long they will stay at a certain anchorage.

The current practice of the customs department forwarding the relevant documentation to immigration and therefore eliminating the need to visit the immigration office is very user friendly and could be promoted.

6.2 Dilapidated nature of Portsmouth, the principal yachting port of entry for Dominica

Portsmouth and Prince Rupert Bay is that area of Dominica that has the most potential for future development. The area offers a number of advantages, such as closeness to Guadeloupe, protected harbour, basic facilities, the Indian River excursion and the nearby Cabrits Park with its options for diving and land excursions and an efficient guide system.

There is a prevailing sense of neglect at Portsmouth. This bay needs to be cleaned, organized with a marked fairway and proper along-shore berthing facilities provided. The overall entry statement of the Bay is depressing. It is not only the many shipwrecks, but also the entrance to Indian River, the brokendown jetties at the public beach, half completed infrastructure at private properties, Sunshine Village and the lack of maintenance for the cruise ship dock and the customs jetty. Altogether there is a pervasive atmosphere of neglect which does not stimulate a long-term stay. This Bay could be a beehive of yachting traffic if the suggested improvements are made and moorings placed and managed properly.

6.3 Lack of data and information on the sector

Access to data, like in many other Caribbean countries, remains problematic and there is little or no information on yacht arrivals, length of stay and yachting tourist arrivals. As one of the few countries in the region, Dominica carried out a Dominica Yachts Passenger Survey in 1995. Apart from being outdated, the survey suffers from a number of structural weaknesses and inconsistencies which limit its use even further.

The lack of yachting data and information has several effects. One consequence is a lack of awareness at government and private sector levels. For example, yachting arrivals and expenditures are not recognized in the tourism statistics although they do form a significant, albeit still small niche. Another consequence is that it hampers marketing efforts as the relevant

yachting demographics are not available and hence can not be used to inform promotion decisions.

Nevertheless the basic structure of the data is there and can be accessed on a regular monthly basis. The customs entry clearance form is the main source of data and the aggregation of data by the Customs and Excise Department should not interfere with confidentially issues.

6.4 Lack of easy access to duty free fuel and yachting spares

Because the current market is limited (and geographically dispersed) there is little incentive to provide services (duty free or not).

The mechanism already exists for the sale of duty-free fuel and yacht spares. The system for the sale of duty-free fuel is cumbersome and not user friendly and is therefore fully utilised. NP is hesitant to deliver small quantities of fuel and fuel must be pre-ordered.

The importation of yacht spares for transient yachts is fairly efficient when yachtsmen order spares and have these sent to Dominica. Existing retail outlets are small and cater more to fishermen than to yachtsmen. Duty free sales e.g. chandleries similar to the duty free shops catering for cruise ship visitors are non-existent.

6.5 Lack of visibility in the market

The lack of visibility in the market remains a formidable constraint. It has been referred to in several sections of this study and needs to be addressed with urgency.

6.6 Lack of ownership

The lack of a private sector association and the limited possibilities for a full time occupation in the yachting sector has resulted in a lack of ownership. Developments occur haphazardly and do not necessarily complement each other often remaining half-finished.

Presently the following is evident in Dominica:

- Physical reef damage caused by divers and anchoring of boats
- The construction of unauthorized jetties
- Installation of unauthorized moorings
- No collaboration between law enforcement agencies, tourism departments, and community entities to deal with thefts on yachts, illegal anchoring, and illegal diving.
- Negative perception of yachting by locals and its contribution to crime and harassment
- Lack of coastal zoning

6.7 Lack of infrastructure

If Dominica is to gain a competitive edge within the yachting industry several key factors such as: carrying capacity, quality finished berths, varied general services, and efficiently placed moorings must be explored.

The following is a summary of the existing gaps that must be addressed:

- Increase moorings facilities at Scotts Head, Roseau, and Portsmouth. These moorings must be able to accommodate yachts from 26 feet to 90 feet in size.
- There must be a greater development of dockside, along with berth services at cruise ship docks and coastal tourist sites. Adding dinghy dock platforms and rubber fenders can modify the existing cruise ship docks.
- Portsmouth must be revisited with the view of creating a new port and marina. This can be established at the head of the bay providing a focal point for the entire community of Portsmouth. As a port of entry and one of the few protected bays on the west coast it is an important destination for recreational navigation.
- A marina-type village can be established at Portsmouth near the mouth of the Indian River. The village can consist of a group of Caribbean colonial-style structures housing services, retail, food and beverage, entertainment, customs, immigration and a port officer.
- The hauling and dry storage capacities must be explored to ensure that this service is available somewhere on the west coast. The present Coast Guard operation can be expanded, by adding a better launch pad and a 30-ton travel lift.
- There must be a permanent presence of customs, immigration and Port Authority at all ports of entry.
- Installation of navigational aids along the entire west coast. This should include leading lights positioned at all bays, fairway buoys, and properly marked moorings.

