

GENERAL
LC/CAR/G.706
6 November 2002
ORIGINAL: ENGLISH

SAINT LUCIA
The Yachting Sector

Acknowledgement

The Economic Commission for Latin America and the Caribbean (ECLAC) Subregional Headquarters for the Caribbean wishes to thank officials of the Government of Saint Lucia and the yachting industry for the time spent in providing information and, generally, in facilitating this study. Their help was invaluable to the understanding of issues and solutions.

ECLAC also wishes to acknowledge the assistance of Mr. Cuthbert Didier in the preparation of this report.

This report is prepared as part of the Government of the Netherlands-funded project NET/00/79 “Development of a Regional Marine-based Strategy”.

TABLE OF CONTENTS

1. EXECUTIVE SUMMARY	1
2. INTRODUCTION	3
3. HOW THE STUDY WAS DONE	4
4. COUNTRY BACKGROUND.....	5
4.1 OVERVIEW OF THE TOURISM SECTOR	9
5. DESCRIPTION OF THE YACHTING INDUSTRY	13
5.1 HISTORICAL GROWTH OF THE INDUSTRY	13
5.2 THE STRUCTURE AND DYNAMICS OF THE INDUSTRY, INCLUDING TYPE OF YACHTS AND SIZE OF FLEETS BASED IN THE COUNTRY.	16
5.3 COMPANIES DIRECTLY INVOLVED IN YACHTING.....	18
5.4 MAJOR EVENTS AND OTHER PULL FACTORS THAT SUPPORT YACHTING.	19
5.5 ANCHORAGES AND HARBOURS	21
5.6 PATTERNS AND LEVELS OF USE	25
6. THE ROLE OF YACHTING WITHIN THE NATIONAL SUSTAINABLE DEVELOPMENT FRAMEWORK	28
6.1 ON-SHORE DEVELOPMENTS	28
6.2 ANCILLARY SERVICES AND INFRASTRUCTURE.....	29
6.3 COMMUNITIES WHICH ARE DEPENDENT ON YACHTING	30
6.4 VARIOUS STAKEHOLDERS AND POSSIBLE USER CONFLICTS	31
7. EMPLOYMENT ASPECTS OF THE YACHTING SECTOR	34
7.1 DIRECT AND INDIRECT EMPLOYMENT GENERATED	34
7.2 DIRECT AND INDIRECT INCOME, WAGES AND SALARIES	35
7.3 EMPLOYMENT PRACTICES	35
7.4 REQUIRED AND AVAILABLE SKILLS	37
7.5 EXISTING TRAINING FACILITIES.....	39
7.6 MEASURES TO INCREASE THE PARTICIPATION OF CARIBBEAN NATIONALS IN THE INDUSTRY.....	41
8. THE SOCIO-ECONOMIC IMPORTANCE OF THE YACHTING SECTOR.....	43
8.1 THE CONTRIBUTION OF THE YACHTING INDUSTRY TO GDP AND BALANCE OF PAYMENTS	43
8.2 THE YACHTING INDUSTRY’S CONTRIBUTION TO GOVERNMENT.....	48
9. THE ENVIRONMENTAL IMPLICATIONS OF YACHTING.....	49
9.1 SOURCES OF MARINE POLLUTION	49
9.2 LIQUID AND SOLID WASTE MANAGEMENT PRACTICES	51
9.3 OPERATING PRACTICES OF MARINAS AND ANCILLARY YACHTING SERVICES	52
9.4 WATER QUALITY	54
9.5 CHANGES TO COASTAL ZONE AND COASTAL HABITATS	54

10.GOVERNMENT AND PRIVATE SECTOR POLICES REGARDING THE MANAGEMENT AND DEVELOPMENT OF THE YACHTING SECTOR	58
10.1 INTEREST GROUPS AND ASSOCIATIONS.....	58
10.2 EXPLICIT TOURISM AND YACHTING POLICES.....	58
10.3 GOVERNMENT’S INSTITUTIONAL ARRANGEMENTS TO MANAGE THE INDUSTRY.....	58
10.4 SECTORIAL INCENTIVES.....	59
10.5 RELEVANT ORDINANCES AND REGULATIONS AND ENFORCEMENT POLICIES	59
10.6 CUSTOMS AND IMMIGRATION PROCEDURES AND PRACTICES.....	60
10.7 COMMUNICATIONS BETWEEN GOVERNMENT AND THE YACHTING SECTOR	60
11. PROBLEMS AND STRUCTURAL WEAKNESSES FACING THE INDUSTRY	61
11.1 SAFETY & SECURITY	61
11.2 PERCEPTION OF OVERCROWDING AND GRADUAL SLIDE DOWN MARKET.....	66
11.3 COMPOSITION OF YACHTING SECTOR AND IMPLICATIONS ON SEASONALITY	66
12. RECOMMENDATIONS	67
12.1 REGULATIONS, POLICIES AND INSTITUTIONAL	67
12.2 INFRASTRUCTURE	67
12.3 INCENTIVES FOR DEVELOPMENT OF LOCAL ENTREPRENEURSHIP	68
12.4 SAFETY, SECURITY AND THE ESTABLISHMENT OF MINIMUM STANDARDS.	69
12.5 MARKETING	69
APPENDIX A- HISTORICAL GANTERS BAY.....	70
APPENDIX B- THE CAUSEWAY	71
APPENDIX C- RODNEY BAY	72
APPENDIX D- COMPANIES DIRECTLY INVOLVED IN YACHTING.....	74
APPENDIX E- RODNEY BAY	76
APPENDIX F- CASTRIES BAYS	77
APPENDIX G- MARIGOT BAY	78
APPENDIX H- SOUFRIERE BAY	79
APPENDIX I- VIEUX FORT	80
APPENDIX J- YACHTING QUESTIONNAIRE	81
BIBLIOGRAPHY	84
ACKNOWLEDGEMENTS	85

TABLE OF FIGURES

FIGURE 1 MAP OF SAINT LUCIA	8
FIGURE 2: BREAKDOWN OF VISITORS TO SAINT LUCIA BY COUNTRY OF ORIGIN.....	9
FIGURE 3: SAINT LUCIA TOURIST ARRIVALS BY COUNTRY OF RESIDENCE 1990-1998	10
FIGURE 4 SAINT LUCIA NICHE MARKETS.....	10
FIGURE 5 :SAINT LUCIA CRUISE PASSANGER ARRIVALS 1990-1998.....	11
FIGURE 6:PERCENTAGE OF VISITING YACHT BY TYPE.....	16
FIGURE 7: THE NUMBER OF YACHTS, BASED ON LENGTH VISITING RBM IN 2000.	17
FIGURE 8: NUMBER OF YACHTS AND VISITOR TO MAJOR MARINAS 2000.....	18
FIGURE 9: NUMBER OF YACHTS VISITING THE SMMA DURING 1995-2001	27
FIGURE 10: BASIC OPERATING STRUCTURE FOR MARINAS	35
FIGURE 11: AVAILABLE AND UNAVAILABLE SKILLS WITHIN THE YACHTING SECTOR	38
FIGURE 12: TRAINING OFFERED BY MARINAS	39
FIGURE 13: TRAINING SUPPORT FACILITIES.....	40
FIGURE 14: YACHT ARRIVALS BY COUNTRY OF ORIGIN	43
FIGURE 15: NUMBER OF VISITORS AND EXPENDITURE BY COUNTRY OF ORIGIN	44
FIGURE 16: TABLE SHOWING GDP IMPACT OF 2000 SAINT LUCIA YACHT VISITORS EXPENDITURE	44
FIGURE 17: TABLE SHOWING SAINT LUCIA 2000 BALANCE OF PAYMENTS.....	45
FIGURE 18: TABLE SHOWING ESTIMATED IMPACT OF VISITOR EXPENDITURE ON SAINT LUCIA 2000 BALANCE OF PAYMENTS.....	46
FIGURE 19: TABLE SHOWING YACHT VISITOR EXPENDITURE BY CATEGORY	47
FIGURE 20: POTENTIAL POLLUTANT SOURCES FOR MARINA OPERATIONS	50
FIGURE 21: SOURCES OF MARINE WASTE AND MANAGEMENT PRACTICES	52
FIGURE 22: EFFECTS TO THE COASTAL ZONES	55

1. EXECUTIVE SUMMARY

This study is a measure of the impact of the yachting sector in Saint Lucia specific to the terms of reference as presented by the Economic Commission for Latin America and the Caribbean (ECLAC). This study is part of the project: Development of a Subregional Marine-based Tourism Strategy, co-funded by the Government of the Netherlands, which is aimed at the development of sustainable yachting in the Eastern Caribbean and focuses on the island arc from the British Virgin Islands in the north to Trinidad and Tobago in the south. This study was compiled based on information gathered through interviews, reviewing of existing data and current findings and observations in areas where data was not presented. This study reviews specifically the yachting sector, or pleasure boat industry, which can be defined as a complex set of activities that are required to sustain boating and cruising in Saint Lucia. These activities are emphasized by yachting tourists, who are visitors to the island, staying for more than 24 hours on their vessels.

A comprehensive economy-wide input out model is not available for Saint Lucia's yachting sector and therefore the measuring of successive rounds of the indirect impact is not possible.

The following are the major findings of this study:

- In 2000 the yachting industry visitor expenditure generated an impact of 48.2 m on the GDP of Saint Lucia.
- Saint Lucia's yachting sector comprises mainly cruising yachts, live-aboard and a limited number of offshore charter yachts. Greater efforts must be made to attract crewed and independent yachts to make Saint Lucia their homeport.
- A total of 5519 yachts visited Saint Lucia during 2000.
- The onshore developments are concentrated on the West Coast of the island, with the greater concentration of yachts between Marigot Bay and Rodney Bay.
- A total number of yachting-related jobs on the island are estimated at 450.
- Saint Lucia's yachting industry has significant potential, however, neglect and bureaucracy retard this potential.
- The agencies charged with the responsibility of regulating the yachting industry in Saint Lucia have little knowledge about this industry.
- The yachting industry in Saint Lucia needs clear non-ambiguous guidelines to foster future growth.

- Greater effort must be made to involve local participation in the yachting sector.
- The yachting sector in Saint Lucia needs ownership and must be appreciated as an integral part of the island's overall tourism product.
- Environmental implications of yachting must be monitored with emphasis on water quality control.
- There is an urgent need for sound liquid and solid management practices in all marinas, ports and anchorage areas.
- Saint Lucia over the last four years has lost three charter-based operations to other islands.
- Marinas, boatyards and other ports of entry must improve the infrastructure to attract and service the growing mega yacht industry.
- A greater effort must be made to organize boat boys and over zealous salesmen who ply the marinas, ports of entries and anchorage spots for their daily trade.
- Saint Lucia Tourist Board must give greater promotions to the local Heineken regatta by marketing the event at the beginning and end of the Atlantic Rally for Cruisers.
- The yachting sector in Saint Lucia needs the formation of a Marina Trades association; this will give the sector greater visibility and recognition by government.
- Emphasis must be given to the development of training facilities specializing in skills directly related to the yachting sector.

2. INTRODUCTION

The objective of this report is to understand the yachting industry in Saint Lucia with the intention of formulating a policy towards promoting sustainable yachting tourism in Saint Lucia. Because of a lack of understanding the following issues were addressed in this report:

- The socio economic impact of yachting
- Issues which need to be addressed to facilitate growth within this industry
- The environmental impacts of yachting.

3. HOW THE STUDY WAS DONE

Saint Lucia was selected as one of the six countries in this project. It is an important case study because of the island's increasing tourism industry, level of economic diversification, the yachting infrastructure and the present problems within the yachting sector.

The study is based on present yachting statistics and national data: primarily data on the island's environment. Very little economic data was available specifically on the yachting sector, however, data compiled was based on interviews and data presented by some government agencies. In conducting the study several meetings were held with key agencies in Saint Lucia which would be the major data providers. These agencies included the Saint Lucia Tourist Board, Government Statistics Department, Ministry of Finance, Saint Lucia Air and Sea Ports Authority, Rodney Bay Marina, Moorings, Soufriere Marine Management Area, Solid Waste Management Authority, Castries Yacht Center; in addition to other persons involved in the yachting industry. The data compiled was based on interviews conducted during these meetings.

The consultant on this project selected a sample of nine establishments involved in the yachting industry in Saint Lucia based on criteria such as size and market share. The sample included marinas, boatyards, charter companies and independent freelance contractors.

4. COUNTRY BACKGROUND

Saint Lucia is the proud owner of one of the Caribbean's most colorful histories. During the 17th and early 18th centuries, England and France contested her ownership changing hands 14 times. In 1814 the United Kingdom gained final possession. Saint Lucia sought self-government in 1967 and, later, independence in 1979.

□ **Economic background**

Saint Lucia's economy has traditionally been composed of four major sectors; agriculture, tourism, manufacturing and construction. In recent times the financial services sector has been identified as an emergent sector. The present global climate mixed with recent changes in the European Union (EU) preference regime regarding the banana industry and the increased competition from Latin American bananas have made economic diversification increasingly important in Saint Lucia.

Agriculture accounts for 7.7% of Gross Domestic Product (GDP) but the performance of this sector is overshadowed by the domestic and external developments within the banana industry. Notwithstanding depressed market conditions in the UK market, banana exports grew by 7.7% in 2000 almost reversing the 10.7% decline in 1999. For 2000, Saint Lucia recorded 70,281 bananas and accounts for 50% share of Windward Islands production.

Fisheries, an agriculture sub-section, entered its second consecutive year of expansion, with a recorded growth of 8.5% to 1,860 tons. Dennery and Vieux Fort continue to be the major contributing sites, accounting for 26.2% and 15.9% respective of total fish landed. However Choiseul and Castries show the most significant growth rates for fish landed.

The tourism sector has continued its path of steady growth during 2000. This sector's growing importance is reflected in its share of GDP increasing from 13% to 13.3% while its contribution to exports of goods and services moved up to 75%.

Total visitor arrivals showed an impressive increase of 16.2% to 726,254 in 2000, compared with a total of 625,269 in 1999. This increase was as a result of a "*phenomenal*" increase in cruise ship passenger arrivals, which constitutes a growth of 26.3% representing 443,551 visitors. The tremendous increase in the capacity of the new cruise ships, along with improved load factors and the marginal increase in cruise calls are the main reasons for this phenomenal increase. The recent expansion and upgrade of Saint Lucia's well-marketed and modern berth facilities has accommodated the growth in cruise traffic. Investment in tourism appears to be expanding rapidly, with the continuation of work on the Troumasse Resorts, re-commencement of the Rosewood Hotel, Sandals and development of the Vigie Cove. However, Saint Lucia has suffered a 15% decline in stay over visitor arrivals when compared to the same period last year. This is due to a combined effect of external factors, which Saint Lucia has no control over. Such external factors include intensified price/value competition from destinations

in the Indian Ocean and the Spanish-speaking Caribbean, and a curtailment of airlift, particularly by charter operators servicing the UK market.

One important addition to this sector has been the introduction of gambling legislation, the establishment of standards at small properties and the training of taxi drivers. The investments in this sector form foundations for future growth in this sector.

The manufacturing sector in Saint Lucia is one of the most diverse in the Eastern Caribbean. This sector comprises: food and beverage, wearing apparel, textiles, paper products, wood, chemicals, copra, printed material, electrical products and plastic products. In 2000 the manufacturing sector records a contraction of 4% after expansion of the same rate the year before. Manufacturing's share of GDP is 5.9%. A lack of competitiveness, small size and the rapid pace of Trade Liberalization continue to pose a serious challenge to the maintenance and survival of this sector.

Saint Lucia's construction sector is estimated to have recorded a 4.6% contraction during 2000. Accordingly, this sector's share of GDP fell from 9.4% in 1999 to 8.9% in 2000. The decline in activity in the construction sector has had a significant impact on present economic activity. Indicative of this is private sector construction contracted with the Hyatt Regency Hotel, and a halt in the construction of the Rosewood Hotel, proof of these projects' impact on the local economy.

The recently emergent financial sector is at present still in its initial stages with the recent establishment of the first offshore bank, Bank Crozier. It is expected that others will soon follow. No data measuring the financial services sector's expected impact on GDP was found.

Overall the Saint Lucian economy recorded the following economic indicators in 2000.

- Population-155, 460
- Labour Force- 76,005
- Employed Labour Force- 63,470
- Unemployment Rate- 16.45%
- Labour Force as a percentage of total population- 48.85%
- Labour Force participation rate- 71.2%

□ **Physical and Environmental**

Saint Lucia is located between the Caribbean Sea and the North Atlantic Ocean at coordinates 13 53N, 60 68W. The total area making up this island is 616 sq. km, (608 sq. km land and 8-sq. km water). Of this area habitable area consists of 539.14 km. Saint Lucia is divided into 10 major districts with the capital being Castries located in the northern part of the island. The second city, traditionally described as an industrial zone located in the southern part of the island, is Vieux Fort. The highest point is Mount Gimie at 950 m and the lowest point being the Caribbean Sea at 0m. The coastline stretches a total of 158 km, with maritime claims of 200nm. The natural relief is volcanic and mountainous punctuated by the landmark Gros Piton and Petit Piton found in the southern region of Soufriere. Within this same area the "Worlds only

Drive in Volcano”, the Sulfur Springs, can be found. Climate is typified by tropical conditions, moderated by northeast trade winds. Seasons vary between the rainy¹ and the dry² season. Saint Lucia’s natural resources are forests, sandy beaches, agricultural lands, mineral springs and geothermal potential. (*See figure 1 for Map of Saint Lucia*)

There are several environmental issues facing St. Lucia at present. Traditionally deforestation and soil erosion have been the major issues. Soil erosion and slippage continue to be a major problem intensified by the rainy season. As St. Lucia develops its tourism industry and more specifically Eco-tourism, several other environmental issues have been brought to the forefront; preservation of coastal zones and coastal habitats, damage to marine life and environs, rising sea levels and effective solid waste management.

□ **Social**

Saint Lucia has a reported population of 155,032 and an overall trend of a declining population growth rate. In relation to the landmass, population density is 746 persons per squared meter. In 2000 the population growth rate was estimated at 1.21% with a life expectancy at birth of 72.31 years. The birth rate stands at 19.8 per thousand and death rate 6.2 per thousand. Both display a declining rate with male birth and death rates outnumbering females. Females account for the majority of the population accounting for 51% of the population. The population age structure subdivides as follows; 0-14 years 33%, 15-64 years 62% and over 65 years 5%.

The population’s ethnic composition consists of 90% Black, 6% Mixed, 3% East Indian and 1% White. The official language is English and a French Patois is spoken. Significant emphasis is presently being placed on the survival of this Patois as a part of Saint Lucian Heritage.

Social development through education has been made a priority by the present government with education taking the largest share of government expenditure at 25.5%. It is recorded that 67% of the population over 15 years have attended school. Literacy has been recognised as an investment for the future development of Saint Lucians hence Saint Lucia, a population recognising the need for the development of a country, is better equipped to meet that need, specifically within the growing Tourist Sector.

Saint Lucia has traditionally been a strong Roman Catholic community, with 90% of persons being Roman Catholic. There is though a rising awareness of other religions; Seventh Day Adventists, Church of God, Pentecostal and Methodist.

¹ May to August

² January to April

Source: Saint Lucia Tourist Board (SLBT)

4.1 Overview of the tourism sector

Like most other islands Saint Lucia has traditionally promoted its natural scenic beauty focusing heavily on its spectacular landmark twin peaks, the Pitons. It has also promoted its exotic rain forest, sandy beaches, and award winning hotels and restaurants and most importantly its warm and friendly people. Unlike most other islands two airports conveniently located in the southern and northern tips provide links to the USA, Europe, Canada and the rest of the Caribbean. Together with developed infrastructure in the major tourist areas Saint Lucia offers a highly competitive product gaining notoriety as one of the most desirable Wedding/Honeymoon destinations in the world.

The focus on growth of the tourism industry was the result of recognising the potential of the tourism sector in an economy, which needed to diversify in order to improve its foreign exchange earning capacity.

□ Geographic Markets

Saint Lucia's top three markets have consistently been the United States, the United Kingdom and the Caribbean. In entirety they constitute 83% of total stay-over visitors.

