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**Economic Commission for
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Tobago Yachting Study



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Executive Summary

Yachting in Tobago has not developed in any formal manner and much of its growth took place after the emergence of Trinidad as a regional yachting service centre. The Tobagonian experience thus far has been one of minimal engagement with the sector. In this environment, misconceptions abound and there is only a vague awareness of opportunities to turn the yachting experience into a positive one for Tobago.

Nonetheless it is estimated that expenditures of the yachting sector amount to TT\$ 5.8 million, which is possibly more than expenditures by cruise ship visitors.

Development of Tobago's tourism product will require putting to fullest use the benefits to be derived from sustainable use of its natural resources: from its people, its land and as well from its marine resources. Development of the marine tourism sector cannot be ignored. Marina type facilities are the conduits for economic development of all boating related tourism; and Tobago will have to address the infrastructural needs of this sector in order to derive its potential benefits for Tobagonians.

Overcoming negative perceptions of the yachting sector will be achieved by overcoming indifference to the basic requirements for it to be operational; be it in the provision of proper landing docks or convenient clearance requirements. Toting fuel and water by hand does not attract a better paying market. The introduction of anchorage management to limit impacts, be it through moorings or demarcation buoys, will be a positive sustainable step once it is done in tandem with the creation of a yachting facility on the island to generate suitable economic activity.

An analysis of arrival figures for Tobago indicates that except for the annual events, on average there are less than 50 yachts in Tobago's waters on a continuous basis. Total combined capacity of the 15 different anchorages being used throughout Tobago suggests that not much more than 100 yachts could remain comfortably at anchor in Tobago's waters at any point in time. This is a relatively small density given the widespread distribution of these anchorages and also in comparison to other yacht destinations in the Caribbean. It is therefore expected that any appreciable increase to this number, which would contribute to the growth of yachting as a positive economic activity for Tobago, will need to occur through the creation of purpose-built marinas for the clustering of yacht based activity.

Tobago is charting its own course for its tourism product. This will require conscious choices and programmes for development of the various tourism niches available to it. Yachting can become a plus for Tobago by development of the tourism aspect of yachting, distinct and apart from the Trinidad product, yet benefiting from its proximity to it. The first step will be the commitment to learn more about it.

Recommendations

1. Establish a policy for the creation of marina type facilities in Tobago as a strategy to help address growth and management of the sector; particularly towards mitigation of wider environmental stress through containment and concentration of sector activity. Establish as a priority at least one such facility for the south west part of Tobago to be designated as a port of entry.
2. Commission a site selection survey for possible marina sites utilising coastal site analysis methodologies, community inputs, yacht industry knowledge and land use evaluation. Provide recommendations based on a cost/benefit evaluation.
3. Develop a zoning policy for anchorage which can help address user conflicts and environmental issues in the various bays. Measures to be examined could range from establishing minimum distances from shorelines to implementation and management of moorings.
4. Conduct an audit of the existing information systems and streamline information requirements for management information and control of the sector. Simplify procedures and paperwork,- wherever possible.
5. Encourage representation of the local charter boat sector at an official level to provide a balancing voice for the yacht sector within tourism forums.
6. Consider specific incentives to target private sector investment for appropriate development of the sector.
7. Encourage a revival of the bumboat activities by promoting sponsorship of an annual sailing event, such as a sailing festival from village to village as takes place every year in Martinique.
8. Provide an opportunity for decision makers of the Tobago House of Assembly (THA) to visit various yachting venues and events in the Caribbean which will highlight opportunities and models for the appropriate development of the yacht sector in Tobago.

CHAPTER 1 INTRODUCTION AND OBJECTIVES

1.1 Introduction

The Government of Trinidad and Tobago (GOTT) established a Standing Committee on Business Development in May 2003. The objective of that committee was to develop a suitable climate for investment and to identify priority industry areas in the non-energy sector for development. One of the industries targeted for development was the yachting industry and a separate Yachting Industry Team (YIT) was established in February 2004.