6.8 Crime

Crime remains a problem and Dominica ranks high in the listing of reported crimes against yachts. It has been a problem for years and will continue to have a negative impact on Dominica's attractiveness as a destination. The French language yachting web site has the following "Attention toutefois: des récents témoignages indiquent un certain danger de vol au mouillage" on the bottom of the Dominica front page.

7. RECOMMENDATIONS

7.1 General

- Develop yachting as an addition to Dominica's tourism product that supplements the current tourism activities while circumventing issues of limited airlift and hotel accommodation.
- Develop yachting consistent with government's policy of small-scale community tourism, i.e. 10-20 moorings off small coastal communities that will stimulate existing and foster new businesses.
- Set as the short-term objective: doubling of yachting revenues/expenditures within three to five years while maintaining the general tourism objectives.

7.2 Make Dominica yachting friendly

- Remove the existing confusion to the current clearance system and advise Doyle, Street and Sail Pilot and write letters to All at Sea, Caribbean Compass and Caribbean Yachting and Fishing.
- Remove restrictions on coastal cruise permit or abandon the coastal cruise permit altogether and consider the imposition of a US\$10 cruising fee.
- Be more proactive in reducing the number of non-clearing yachts and carry out spot checks in collaboration with the Coast Guard.
- Maintain and advertise the current practice of customs acting as immigration officers.
- Implement two-week minimum stay for yachtsmen.
- Clarify the "tow a line policy".
- Promote the establishment of a residential yachting sector and remove duties and consumption tax on the importation of yachts.
- Address the crime problem and investigate possibility of issuing powers of arrest to selected members of IRGA and similar community groups.
- Use the Indian River Guides as role model for other community groups in Dominica

7.3 Ancillary services

7.3.1 *Chandleries*

- Establish an efficient duty free/consumption tax free system of transient yachts. Establishment of open warehouse system for yacht spares, similar to that of the duty free shops for cruise ship passengers whereby copies of the clear-in certificate would entitle a customer to duty free sale of yachting spares.

7.3.2 *Establishment of duty free fuel depot.*

- At the current stage of development, it is unlikely that any fuel dock will be profitable if it is only geared towards the sale of duty free fuel. On the other hand there is also local demand that would benefit from easier access to fuel. Furthermore, properly maintained fuel docks are less likely to pollute than haphazard methods using jerry cans. Combined operations are possible whereby a copy of the clear-out certificate should entitle the customer to duty free purchase of fuel.
- The duty free operations can be facilitated by an open warehouse system for the sale of duty free fuel. A customs bond can be placed for the maximum duty liability on the carrying capacity of the tank. Such a facility can be done with a bank or insurance company. Once the bond is placed, duty free fuel can be delivered to the tank and the sale of duty free and duty paid sales of fuel can be facilitated. Customers wanting to purchase duty free fuel must present a customs clearance proving that their vessel is leaving Dominica within the next 24 hours. Customers wanting to purchase duty paid fuel pay the normal price. At the end of the month all sales must be tabulated and submitted to customs with all supporting documentation. The customs department can then determine the duty liability on duty paid sales.
- Reduction of duty and consumption tax on pleasure marine vessels

7.4 Institution building

7.4.1 *Yachting Sector Standing Committee*

- Establish a 12-18 month Yachting Sector Standing Committee comprising representatives from the public and private sector stakeholders (see Section VI) to address the challenges facing the sector. The committee should be focused on making recommendations to Cabinet or facilitating solutions where the jurisdiction falls under one of the members of the Committee. The Committee could also determine guidelines, numbers and suitable locations for the placement of moorings.