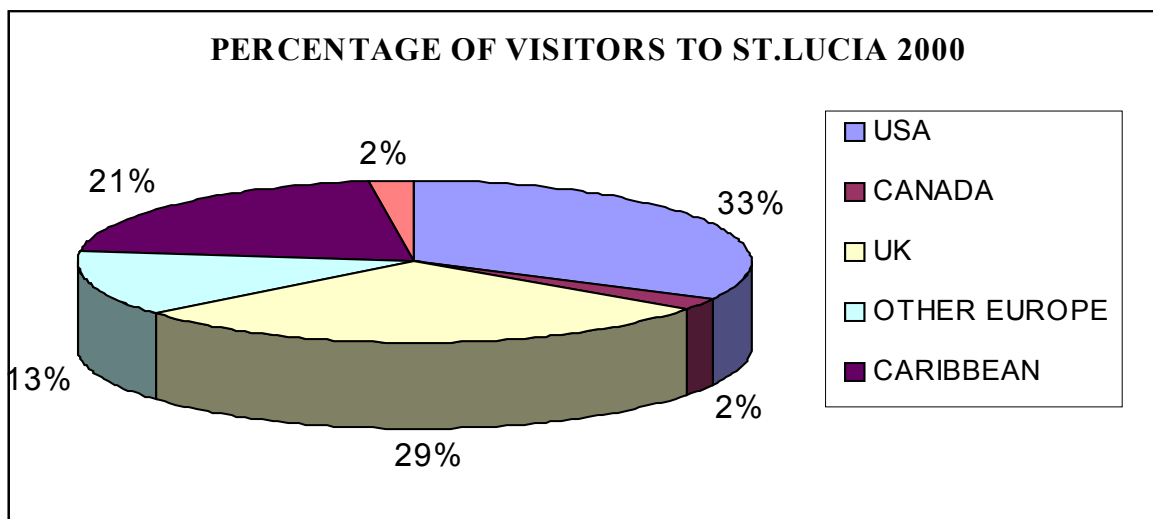


Figure 2: Breakdown of Visitors to Saint Lucia by Country of Origin

Source: Saint Lucia Tourist Board

During the year 2000 Saint Lucia experienced significant growth from the United Kingdom with 35% and the United States with 16%. Historically the top three markets have continued to increase annually while the other markets remain at a relative standstill. Thus the performance gap between these groups widens.

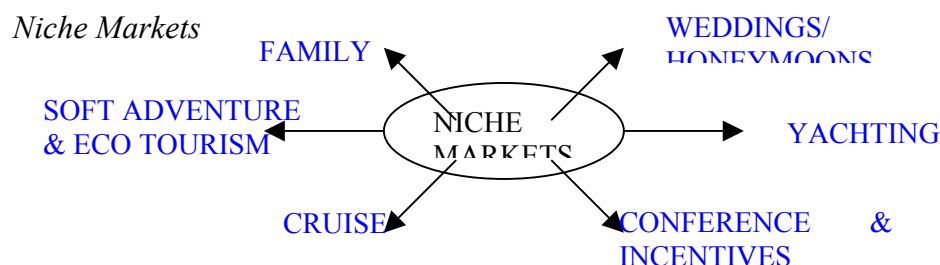
Country/Year	1990	1991	1992	1993	1994	1995	1996	1997	1998
United States	39,333	42,025	44,448	56,364	77,928	84,728	75,622	73,446	81,161
Canada	15,072	13,726	14,075	12,096	12,310	11,073	11,734	16,043	15,439
Europe	49,393	57,548	72,928	77,964	76,983	81,988	84,376	96,398	88,642
United Kingdom	32,197	33,809	44,906	49,200	46,763	50,965	50,563	59,592	63,160
Germany	6,826	10,358	12,530	12,084	14,430	12,518	12,757	11,085	8,345
Other Europe	10,370	13,381	15,492	16,680	15,790	18,505	21,056	25,721	17,137
Commonwealth Caribbean	27,985	27,988	27,707	29,529	31,274	35,559	33,026	34,158	36,607
French West Indies	14,264	14,559	15,649	16,148	16,583	17,976	26,722	24,425	26,917
Other Countries	2,923	3,188	2,681	2,035	3,489	3,951	4,179	3,936	3,471
TOTAL	148,970	159,034	177,488	194,136	218,567	235,275	235,659	248,406	252,237

Figure 3: Saint Lucia Tourist arrivals by Country of Residence 1990-1998

Source : Saint Lucia Tourist Board

The US market grew by 2.9% from 1998 to 1999. This is attributed to increased airlift from Air Jamaica. The Canadian market continues to be very small, fluctuating between growth and decline.

Figure 4 Saint Lucia Niche Markets



Source: Saint Lucia Tourist Board

The Tourism industry consists of six markets described as niche markets. Saint Lucia as a wedding destination is well established and external ratings continue to be consistent. Many hotels offer very affordable wedding packages in dream locations.

As a conference destination many groups from around the region use Saint Lucia as a meeting point, increasingly international groups are being drawn to Saint Lucia, newer hotels like the Hyatt Regency have developed modern conference facilities which they are able to market internationally.

Within the cruise ship industry, the number of cruise ships entering Saint Lucia is expected to increase during the traditional cruise ship season. During 1999, cruise ship arrival declined 5.6% to 351,233. This was partly due to the construction of new berthing facilities,

which caused a decrease in ship arrivals. This sector's spending is concentrated on the Duty Free stores at complexes such as Pointe Seraphine and La Place Carenage.

Month/Year	1990	1991	1992	1993	1994	1995	1996	1997	1998
January	16,981	27,397	24,974	23,622	19,777	19,335	27,183	40,889	50,919
February	12,900	19,783	22,062	17,893	19,490	19,577	26,126	33,694	42,343
March	15,291	18,437	22,486	25,980	24,974	22,528	29,806	34,051	51,064
April	12,954	16,865	21,225	16,782	18,959	11,750	19,575	26,412	39,523
May	3,949	6,098	6,766	6,263	6,530	10,358	4,967	13,772	16,799
June	2,041	1,720	5,488	4,415	7,575	5,636	3,603	15,530	14,732
July	3,270	1,877	6,762	4,973	7,179	8,650	4,064	16,536	18,753
August	2,949	4,237	7,670	5,740	8,484	11,340	3,405	16,204	15,176
September	1,973	3,090	5,298	5,045	6,107	9,609	2,814	8,164	16,910
October	3,331	7,911	4,720	7,195	10,873	18,159	9,014	25,849	16,112
November	11,792	19,131	18,700	13,648	18,508	25,172	19,948	30,730	39,588
December	14,517	26,235	18,771	22,817	23,082	31,798	31,651	48,432	50,149
TOTALS	101,948	152,781	164,922	154,373	171,538	193,912	182,156	310,263	372,068
Number of Calls	226	318	319	431	301	455	297	322	345

Figure 5 :Saint Lucia Cruise Passenger Arrivals 1990-1998

Source: Saint Lucia Tourist Board

Eco Tourism is a developing niche market; it is considered a natural progression for an industry, which exploits its natural relief. Closely linked to this is heritage tourism, which seeks to develop aspects or locations of Saint Lucian heritage as tourist attractions.

□ **Economic significance**

Tourism as previously mentioned is a key economic contributor, it is important to recognise its 28.2% contribution to Saint Lucia's GDP. Tourism continues to play a leading role in creating economic activity on the island, by providing the principle source of foreign exchange, and foreign investment. It provides over 11,644 full-time jobs, accounts for 88.3% of total exports and 66.7% of all inflows on the current account on the balance of payments. Tourism provides more foreign currency to the economy than other sectors.

□ **Accommodation**

Saint Lucia's hotel sector offers a variety of accommodation types from the five star Royal Saint Lucian to the country Balenbouch guesthouse. Presently a concentration of hotels occurs towards the northern tip of the island with a select few being located in the Southern region. This concentration has led to the development of many services, which cater to the hotel industry being located in the north. Efforts are being made to spread this concentration, for example the development of Anse la Raye Fish Friday, to other areas. The hotel sector is further divided into 40% all-inclusive, 40% full service hotels and 20% villas and guesthouses. It is worthwhile noting that 70% of all stay over arrivals stay at all-inclusives.

❑ **Special Events**

At present the Tourist Board has listed the following events as special events, which are used as a marketing tool:

- The much acclaimed Jazz Festival featuring international Jazz and R&B artists. Saint Lucia receives US\$10 million of exposure.
- Atlantic Rally for Cruisers (ARC) is a commitment through contractual agreement with the World Cruising Club (WCC).
- Carnival, an event that traditionally draws Saint Lucians overseas and persons from other islands.

❑ **Challenges**

At present there are several challenges to the tourism industry; limited budgets, competition from lower priced destinations, knock on effects of stagnant or declining international markets, declining secondary markets and the potential effects of unforeseeable events on the world stage. The World Bank predicts very far-reaching impacts on both developed and developing countries of the terror attacks of 11 September 2001 on the United States of America. But because the attacks will delay the developed countries' recovery into 2002, the World Bank now warns that developing countries' growth could be lowered by .75 percentage points in 2002, that is, to as low as 3.5 percentage. Prior to the events of 11 September, the English speaking subregion (which includes Saint Lucia) was already experiencing the effects of a down turn in the American economy, which together with the relative decline in the value of European currencies, was causing American holiday makers to opt for cheaper vacations in Europe or closer to home, on the continental USA.

5. DESCRIPTION OF THE YACHTING INDUSTRY

5.1 Historical growth of the industry

Ganthers Bay

The yachting industry in Saint Lucia began its humble roots in Ganthers Bay, (Lunar Park) known now as Vigie Cove. Vibrant boating activity began in that area during the early 1950s, partly due to its close proximity to the capital, Castries, and Vigie airport. Most of the vessels berthed in this very sheltered harbor were locally owned with a few foreign registered vessels.

A plan of a survey dated 1886 of Bon Fortune Estate, now known as Choc Bay, purchased by the English War Department shows the now Ganthers Bay between Vieille Bay Sans Souci and Conway. This Bay has a historic legacy with the 1300 Northumberland Fusiliers fighting the French troops along the Vigie Peninsular in 1778. In 1905 the West Indian Regiment disbanded the Fort within the Bay, which was used as a British Naval Dry Dock and for small draft vessels. As Castries developed and the change of name, town and capital came into being so did this historic Bay. It was first called Petit Carenage up to 1763 when the town of Castries was situated in Vigie, which had replaced Soufriere as the capital and then renamed Vigie Creek. Around 1905 natives and mariners, who used the Bay during this period, 1943, reported that the name became somewhat silent and emphasis was focused on Trou Gannier.

In 1950 an ex-military Naval officer and a dealer in ex-naval military equipment came to Saint Lucia and set up shop in the Vigie Creek. His import export business boomed so that his name became synonymous with Vigie Creek, hence the revised name: Ganthers Bay. One of the three ML101P.T boats berthed at Ganthers Bay housed Ganthers family and office. He lived and traded from the boat for a number of years. After the fire of 1948, which destroyed the famous entertainment hallmark; The International Caffee on St. Louis Street in Castries, the Lunar Park was opened in Ganthers Bay. Some time in 1950 the sails and engine of the yacht Phoenix entered Ganthers Bay to herald a new beginning and strengthen the claims of development put in place by another family. Ganthers Bay took a new turn when the reef club was established. Today the Bay is active with two restaurants: Froggie's Jack and the Coal Pot and a small hotel called Auberge Seraphine. Many yachts are still attracted for overnight stays and refueling purposes. At present 30 boats are permanently berthed at various docks: these boats include two dive operators, two Sandals hotel dive boats and several Carnival day sail catamaran. The present infrastructure at Ganthers comprises of broken dock wooden side piers, limited water and electricity outlets, rundown rental units that are not utilized and a small fuel dock. (*See Appendix A Historical Ganthers Bay*)

Rodney Bay

It was not until the early 1970s when the Caribbean Development Corporation began the Rodney Bay project: construction of a cause way linking the mainland to Pigeon Island, creating 70 acres of prime beach property and up-market tourist projects, condominiums, apartments and

a sparkling man-made lagoon, that Rodney Bay and Pigeon Point areas became a yachting haven. (*See Appendix B the Cause Way*)

This lagoon extended from the sea to form a sheltered yacht anchorage, and thrust the fishing village of Gros Islet into a central and integral part of this new community.

Dredging a swamp area behind Rodney Bay into two lagoons created Rodney Bay Lagoon. The outer lagoon of some 90 acres connects to the bay. This was the resulting creation of a development entity called Rodney Bay Limited, comprising the Caribbean Development Corporation of Britain, the Government of Saint Lucia and a dredging company of Jamaica.

The first yachting activity in Rodney Bay was ushered in by Stevens Yachts, which started operations in 1976. The charter fleet was located in what is now known as the inner lagoon and comprised 30 vessels all ranging between 35 and 52 feet. This charter operation for a long time represented the Saint Lucia yachting sector. The operations continued to grow in anticipation of a Marina complex. However while Stevens was the only charter base, Rodney Bay and Reduit beach became popular anchorage spots for the few cruisers who sailed through Saint Lucian waters.

In 1986 Rodney Bay Marina was near completion, and Stevens Yachts moved their operations to the Marina, which was constructed in the first portion of the lagoon. Prior to completion Stevens yachts occupied a third of the rental space and 35 concrete docks equipped with electricity and water. Within four years Rodney Bay Marina had three more Charter base operations:

- i. Trade Winds
- ii. Austro Yachting
- iii. Starlight Charters.

During that period (1988 to 1992) Rodney Bay Marina had almost four times the concrete docks and rental space. The presence of these charter companies created a service industry consisting of mainly banks, provisioning outlets, restaurants, mechanic shops and a sail loft within the Marina complex. For most of this time the main customer base for the four-acre area, also part of the Rodney Bay Marina development, were the charter operators. This boatyard created a core of industrial services for the growing yachting clientele in and around Rodney Bay. (*See Appendix C Rodney Bay Marina construction to present*).

Marigot Bay

This Bay is known as one of the most scenic harbors in all the Caribbean. It has been a popular anchorage with visiting yachts for the past 50 years, most, if not all yachts that clear into Saint Lucian waters, visit Marigot Bay. This anchorage was first called Hurricane Hole, prior to the construction of a hotel some 30 years ago. Marigot Bay is a picture perfect bay, surrounded by lush vegetation and an overflow of restaurants, motels, bars and luxurious homes. The construction of a hotel in the late 1970s made the Bay even more popular with visiting yachts, and in 1984 Moorings yacht charters set up a base next to the hotel property. Marigot Bay presently has 32 single docks all assigned to the Moorings charter fleet, however it provides ample anchorage for a large number of yachts that moor in the bay for shelter, use of the amenities or the pleasant quite ambience. This bay has a natural deep-water entrance, which attracts yachts of all drafts and lengths; the calm inner bay provides a natural protection from tidal surge.

Soufriere

Soufriere Bay is a very popular anchorage spot and a “must-see” for all visiting yachts. Ninety per cent of all yachts that enter Saint Lucian waters stop in Soufriere. Due to the growing numbers of visiting yachts, the Soufriere Marine Management Area (SMMA) was formed in 1992. SMMA was formed out of the need to address the growing yacht traffic while preserving and maintaining marine and coastal resources. To successfully manage this marine area the SMMA provides five yacht mooring areas within the Soufriere coastline. Moorings are available between Anse Chastanet and Anse Mamin, Rachchette Point, Soufriere Jetty, Malgretoute Beach and the Beausejoure Area. The use of the moorings requires a coral conservation permit; the cost of this permit depends on the size of vessel and the duration of stay. Uniformed SMMA Rangers, who patrol the areas and are in contact via VHF radios, issue these permits. The SMMA strengthens Soufriere's crucial role in the yachting sector in Saint Lucia by creating a safe stopover for charter vessels traveling North to Martinique from the Grenadines or charters traveling South from the Grenadines to Martinique. Soufriere is a perfect example of a well-managed anchorage, which allows all the users of the Marina environment to exist in harmony. Soufriere Bay is attractive to visiting yachts due to the rain forest, historical sites and the support services from the immediate community, however, to reap the benefits of the yachting sector the entire local community must fully understand this industry. In Soufriere several touristic services already exist which cater to visiting yachts: restaurants, bars, and motels. However there is a need for greater investment in onshore services such as: laundromats, provisioning outlets, shower facilities, propane gas depots, and yacht repairs.

5.2 The structure and dynamics of the industry, including type of yachts and size of fleets based in the country.

Saint Lucia's yachting sector comprises four categories of yachts: Cruisers, live aboards, charter yachts, and local yachts engaged in day boat coastal charters, deep-sea fishing and whale watching.

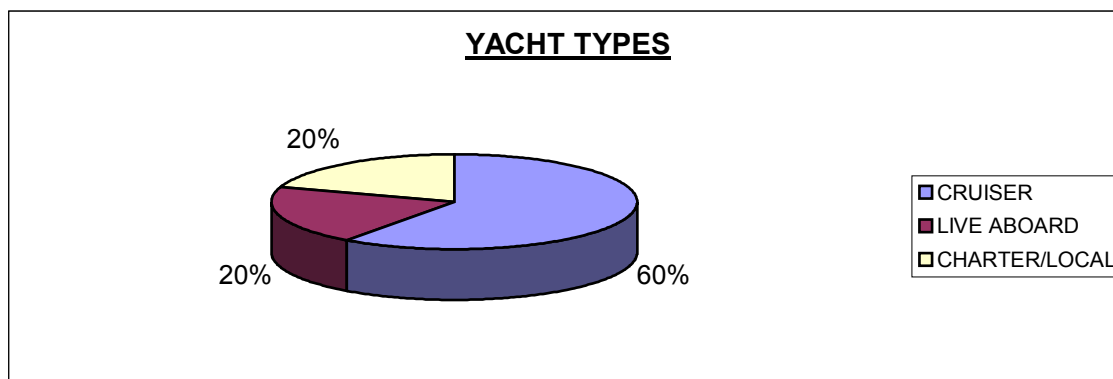


Figure 6: Percentage of visiting yacht by type

Source: SLASPA, RBM, Marigot Bay

Sixty per cent of the yachts that visit Saint Lucia are cruisers, which form the first category. These yachts visit the island for the sailing experience and as a stop for repairs, provisioning, and communications. These yachts and crew normally stay in Saint Lucia for an average of three weeks. Twenty per cent of the yachts are live-aboards, which is the second category; these yachts make Saint Lucia their base for an average of six to twelve months. Very often these yachts are forced to stay for such long periods due to refits; major repairs or hurricane storage. The third category is that of the charter yachts. Presently in Saint Lucia there are only two charter base operations, the Moorings and Destination Saint Lucia (DSL).

The Moorings is located at Marigot and Destination Saint Lucia (DSL) is located at Rodney Bay Marina. The Moorings has a present fleet of 29 vessels ranging between 32 and 52 feet. This fleet comprises of four vessels, which are used as bareboat charters, (vessels rented without crew), and 25 vessels as crewed charters. The Moorings cater for the American market and all the vessels have local skippers. DSL has a fleet of nine vessels, which are all 40 feet. All of the vessels are chartered as bareboat vessels, with the option for skippers if required. DSL caters primarily towards the Germany market; therefore most of their skippers are German.

The fourth category comprises of the local element of the industry: day boat operators, day fishing charters, whale watching and water taxis. These local vessels are concentrated in Ganters Bay and Rodney Bay.

Sixty per cent of all the yachts that visit Saint Lucia are berthed at Rodney Bay Marina, on anchor in the Rodney Bay Lagoon, and in the Rodney Bay off Reduit and Pigeon Island beaches. Fifteen per cent are on dry storage at the RBM boatyard. Twenty per cent are located at Marigot bay, and 5% can be found on anchor in Soufriere at SMMA.

While the Moorings has a high international appeal and engages in aggressive marketing, Saint Lucia appears to be losing its appeal for charter operations. Aggressive customs enforcement tactics, along with reduced direct airlift from France and Europe in general are contributing factors. However the Atlantic Rally is marketing the island as an attractive destination for Cruisers and word of mouth.

The average size vessel visiting Saint Lucia is 55 feet. Over the last two years Saint Lucia has seen an increase in Maxi yachts (sailing yachts over 60 feet), and Mega Yachts (motor yachts over 70 feet). During the winter season: November to May, maxi yachts can be found cruising the island's West Coast. Seventy per cent of these mega yachts are motor vessel with an average size of 100 feet, while the maxi yachts account for 30%. During 2000, 60% of the yachts, which visited Saint Lucia, were between the 40-foot to 70 feet, 36% were in the 40-foot category, while 3% were between 70 feet to 100 feet. Yachts over 100 feet accounted for 1% of arrivals.

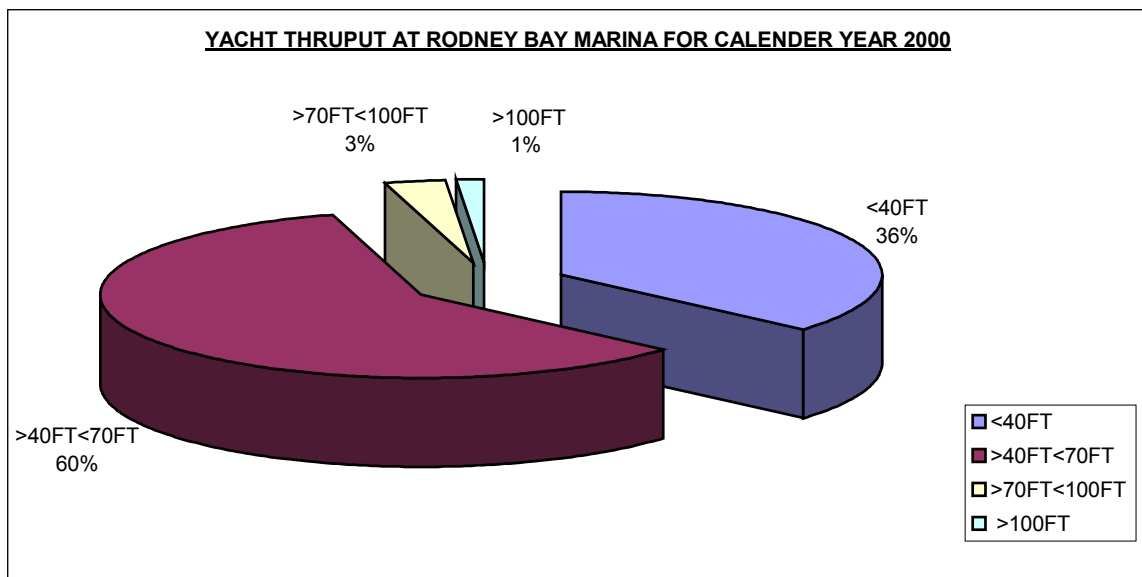


Figure 7: The number of yachts, based on length visiting RBM in 2000³.