In the last few years studies on yachting have been carried out by the Tourism and Industrial Development Company of Trinidad and Tobago (TIDCO), the Institute of Marine Affairs (IMA) and most recently by the Economic Commission for Latin America and the Caribbean (ECLAC). The results of the latter study were presented in Tobago in 2003. The ECLAC study was also discussed in detail at a national consultation organized by the Ministry of Tourism in October 2003.

Most of the studies concentrated on the Chaguaramas area and for a number of reasons, lack of data amongst the more significant ones, little attention was paid to Tobago. It is noted however, that the Planning Department of the THA undertook a study in 1995 that was entitled “A Critical Review of Yachting Activity in Tobago.” The THA Planning Department updated this information when a new review was initiated in 2004, producing a document entitled “Review of Yachting Industry in Tobago” (THA 2004). Prior to that, the IMA carried out a case study on the Establishment of a Marina/Small Craft Harbour in Southwest Tobago (IMA, 1991). Also in 1993 Cabinet approved a number of measures to facilitate yachting, some of which pertained to Tobago.

The government has stated its commitment to help strengthen the yachting sector in Trinidad and Tobago. There is at present however, no policy document which distinguishes between the needs of the sector in Tobago from that of Trinidad.

The Tobago study diverges from the earlier yachting study on Trinidad as the product in Tobago is very much different from that of the semi-industrialized Trinidad yachting sector. Therefore it focuses instead on managing the impacts of existing yachting on the island and on options for a managed low impact development as a third component of the island’s tourism product. The study builds on the marine tradition of Tobago itself as traditionally the island has held and participated in regional events such as the Carriacou Regatta and races of the traditional, locally built work boats or bum boats as they are called in Tobago.

This study therefore focuses on all aspects of yachting activity in Tobago, drawing primarily from the inputs of stakeholders taken during the Tobago survey as well as from the recent THA review on yachting by its Planning Department.

Recommendations in response to those various inputs are made both in terms of policy formation and in direct response to proposals for specific areas of implementation.

1.2 Objectives

This document has been prepared as a position paper to inform the decision-making process related to developing policy and managing the Yacht Sector in Tobago.

The main objective of the study is to provide information to assist the THA and the people of Tobago in their deliberations on the costs and benefits of managing the island's yachting sector.

CHAPTER 2 BACKGROUND

2.1 Social

According to the 2000 census, Tobago has a population of 54,000 people, almost equally divided among the sexes, and most of whom (about 70%) live in the western part of the island. Population growth from 1990 to 2000 stood at 11.28%. Estimates of the incidence of poverty vary and range from 17 to 26%. Unemployment appears to be less than in Trinidad at 6.9 % out of an estimated labour force of 23,200 (21,500 employed and 1,600 unemployed) people in 1999.

At a social level, Tobago is largely community based. Because of the main mountain ridge which dominates the middle and north part of Tobago, together with the bay type coastline in these parts, many of these communities are centered around coastal villages where fishing and agriculture have been the traditional mainstays. The southwest part of Tobago, with its more open topography, has lent itself to wider economic activity and mixed-use settlement. Throughout Tobago, the relationship to the seashore is close spiritually, physically and socially.

2.2 Tourism

Unlike Trinidad, Tobago is little industrialized and its two main economic activities are tourism and agriculture/fisheries. Within the island there are two components of tourism. One group comprises the inbound tourists, arriving either at the Crown Point Airport in Tobago or at Piarco in Trinidad, the other group consists of Trinidad residents who spend more than 24 hours in Tobago. In addition there are visits by cruise ships using the cruise ship pier/dock at Scarborough or by the smaller Windjammer Cruises that anchor off Charlotteville.

The tourism product envisioned for Tobago relies heavily on the natural environment and culture of its people. This points to smaller scale tourism activity as being a key, though not exclusive, component of its future growth. It would be within this overall framework that yachting would be developed.

The available data on visitor arrivals only include overseas arrivals at Crown Point Airport. Therefore Trinidad residents and those overseas arrivals via Piarco Airport are not included. This is a major omission that severely underestimates tourist arrivals and expenditures.

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