7.4.2 *Establish a private sector marine trade association*

- The marine association's main objective would be to facilitate the development of the yachting sector. The main areas of concern would be promotion, data collection, revenue generation (to fund activities) and facilitation.
 - Members would include businesses that enjoy economic benefits from the yachting sector - groceries, restaurants, repair services, car rentals, tour operators, marine supply businesses, internet cafes, laundry services, dive operators, craft shops, moorings operators, etc. Dues could be structured on size of business or importance of yachting to the business.
 - Objectives would include promotion, lobbying government, facilitating the industry, revenue generation, collecting statistics
 - Improve external communication to yachtsmen - press releases re new developments in the industry, etc., news updates to monthly publications
 - Improve internal communication to yachtsmen - DHTA publication, flyer/brochure with information on mooring locations and fees, membership listing identifying available services be made available at Customs offices
 - Work with DHTA on national awareness programme of yachting sector (in conjunction with existing awareness programme) - its economic contribution, job opportunities
 - Partner with DHTA to use their office (once open) as a point of contact for yachtsmen, offering assistance, receiving complaints and compliments
 - Work with the private sector to organize yachting events
 - Lobby government for the placement of navigational aids, approval for moorings, approval for duty-free fuel at waterside, development of yachting policy

7.4.3 *Establish a yachting officer within suitable government division*

- A yachting officer should be designated within the Ministry of Tourism or the NDC. This person would be responsible for facilitating the development and promotion of this market, liaison with the private sector and act as the focal point for yachting within government.
- Clarification of areas of responsibility between Fisheries and Port Authority
- Address user conflict issues in marine parks and other areas
- Issuing of VHF radios for related authorities
- Review fee for length of stay extension

7.4.4 *Improvement of data availability*

- Use the Customs Clearance Form to aggregate on a monthly basis the following:
 - No of yacht arrivals (and departures) by length of vessel e.g. (in feet)
 - 20 – 35
 - 35- 45
 - 45- 60
 - 60 – 90
 - >90
 - Yacht arrivals by type of vessel e.g. sail or power
 - Yacht arrivals by previous country or port of call
 - Yacht departures by next country or port of call
 - Length of stay
 - Number of crew (including master)
 - Nationality of the master
- Carry out a bilingual exit survey to determine market, spending, and length of stay and provide feedback on the product. Use this data to make informed decisions for promotion and product enhancement.

7.5 *Marketing and promotion*

7.5.1 *General*

- Increase the visibility of Dominica as a yachting destination
- Establish a web site dedicated to yachting or develop a robust yachting page of an existing web site. Information should include general information, customs and immigration arrivals procedures, moorings locations and fees, waste disposal facilities, map, local transport, yacht in-transit shipments, firearms regulations, stay-over extensions, pets, regattas, yacht services, festivals and events, private sector association and its members. This web site could be the site for the private sector association.
- Addition of section on yachting to DHTA and NDC publications. Should include customs and immigration arrivals procedures, moorings locations and fees, waste disposal facilities, map of moorings locations, yacht in transit shipments, firearms regulations, stay over extensions, pets, regattas, yacht services. The above information should also be included on the DHTA web site.
- Improve internal communication to yachtsmen - DHTA publication, flyer/brochure with information on mooring locations and fees, membership listing identifying available services be made available at Customs offices.

- Use the VHF to let visiting yachts know what is happening and what is available. A trusted person such as Cobra could coordinate this activity in Portsmouth. Persons being advertised could pay a small monthly fee to be included, e.g. Announce on 16 to switch to 68 for today's activities - Friday night at Fort Young, live band at Cellars, dinner special at Purple Turtle, laundry pick-up at 7:00am, etc.
- Ensure that all web sites and other publications are bilingual.

7.5.2 *Guadeloupe and Martinique*

- Government and private sector familiarisation tour to Guadeloupe and Martinique.
- Develop yachting specific events (e.g. small traditional boat races or regattas), linking it with events in Martinique and Guadeloupe). For example, fishermen from Saint Lucia and Martinique have a wooden boat race to Guadeloupe, sponsored by La Mauny Rhum, each year in December. Promote existing Dominican events, such as the Creole World Music Festival, in Guadeloupe and Martinique and develop packages and /or temporary mooring buoys in the festival village. Web sites in French (general recommendation) and establish a bilingual web site with a marine/yachting/sailor's guide for Dominica.
- Explore Martinique and Guadeloupe charter base expansion opportunities in particular relationship building with charter boat companies based there.
- Attendance at Martinique's Festival of the Sea to promote Dominica as a destination, using flyers, DHTA publication Alliance with the French-based charter companies:
 - Familiarisation trip to Dominica for charter boat operators highlighting regulations regarding marine parks, showcase tourist attractions, partner/pair up local tour operators with charter companies. Goal is to formalise arrangements for charter boat visitation to Dominica to ensure that they are 'playing by the book'
 - Create charter packages for Dominica events such as World Creole Music Festival, Carnival
 - Rental of charter boats for events to supplement hotel rooms for large events
 - Familiarisation trip to Guadeloupe and Martinique for private and public sector
 - Sale of fishing licenses locally in Guadeloupe and Martinique to facilitate fishing charters
 - Establish a 'Dominica Desk' or office in Martinique and Guadeloupe to facilitate Dominica interests in these territories including yachting (similar concept to Dominica Desk at V. C. Bird International Airport in Antigua)
 - Addition to charter guide book
 - Jean Michel Cousteau has been invited to Dominica. This visit is an opportunity to have a respected marine expert promote Dominica as a marine destination and/or launch an appeal to both the charter companies and the French public to