Source: Rodney Bay Marina

Data obtained from Saint Lucia Air and Seaport Authority (SLASPA) and Saint Lucia Tourist Board (SLTB) confirms 3409 yachts arrived at Rodney Bay during the 12 months period in 2000. These yachts arrived with a total of 16,069 visitors who stayed an average of 15 nights on the island. For the same period 1193 yachts arrived at Marigot, delivering a total of 6135

³ Data as collected by SLASPA

visitors to the island. The average length of stay was 15 days. Soufriere recorded the lowest yacht arrivals at 917, with a total of 4587 visitors who spent an average of 15 days.

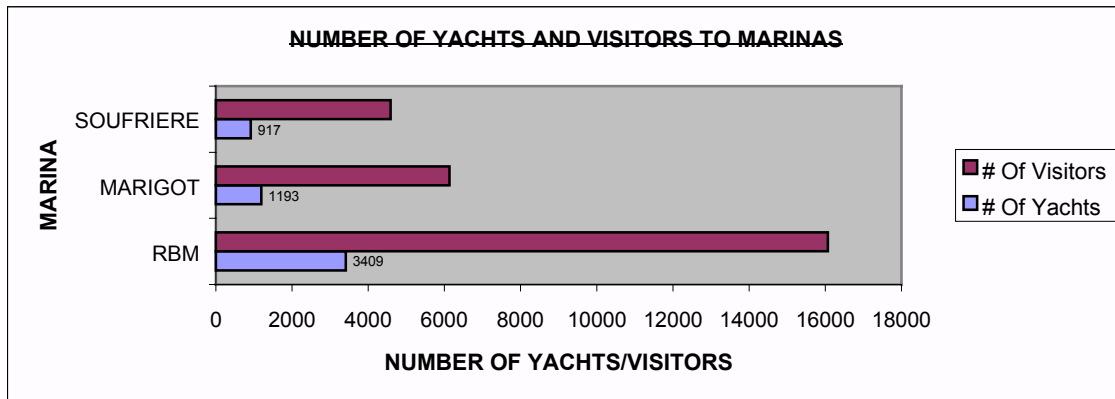


Figure 8: Number of yachts and visitor to major marinas 2000

Source: SLASPA

The low volume of yacht arrivals in Soufriere is attributed to the lack of customs facilities and the lack of on site immigration services at Soufriere. It should be noted that the data on each yacht deals specifically per vessel and not each entry into the island, therefore avoiding double counting, since the same vessels can clear in and out of Marigot and Rodney Bays. To avoid this, there must be port officers stationed at Marigot and Soufriere.

5.3 Companies directly involved in Yachting

Presently the yachting industry is dominated by two marinas: Rodney Bay Marina (Marina and Boatyard) located in the touristic north of the island and Marigot Bay located south of Castries next to the fishing village of Anse La Raye. There are a variety of companies directly involved with yachting; these are listed in Appendix D.

All the business located at the Rodney Bay Marina except the banking services are very dependent on the yachting clientele for their daily trade. While the services are extended to locals most of the businesses interviewed confirmed that 60% of their daily taking were from visiting yachts.

The business at Ganter Bay differed dramatically, with only the restaurants confirming patronage from visiting yachts. The moorings of Marigot Bay confirmed most of their trade was as a result of visiting tourists who had booked overseas for charters that started at Marigot. While all the other businesses confirmed patronage from visiting yachts, there appear to be little distinction between visiting yachts persons (mainly Moorings clientele) and tourists arriving via air who participate in yachting activities and stay in the Marigot area.

In Soufriere, only the Soufriere Marine Management Authority and the water taxis confirmed 100% patronage from visiting yachts. While the other business confirmed their businesses did receive patronage from visiting yachts they could not confirm the percentage, however they all confirmed it was very seasonal: December to May.

5.4 Major Events and other pull factors that support yachting.

Saint Lucia's yachting calendar has presently one international rally listed. The Atlantic Rally for Cruisers (ARC) takes place during the month of December. This event has mushroomed into a huge event, which takes place over a three-week period. The number of vessels has reached a peak of 250 vessels per event with a total of 1500 persons from 32 countries participating. These vessels are located at Rodney Bay Marina and Rodney Bay Lagoon. However all of the yachts do visit Marigot and Soufriere.

The overwhelming majority of participants (96%) are of European origin, arguably because the promotional activities surrounding this rally are concentrated around Europe. The remaining visitors (4%) are usually from the USA and Canada. Most of the participants fall within the age range of 30 to 49 years, with an overall of 41% of the participants between the ages of 40 to 49 years⁴.

Surveys conducted over the last three years show that the participants are generally satisfied with the quality of berthing facilities at the final destination. Also 80% of the participants interviewed were satisfied with the quality of service that they received from the Customs and Immigration officials during their stay in Saint Lucia.

Other areas receiving complimentary ratings from the visitors include the quality of service provided by taxis, banks, postal services, telephone company and various land-based tours. However, there is a need to improve the quality of shopping available as well as entertainment and recreation. Concerns about the quality of food and drink relate specifically to dissatisfaction with the value for money, restrictions in the terms of variety available and a need to increase the amount of local foods served.

With respect to expenditure directly related to the ARC participants, their estimated daily expenditures compute as approximately US \$44 per person. Further immigration records reveal the average length of stay of the participants was 15 days. (Exclusive of excursions to neighboring islands). By extension therefore the estimated visitor expenditure directly related to the ARC participants during their stay in Saint Lucia is estimated to be in the region of EC\$2.7 million.

From the Saint Lucia Tourist Board's surveys of the last ARC events, interviews revealed an encouragingly high percentage of respondents indicated a general satisfaction with their experiences while in Saint Lucia. A total of 90% indicated a definite willingness to return to the island at some future date. On the other hand, whereas 62% reported they would definitely

⁴ These figures are subject to change in the future

recommend Saint Lucia to a friend or a relative, 35% thought that they probably would, with 3 % stating openly that they would not. On further investigations those with negative views had concerns with regards to safety and crimes that they either experienced first hand or had heard about. The only major specific complaint made by the visitors related to the frequency with which they were harassed by “boat bums” and in some instance overzealous salesmen. Another very popular complaint was the need for better shower facilities to be provided at the Marinas as well as laundry facilities.

The Heineken Sailing regatta is held in January, however it has not been promoted heavily and as a result the participation is mostly local. This event is held over a three-day period with most of the races being held in the North off Reduit Beach. While Heineken heavily sponsors the event it suffers from lack of official support by the Saint Lucia Tourist Board and the Saint Lucia Hotel and Tourist Association (SLHTA). No data was available to effectively evaluate this event.

Michael Hackshaw Memorial tournament is held in March. This event is a fishing competition, which is showing great potential as a viable event. It is held at Rodney Bay Marina over a two-day period. This event attracts a large number of sports fishing boats both local and from the neighboring islands of: Martinique, Barbados, Dominica, Trinidad and Tobago and Grenada. This event has attracted some local sponsors. However the biggest visible contribution is the fuel sales, which is normally a total of 20,000 gallons during the two days. The participants of this tournament enjoy a duty free price of EC\$4.50, a big discount from the duty paid price of EC\$6.60.

The Saint Lucia Tourist Board inaugurated the Saint Lucia Jazz Festival in May 1991 in an attempt to attract tourists during the traditionally slow early summer months. The festival is on the annual tourism calendar and has gained a reputation of being one of the better Jazz festivals worldwide.

Held in May the Saint Lucia Jazz Festival attracts a large number of yachts from Martinique. So large, that it is called the mini ARC, this event is held over a seven-day period, during which a number of vessels anchor in the lagoon area, off Reduit Beach and at Marigot. Events are held all over the island for 10 days and nights. Shows are staged in a diverse range of settings, to suit any taste. From Jazz dinner performances to outdoor concerts in old colonial plantations, a beach in the south, or the bustling Castries city center, a marina in the north to the showcase site of Pigeon Island National landmark, with its colonial fortification ruins. Part of the Jazz festival provides for free public daytime shows up and down the island. This began in 1994 and “the fringe” came into being. Today the fringe is so popular; it is a draw card all on its own. Jazz on the Square; held on the Derek Walcott Square, Tea-Time Jazz; held at La Place Carenage, Jazz in the South; with V-Fort Soufriere and Balembouche, and Jazz at the Bay; held at Rodney Bay Marina. These fringe activities along with the main events have attracted yachts in scores, creating a mini ARC atmosphere in all the marinas in Saint Lucia. Most of the yachts, which visit during the Jazz Festival are chartered vessels based in Martinique along with other European and American flagged yachts sailing the Caribbean. The revenues generated during the Jazz Festival are berthing fees, hotel accommodations, utilities, fuel, taxis and telecommunications and provisioning.

The Jazz Festival contributes approximately EC\$1million dollars directly to the yachting sector during the seven-day event.

The Saint Lucia Golf Open held in June is beginning to attract a reasonable number of cruisers.

The Saint Lucia Game Fishing Tournament held in November attracts a large number of sports fishing vessels from the neighboring islands. In the last three years the event has received international recognition and impressive records have been set during the tournament.

One of the exciting and eagerly anticipated annual events in Saint Lucia is Carnival, which is now held in July of every year. Because carnival is so popular in many countries in the Caribbean, Saint Lucia, like other islands, has changed the scheduling of the celebration away from the traditional pre-Lenten period. This decision has brought out mixed views but to date appears to be a good one.

Most travelers from Europe and North America are attracted to this event, however unlike Trinidad and Tobago; Saint Lucia's carnival has not been able to draw visiting yachtsmen to participate. Now that the event is being held at the beginning of the hurricane season, many yachts do not participate, and concentrate instead on heading south. Data on yacht arrivals show no visible increase around the Carnival dates, however this event can be marketed to counter the effects of the hurricane season on yacht arrivals into the island.

The annual Bill Fish competition, now held in November has become a popular event on the yachting calendar. The tournament is organized by the Saint Lucia Game Fishing Association and receives excellent support from certain sections of the private sector. Like the Hackshaw Memorial tournament significant revenue is generated in duty free sales, however the event appears to be growing, showing signs of increasing visitor arrivals for small hotels and guest houses in the north of the island. The event is held annually at Rodney Bay Marina. The game fishing association is over 30 years old and has created vital links with all the Caribbean islands and has been able to attract yearly anglers from the United States of America, United Kingdom and Germany. With the present participation of the Ministry of Tourism and the Saint Lucia Tourist Board, this event has great potential. Although hard data was not available from the Tourist Board, figures from the Rodney Bay Marina confirms that the event generates EC\$100,000 in fuel sales, EC\$15,000 in berthing and EC\$20,000 in support services.

5.5 Anchorages and Harbours

□ General

Vigie Light House (White Flashing; group 2 every 10 seconds) serves as a major landfall for maritime traffic approaching Saint Lucia from the northwest. Moule-a-Chique Light (Flashing every 5 seconds) the second tallest light in the world serves the southern waters of the

island. Cape Marquis light (Flashing 5 every 20 seconds) situated on the northeastern coast serves vessels approaching Saint Lucia from these northeastern waters.

By day, the Pitons serve as landmarks for vessels approaching from the west.

- ***Rodney Bay Marina***

The approach to Rodney Bay Marina usually poses a challenge to first time yachtsmen to the area. Fourreur Rock light (Flashing 2, every 5 seconds - 23ft, range 2 miles) marks a rock to the south of the Marina's entrance. The entrance is marked by a set of leading lights bearing 098 degrees on approach. The entrance is also depicted by a set of entrance marker lights (port and starboard hand channel marker lights). The entrance is dredged to a depth of 10 feet.

Fourreur/Barella Reef Light (white), Flashing 2 Every 5 seconds is located on a low-lying rock about a quarter of a mile off the entrance to Rodney Bay. The water around the rock allows for safe passage on either side. The passage between the mainland is at a depth of 18 feet. It is safe to pass inside of Barella Reef on route to Port Castries.

The Rodney Bay Marina offers 232 side tide Berths with 32-36 ft between side tides with each berth having its own individual meters for both electricity and water. Showers, both hot and cold, and toilets are available for all berthing guests; customs and immigration on site; free docking whilst being cleared; mail collection and modern communication services including portable cellular phones.

The Boatyard services include dry storage for up to 80 boats and hauling for boats up to 21 ft. wide and 50 tons; repairs in wood, fibre glass, aluminum, stainless steel and bronze; diesel engine repairs; wet sandblasting; osmosis treatment; spray painting and dry sand blasting can be arranged; duty free fuel for outgoing boats.

Rodney Bay Marina offer several shore facilities; it has its own Shopping Complex with a wide variety of boutiques and stores including a bakery, café, pizzeria, liquor store, supermarket, pharmacy, book, gift shops, car rental office, travel agency, banks, restaurant and bar with swimming pool. (*See Appendix E- Rodney Bay*)

- ***Castries***

The entrance to the Seaport of Castries is directly south of the Vigie lighthouse. Like the Rodney Bay Marina, the entrance is also marked by a set of entrance lights (quick green and red). The entrance channel is marked by a set of lead lights (fixed red) bearing 121 degrees on the approach. Tapion Rock light (Flashing quick white) is located to the south of the harbor entrance.

Yachts are required to report their intention to enter port Castries via VHF ch 16 to the Vigie Signal Station. Similarly upon departure all yachts are required to inform the Vigie Signal Station of their intention to proceed to sea.

Main Channel Depth: 12.9 m; Width: 122m; Turning Circle: 426.8 m (diameter); Depth 12.9 m.

□ **Port Terminal and Facilities**

• ***Castries***

The following berths are found in and around the Castries harbour:

Berth 1-3: Port-Owned & Operated; Total length: 357m; Cargo: Break bulk & general.

Berth 4: Port-Owned & Operated; Total length: 152; Depth: 10.67m; Height of Berth above MSL: 1.5m; Cargo: Containerized.

Berth 5: Port-Owned & Operated; Total length: 158.5m; Depth: 10.67m; Height of Berth above MSL: 1.5m; Cargo: Containerized w/ Ro/Ro; facilities; Ramp width: 14.6m.

Berth 6: Port-Owned & operated; Total length: 137m; Depth: 9.75; Height of berth above MSL: 1.8m; Cargo: Banana operations (twice weekly); vessels with open storage cargoes and cargoes delivered ex-ship.

• ***Point Seraphine***

There are two dolphin berths for cruise ships only, with lengths of 164 ft. (50 m) each have been upgraded to the following: Pointe Seraphine No. 1 Length: 400 ft, Depth: 35 ft; Pointe Seraphine No. 2 Length 300 ft; Depth: 35 ft. Depth approximately 35 ft. (10.7 m). Duty free shopping.

• ***Ganthers Bay***

Limited anchorage is available within Castries Harbour; Vigie Creek/Ganthers Bay and the inner harbor area near the city are considered suitable anchorages. Skippers who choose to anchor are advised to clear customs at the Castries dock first. (*See Appendix F- Port Castries, Point Seraphine and Ganthers Bay*)

• ***Marigot Bay***

Marigot Bay/Harbour, one of the region's most sheltered harbours, lies just about one mile due south of Hess Oil Terminal at Cul de Sac. Marigot is considered as one of the Caribbean's most beautiful anchorages. After sunset the Hess Oil Terminal serves as an excellent landmark, as it is brightly lit. By day the Oil Terminal also serves a landmark. The only aid to navigation within the bay is a port hand buoy, which marks a shoal in the northern section of the channel entrance.

When entering the Harbour mariners are advised to remain to the south side of the channel. Steep sides to the south, palm trees and heavy vegetation on the northern side depict the channel entrance, which is somewhat gently sloping.

Marigot is an official port of entry and has both customs and immigration facilities on site. The Moorings, a commercial entity manages yachting facilities (yacht charter operation)

situated in the southern section of the inner bay. The Moorings makes provisions for the supply of water, ice, gasoline and diesel to yachts. A laundry service is also available.

MARIGOT BAY: Marigot Bay lies approximately 6 miles south of the Castries Harbour and is an official Port of Entry. The Moorings Ltd manages all commercial activities at the Marina. Restaurants and shops are located nearby. Water, fuel and ice are also available. In addition to long and short-term dockage, Bareboat and Skippered Charters are offered. *(See Appendix G- Marigot Bay)*

- ***Soufrière***

Soufriere is home to the island's most famous twins, the Piton. Skippers approaching Soufriere from the North should remain well clear of Grand Caille Point, south of Anse Chastanet. The Soufriere bay is the deepest of all bays in Saint Lucia and this has placed constraints on the nature and extent of berthing facilities there. Soufriere is an official port of entry and due to the nature of the deep bottom, limited anchorages can be found to the north and south sections of the Soufriere Bay. The entire Bay falls under the Jurisdiction of the Soufriere Marine Management Authority (SMMA). The SMMA is responsible for managing the marine resources and anchorages in the area. Soufriere has limited berthing space for powerboats and yachts. *(See Appendix H- Soufriere Bay)*

- ***Vieux Fort***

The seaport of Vieux Fort is home to the Saint Marine Terminals Limited (SMLTL). The SMLTL manages the operations at the Seaport of Vieux Fort. The main activity there is container transshipment with some domestic traffic. Vieux Fort is also home to a modern fisheries complex, which is located to the north of the port facility.

The approach to the port is marked by a set of leading lights- Flashing quick red (059 degrees True). The Mathurin Point light (white group Flashing 2 every 5 seconds) marks the Southern Point Mathurin Point. A series of Entrance channel lights marks the northern and southern limits of the navigable area within the port.

Anchorages for yachts can be found in the southern section of the Seaport.

- ***Port Vieux Fort***

Berths Container; (Lo/Lo and Ro/Ro); length: 210 m; Finger pier: Cargo: Break bulk, bananas and others; Length 152m; Depth 10.7m; TEU Bottom Spaces: 750 (Dry Boxes); TEU Points: 40 for Reefer Boxes. Other Features: New Mechanical Workshop: 24,000 square ft; High mass lighting; Improved channel navigational aids; Improved security lighting and fence; and provision for the future installation of a gantry crane. This second Port is managed and operated privately by a subsidiary company of the Saint Lucia Air and Sea Ports Authority, known as the Saint Lucia Marine Terminal Ltd.

- ***Anchorage***

There is mainly deep water from Castries Harbour to the Pitons in Soufriere. The coastline is primarily rocky with some beaches situated at various sections along the coast. The main beachfront areas span from the Castries Seaport northwards.

A distance of about a quarter mile offshore will ensure that all dangers are cleared when sailing along the western coast. Skippers should pay particular attention to Tapion Rock - south of the entrance to Port Castries and Grand Caille Point to the south of Anse Chastinet in Soufriere.

Anse Cochon is an exclusive get-away from the commercial element associated with yachting. Anse Cochon is located just about three miles south of Marigot Bay; it is an excellent anchorage for overnight or day and one of Saint Lucia premier snorkeling and scuba diving spots. Other good anchorages are: Marigot Bay, Ganter's and Rodney Bay.

5.6 Patterns and levels of use

Since a great percentage of the yachts visiting Saint Lucian waters are cruisers, they inevitably visit all of the major anchorages and marinas. Yachts, which arrive from the northern end of the island invariably either drop anchor off Reduit and Pigeon Island beach or in the Rodney Bay Lagoon, once their arrival time is after dark. Once they clear customs they most often berth at the Marina for necessities such as: water, electricity, provisioning, entertainment and services. These yachts will move south slowly often within one week, next stop Marigot.

Marigot provides the option of anchorage or along side berthing. Because the Marina base at Marigot is primarily for the charter fleet of Moorings, most of the visiting yachts have to anchor out in the bay.

Saint Lucia Air and Seaports Authority confirms that during 2000 a total of 3409 yachts cleared into the Rodney Bay area. These vessels carried a total of 16,069 visitors into the island. This is a result of the surrounding amenities and recognition of this area as the primary touristic hub on the island. During the peak months, November to April, there is a minimum of 70 yachts on anchor in the Rodney Bay basin and in the lagoon. Rodney Bay Marina enjoys 100% occupancy of its 232 concrete docks in the months of December and January. This is primarily due to the ARC, which has an average of 230 participants each year. After January, the occupancy of the Marina is approximately 80 % with a dramatic decline immediately after the Jazz festival. The period that follows: May to October is regarded as the hurricane season, causing most yachts to sail further south to Trinidad and Grenada.

The dock occupancy during this period is at a monthly average of 40%. However the opposite occurs with the dry storage at the boatyard. During the hurricane season vessels whose owners have decided to stay in Saint Lucia prefer to store their vessels in the Boatyard. During the months, May to October, a monthly average of 100 vessels are stored on land. That number drops significantly during the months November to April, when owners escape the winter to sail

and enjoy the Caribbean sun. The number of yachts stored on dry land averages 80 to 60 vessels during November to April.