respect Dominica's laws and regulations with regards to arrivals procedures and protecting the marine habitat. Could be a flyer or video, meetings with charter companies.

7.5.3 *Cruisers*

- Increase visibility in the market. It may not be necessary at this point for Dominica to consider representation at large boat shows but rather to take advantage of regional events at which Dominica as a yachting destination can be effectively promoted.
 - Attendance at the Atlantic Rally for Cruisers (ARC) in St. Lucia (Dec) to promote Dominica as a destination, using flyers, DHTA publication
 - Attendance at the Antiguan boat show to promote Dominica as a crewed yacht charter destination.
 - Attendance at the Festival of the Sea in Martinique to promote Dominica as a charter destination and to establish relationships with the relevant stakeholders in Martinique
 - Advise relevant publications of the Customs and Immigration procedures
 - Develop or add yachting information to already existing web sites

7.6 **Infrastructure**

- Placement of 100+ moorings with a body clearly identified as being responsible for regular maintenance of the moorings and collecting fees. Environmental impact assessment will be required for sensitive areas. Consider placing 4 to 6 at Soufrière.
- Label existing "dive" moorings to prevent use by yachts.
- Place a sign in protected areas "No Yacht Anchoring"
- Repair and upgrade of existing dinghy docks
- Remove wrecks in Portsmouth
- Consider the construction of a small-scale marina (20-30 slips) in three-five years if the traffic has increased substantially, possibly at the current Sunshine Village location. But, serious consideration must be given to the seasonality of the sector, i.e. revenue flow will be a challenge in the off-season; the current market that Dominica attracts, i.e. would this market be willing to pay marina fees and the support services that will be required.
- The use of the existing wetlands in the Cabrits area for marine development is not recommended.
- Evaluation of the possibility of converting the Portsmouth cruise ship dock into a finger pier to service yachts. There is a possibility that more revenue could be generated by yachts than by the current usage of this facility. A resident population may also stimulate development of the unused building adjacent to the dock for shops or services for yachts, the relocation of customs and immigration to one location in the building, increase the water taxi usage and draw the yachts away from the unattractive coastline at Portsmouth.
- Placement and maintenance of navigational aids
- Provide facilities for solid waste and oily waste disposal.

- Consider using Sunshine Village as a “One Stop Shop”.
- Complete and maintain existing coastal infrastructure
- Remove vessels from the mouth of Indian River and terminate haul-activities.
- Ensure the availability of water
- Construct fuel docks and instil environmentally sound fuel delivery practices.

Annex 1

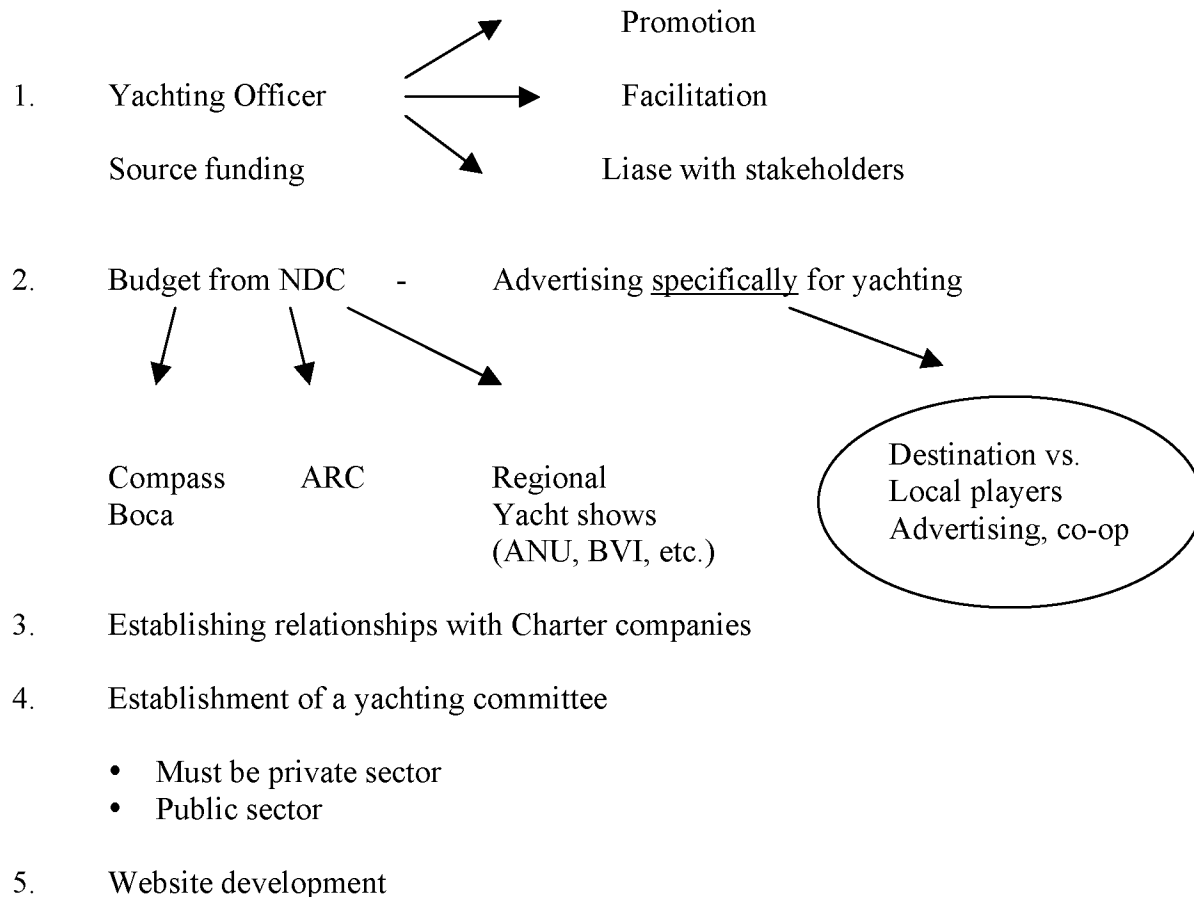
NATIONAL CONSULTATION

On 16 August 2003, as part of the mission's activities, a national consultation on yachting in Dominica was convened by the Ministry of Finance and Planning, the Ministry of Tourism, Industry and Enterprise Development and ECLAC.

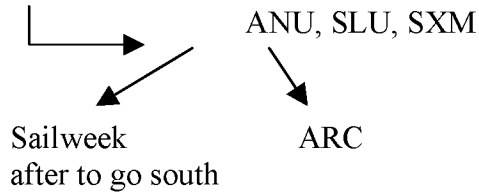
One of the objectives of the consultation was to present and review the findings of the ECLAC mission. A second objective included the provision of a forum for a private - public sector discussion on yachting. The final objective was the identification of ways and means to increase the contribution of yachting as a viable component of the tourism industry in Dominica.

The participants formed three focus groups to discuss recommendations and follow-up activities. The three groups were in Marketing and Promotion and Services, Infrastructure and Institutional Development. The recommendations are included below.

Marketing/Promotion/Services



6. Bridging the information gap of between FDF and PTP
7. Initial target market in the French



8. Local Culture
 - To be yachtsman friendly
 - Awareness
 - Duty free on pleasure craft

Services

1. Angus Dream
 - To be different than any one
 - Please listen to his 3-minute presentation
2. Duty Free Fuel
 - Available through private sector
 - H₂O - competitive price needed
 - Electricity - competitive price needed
3. Chandlery - Duty Free
4. Garbage, laundry, fresh water shower, ice, groceries, maintenance, sails, customs brokerage
5. Indian River Guide Model - providing services like them down the coast
 - They provide all services
6. Upgrade facilities - dingy dock, etc.
 - Marketing is dependent on this
7. Statistics need to be accurate
 - Where from
 - Size on yacht
 - Reason for choosing D.A.