The use of Ganter's Bay and Castries harbor remains the same all year round. Ninety percent of the traffic at Ganter's is directly related to the 30 yachts and small motor vessels stationed there. On a daily basis three or four yachts can be seen on anchor enjoying the ambience of the bay. Yachts in transit from Martinique often use the Castries harbor to clear in and out and as an anchorage spot for provisioning, due to its close proximity to the Castries market. However because of the potential high swells and surges, the number of vessels that use the island's main port is very small: an average of two yachts per day, year round.

Marigot bay attracted 1193 yachts during the 12-month period in the year 2000. The number of visitors clearing into Marigot from these vessels was 6,135. However because of the limited space in the Marigot bay during the season; November to May a monthly average of 35 yachts can be found on anchor. However the Moorings fleet of 29 occupies the wooden side piers. The same pattern of use as in Rodney Bay is evident at Marigot. Once the hurricane season begins the number of vessels on anchor drops to a monthly average of 17, but unlike other marinas and ports on the island, the dock occupancy remains the same because the docks and vessels belong to the Moorings charter operations.

Because of the lack of Customs and Immigration officials at Soufriere it is very difficult to confirm the number of vessels that use the Soufriere Bay. However data is available from SMMA, which confirmed that a total of 3000 yachts used the Moorings in the Marine parks managed by this authority. (See figure 9 Graph showing number of yachts recorded by SMMA) However there are a limited number of Moorings in the five designated mooring areas within the SMMA.

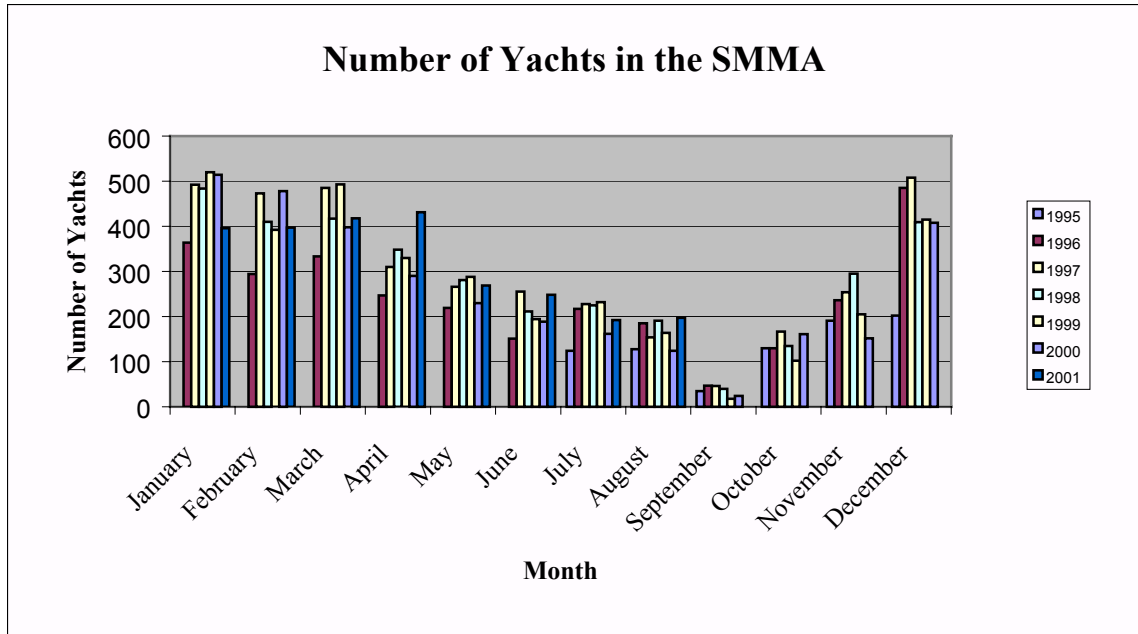


Figure 9: Number of yachts visiting the SMMA during 1995-2001

Source: Soufriere Marine Management Association (SMMA)

The V-Fort harbor located in the far south of the island has customs and immigration facilities, however very few yachts use this facility because of the location, and the lack of services such as: moorings, and water taxis.

6. THE ROLE OF YACHTING WITHIN THE NATIONAL SUSTAINABLE DEVELOPMENT FRAMEWORK

6.1 On-Shore Developments

Saint Lucia has two major Marinas, one underdeveloped docking facility, and two dry dock facilities. Apart from the marina at Marigot Bay all of the above mentioned facilities are concentrated in the North end of the island, with the only exception being SMMA, which is in the Southern part of the island.

Rodney Bay Marina is a privately owned property strategically located within walking distance of the vibrant tourist life in the Rodney bay hub. To the North of this marina is Gros Islet which has managed to retain much of its original character with its French colonial peasant style and its many bars and restaurants which serve fish fresh from the sea.

The Marina is located in the shelter of the Rodney Bay lagoon, and provides a tranquil and protected enclave for up to 232 side tie berths. The overall draft of the Marina is 14 feet (SLASPA dredged the entrance and access to the docks in early late 1999). The Marina provides individual metered water and electrical outlets on all of its berths. Electricity is 220 volts however transformers are available for rent. Showers and toilets are available for all berthing guests, however vessels on anchor, for a small fee, can use these facilities. Customs, Immigration and Air and Seaport Authority are on site along with 24 hour Marina security.

The Rodney Bay Marina Boatyard offers dry storage for 110 vessels and can haul out vessels up to 21 feet wide and a maximum of 50 tons. The boatyard carries out repairs in wood, fiberglass, aluminum, stainless steel, and bronze as well as all engine repairs. The Marina and Boatyard cover a total of eight acres with seven major buildings comprising: Marina facilities, Charter facilities, Engineering workshop, restaurant, public toilets, showers and banks. The Marina has on site facilities that handle garbage and used oil disposal, it has 24,000 square feet of shop rental space, and one acre of land available for further expansion.

Ganters Bay located adjacent to the Point Seraphine duty free shopping complex is presently a very run down small Marina. There is no serious infrastructure in place on site to provide the services that the present long-term customers require, however there is access to water, electricity and telecommunications. There are presently no concrete piers, however, some wooden side piers are still being used, which are very run down. There are garbage receptacles on site and the water shows signs of extreme oil and diesel pollution. There is some expansion-taking place in Ganters by operations, which are squatting on land close to the waters edge, some of these operations include out of water repairs and catamaran day coastal charter reception areas. This may be as a result of the users, which are 90% powerboat type vessels. Ganters Bay has a depth of 16 feet, and provides berthing for 30 locally based vessels. However its location does not offer safe anchorage because of the location of a breakwater wall, which diverts any swells or wave action into the bay. Some marina services are within close proximity: Castries Yacht Center (CYC) operates a 20 ton travel lift and can store up to 50 vessels, and provides contractual services in: mechanics, carpentry and a small chandlery operation. CYC is located

on leased land that is owned by the Saint Lucia Air and Seaport Authority. Ganters' location makes it perfect for a small type charter base operation. Its close proximity to the Vigie Airport, Point Seraphine and Castries City makes it a very valuable property with immense potential. The marina operations at Ganters has no on site Customs or Immigration nor is there the presence of SLASPA.

Marigot located just before the fishing village of Anse La Raye is primarily a charter base for the Moorings charter fleet. The charter base began in 1983 and now caters to a fleet of 29 vessels, with onshore facilities: dual electrical voltage, water and 16 wooden side piers. The facilities are specifically set up to target a charter base operation. Onsite are provision stores, duty free open warehouse for the fleets spare parts and offices. There is a customs facility onsite, however there is no Saint Lucia Air and Seaport authority presence and although immigration is on site the office does not operate on weekends. The Moorings Marina is supported by the nearby Marigot Beach property, which has just been sold to a new company. All of the general amenities such as: restaurants, postal service and taxis are present but scattered through out the area. The lack of a Port Officer allows ad hoc anchoring and continuous visitor harassment, and over zealous salesmen. Although the Moorings base has a garbage facility, this facility cannot accommodate the heavy volumes of garbage and used oil from yachts on anchor.

Water taxis are present but very disorganized, and not licensed for water operations. These water taxis often collect the garbage from visiting yachts for a fee, however there is no control regarding the disposal of garbage collected. Most of this garbage is dumped indiscriminately in the mangroves, within the bay. Marigot marina is an excellent charter base, however it is being pressured to service the needs of all yachts, which use the Marigot Bay, and as a result its facilities cannot effectively handle this demand. It offers all marina services: electricity, water, communications and provisioning, however presently this area lacks an effective solid waste disposal system.

Although these facilities are operating and are used by visiting yachts, there is very little understanding by the Government authorities of the yachting industry. The relevant authorities have not studied the yachting industry, and to date there is no study confirming the yachting sector's role in the sustainable development of Saint Lucia.

6.2 Ancillary services and Infrastructure

Saint Lucia has all the necessary infrastructure needed to service the yachting industry. The island has a developing land based tourism sector, which has fostered a fast growing service sector of restaurants, hotels, taxis, entertainment and provisioning outlets. However the concentration of these ancillary services is in the northern end of the island. Soufriere, with its growing yachting traffic, needs the mirage of touristic services in order to cater to all the demands of visiting yachts. All the ports and Marinas with the exception of Soufriere need an efficient and effective water taxi system to service visiting yachts. All the other ports and Marinas should implement the SMMA model. The SMMA model continues to pull together and manage the resources of local fishermen, hoteliers, divers, yacht operators and the Soufriere community to manage and develop all economic activities related to the Soufriere coastal area.

All the ports and marinas on the island do have the needed infrastructure such as water and electricity however the availability of efficient liquid and solid waste management systems is lacking. Presently none of the ports or marina has the ability to deal with human waste generated from visiting yachts.

❑ **Gaps in Services available to Yachts**

Several key features are missing in the yachting industry in Saint Lucia:

- Proper oil disposal systems
- Inability to attract skilled labor from anchorage areas.
- Lack of skilled labor in: Yacht brokerage, lack of consistency in service
- Lack of product sensitivity from close communities.
- Lack of essential mooring facilities in anchorage areas, for example, buoys.
- Negative perception of yachting from communities where yachting facilities are located.
- Inadequate infrastructure in Marigot to handle human waste generated from yachts
- Inadequate infrastructure in Rodney Bay and Gros Islet to handle human waste from yachts.
- Lack of a skilled service industry: (such as Trinidad & Tobago, Antigua & Barbuda, and the BVI).
- Lack of quick response law enforcement.

6.3 Communities which are dependent on yachting

The following communities are highly dependent on the yachting industry:

- Soufriere
- Marigot
- Anse La Raye
- Castries
- Rodney Bay Lagoon
- Gros Islet
- Canaries

The highest concentration of yachting activity is within the Rodney Bay area, which is the Reduit beach, Pigeon Point, Rodney Bay lagoon and Rodney Bay Marina. This is as a direct result of the high infrastructure and tourist-related activities, making the immediate communities very dependent on this sector. The fishing village of Gros Islet provides some services: laundry, entertainment, sail repairs and general labor. The restaurant and entertainment services in the general Rodney Bay vicinity are highly dependent on visiting yachts.

Marigot and Anse La Raye are two communities further south which are very dependent on yachting. The community of Marigot surrounds the Marigot Bay, where all of the service amenities are scattered. A random interview of 12 businesses operating in Marigot estimated

that one out of every three persons in Marigot is engaged directly in the yachting sector. Most of the local skippers and delivery crews are from communities in and around Marigot. The fishing village of Anse la Raye, because of its close proximity to Marigot is also dependent on the Yachting sector. A high percentage of the bars and restaurants cater to visiting yachts.

Soufriere, being a picture-perfect scenic town with adequate anchorage areas attracts several yachts heading south to the Grenadines. The restaurants, bars, water taxis and guesthouses are very dependent on this sector. A high percentage of the local skilled marine related labour force is from Soufriere.

Canaries, a fishing village within close proximity to Marigot and Soufriere, is lightly dependent on the small anchoring area called Anse Cochon. This small bay is abuzz with daily activity from day boat coastal charters, visiting yachts and tourist traffic from the nearby recently opened Ti Caye hotel. Most of the persons engaged in daily trading of handicrafts, fruit vending, and water taxis are from Canaries.

Ganters located in Vigie within close proximity to Castries, the capital, is the homeport for 90% of the locals engaged in day boat (powerboat) coastal charters, deep-sea fishing and whale watching. As a result, the two restaurants located on either side of this small marina service the tourists who use these services. Pointe Seraphine, the island premiere duty free shopping complex, benefits due to its close proximity to Ganters Bay.

While these communities are dependent on yachting, few of these communities have been able to provide adequate provisioning, boat repairs and facilities for visiting yachts.

6.4 Various stakeholders and possible user conflicts

□ Stakeholders

- Ministry of Tourism
Responsible for charting the development and regulation of the yachting sector.
- Saint Lucia Air and Sea Port Authority
Responsible for all registration, inspection and safety issues dealing with yachts.
- Marine Police
Responsible for surveillance of all yacht traffic entering and leaving Saint Lucian waters.
- Department of Fisheries
Responsible for the issuing of fishing licenses and the surveillance and monitoring of yachting traffic in relation to marina designated areas.
- Saint Lucia Game Fishing Association
An association of private power boats, responsible for the organization of the Saint Lucian Bill Fishing tournament.

- Saint Lucia Whale and Dolphin Association
An association of private boat owners engaging solely in whale and dolphin watching, whose main interest is ensuring this sector is developed.
- Soufriere Marine Management Area
An association drawing from the resources of government agencies, community of Soufriere, fishermen, hoteliers, dive operators and yacht operators to manage the coastal zone of Soufriere.
- Yachting Establishments
Marinas, boatyards, charter companies, yacht repair companies, and all other services directly related to the yachting sector.
- Day Boat Charter Association
An association of private yacht owners engaging in daily coastal charters, main responsibility: the approving day boat charter licenses.
- Saint Lucia Hotel and Tourism Association
An association of all stake holders (land and water based) in the island's tourism industry.

❑ **User conflicts**

Saint Lucia has a coastline of remarkable beauty and natural wealth, on which it depends heavily. This dependency is threatened by the increase in tourism activities. Saint Lucia's coast line is used by: sea bathers, fishermen, yachts, dive operators, deep sea fishing charters, whale watching operations, offshore charters, and land based industrial and agricultural entities along with other users. As a result of these activities along the coastline the following is evident:

- Discharge of sewage and wastewater into bays and harbors.
- Indiscriminate dumping of solid waste along watercourses and the coastline.
- Illegal fishing in Marine reserves and the practice of indiscriminate fishing.
- Physical reef damage caused by divers and anchoring of boats.
- The construction of unauthorized coastal structures such as jetties.
- Insufficient collaboration between the tourism and enforcement agencies and insufficient enforcement capabilities of the marine police to deal with thefts on yachts and illegal fishing and diving.
- Lack of marked fairway areas in bays and anchoring areas.

- Impact of anchoring close to beaches where land users frequent. Negative perception of yachting by locals and its contribution to harassment and crime.
- Lack of adequate zoning for coastal areas in high use: Rodney Bay, Marigot and Anse Cochon.
- Conflict among users due to lack of sufficient infrastructure in appropriate areas and the lack of respect and understanding for each other's resource needs.

7. EMPLOYMENT ASPECTS OF THE YACHTING SECTOR

7.1 Direct and indirect employment generated

Direct employment can be defined as jobs created and sustained due to the yachting industry. These jobs can be clearly linked to the yachting industry. If the yachting industry were to cease to exist these jobs would not be in existence. A survey of marinas in Saint Lucia revealed the following direct employment generated:

- Dock Masters
- Crane Operators
- Marina Managers
- Boat Yard Managers
- Sail makers, sail loft
- Electrical engineers
- Charter companies
- Fuel operators
- Mechanics
- Riggers
- Fiber glass workers
- Reservations workers
- Marina restaurants and supermarkets

These can be further classed as managerial jobs, administrative jobs, jobs relating directly to yacht repair, maintenance and storage.

The yachting sector also indirectly creates jobs, for example, through support services which were not created as a result of yachting but the yachting sector creates a demand for services or products. Indirect employment generated consists of:

- Laundry services & garbage disposal
- Taxi services
- Car rental
- Supermarkets
- Security
- Travel Agencies
- Tour Guide Services
- Banking and Foreign Exchange services
- Fuel Operations

Essential to assessing indirect employment generated by the yachting industry is recognising that a visiting yachtsperson requires and uses all the products and services that a visitor arriving by air would use.

7.2 Direct and indirect income, wages and salaries

The demand for goods and services by visiting yachts creates a requirement for labour. In addition to the businesses that provide services directly to the yachting sector (such as marinas, ports, etc.) further businesses supply the yachting industry with consequent downstream effects on other economic sectors. Employment is therefore created in all these business activities that service the yachting sector indirectly. In addition, expenditure of household income due to expenditure from visiting yachts generates further induced employment throughout the Saint Lucian economy.

7.3 Employment Practices

□ Number of persons employed

Six facilities utilized by yachts persons and their vessels were surveyed to produce the following information. (*See Appendix J for questionnaire used*) On average there are 15 persons directly and full-time employed; the highest number employed being 32 employees at Rodney Bay Marina and the lowest number two at Ganter's Bay. The figures vary so widely due to operation size and totality of services offered. Only two of the five marinas use seasonal workers both employing eight persons. It can clearly be seen that all yachting facilities use a team of full time employees; and despite having high seasons and low seasons for the arrival of yachtsmen there are year round demands which must be met and a skills base which must be maintained and readily available.

□ Employment Structure

The basic operating structure of yachting facilities such as marinas and boatyards can be seen as below:

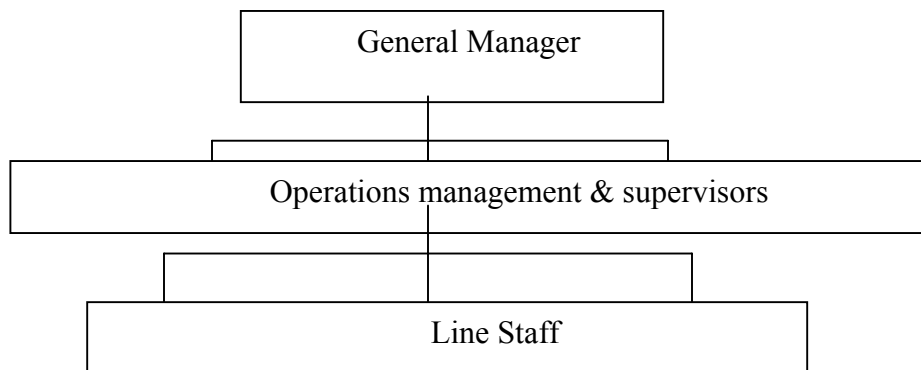


Figure 10: Basic Operating structure for marinas

Within this basic structure, there is a general manager, operations management and supervisory staff consisting of on average 4-5 persons and line staff which can vary between 2 to 28 persons. Generally operations management will consist of a Boat Yard manager, Dock Master, Maintenance Manager, Office and Accounts Manager. These roles may not always be individualized as an individual may hold dual roles. Rodney Bay Marina (RBM) is one of the yachting facilities with a more sophisticated hierarchy. This stems from its all-inclusive nature and highly developed departments. RBM has an operations management team of four persons, a General Manager, Boatyard Manager, Maintenance Manager and Docks Manager/Master. Their break down is as follows:

- Management- 4 persons
- Administration and Accounts- 7 persons
- Boatyard- 9 persons
- Docks- 3 persons
- Domestic- 4 persons
- Maintenance- 5 persons

This cannot be seen as a typical structure, as at most yachting facilities such a complete range of services may not be offered or are not set up in distinctive departments with such large teams. These facilities may have staff of a more flexible nature e.g. where maintenance also performs administrative duties and management performs accounts functions. Furthermore for some of these operations accounts may be a function that is outsourced.

□ **Recruitment of Labour**

Due to level and specialization of skill required, recruitment is an area that in some places is formalized. Two out of the six places interviewed describe their recruitment as follows:

1. Outline position vacant and requirements to fill the job
2. Advertise for post formally and informally
3. Interview
4. Assess persons interviewed
5. Select
6. Offer job and terms of employment

The remaining four places use word of mouth to look for new employees. This form of recruitment can be very dependent on trusting present employees' judgment of character, it normally means the person hired is familiar with present staff, hence, a reduced settling in period. There is also the risk that the employment relationship begins very casually without defined employee-employer expectations. Within this industry word of mouth can be very effective and poaching from other yachting facilities is a given. This can be further explained in considering the lack of availability of skilled yachting workers available in the labour force.

On average, of the six places surveyed, 67% report that 26-50% of persons who apply for jobs have not had any past experience or knowledge in the industry or required fields and 33% report that 0-25% of persons who apply for jobs have had past experience or knowledge in the

industry or required fields. This is very significant when one considers the need for persons skilled, for example, in the following areas sail makers and fiberglass personnel. This puts pressure on current employers to ensure that they begin training workers using their current skilled workforce. This in turn means management must do effective manpower planning. This is more important at this time than ever before, as government has recognized the future potential of the yachting industry and implements new measures and policies to encourage yachtsmen and longer periods of stay.

As with all other industries the yachting industry is subject to all existing labour legislation and recommended practices. This encompasses the following areas and legislations: number of days given for holiday based on duration of employment, sickness pay, general work rates, procedures for discipline, dismissal and redundancy, conditions of severance and maternity rights.

Presently the labor code in Saint Lucia does not make a distinction between full time workers and seasonal workers. Most of the seasonal workers who are employed in the yachting industry are called freelance workers. Such workers operate within the ports and marinas offering services such as cleaning, varnishing, mechanic services and boat care taking. These persons are not employees of the establishment where they operate and, as such, do not fall easily in any employee classification in the present labor laws. This creates a situation in which parties usually take advantage of each other's services, for example, persons who offer cleaning services use water and electricity paid for by the marina they operate in. Further, independent contractors who operate within marinas and port facilities are not represented in the present labor code. This is partly due to their status as quasi entrepreneurs and quasi employees. Saint Lucia does not have a Marina Trade Association, therefore such persons - freelance workers and independent contractors - do not have adequate representation and this allows inconsistency in the way they are treated and how their services are engaged.

7.4 Required and available skills

Due to the physical structure of yachts and the needs of yachts persons, people with specific skills are required to provide services. Below is an outline of the specific skills required and the reported availability.

Required Skill	<i>Available</i>	<i>Unavailable</i>
Marine Mechanics	<i>X</i>	
Boat Cleaners	<i>X</i>	
Riggers	<i>X</i>	
Fiberglassers	<i>X</i>	
Skippers	<i>X</i>	
Marina Management Skills		<i>X</i>
Administrative and Accounting	<i>X</i>	
Boat Handling	<i>X</i>	
Yacht Mooring installation		<i>X</i>
Certified Scuba Divers		<i>X</i>
Scientific monitoring of water quality and carry capacity of harbours/marinas.		<i>X</i>
Basic outboard engine repair	<i>X</i>	
Computer network and website administrators		<i>X</i>
Public Relation (outreach and education)		<i>X</i>
Infrastructure maintenance	<i>X</i>	
Security	<i>X</i>	
Advanced outboard engine repair and maintenance	<i>X</i>	
Sea Worthiness	<i>X</i>	
Water sports instruction	<i>X</i>	
CPR trained persons	<i>X</i>	
Hydraulic mechanics	<i>Limited</i>	
Fabrication and machine operators	<i>Limited</i>	
Cosmetic and re-finishing staff	<i>Limited</i>	
Quality varnishers and painters	<i>Limited</i>	
Wood craftsmen	<i>X</i>	
Experienced sourcing personnel	<i>Limited</i>	

Figure 11: Available and Unavailable skills within the Yachting Sector.

Source: Yachting Survey 2001

It must be noted that the skills, which are available, are in some circumstances not available in the quantity required. It can be that there is one highly skilled person in a specific field who due to this shortage is contracted out to all yachting facilities. Presently in Saint Lucia there is a need for highly skilled labor to service the growing yachting industry. The level of knowledge and experience of most of the Riggers and Fiberglass specialists are not on the required level to encourage visiting yachts to use Saint Lucia as a serious refitting base. It is very important that Saint Lucia encourage the development of a highly skilled workforce to service the technical aspect of yacht repairs and maintenance. This is an area that could be further developed through local technical colleges.

7.5 Existing training facilities

Two out of the six places surveyed found that between 76%-100% of employees required training at the start of employment while the remaining four places found that 51%-75% of employees required training at the start of employment.

The following depicts the kind of training these employers find it necessary to give to employees.

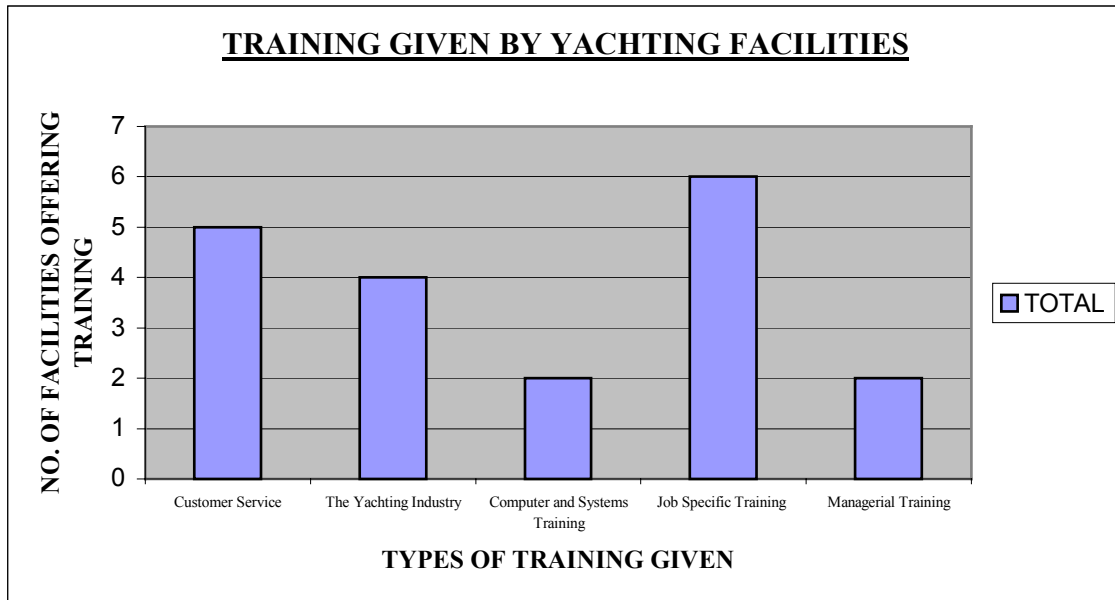


Figure 12: Training offered by Marinas

Source: Yachting Survey 2001

The above clearly shows that the focus regarding training is in the specific areas within which an employee will be placed to work as depicted by the bar “Job Specific Training”, for example, all six facilities surveyed give individuals training related specifically to the job they are hired to do. This can be limiting regarding having a flexible workforce. It is important that facilities, which provide services to yachts persons, try to have multi-skilled workforces. Having recognized that few persons seeking employment in the yachting industry have the necessary training, they need to plan for future demand. The “Sit next to Sally” method of training is traditionally used for job specific training. This is generally where an employee is placed next to an existing employee who performs the function, which they are to be trained in, and learns through observation, discussion and eventually practice. This method, like all others, has its advantages; it is short term, cost effective and on the job training, but its greatest failing is that the person who acts as unofficial trainer passes on whatever habits and alterations to the correct process they have acquired and devised through the years, this includes all bad habits as well. Therefore it is not always cost effective in the long run.

Very few places provide training in computer and systems training, the result is as we increasingly communicate through computers, at a rapid and immediate rate, we will not be able to efficiently and cost effectively communicate with clients. For an international industry such as

this one it is imperative that a focus be placed on computer and systems training. For example, lack of computer training to persons who perform technical tasks may hinder the introduction of technologies that trouble shoots, etc.

Another area severely lacking is training in marine and marina management. To date, on island and regionally there is only one Certified Marine Manager found in Saint Lucia. The provision of yachting facilities is like any other business hence it must be managed as such but within its specified context. Increasingly yachting customers are demanding higher levels of customer services. This can only be achieved through structured marina management.

Training options are limited with 100% of facilities using an in-house trainer for training, 33% of facilities using a local external person and 50% sending persons off island for training: Miami, Puerto Rico and United Kingdom.

Opinion differs in assessing what training support facilities exist as shown below:

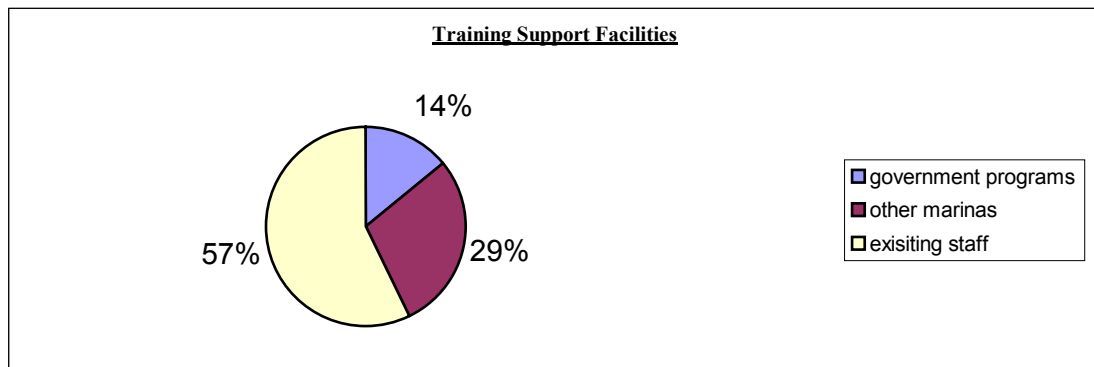


Figure 13: Training Support Facilities

Source: Yachting Survey 2001

Just over half of yachting facilities identify existing staff as a training support facility, a third identified other marinas and 14% identify government programmes as a training facility.

It can clearly be seen that at present existing staff is the major training asset. This clearly indicated that there is a limited training sphere. Opinion is split 50-50 regarding whether training needs are met; if it is met, it is found that it is only met by internal efforts.

The survey has revealed that assistance is needed to fully meet training needs. It is suggested that it can be done in the following ways:

- Seminars addressing use and serving of machinery though it is commented that there may first be a need to address literacy levels.
- Workshops on boat handling techniques
- Environmental Conservation and damage protection Seminars by experts in that field specific to the yachting industry.

It has also been suggested that training be provided in the following areas:

- Safety at sea
- Law of the sea conventions
- General information sessions on the tourism industry
- Marine rescue techniques
- Function of local bodies e.g. Saint Lucia Air and Sea Ports Authority, Soufriere Marine Management Association, Ministry of Tourism, Fisheries, Marine Police

7.6 Measures to increase the participation of Caribbean nationals in the industry

Marine facilities surveyed highlighted the following points:

- Industry specific education and public awareness of the industry
- Awareness of career opportunities
- Increased coverage of local regattas
- Encouragement and incentives to invest and participate in the industry
- Government and industry sponsored programs
- Less bureaucratic procedures for the importation of vessels

Presently the process of importing a yacht is handled as a customs entry through the Customs Department, however, no systems are in place to facilitate the registration of the yacht when imported. Therefore a vessel imported into Saint Lucia cannot provide necessary documentation to support its homeport. This contradicts the concept of importing one's vessel.

- Clear and streamlined licensing procedures for yachts. Presently the procedure involves too many agencies, and is not consistent.
- Focus on yachting as a career with provision of vocational courses
- Easier work permit application process and temporary work permits

To increase the participation of Caribbean nationals in the yachting industry, yachting companies and individuals involved in this sector must form an association that can join other international marine institutions, which can make available international training and certified industry standards for those involved in the industry. All of the companies interviewed noted that locals are not attracted to the industry because of the lack of information on the sector and the lack of ownership of the industry within the tourism industry, government.

By far the most important issue, which needs to be addressed, is the Customs duty regime governing the importation of yachts. While government's emphasis on collection of revenue is appreciated, governments must also recognize that the high duties applied on yachts and yachting spares retards the growth and development of all the island's yachting sector and has far reaching social implications:

- Caribbean nationals' participation in importation of yachts is not optimized.
- Caribbean nationals do not invest in boat charter operations; hence they do not experience feelings of ownership or understanding in this sector.
- Foreign boat charter companies have relocated to territories where the regulatory framework is more conducive to yachting. This creates a situation where the Caribbean nationals lose out on job opportunities.

In all the Caribbean islands with high duties on yachts, the governments of these islands have failed to collect substantial sums from this duty due to reduced volume of persons willing to pay these duties. This translates in the loss of substantial revenue for the islands' economies because of the missed opportunity from economic activity associated with yachts. (Yacht owners often do not base their yachts in islands where the duties are high).

When the volume of yachts are reduced in any of the islands, there is an automatic reduction in the quantum of visiting yachts persons, a reduction in the number of Caribbean nationals employed in the yachting sector, and a reduction in the overall multiplier effect within the island's economies.

8. THE SOCIO-ECONOMIC IMPORTANCE OF THE YACHTING SECTOR

8.1 The contribution of the yachting industry to GDP and Balance of Payments

To evaluate the contribution of the yachting industry to Saint Lucia's GDP, it is important to identify who visits Saint Lucia and in what numbers. The advantages of the island's proximity to North America and its traditional ties with Britain are reflected in the market share of visiting yachts. Measured by area of residence, data reveals that 25 % of yachts visiting Saint Lucia are from the United Kingdom, 25% from the United States, 12% from Spain, 5% from Belgium, 4% from the Caribbean, while 7% represent yachts from Canada. France, Italy, Sweden, South America and Switzerland represent small percentages.

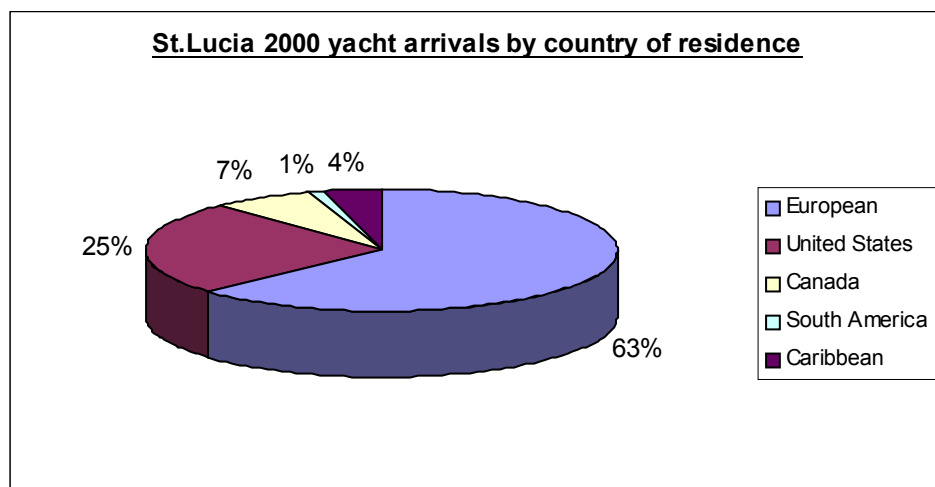


Figure 14: Yacht Arrivals by Country of Origin

Source: SLTB

Data on the yachting sector was only available for the year 2000; therefore an accurate comparative analysis for previous years could not be made.

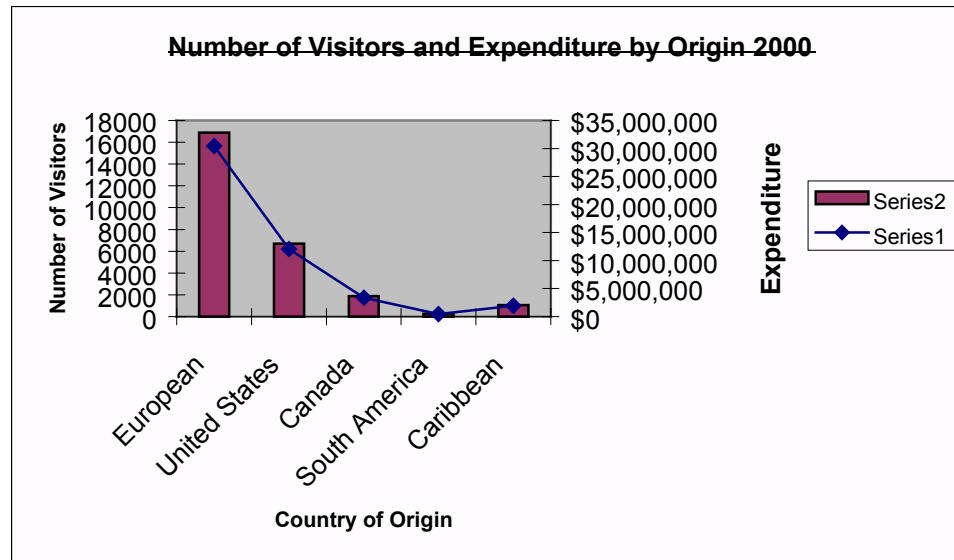


Figure 15: Number of Visitors and Expenditure by Country of Origin

Source: SLTB

The total impact of 2000-yacht visitors' expenditure is estimated at EC\$72.64m comprising direct impact of EC\$48.2m, an indirect impact of EC\$14.8m, and an induced impact of EC\$9.64m. These figures appear in the first column of the table presented in Figure 15. The direct impact of the yachting industry was 31% of Hotels and Restaurants sector contribution to total GDP in 2000.

GDP Impact of 2000 Saint Lucia Yacht Visitors Expenditure (EC millions)			
	GDP Impact	Share of 2000 GDP tourism	GDP normal Multiplier
<u>Direct Impact</u>	48.2	31%	.4146
<u>Indirect Impact</u>	14.80	9.5%	.1496
Induced Impact	9.64	6.2%	.0829
Total Impact	72.64	46.7%	.6471

Figure 16: Table showing GDP impact of 2000 Saint Lucia Yacht visitors Expenditure

The indirect impact of the yachting industry accounts for 9.5% of the Hotel and Restaurant contribution to 2000 GDP at market prices, with the induced impact accounting for 6% of the tourism sector contribution to GDP. The induced impact is relatively small compared with the direct and indirect impacts.

The normal multiplier is the ratio of an impact value to visitor expenditure in the tourism sector, which for 2000 was EC\$778.76 million. This multiplier shows the average impact of every dollar of visiting yachts' expenditure. The total impact multiplier for yachts visiting expenditure is estimated at .065, comprising a direct impact multiplier of .41, and indirect multiplier of 0.15 and an induced multiplier of 0.09, as shown in the third column of table.

□ **Impact of the Yachting sector on the Balance of Payments**

The balance of payments is a statistical statement that summarizes the economic transactions between the domestic economy and the rest of the world. It is divided into two separate accounts. The current account covers transactions in goods and services, income and transfers such as gifts, whilst the capital and financial account records the financial claims on the rest of the world and liabilities to the rest of the world.

Visitor expenditure (listed in Travel), to the extent that covers transactions between non-residents and residents, represents an export of services to the rest of the world (invisible exports) and is therefore a balance of payments item.

Saint Lucia 2000 Balance of Payments			
	Credit	Debit	Balance
Current Account	\$279,503,790	\$204,951,990	\$74,551,800
Goods and Services	\$198,663,940	\$109,641,780	\$89,022,160
a) Goods	\$25,804,430	\$0	\$25,804,430
b) Services	\$172,859,520	\$109,641,780	\$63,217,740
Travel	\$77,876,170	\$9,369,240	\$68,506,930
Other Services	\$67,090,750	\$74,291,100	\$(7,200,350)
Government Services	\$0	\$17,887,760	\$(17,887,760)
Income and Current Transfers	\$80,839,850	\$95,310,210	\$(14,470,360)
Capital and Financial Account	\$245,139,470	\$88,652,590	\$156,486,880

Figure 17: Table showing Saint Lucia 2000 Balance of Payments

Source: Ministry of Finance: Statistics

□ **Impact Estimates**

The limited resource base of Saint Lucia suggests that the economic importance of yachting implies the demand for imported good and services. As a result there is a strong link between tourism related inflows on the current account (exports of goods and services) and out flows (import goods and services). A strong vibrant industry creates the need for goods and services both at the direct and indirect level and therefore many of the goods and services required to meet the needs of the industry have to be imported from the rest of the world.

Impact of Yachting Expenditure on Saint Lucia 2000 Balance of payments		
	<i>Imports EC Millions</i>	<i>Percentage Share of Import Goods & Services</i>
<i>Direct Impact</i>	48.28	6%
<i>Indirect Impact</i>	9.45	1%
<i>Induced Impact</i>	12.56	2%
<i>Total</i>	70.29	9%

Figure 18: Table showing Estimated Impact of visitor expenditure on Saint Lucia 2000 Balance of payments

At the direct level these imports primarily represent merchandise purchased by visitors in the form of food, drink and other manufactured items. In 2000, imports of goods purchased directly by visitors amounted to EC\$9.45 million comprising of 1 % of total imports of goods and services.

Induced impact represents both goods and services purchased by the business establishments in order to produce further goods and services to be consumed by the visitor. These cover not only goods for reprocessing but also include services such as advertising management services and insurance purchased overseas. Induced impact EC\$12.56 m accounted for 2% of total 2000 imports of goods and services.

Thus, in summary, the total 2000 impact amounted to EC\$70.51m, comprising 9% of imports of goods and services.

□ **Impact of Visiting Yachts expenditure on Employment**

Yachting activities, being primarily services oriented, tend to be relatively labor intensive and thus employment in yachting industries are more responsive to changes in output. In much the same way that yachting visitor expenditure has direct, indirect and induced impacts on value added, employment is also generated by successive impacts of yachting visitor expenditure.

The indicator used is the average number of persons employed, which in 2000 was 63,470. This measure of average employment however does not reflect the seasonal variations that may occur in employment especially in the yachting sector and other tourism dependent industries such as hotels and restaurants. The following estimates were derived from data on present employment trend within the yachting sector.

For the year 2000, 350 persons were directly employed within the yachting sector. A further 225 persons are indirectly employed within Saint Lucia's yachting sector, since they engage in employment which relate to this industry. There was insufficient data to arrive at

employment impact estimates. However, based on questionnaires sent out to business in the sector, the average monthly income for persons employed in the yachting industry in Saint Lucia is EC\$1,500.