8. Mooring - will help us provide services



Decision needs to be made immediately as to where, how, what standard and all guidelines

Institutional framework

Recommendations

1. Endorse need for committees
2. Improve VHF communications
3. Enactment of draft legislation
 - Marine pollution management
4. Simplify customs and immigration procedures
5. Increase in fees
 - Consistent with level of customs service (very good service)
6. Need to clear yachting policies and procedures:- customs duties
 - Incidents of crime/harassment
7. More autonomy to technical staff/project
 - Eliminate bureaucracies

Infrastructure

Factors for moorings

- i. Need to be close inshore due to benthic topography.
- ii Topography of coastline and reefs need to be addressed - limits areas to a few.

Possible areasGeneral list of possibilities:

SSMR	-	Anchorage has H ₂ O
Loubiere - Ft. Young	-	Seaworld has H ₂ O
Roseau	-	H ₂ O and fuel
Donkey Beach		
Les Pointe		
Tarreau		
Mero/Castaways	-	Has water
Salisbury/East Carib Dive	-	Has water
Batau Bay/Sunset Bay Club		
Pointe Round		
Coconut Beach		
Indian River	-	Upgrade
Purple Turtle		
Portsmouth Beach		
Toucari Bay		
Cabrits	Shop - Duty -	H ₂ O
Douglas Bay		

Dingy docks and navigational aids at all areas deemed suitable for moorings

Water where possible - water at fuel at major dockages

All sites to provide facilities for waste both garbage and oil

Possibility of using Sunshine Village as ‘One Stop Shop’

- I.M.O. Headquarters
- Limited slippage for repair
- Chandlery
- Customs
- All buildings are there, will cost minimal dollars to upgrade

Indian River to be repaired/upgraded - limited access to river mouth with fee system to effect management. Gives protection to river mouth and stops illegal or long-term use of same.

Dinghy dock in Portsmouth to be upgraded - needs steps.

Port Authority would deploy moorings and collect fees - they would also be responsible for maintenance.

Also open to private sector enterprise.

Participants:

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Sharon Pascal	NDC	
Aaron Madicetti	Marine Reserve Manager ETDP c/o Fisheries	

Annex 2**SOUFRIÈRE MARINE MANAGEMENT AREA (SMMA), SAINT LUCIA**

The SMMA has approximately 60 mooring buoys which in 2002 were used by over 3700 yachts, resulting in a revenue for that year of EC\$147,000. Mooring rates, referred to as coral conservation permits, at the SMMA are listed below:

Vessel size (ft)	Up to 2 days (EC\$)	2 days to 1 week (EC\$)
< 35	27	40
35 - 65	40	54
> 65	54	67

Source: <http://www.smma.org.lc/Yachting/Areas.htm>.

In certain areas diving is allowed while others are off limit apart from scientific research. However, diving is only allowed with divers using either a local authorised dive operator or a licensed dive guide.²¹

²¹ Kai personal communication

Annex 3**POLICY MEASURES TAKEN BY ST LUCIA TO STIMULATE YACHTING****CABINET CONCLUSION**

No. 937 of 2001

Minute Paper No.

Date: 13 September 2001

The following Cabinet Conclusion is submitted for your attention.

937. RECOMMENDATIONS FOR IMPROVING THE GROWTH OF THE YACHTING SECTOR

Cabinet considered a Memorandum dated 4th September 2001 and approved the following recommendations regarding the yachting sector, with immediate effect:

- (a) That yachtsmen be permitted to stay for a period of six (6) months instead of the current six (6) weeks.
- (b) That subject to the availability of funds a Customs and Immigration office be established in Soufriere that provides weekend coverage.
- (c) That the concern raised by Customs “that there is an absence of clear guidelines on Cabinet decisions” and that “the regulations are open to interpretation” be addressed and clear and precise regulations be developed for yachting so that they can be made available to the Customs Department.
- (d) That yachts which have been cleared for departure be given the same rights as yachts passing through (72 hours)
- (e) That merchant shipping legislation should be introduced to include the registering of vessels in St. Lucia.
- (f) That the Tourism Incentives Act of 1996 should be amended to include yachting and that yachts registered in St. Lucia should be considered as an approved tourism product.
- (g) That the Attorney General’s Chambers draft legislation to regulate yachting in St. Lucia.
- (h) That consumption tax on yachts be reduced to 0%.
- (i) All existing charges, excluding that of the Soufriere Marine Management Authority be replaced by a three-tier flat rate licence system as follows:

<u>Licence Type</u>	<u>up to 40 ft.</u>	<u>40 to 71 ft.</u>	<u>over 71 ft.</u>
Occasional	\$ 50	\$ 80	\$ 150
Semi-Annual	\$300	\$400	\$ 550
Annual	\$450	\$750	\$1000

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