□ **Impact of yacht visitor expenditure on Government Revenue**

The yachting sector has a direct impact on government revenue through various taxes and other charges levied on tourist and an indirect impact through the tax collected from yachting related industries. In addition there is the induced impact generated by income taxes, commodity taxes and services charges paid by the recipients of yachting related income on that income or expenses.

Calculation of impact estimates on government revenues was not possible due to insufficient data.

Yacht Visitor Arrivals Expenditure by Type of Category	
Marina and other services	\$20,279,313.50
Food and Drink	\$7,725,452.00
Transportation	\$647,693.00
Entertainment	\$5,021,544.00
Handicrafts	\$289,704.48
Duty Free Shopping	\$1,593,374.00
Duty Paid Shopping	\$4,490,419.00
SLASPA	\$403,000.00
Customs Duties	\$387,595.00
Sub Contractors	\$3,857,644.00
Utilities	\$1,001,000.00
Government fees	\$2,607,340.31
Total	\$48,284,079.29

Figure 19: Table showing Yacht Visitor expenditure by category

Source: SLTB, Inland Revenue, RBM

Accurate information is required about the yachting industry to ensure informed planning and decision-making regarding the yachting industry in Saint Lucia. Currently there is little information available on the economic impact of the industry, the diversity of Marine tourism activities, the resources on which the industry depends, the major geographical locations of the various ports and marinas, and the issues faced in the further development of the industry including possible conflicts with other resource users. However it should be recognized that yachting is inexorably linked to terrestrial tourism, and it is therefore difficult to view and quantify in isolation.

8.2 The Yachting Industry's contribution to Government

Visitor expenditure from visiting yachts has a direct impact on government revenue through various taxes and other charges levied on tourist and indirect impact through the taxes and other revenue collected from tourism related industries. In addition, there is the induced impact generated by the income taxes, commodity taxes and other service charges paid by the recipients of tourism related income on that income and expenses.

For the purposes of this report the operations of the Saint Lucia Air and Seaports Authority (SLASPA) is incorporated as part of the general government as the Authority collects fees and taxes in various forms on Visitors.

9. THE ENVIRONMENTAL IMPLICATIONS OF YACHTING.ⁱ

It has been suggested that the coastal area is a unique resources system, which requires special management and planning approaches (UNEP, 1996).

Marinas and boatyards are essential for providing boaters with public access to coastal and marine waters. Routine activities at these facilities, such as boat maintenance and repairs and boat generated waste handling, plus construction and expansion of the facilities, can result in the release of pollutants and ultimately these have adverse water quality impacts. Although ships that visit marinas throughout the region are known to generate small amounts of waste daily, the cumulative effect of their operations in near coastal and coastal areas dictates the need to establish clear guidelines to protect the marine environment from polluting activities. Without these clear guidelines coastal ecosystems will continue to be at risk.

Marine pollution becomes even more pronounced in the sheltered and often highly visible Marinas in the island. Such wastes affect not only the general aesthetics of the area often affecting visitor perceptions, but also impact directly on the near shore coastal and marine environment and ecosystems, and indirectly on human health.

Marine pollution is defined by the Group of Experts on the Scientific Aspects of Marine Pollution (GESAMP) as “Introduction by man, directly or indirectly, of substances or energy into the marine environment (including estuaries) resulting in such deleterious effects as harm to living resources, hazard to human health, hindrance to marine activities including fishing, impairment of the quality for use of sea water, and reduction of amenities”.

9.1 Sources of marine pollution

Illegal discharges of waste from ships have been a very real problem in the Caribbean and Saint Lucia is no exception. Apart from beaches being contaminated with oil and litter, thousands of seabirds have died and the marine environment in the Caribbean has suffered badly. However, not all the pollution problems associated with marinas and other coastal areas originate from the yachting and shipping industry. A great deal of waste finds its way to the sea via rivers and other storm water run-off. The control of waste from the yachting sector must therefore be addressed within a broader holistic framework that also accounts for land based activities.

Marine and harbor pollution is generated by many sources, including storm water runoff, urban sewage, marina construction, and shipping wastes. Marinas in Saint Lucia are also associated with urban centers, resulting in significant levels of pollution from nearby settlements, which are often difficult to control. Most of the oceanic pollution (more than 75%), including municipal, industrial and agricultural wastes and run-off, as well as deposits from the atmosphere, comes from land-based activities and affects the most productive areas of the marine environment- estuaries and coastal waters (UNEP, 1994).

USE/ACTIVITY	POLLUTANT TYPE
Operations and Maintenance	
Boat Scraping/Painting/Cleaning	Hydrocarbons (Oil)
	Heavy metals
	Nutrients
	Sediments
	Solvents
	Acids/ Alkalis
	Other organics
	Surfactants
Engine Repairs/ Maintenance	Hydrocarbons
	Solvents
Dry Storage	Acids
Maintenance Dredging	Sediments
	Metals
	Hydrocarbons
	Nutrients
	Other Organics
BOATING	
Sewage	Nutrients
	Bacteria
Galley wastes	Plastics
	Paper
	Aluminum
	Food scraps
Vessel Maintenance	Used Oil
	Oil filters
	Batteries
	Paint
	Other hazardous material
Recreational Wastes	Fishing Line
	Other Floatable

Figure 20: Potential pollutant sources for Marina Operations

Source: Landuse, Tourism and recreational Uses Government of Saint Lucia

9.2 Liquid and solid waste management practices

□ Sewerage

Sewerage, also known as wastewater is one of the most significant pollutants affecting marinas in Saint Lucia and the region. It is reported that 80-90% of sewerage waste which is discharge into the Caribbean Sea is untreated. This sewerage contains harmful chemicals, nutrients, pathogens, dissolved material, bits of solid matter including human waste and garbage. Most small vessels have holding tanks for temporary onboard effluent containment. These must be emptied to reception facilities or at sea. When emptied near shore waters, it is found that marinas, which operate in Saint Lucia, do not have adequate facilities to pump out the disposed sewerage from their waters.

Storm water run-off contributes to pollution of waters through faeces, human and animal, and bacteria founding the soil, which is picked up as the waters drain into the sea. This can be significant in marina areas where waste matter brought onto land is not properly disposed and easily washed in surrounding waters. Run off waters often contain high levels of nutrients from commercial agricultural fertilizers, animal manure and sewage. Nutrients like nitrogen and phosphorus are essential for the proper growth and reproduction of general marine environments but excess can lead to increased turbidity of waters by excessive algal growth, which in turn blocks sunlight from penetrating to submerged vegetation, which then dies. Excess oxygen depletion from algal death can also kill marine life and stunt their growth; some algae could also produce toxins, which then enter the food chain.

Oils are another significant form of liquid waste; waste oil is generated through leakages from engines, lubrication oil, oily filters and bilge water and in the water repairs. The effects of these oils entering the water are far-reaching, the severity depending on the organisms involved, the type of oil, amount of oil and environmental factors. Firstly it results in the death of marine life due to smothering, toxic effects, and sublethal alterations in physiology, fecundity and community structure. At marinas it can prevent recreational use of surrounding waters and create an unsightly environment.

It must also be pointed out that the detrimental effects are not only on the coastal areas but also on human health through pathogens, which directly come into contact with or are ingested through contaminated food. This could result in swimmers itch, gastroenteritis, dermatitis, viral hepatitis, wound infections, cholera, typhoid fever, bilharzias and dysentery.

Solid waste is an equivalently significant problem. Vessels of all sizes generate garbage usually consisting of large amounts of plastics, household waste e.g. food waste, bottles, tins, etc. Small vessels are also likely to want to get rid of used batteries, bulky and small. Heavy rainfall is likely to wash large amounts of litter into the marina waters, much of which is non-biodegradable. This litter can be an aesthetic problem giving marina waters the appearance of severe pollution. It can also ensnare marine life and endanger the safety and livelihood of fishermen

Rodney Bay Marina like most marinas is “characterized by fine sediments such as mud and silt which is limiting to most marine species”ⁱⁱ These areas are also considered polluted areas which when dredged may cause the release on contaminants which may have local toxic effects.

9.3 Operating practices of marinas and ancillary yachting services

The following outlines the sources of liquid and solid waste pollution caused by operating practices of marinas and ancillary yachting services, and what measures can be taken as damage control.

Waste Categories/Generation	Sources	Management Measure
Wastewater	Kitchens, restaurants, bars, bathrooms, shower facilities, laundry	Must be collected and treated prior to disposal
Wastewater	Boat maintenance areas	Contain toxic metals from antifouling paints. This should not be allowed to flow into the marina or coastal waters
Vessel Generated waste	Small boats and Yachts	Oily waste, garbage, sewage and occasionally hazardous wastes which must be disposed of soon after arrival at the marina
Fueling Facilities	Fuel storage tanks and dispensing equipment	Must be properly maintained and regularly checked for leaks, corrosion and mechanical failure.
Boat maintenance and repair	In water and on shore	Includes painting, sanding, engine overhaul and hull maintenance. Special areas must be designated for this purpose.

Figure 21: Sources of Marine waste and management practices

Source: Landuse, Tourism and recreational Uses Government of Saint Lucia

At present there is an increased concern regarding the potential pollution caused by oils and antifouling paints used which have a heavy metal content. Tributyl tin is very high toxic component of some antifouling paints. Efforts are being made to promote less toxic paints but these alternatives are still not widely used.

General operational practices of marinas can result in damage to sea grass beds by dredging and anchor damage, which leads to loss of productivity within the bed.

The following are identified as known or potential marine habitat issues specific to marina areasⁱⁱⁱ;

- Boat/yacht sewerage causing algal overgrowth of coral
- Boat/yacht hydrocarbon contamination/ tainting of biota
- Garbage/ solid waste contamination of marine habitats
- Sedimentation of corals
- Anchor damage to coral/ sea grass
- Industrial effluents contamination of biota

The recently developed Code of Conduct for the prevention of Pollution from Small Ships in Marinas and Anchorages in the Caribbean region provides guidelines for administrators, facilities and users in the area of organizational and implementation requirements. Guidelines like this can provide significant direction for Marinas to curb pollution.

It is of key importance to have monitoring systems, as potential pollution impacts are dependent on effectiveness of controls and measures put in place. A monitoring system should include water quality, benthic marine organisms and a physical process. Despite much of the on site responsibility lying with marinas the following should also be seriously taken into consideration:

- Inadequate policy Legislative frame work
- Inadequate/ineffective planning and monitoring systems
- Inadequate institutional capacity
- Low sensitivity and awareness of resource users and the general public

Waste management at marinas can be considered in two key ways: active management and passive management. At present it may be argued that we practice passive management; a system of management which is not perceived to have any direct impact. It may include the location of defined landing places, or ensuring that they are waste reception facilities. It would also involve the provision of information to users of marina facilities relevant to the disposal of solid, liquid and hazardous waste.

What we need to move towards is a system with more active management. This is usually one where there is positive intervention usually within a statutory framework to prevent unsustainable developments and activities. The most obvious form is an integrated coastal zone management plan, which is legally binding and defines where developments for nautical tourism are allowed. This is inclusive of statutory framework for a waste management plan for handling waste deposited ashore and control of disposal sites and contractors, and penalties for offenders.

9.4 Water Quality

“Water quality and degradation of water quality is an area of key concern as water is needed by everyone in sufficient and suitable quality to live a healthy life. Water can carry non-infectious diseases and infectious diseases. Both of these are linked to water quality, non-infectious diseases are most pronounced in aquatic environments where chemical contaminants have effect. There is significant concern over marine ecosystems, which are directly affected by water quality.” *Based on water Quality Problems in the Caribbean^{iv}*

Marinas can contribute to reduction of quality of water in the following ways:

- Release of untreated or poorly treated sewerage into surrounding waters
- Release of oils, scrap metals, paints and general repair material into surrounding waters
- Failure to regulate vessel dumping in marina waters
- Failure to provide adequate refuse dumps on site
- Release of excess nutrients into waters
- Poor drainage to regulate run-off waters into surrounding waters
- Failure to enforce existing protective legislation

As a result due to the entry of pollutants into marinas and near coastal waters the quality of surrounding water is affected. See discussion on effect of sewerage entry into waters.

What must be done recognizing the polluting of waters are control measures. This includes treatment and disinfection of water and wastewater, implementation of facilities for water quality surveillance and finally legislation and regulations. These measures cannot be implemented by marinas in isolation but must be in collaboration and commitment with government bodies.

9.5 Changes to coastal zone and coastal habitats

Due to entry of solid and liquid waste into coastal waters there are arguably short-term and irreversible long-term damage to coastal zones and coastal habitats.

On a superficial level one of the obvious forms of damage is at an aesthetic level where the image of the shores are damaged with garbage etc.

The main coastal habitats, which are at risk, are coral reefs, sea grass beds, mangrove swamps, beaches and the actual water.

Chemicals, sewerage, excess nutrients, oils that may be released from yachting activity can negatively affect all of the above and this in turn can affect the coastal zones.

<u>Factor Affecting</u>	<u>Coastal Habitat Affected</u>	<u>Effect on Coastal Zone</u>
<i>Sediment, nutrients, chemicals, oils, anchoring, dredging</i>	<i>Coral Reef</i> erosion-anchor damage, algal overgrowth caused by sewerage and fertilizers, reduced water quality due to input of oils, hydrocarbons, heavy metals used in yacht repair.	<i>Less absorbance of wave energy leading to acceleration of shorelines. Reduction of diversity of biological communities and marine productivity.</i>
	<i>Sea grass</i> -severely damaged by dredging and anchor damage.	<i>Consolidates marine sediments and provides a nursery habitat for several marine species. This is lost and marine nurseries lost therefore reduction in marine diversity</i>
	<i>Mangrove</i> - pollution by solid waste and sewerage and fertilizers and oils, which enter.	<i>Mangroves degraded by pollution and encroachment leading to loss of wildlife specifically birds.</i>
	<i>Fish diversity</i> -variety of pollutants	<i>Reduced by loss of coral reefs, pollutants, and reduced water quality.</i>
	<i>Sea Turtles</i> - near shore construction	<i>Loss of species due to degradation of natural habitat, reefs, sea grass beds and liquid and solid waste, which reduce quality of waters.</i>
	<i>Water-land</i> based contaminants, sedimentation.	<i>Poor water quality affects all of the above.</i>

Figure 22: Effects to the coastal zones

Source: Landuse, Tourism and recreational Uses Government of Saint Lucia

There are at present various legislations, which apply specifically to the yachting industry and preservation of coastal habits and coastal zones.

In review following are some of the major contaminants, which result from yachting activities and marina operations:

- Sediments or suspended solids, which degrade marina water quality due to increased turbidity and the blocking out of sunlight. The result is reduced photosynthesis and harm

submerged vegetation, the destruction of spawning grounds for important food species can also occur.

- Sewage is one of the most significant pollutants as it contains harmful chemicals, nutrients, pathogens and viruses. Most small yachts have some sort of holding tank for temporary onboard effluents but these must be emptied to reception facilities or at sea. However, marinas operating in Saint Lucia do not have adequate sewage pump out facilities. This exacerbates the pollution problem from inadequate sewerage disposal by these small ships that often takes place in near shore waters. This has harmful effects for human beings who may bathe in contaminated waters. The result could be swimmers itch, gastroenteritis, dermatitis, viral hepatitis, wound infections, cholera, typhoid fever, bilharzias and dysentery.
- Increased nutrient levels in the water can lead to turbidity of water leading to death of submerged vegetation, changes in the distribution, abundance and diversity of marine species, oxygen depletion from death of algae, algae producing toxins which enter the food chain.

Presently there are no serious solid or liquid waste management systems at any of the marina, port or anchorage sites in Saint Lucia. Although several studies have been conducted since 1991, most if not all the recommendations have been implemented.

SUMMARY OF FINDINGS

Data specific to Choc Bay watershed

- Water quality from headwaters to Rodney/Castries Highway showed little evidence of trace metal or trace organic pollutants
- Water quality did show very high concentrations of total fecal coliform bacteria indicating strong inputs of septic sewage
- Bacteria and fine-grained suspended matter are deposited in estuary of River between Rodney/ Castries highway and river mouth.

Data specific to Rodney Bay Watershed

- High turbidity in Rodney Bay lagoon waters indicates significant algae and suspended solids content due to land erosion and excess sewage entry
- Content of trace metal pollutants in lagoon sediments is higher in Rodney Bay and reflects long term contamination due to anti-fouling paints and other yacht related pollution
- Limited indication of petroleum hydrocarbons
- High total and fecal coliform bacteria in lagoon waters due to incomplete on-land connections to central sewage systems and no sewage disposals for yachts
- Based on the estimated rate of disposal of sewage into ground, there is a potential to create significant nutrients loadings into the lagoon. Measurements of lagoon water quality showed high total of fecal coliform bacteria.

- Water exiting from lagoon transports bacteria north along Gros Islet beach: potential to also affect Rex Saint Lucia in section of reduit beach
- Bacteria levels along Gros Islet beach considered essentially closure: Rex Saint Lucian section of reduit beach is acceptable.

Data on entire Saint Lucian Coastline:

- The introduction of high levels of untreated or poorly treated sewage to the marine environment
- Spillage and leakage of oil and fuels from yachts and cruise ships
- Destruction of marine habitat through land reclamation and disturbance from pleasure crafts
- Imposition of poorly designed or planned coastal structures such as groynes and piers, which alter current flows and long shore transport of sediment.

There was not data specific to Ganter's, Marigot and Soufriere.

10. GOVERNMENT AND PRIVATE SECTOR POLICES REGARDING THE MANAGEMENT AND DEVELOPMENT OF THE YACHTING SECTOR

10.1 Interest Groups and Associations

- Saint Lucia Hotel and Tourism Association
- Day Boat Charter Association
- Saint Lucia Game Fishing Association
- Saint Lucia sailing club
- Saint Lucia Whale and Dolphin association
- Soufriere Marine Management Area.
- Canaries Marine Management Area
- Anbaglo
- Offshore charter companies
- Real estate and waterfront developers.

10.2 Explicit Tourism and Yachting Policies

Although Saint Lucia has shown the vision to create yachting infrastructure, the relevant authorities have not until recently put in place a cohesive and well-defined yachting policy. In 1994 and 1998 water-based tourism consultations were held by the government. To a large extent both consultations were very successful in bringing all the various interest groups and government agencies to dialogue. However visible action on recommendations put forward never materialized.

On 14 September 2001 the present government published policies. This has been the first clearly defined set of policies for this sector.

10.3 Government's institutional arrangements to manage the industry.

Presently government has in place arrangements through the Customs Department and SLASPA to regulate certain aspects of the yachting sector. The cabinet via individual application handles the approval of concessions for charter-based fleets to operate in Saint Lucia. Also there is a general position of encouraging Marina development on the island via the Ministry of Tourism. The control of boating standards for locally operated vessels; inspection, and quality control is policed and administered by SLASPA. This authority also administers the fee structure for charter vessels operating on the island. However it must be noted that although some measures are in place, most are counter-productive placing more emphasis on the supervision of yachting traffic rather than harnessing further development.

10.4 Sectorial Incentives

Incentives for the yachting sector are normally based on incentives outlined in the Tourism Incentive Act of 1996. Recently the Government has announced greater incentives for the sector.

This act provides the provisions for the request via cabinet for:

- The provision of access to duty-free supplies, importation of yachts for charter companies and locals.
- The setting up of duty free operations i.e. Chandleries, Waterfront fuel depots, with minimum hassles.
- Tax holidays for Marina and water based related tourism development.
- Tours and charter yachts can also access duty free importation of spares.

10.5 Relevant ordinances and regulations and enforcement policies

Presently the following ordinances and regulations provide the guidelines for enforcement in the yachting sector:

Fisheries Act 10 of 1984.

Saint Lucia Air and Sea Ports Authority Act of 1983.

Saint Lucia Air and Sea Ports Authority (Seaports Tariff) Regulations No 13 of 1985.

Yacht License Act of 1971.

Customs Control and Management Act.

Immigration Act.

Shipping Act 11 of 1994.

Cabinet Conclusion 937 of 2001.

However specific ordinances are buried in major legislation, this included legislation for the following government departments:

- Ministry of Finance: Customs Department
- Customs regulations apply to broad overall supervision, which is open to varied degrees of interpretation by the customs officers, who enforce these regulations.
- Ministry of Legal Affairs: Immigration Department
- Ministry Of Agriculture: Fisheries Department
- Fisheries defend every fish pot or place to fish, even when the pots are in hazardous locations. The two-mile offshore limit for any yacht to tow a line is the extent to which fisheries will allow illegal fishing in Saint Lucian waters.

Due to the lack of a clear precise yachting act, the regulations that govern the yachting industry are often enforced in an ad hoc fashion. All of the above ordinances and regulations (except for Saint Lucia Air and Seaports Authority Act and the Shipping Act) allow for the use of excessive discretionary power by the officers who enforce these regulations. As a result there is no consistent policy within the ministries of the yachting industry.

10.6 Customs and immigration procedures and practices.

The present Customs procedure is excellent for yachts, which visit Saint Lucia; 72 hours is allowed for their departure, which suits most visitors. However when a yacht which has been in Saint Lucia for a varied time period, or even a charter company based vessel supported by tax paying Saint Lucians wishes to leave, there is a rigid 24-hour maximum time to leave. However, Customs boarding stations are normally staffed by sensitive officers who have not been trained to understand the operations of yachts and the people who arrive on them, but have learned over a period of time while dealing with various situations. However the process of transshipments for spares assigned or shipped to yachts in-transit is still based on a time consuming expensive brokerage system that is further complicated by the associating of licensed customs brokers and thereby creating a cartel like modus operation.

While Trinidad and Tobago and other islands allow FedEx, DHL, etc., to deliver to customs officers who then examine and decide the time of delivery, in Saint Lucia a tedious complicated process is in place. That process often contradicts the concept of saving time by using such courier services. It also encourages customs officers assigned to over charge while on duty. (Recent cabinet conclusion has changed to 72 hours)

The processing of yachts and yacht visitors by the Immigration Department is greatly impaired by the perception immigration officers have of visiting yacht-persons. There appears to be a general position by most immigration officers that visitors who arrive via yachts are not tourists. As a result, ports which process yachts, are plagued with the following issues:

- Poor level of welcome to yacht visitors.
- Lack of guidance regarding allowed length of stay and extensions.
- Time consuming and tedious process to obtain extensions when required.
- High level of mistrust by yacht visitors, who are not encouraged to stay and explore the island.
- The element of suspicion of intent, which aggravates many yacht visitors.

10.7 Communications between government and the yachting sector

The yachting sector suffers from a lack of understanding by the very agencies assigned to administer the sector. Although there are several ministries, which deal with this sector, the level of communication is extremely poor. Very often issues that are being dealt with involve figuring out who one should talk to, and most often the issue is not solved. This may be subject to change if the post of a Maritime Desk is put in place.

11. PROBLEMS AND STRUCTURAL WEAKNESSES FACING THE INDUSTRY

11.1 Safety & Security

The recent decline in traditional tourism, exacerbated by the events of 11th September, which have made potential travelers wary of venturing forth, especially by air, has caused those nations with tourism-dependent economies, to explore and/or expand alternatives to air- and cruise-bound tourists. One such alternative is the yachting sector. While Saint Lucia abounds with many natural attractions to any visitor, it is especially blessed with features and infrastructure – marinas, haulage, yachting yards and storage facilities - that appeal to yachties and other marine-based tourists, among them, sheltered natural and man-made harbors, friendly people and skilled labour. Saint Lucia therefore has the potential to position itself to be the premiere yachting destination in the region.

In order to heighten the appeal of Saint Lucia to marine-based tourists, issues of safety and security ought to be addressed. The recent terrorist attacks on the World Trade Center have made all travelers extremely conscious of their safety, and understandably so. The authorities, therefore, need to recognize and respond to these legitimate concerns and endeavor to create a safe physical and social environment for the comfort of these marine-based tourists. It is imperative that visitors are assured that their safety and comfort have been given consideration. Failure to do so will result in negative publicity (via marine radio, Internet and ship-to-ship communication) that will impact adversely on future arrivals, and on the industry as a whole. For example, a negative experience on the part of one French yachtsman resulted in bad press circulated among the French yachties, especially from Martinique, who comprise a significant portion of Saint Lucia's marine-based tourists. A quick response averted a potentially bad situation that would have resulted in the French boycotting Saint Lucia as a destination.

In addressing these issues, the broadest possible definition should be applied to safety and security. It must cover all aspects of the visitor's experience in Saint Lucia, including security of person and property against all elements, human and non-human, in all locations, in the water and on land. Specifically, the following should be considered:

- Protection of tourists and their effects from vandalism and crime by having a real, visible, continuous, yet unobtrusive and non-aggressive security presence;
- Safeguarding their person and property in hurricane;
- Maintaining their personal comfort by preventing harassment, unwanted solicitation and extreme and prolonged noise;
- Ensuring their physical well-being by avoiding accidents and injuries and affording appropriate medical care as needed.

Also to be considered are issues that may impact negatively on the tourist's experience while visiting Saint Lucia – issues such as unwieldy bureaucracy in clearance of minor but critical replacement parts for yachts in transit.

Altogether, every effort must be made to have the visit as stress-free and as inviting as possible, from entry to departure. At present, four bodies exercise an enforcement/regulatory function of some kind at ports of entry, a situation that does not always provide the most efficient service to marine-based tourists. They are the Saint Lucia Air and Sea Ports Authority, Customs Department, Immigration Office and the Marine Police.

The Marine Police patrol territorial waters to safeguard the nation's security. However, their operations are concentrated mainly in the drug enforcement/trafficking area, and do not routinely extend to offering personal and property protection at sea. Immigration authorities process visitors for entry and determine the duration of stay permitted. Their customs counterparts clear vessels, checking for items that may be dutiable or illegal. They collect duties on the former and charge fees for overtime, and for permits to moor at a place other than a port of entry, for those vessels wishing to do so. Enforcement of customs clearance of vessels is via sporadic patrol of the custom's only boat.

Responsibility for enforcement of safety and security at the nation's air and seaports ultimately rests with SLASPA. This body manages the traffic on the nation's waterways, providing and maintaining navigational aids (including lighthouses) and collecting a fee from yachtsmen for the services that it should provide. SLASPA has its own police force, but maintains a regular police presence only at the two airports and the main seaports (Castries and Vieux Fort), where few marine-based tourists berth. SLASPA police are not present at the other ports of entry, most frequented by yachtsmen, (Marigot Bay, Rodney Bay, Soufriere), although there is a collections officer at Rodney Bay and customs officers collect fees on behalf of SLASPA at Marigot Bay.

All units independently man entry seaports for their individual areas of responsibility. However, severe human resource limitations result in partial service at the entry ports that are frequented by yachtsmen thus:

Rodney Bay Marina Customs – clearance from 8 a.m. to 4.30 p.m. every day except Friday when they operate until 6. 00 p.m.. Customs will clear outside of these hours for a charge and will cover processing for immigration, except for stamping passports.

Immigration – 8 – 12:00 a.m. and 1:30 - 4.30 p.m. everyday, no overtime
SLASPA – fee collection from 8 a.m – 4 pm. every day except Fridays, when hours are 8 a.m. – 6 p.m.

Marigot Bay Customs – hours as for Rodney Bay
Immigration – hours as for Rodney Bay
SLASPA – no presence; Customs collects fees on their behalf

Although Soufriere is officially a port of entry, it is not manned by any of the official bodies. Vessels must clear at one of the other designated ports of entry, before proceeding to Soufriere. As mentioned earlier, enforcement is *ad hoc*.

Added to this mix of agencies is a fifth, the Soufriere Marine Management Authority (SMMA), whose function also affects marine-based tourists, and which also collects fees from marine-based tourists moored within their management areas. The SMMA, governed by a Board of Directors that includes, inter alia, SLASPA and the Ministries of Tourism and Agriculture and Fisheries, seeks to preserve the marine environment by protecting fishing areas and marine reserves and designating mooring areas in Soufriere and Canaries. The SMMA resolves conflicts between yachtsmen and fishermen. Opportunities for such conflict exist when moorings and anchorages are in close proximity to fishing facilities (as happens in the bays on the west coast such as Rodney Bay, Anse-la Raye down to Soufriere), when fumes and noise from yachts scare away fish whose visits are brief and randomly periodic, and when vessels destroy fish pots and seines. Here again, it is the perception that the regulating (and enforcing) of areas for traffic and for fishing, lies with SLASPA, which has limited resources to do so. However, the legal basis is dubious.

Areas of conflict may arise when yachtsmen arrive at port at times outside of the operating hours of those agencies whose officials must process entry. Further, on arrival, visitors must deal with a multitude of authorities in an uncoordinated arrangement of bureaucracies. This situation is exacerbated by the inability of officers present to explain the reason and structure of the variety of fees being collected, especially if the collecting officer is not a staff member of the agency on whose behalf he/she is collecting. One key criticism of these arrangements is that there is no obvious official security presence at any of these ports, especially after hours.

To address these general security issues, it is proposed that SLASPA, in keeping with its mandated remit of securing the ports, should exercise its policing function through a 24-hour real presence at all seaports. It should patrol both land and sea, providing assurance to all visitors that at all times, they are safe on the water and on the shore, within the limits of SLASPA's authority. At present, SLASPA has no vessels for such a function. Further, SLASPA's officers may cover for the other agencies when their staff is not available at the ports. Indeed, officials of the three agencies (SLASPA, Customs and Immigration) should explore means of pooling their limited resources and of coordinating their activities to facilitate the visitor's interaction with official bodies, while satisfying necessary requirements for security.

❑ **Protection Against Crime**

There are documented instances of break-ins and burglaries of vessels, whether berthed at moorings or anchored offshore. Although there are few instances of harm to yachtsmen, the risk for injury during the commission of a crime, is a real one. The lack of a police presence facilitates the occurrence of such events.

The Rodney Bay Marina Limited offers private security to its customers, those yachtsmen who berth at the Marina's moorings. However, this service is not extended to yachts, which anchor within the Bay's lagoon. Indeed, they ought to be covered by SLASPA's security function, as should all yachts anchored in Saint Lucia's waters. In lieu of this, yachts tend to anchor in groups for their mutual safety.

It should be noted that there is the perception that an illegal trade in firearms and drugs takes place at ports, under cover of darkness. This is poor publicity for the yachting sector, especially since this perception cannot be substantiated due to the lack of an official police presence. The reality is that a yachtsman in possession of a firearm may keep it on board, not declaring it to Customs nor handing it over for safekeeping during his stay. If then, the firearm is stolen from on board, he cannot report the theft, thus contributing to the stock of illegal (and uninvestigated) arms.

□ **Protection Against Hurricanes**

Ample protection is provided to vessels at designated hurricane holes, at Marigot Bay and Rodney Bay. However, management of these areas, which also falls under SLASPA, needs improvement.

□ **Maintenance of Personal Comfort**

In the absence of enforced discipline and control, speed boats race around moored yachts, rocking and otherwise disturbing those on board. The comfort of the marine-based tourists may be further disturbed by the noise generated by beachfront entertainment into the early hours of the morning. In addition, yachties are subject to harassment and excessive solicitation. Again, a security enforcement presence in the water can deter such behavior.

□ **Protection Against Injury and Illness**

- Avoiding road traffic injuries

Most of the needs of visitors to Saint Lucia may be met in the immediate vicinity of the ports and marinas they enter, where there are supermarkets, shops, chandlery, restaurants, and other entertainment facilities. However, there are no sidewalks in the area, so those pedestrians are still at risk of collision with vehicular traffic, with which they share the roadway. This risk holds true for all ports, as the roads in Saint Lucia are generally very narrow, barely accommodating two lanes of traffic, without sidewalks and adequate road signs.

- Avoiding water-based injuries

As mentioned earlier, speedboats race recklessly among yachts and their passengers who may be swimming nearby, posing the danger of injury to swimmers and/or collision with other vessels. A similar danger exists between vessels engaged in marine-based tourism and those engaged in fishing. Although SLASPA is mandated to manage the traffic within ports, it does not have the resources i.e. patrols boats, hence it cannot police the traffic on the waterways.

- Provision of medical care

For injuries, accidental or otherwise, and any other medical event, appropriate medical care is readily available at all ports.

The Rodney Bay Marina is located between two medical facilities. Within 10 minutes' drive to the north, is the island's newest health facility, soon to be opened at Gros Islet. It is a polyclinic with a 24-hour Accident & Emergency Department that contains two observation beds, ambulance service, full laboratory and diagnostic services excluding pathology, dental, ophthalmological, pediatric, obstetric and gynecological services. More serious situations may be stabilized here and referred to the island's major hospital, Victoria Hospital, which is less than 20 minutes away in the opposite direction. Facilities at the latter have already been described.

Victoria Hospital is a 157-bed public facility with a 24-hour Accident & Emergency service with ambulances and an Intensive Care Unit. It boasts a range of services with supporting specialist staff, including: Surgery, Internal Medicine, Obstetrics & Gynecology, Physiotherapy, Laboratory including hematology with blood transfusion services, Pharmacy, Orthopedics, ENT, Pathology, Ophthalmology, Radiology including diagnostic imaging. This hospital does not have urological services, although there are dialysis facilities.

Ganter's Bay is in Castries, with the aforementioned Victoria Hospital less than ten minutes away. Victoria Hospital would also service any patients from the Marigot Bay Marina.

Soufriere Hospital is a 31-bed facility located a very short distance from the Soufriere Bay. It is equipped to handle minor medical and pediatric cases and can provide intermediate care for chronic disease patients. There is a pharmacy but no laboratory service. There is an A&E Department sufficiently equipped to stabilize an emergency for transfer to St. Jude's Hospital at Vieux Fort, about 30 minutes away.

St. Jude's Hospital, the island's second largest hospital, can accommodate 87 in-patients and provides a full range of medical specialties (including urology) and laboratory services, although a few are on a part-time basis (ENT, ophthalmology and pathology).

For medical events occurring at sea, Saint Lucia has more than one air ambulance service that may airlift a patient to the island's major referral hospital, Victoria Hospital, or overseas to Martinique or Miami, for appropriate care. The latter would be required for few conditions – moderate to severe oncological conditions, severe burns, decompression management (although there are plans to put such service in place) and highly specialized and usually elective surgery such as knee replacements.

The multiplicity of agencies, which impact on the security and safety of the marine-based tourist, with the potential for confusion, for overlap and for not addressing gaps in service augurs ill for the sector. In the light of the foregoing, it is abundantly clear that there is a pressing need for a single agency to have (and discharge) ultimate responsibility for coordination of security aspects affecting marine-based tourism. This function would ensure that the visitor and his

possessions are safe in the water, and on land within the area of the mooring, with the ultimate goal of assuring him a safe, comfortable and pleasant stay. Given that it is perceived that SLASPA has such a mandate, efforts should be made to enable it to discharge such a function. Clarification of the mandate and provision of resources to allow for a real and continuous presence at all ports, at all times, on sea and on the immediate shore, would have several benefits:

- Patrolling of waterways, thus preventing water-based accidents and thus averting a strain on medical emergency services;
- More efficient management of hurricane holes, thus ensuring that all (foreign, as well as local) vessels are protected;
- Affording a level of protection to all marine-based tourists, thus deterring crime, and improving personal and national security.

Altogether, these efforts of SLASPA, coordinated with and supported by the other agencies, should leave the marine-based tourist with a favorable impression of his visit here.

11.2 Perception of Overcrowding and gradual slide down market

For the yachting sector in Saint Lucia to develop into a competitive and sustainable industry, the problem of overcrowding and user conflicts must be addressed urgently. Presently the water-based activities in Rodney Bay, Choc Bay, Marigot and Anse Cochon need to be reviewed as some areas are showing signs of overcrowding. Over the last 12 months Rodney Bay has reported 16 accidents involving water craft vessels such as yachts, jet skis and divers. The fishermen of Gros Islet have lodged several complaints of fish pots and nets being destroyed.

Recently several serious accidents have been reported in Marigot, one incident involving a day boat charter and a catamaran crystallizes the growing problem of over crowding and user conflicts. There is a growing need to zone all beaches, and bays based on the coastal activities and the number of licensed watercraft using these coastlines.

11.3 Composition of Yachting sector and implications on seasonality

Saint Lucia's yachting sector comprises primarily of transient yachts, live aboard and two major charters companies, with a high influx of yachts arriving during the ARC. The high season for this sector is from December to May. Once the hurricane season starts there is an exodus of yachts back to Europe. This seasonal traffic has serious implications for independent contractors, and support services in most Marinas and ports. Business reduction is estimated at 60% of high season gross. Greater efforts must be made to give these yachts an incentive to remain in Saint Lucian waters for longer periods.

12. RECOMMENDATIONS

12.1 Regulations, policies and Institutional

- There is a need for a clear definition of sport fishing versus towing a line. The Fisheries department must differentiate between different types of fishing.
- The Customs department must address the Temporary Importation policy regarding yachts, which use Saint Lucia for long-term storage in and out of the water. The policy must be reviewed with the intention on making it hassle free.
- Also the clearance of equipment for yachts must be simplified. Saint Lucia has the reputation within the yachting fraternity as having too much red tape and equipment is held in customs for long periods. This will not encourage charter-based operations because of the turn around time factor. The customs procedures need to be revamped to ensure a fast track system for vessels importing spares.
- Locals must be encouraged to invest in day boat charter operations. There is unfair competition from foreign owned business, which has a monopoly on the day charter business. At least 50% of the market should be reserved for local operators, along with adequate concessions from government.
- Saint Lucia's immigration officers need to be trained: they need to understand that yachting is part of the tourism industry. Issues such as extensions and processing of crews on yachts must be dealt with in a more service-oriented manner.
- The Ministry of Tourism needs to develop and create a focused approach to the yachting Industry. The first step should be the introduction of a Yachting Act. This will deal with all the legislative issues presently hampering the industry's growth.
- There must be a greater effort by the Saint Lucia Tourist Board to market Saint Lucia as an attractive base for yacht charter operations.
- The Government of Saint Lucia must review the aggressive customs enforcement tactics being placed on visiting yachts.
- Better mechanisms should be put in place to collect data related to the yachting industry.

12.2 Infrastructure

- Soufriere needs better docking facilities. A port officer, customs officer and immigration officer must be permanently stationed at Soufriere.

- Waste disposal management within the yachting industry is a very critical issue. Implementation of an effective disposal system, both liquid and solid, needs to be implemented in all Marinas, boatyards and ports of entry. Holding tanks must be compulsory for any yachts on anchor.
- Marinas and ports need to attract more up market varieties of shops, laundromats, provisioning outlets, shower facilities, propane gas depots and general yacht repair services and extended duty free shopping at all ports of entry.
- Ganters Bay provides an excellent opportunity for Saint Lucia to encourage more charter fleets. Ganters should be developed as an up market marina; attracting high-end charter boat fleets.
- Government must encourage the improvement in existing infrastructure at all ports of entry, in order to attract and service the growing mega yacht market.
- Saint Lucia Air and Sea Port Authority should install mooring facilities in Castries Harbour, Ganters Bay, and Marigot Bay.

12.3 Incentives for development of local entrepreneurship

- Present insurance rates on the island are too high, creating a high cost for insurance liability. This is a deterrent for local entry into the boat charter market.
- In the yachting sector there is an inability for locals to prepare proper business plans prior to investment and accessing of funds. Government agencies and non-governmental agencies must create a system for assisting small entrepreneurs.
- Import duties on yachts and yacht spares should be reduced to 2%.
- Saint Lucia must implement the ship act, encouraging yachts to register in Saint Lucia.
- The Ministry of Tourism must organize all “ boat boys ” and over zealous salesmen who ply the waters of marinas, anchorages and other ports of entry.
- Development of training facilities specializing in jobs directly related to the yachting industry. A first step can be the inclusion of yachting related skills in government’s list of priorities for training: captain licenses, riggers, machinist, and refrigeration specialists.

12.4 Safety, Security and the establishment of minimum standards

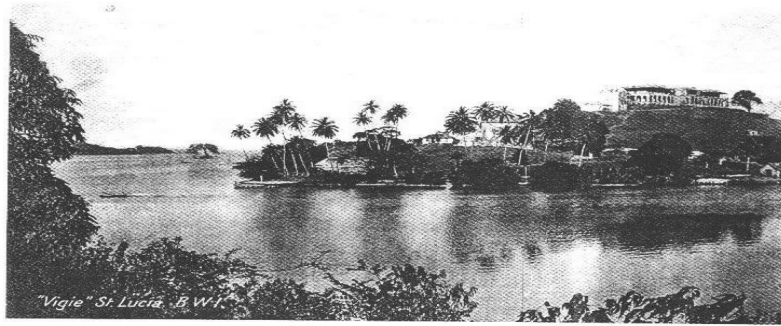
- The yachting industry in Saint Lucia has inadequate waste disposal for yachts. All yachts within 12 miles of the coast must be equipped with holding tanks, or in the absence of holding tanks; Marinas and Ports must have facilities for solid and liquid waste disposal.
- The relevant authorities must ensure the placement of marine buoys and jetties in zones selected for anchoring boats.
- There is a need for clear demarcation of areas of marine activity, and a greater presence of Saint Lucia Air and Sea Port Authority.
- The business involved in the yachting industry should form a Marine Trade Association, to facilitate better dialogue with government agencies, which regulate the industry.

12.5 Marketing

- There is a lack of collateral material on the yachting sector in Saint Lucia. The relevant authorities must develop a proper yachting guide.
- Marketing staff at the Saint Lucia Tourist Board Overseas offices are not properly trained in effectively selling the yachting product. There must be a system in place which will ensure that all overseas offices receive intensive training on Saint Lucia's yachting product.
- In Saint Lucia there is lack of understanding and appreciation for the yachting sector. The Ministry of Tourism must develop and implement a long-term public awareness campaign to correct this.
- The Saint Lucia Tourist Board must explore brand sponsorship for the Atlantic Rally for cruisers, which will elevate the event. This will encourage greater participation from the Chamber of Commerce in Saint Lucia, and wider local participation.
- The Saint Lucia Tourist Board must have greater participation in the promotion of the local Heineken regatta.

Appendix A- Historical Ganters Bay

Historical Ganters Bay



Appendix B- The Causeway

The causeway linking the Main Land to Pigeon Island

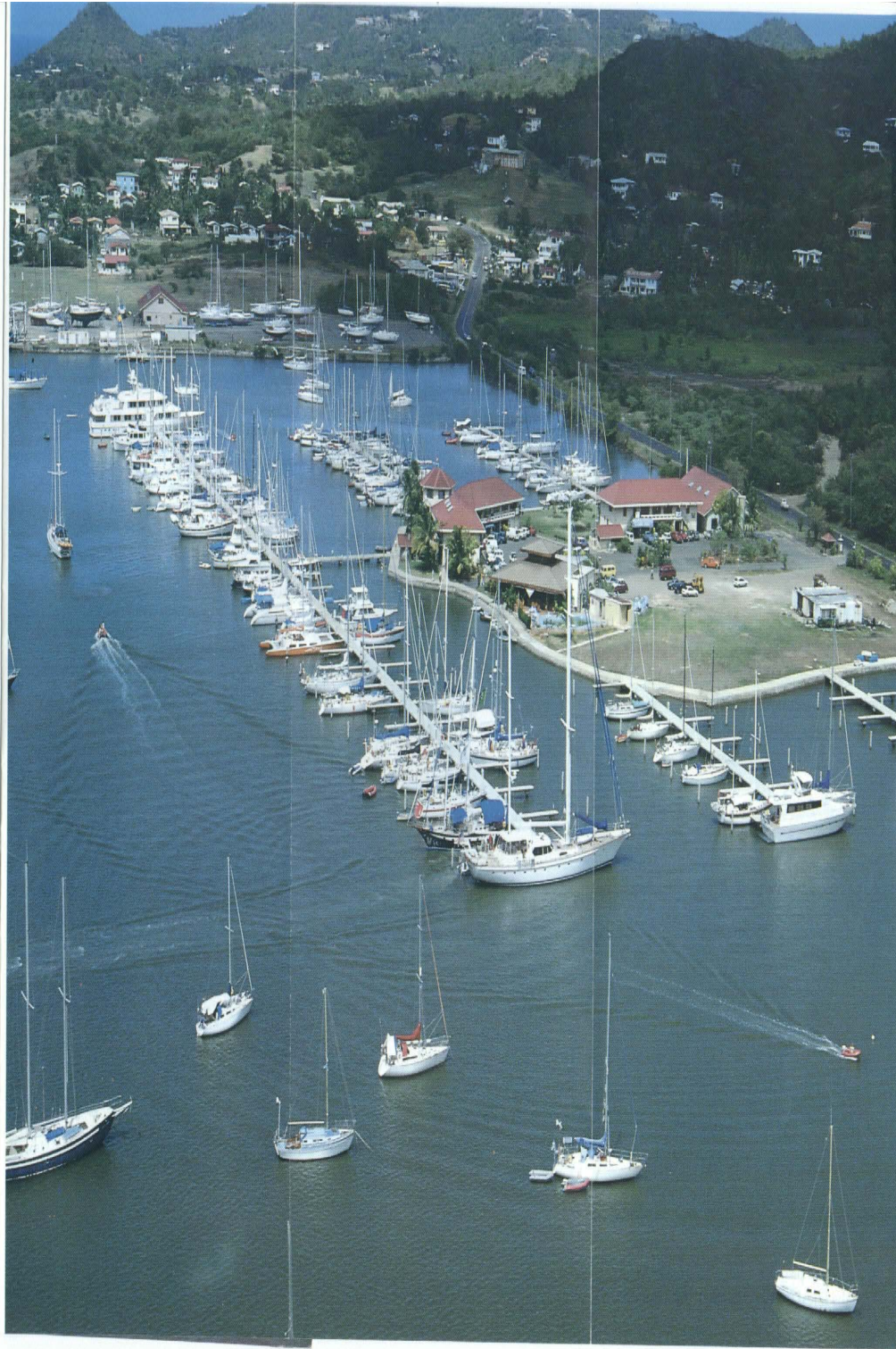


Appendix C- Rodney Bay

(a) Rodney Bay, the beginning.



(b) Rodney Bay present day.



Appendix D- Companies directly involved in yachting

Rodney Bay Marina: full service Marina and Boatyard operations.

- *Tony George's Mechanic Shop: mechanic services.*
- *Dynamics Machine Shop; machinist.*
- *The Sail Loft: sail making and repairs.*
- *Regis Electronics: electronic services and repairs.*
- *The BreadBasket: provisioning.*
- *Destination Saint Lucia: charter operations.*
- *Le Marché supermarket: provisioning*
- *Toucan Travel: travel agency, tour operator, and car rental.*
- *RBSS: ship chandlery.*
- *Dock Side Trading: boutique.*
- *CTL: car rental, cyber café, taxi services.*
- *Drop Anchor: nautical boutique.*
- *Barclays bank: banking services.*
- *Royal Bank: banking services*
- *Collettas: boutique.*
- *Saint Lucia Air and SeaPorts Authority: Government authority for lagoon.*
- *Cable and Wireless: telecommunications.*
- *Cocoa Willies: bar and restaurant.*
- *Tropicana: bar and restaurant.*
- *Johnson's Marine Center: marine hardware.*
- *Buddies Dive shop: dive operations.*
- *Sail Away Tours: coastal day charters.*
- *Mata hawk Whale watching: whale watching.*
- *Brydens Liquor store: provisioning.*

Ganthers Bay

- *Hackshaws day fishing: fishing, diving and whale watching charters.*
- *Carnival cruises: coastal day charters.*
- *Coal Pot: Restaurant services.*
- *Froggie's Jack: restaurant services.*
- *Saint Lucia services: car rental, gas dock operator.*
- *Castries Yacht Center: boatyard facility.*
- *International Diesel: mechanic services.*
- *Auberge Seraphine: hotel facilities.*
- *Point Seraphine: Premier Duty free shopping complex.*

Marigot

- Moorings: international charter base.
- *JJ's Paradise: restaurant services, small hotel.*
- *The shack: restaurant services.*
- *Marigot Beach Club Hotel & Dive Resort: hotel services.*
- *Armands Guest House: motel services.*
- *Sea House Inn: hotel services*
- *The Inn on the Bay: hotel services.*
- *Villa De La Gratia: guesthouse.*
- *Oasis Marigot: villas and guesthouse.*
- *Land and Water based taxi operations.*

Soufriere

- *The Still: restaurant services*
- *The Hummingbird Beach Resort: hotel & restaurant services.*
- *Anse Chastanet Hotel: hotel facilities.*
- *Jalousie Hilton Hotel & Spa: hotel facilities*
- *Ladera Resort & Dasheen: hotel facilities.*
- *SMMA: Soufriere Marine Management Authority; mooring facilities.*
- *Stone Field Estate: hotel facilities.*
- *Land and Water based taxis*

Anse Cochon

- *Ti caye: hotel facilities.*

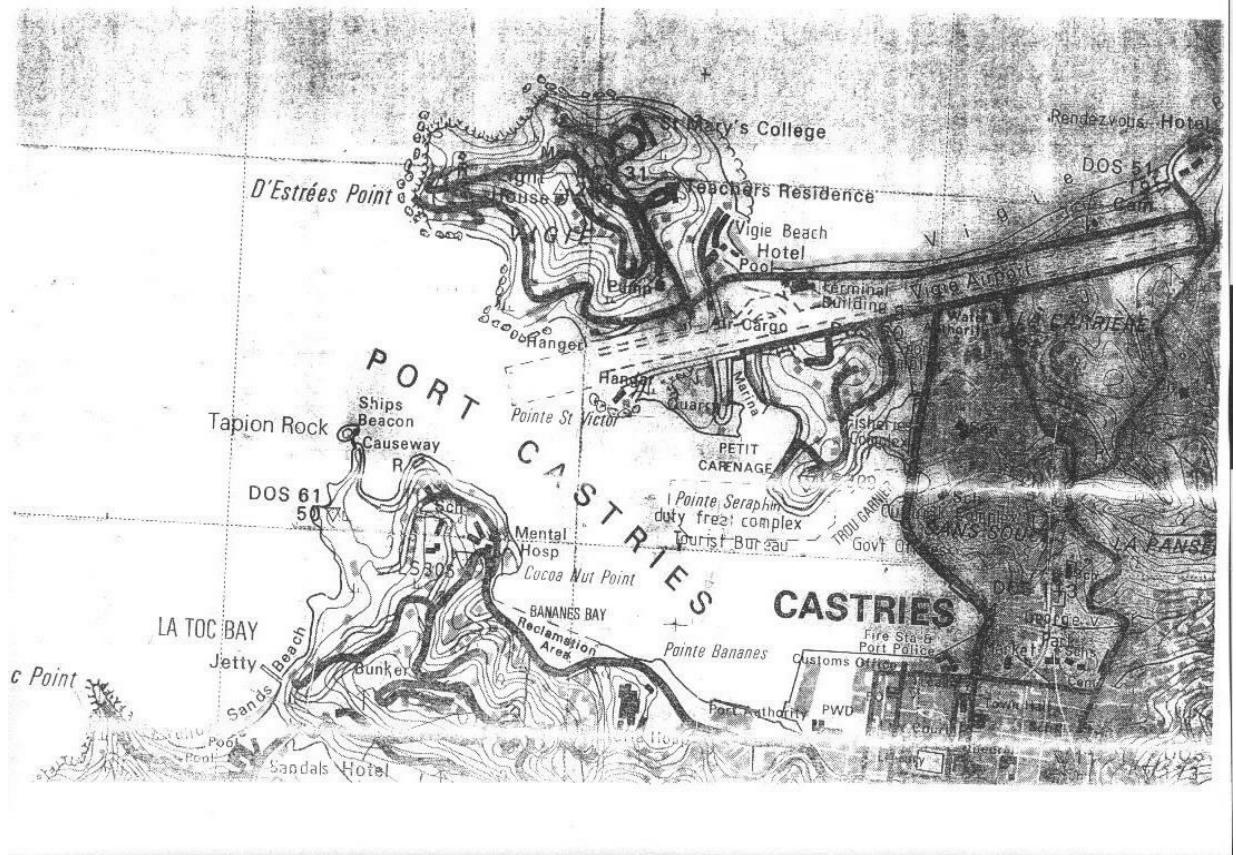
Rodney Bay

- *All restaurants, Malls, Gas Stations, water and land based taxis and Hotels within the Rodney Bay area.*

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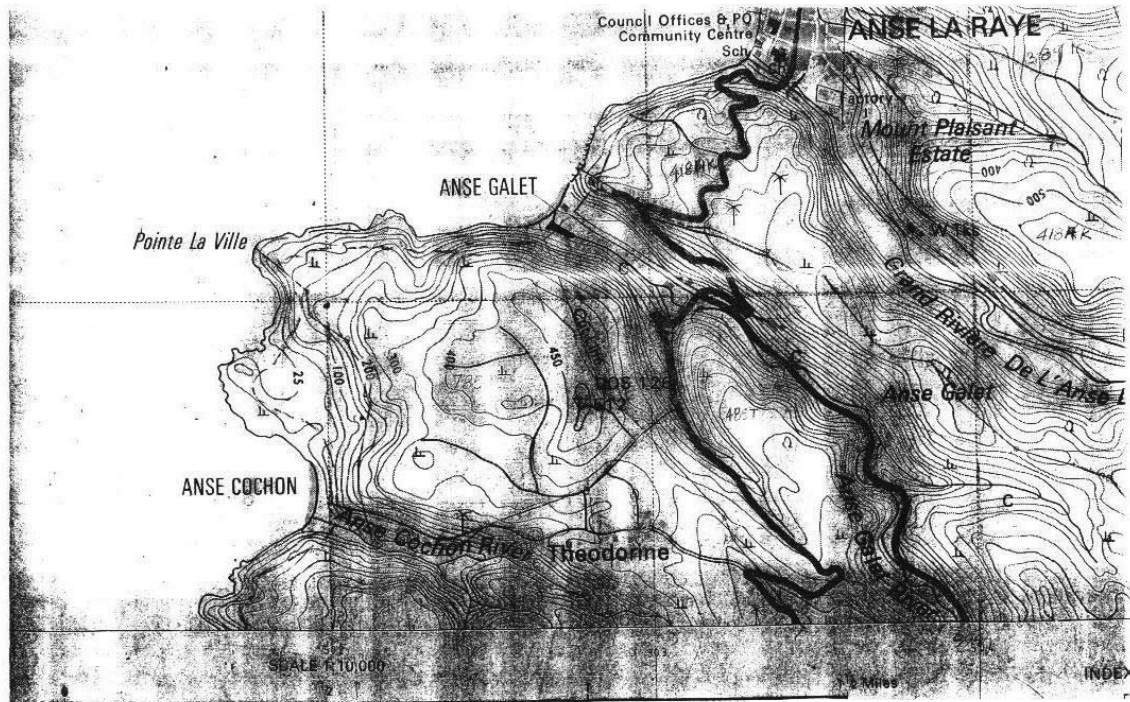
Appendix F- Castries Bays

Port Castries, Point Seraphine, Ganters Bay



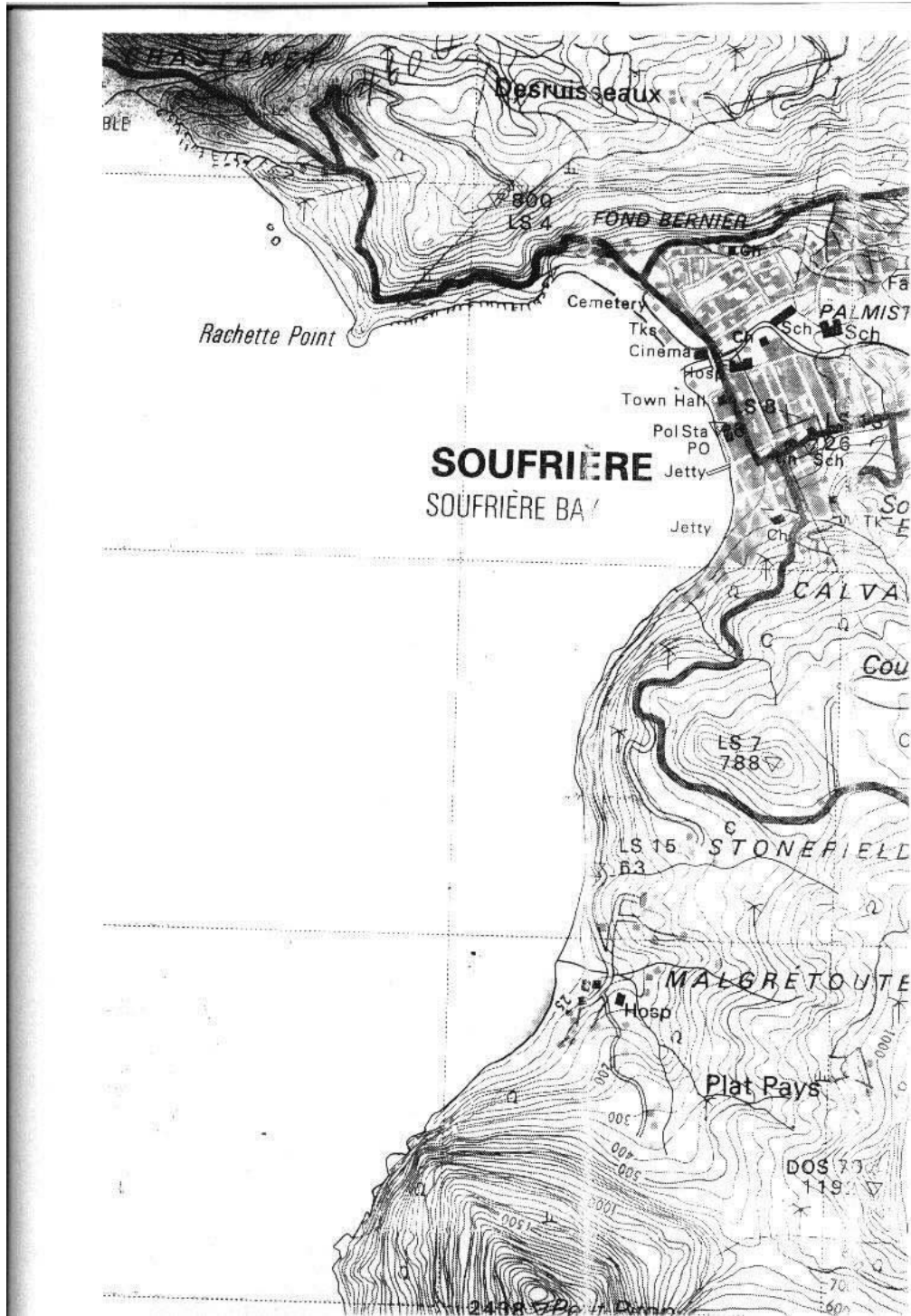
Appendix G- Marigot Bay

Marigot Bay



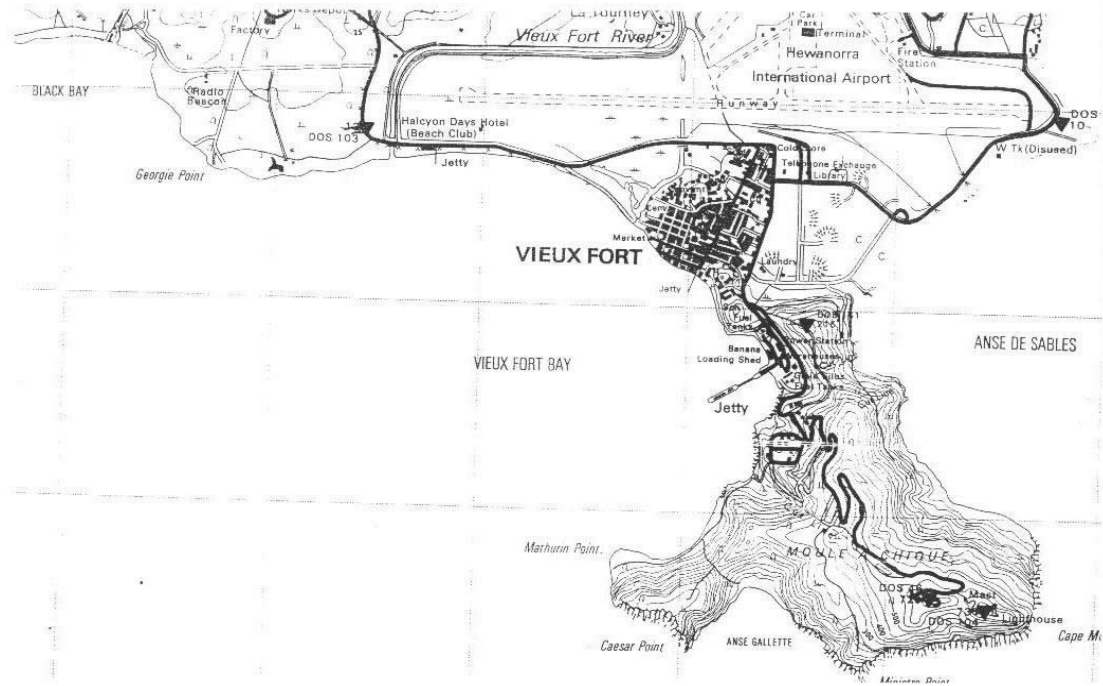
Appendix H- Soufriere Bay

Soufriere Bay



Appendix I- Vieux Fort

Vieux Fort Bay



Appendix J- Yachting Questionnaire

The following questionnaire is part of ongoing research to document and assess all aspects of St. Lucian marinas. The information found will be used to assess areas requiring further development within the yachting industry. Please answer all questions as accurately as possible.

How many persons do you employ?

Full-Time _____
Part-Time _____
Seasonally _____

2. Number of persons in managerial positions _____
 Number of persons in supervisory positions _____
 Number of persons in line staff positions _____

3. What proportion of employees are on fixed employment contracts?

0% - 20%
21% - 40%
41% - 60%
61% - 80%
81% - 100%

What is the average number of years persons remain employed with your marina?

List the positions or posts, which exist at your marina? E.g. docks boy, etc.

6. Briefly describe your recruitment process.

[illegible]

10. What percentage of employees requires training at the start of employment?

- 0 - 25%
- 26% - 50%
- 51% - 75%
- 76% - 100%

What kind of training is usually given?

- General customer service skills
- Information on the yachting industry
- Computer and systems training
- Job specific training
- Managerial training

Training is done:

- By an in-house trainer
- Local external trainer
- Regional trainer
- Persons sent out of island for training

What training support facilities exist

- Government programs
- Other marinas
- Existing staff

Are your training needs met?

- Yes
- No

14. If **No**, what can be done and by whom, to assist with your training needs.

15. The yachting industry is being recognised as a developing industry of much value to St. Lucia and the region. What can be done to increase the participation of Caribbean nationals in the industry?

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Haddican, B., *Tropicana, Owner*

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Jordon, W., *Customs, Head of Preventative*

Jules,C., *Solid Waste Management, Public Relations Officer*

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- ⁱ Based on Coastal Conservation Project Working Paper 2
 - ⁱⁱ Coastal Conservation Project Working Paper 2
 - ⁱⁱⁱ Coastal Conservation Project Working Paper 2
 - ^{iv} Joth G Singh PhD