Meeting yachting information needs for planning and policy in the Caribbean

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Introduction

Not too long ago the Caribbean Tourism Organization indicated that the availability of tourism statistics was insufficient to guide policy and planning in the Caribbean. However, compared to the yachting or leisure marine sector, access to information on overnight tourists and cruise ship visitors is abundant. In contrast, yachting information remains largely unavailable and undeveloped.

In many islands the contribution of the yachting sector may very well surpass that of the cruise ship sector, but still such a contribution is largely unknown and not recognized by government and the public at large. Hence, misconceptions abound.

At the same time it is recognized that the collection of yachting specific information requires human and financial resources that, in view of other priorities, may be beyond the capacity of the government or private sector organizations to conduct effectively.

Chaguaramas, Trinidad and Tobago. Courtesy Don Stollmeyer.
Why the collection of data and information?

Within the tourism industry one of the most effective arguments of any sub-sector in the policy dialogue is its relative contribution to economic well-being and development, particularly in terms of employment and tourism earnings. However this argument would be only one of the many justifications for a better framework of yachting information.

Possible uses of improved yachting information would include:

- Border Control
- Facility planning
- Marketing
- Facilitation of yachting tourism
- Policy formulation, strategic and master planning
- Design and management of marine protected areas
- Design and management of recreational areas
- Multiple use, zoning and conflict resolution
- Impact of specific events
- Gap analysis
- Competitiveness
- Tool to monitor whether received fees match use
- Assessment of the contribution of the sector to employment and the economy
- Communications

Typical users

From the above listing it is clear that there is a wide range of possible uses and that such usage is not limited to governments, but would also include the private sector and other stakeholders. Hence typical users include:

- National authorities
- National marine associations
- Central banks
- Marine park authorities
- Individual yachting businesses
- Business sector in general
- Other stakeholders such as fishermen, NGOs etc.
- Media

Different users may have different information needs, which, clearly may not all have the same priority, nor can all such requirements be addressed. However, it is recommended that a minimum data set, which focuses on much of the needs for information by users, be agreed on, and collected on a regular basis. It is hoped that the following discussion can
assist in the achievement of such an agreement and implementation of an Eastern Caribbean Yachting information system.

**Differences between the yachting sector and other tourism sectors**

Perhaps, the major and obvious, difference of yachting with land-based accommodation is that the place of stay is mobile and can leave the island anytime. In this it is similar to cruise ship tourism, but unlike cruise ship visitors, the yachting tourist (and yachts) stay longer, sometimes for months. In addition, the visiting yachting tourist can, and frequently will, spend time at different marinas, boat yards, anchorages and moorings. One consequence of this difference is that apart from yachting tourist arrivals, the number of yachts within a given location is variable and subject to change.

Another difference is that repairs and maintenance of the vessel can constitute a major aspect of expenditure patterns and it is a rare yachting destination that does not provide some repair and maintenance services.

Yachting, like other tourism sub-sectors in the Caribbean region, is highly seasonal, although the high season period differs among countries. July to August is high season for the Bahamas, while the period May to November tends to be the busiest period with a peak towards the end of October and November, for the boat yards in Grenada and Trinidad. Like other stay-over tourism and cruise ship tourism, the period December to April/May is the high season in the other islands as this period coincides with the off hurricane season and winter in North America and Europe, the two main sources of tourists in Caribbean tourism and yachting.

Seasonality also affects the different islands in different ways. Those depending strongly on the mega or super yacht market (e.g. Falmouth and English Harbour in Antigua) are more affected by seasonality than those that largely depend on (bareboat) charter tourism (e.g. British Virgin Islands) or located close to Florida (the Bahamas).

**Composition of the yachting sector**

It is helpful to distinguish between the different categories of visiting or resident yachts and the land-based or near shore facilities that make this yachting possible. The major sub-groups include:

- Mega or super yachts/ luxury yachts
- Bare boat charters
- Crewed charters
- Cruisers/ live a boards
- Power boats
- Sports fishing
- Day sailing
The last two categories could possibly fall under a leisure marine concept rather than under a yachting sector definition, however, many of these use the same land-based facilities as the yachting sector proper.

The first four groups form the segment where yachting information is largely missing and pose problems that are somewhat unique to the yachting sector.

Facilities would include:

• Marinas
• Boat yards
• Anchorages
• Mooring areas
• Yachting repair and maintenance services
• Ancillary services
• Informal sector
Often, the services provided by the yachting repair and maintenance sub sector, are also used by light commercial marine and fishing vessels. Similarly, ancillary services (e.g. bars, restaurants, banks, shops) are also used by residents and other tourists. Obtaining information on the land-based facilities does not really differ too much from obtaining information from any other sector and hence, does not pose any new problems.

**Information requirements**

Perhaps one can group information needs into:

- **Basic vessel statistics**
  
  Basic vessel information would include arrival data, length overall, type of vessel (sail, power, catamaran, trimaran), category of vessel (mega/superyacht, crewed charters, bareboat charters, cruiser/live-aboard), number of crew and passengers, nationality of the captain, country of vessel registration, length of stay, previous port, next port.

- **Basic yachter statistics**
  
  Gender, age, country of residence, employment, income, temporary departure from the jurisdiction while vessel remains within the country.
• Basic facility data
  Number of marina slips and fixed moorings, services offered and number of yachting dependent businesses, employment levels (permanent and temporary employees, use of anchorages, capacity of boatyards, facility usage)
• Yachting tourist satisfaction levels
  How satisfied with the visit, value for money, peeves and grievances, intention to return, intention to recommend the island.
• Yachting tourist expenditures
  Vessel expenditures, crew expenditures, charter expenditures, cruiser expenditures, expenditures of locally based vessels.
• Facility value added
  Turnover, total wage sum, value added.

Chaguaramas, Trinidad and Tobago. Courtesy: Don Stollmeyer

Sources and methods to collect information

The initial source would be administrative data such as collected by the customs and immigration offices. In most countries of the region, basic vessel data can be obtained from customs arrival or departure forms (the former would be more timely, but the latter would give length of stay of the vessel). Using computerized records, confidentiality can be ensured while cross tab analysis can be performed. Here the customs records would be the primary source. The immigration office can provide information on those who leave the jurisdiction while the vessel remains within the territory.
Yachting guides and membership lists of national marine associations can be used for the initial approach to gain an understanding of the facilities. Usually the initial identification may have to be followed up by visits.

The source of the usage of facilities (e.g. marinas, boat yards, anchorages and moorings) is sometimes collected by national marine associations, as is the case for Grenada and to a lesser extent Trinidad. Marine Park managers often maintain records of usage of the facilities of marine parks as is in the case of SMMA in St. Lucia.

For the estimation of expenditures, satisfaction levels and facility value-added, the administrative sources cannot be used and alternative methods have to be applied. Foremost is the use of a combined expenditure and satisfaction survey, which is usually referred to as a visitor expenditure and motivation survey (VEMS). VEMS studies are used extensively in the tourism and cruise ship industry and, in general, the responsible authority (Tourist Board, Ministry of Tourism, Central Statistical Office) has a wealth of experience, including interviewers, which can assist with the conduct of a yachting VEMS.
The VEMS
VEMS are crucial to obtain an insight in expenditure patterns of the yachting tourist and through this, an understanding of the economic contribution of the sector to the economy. VEMS for the yachting sector differ from those of other tourism sectors for a number of reasons:

Tourism surveys are conducted at points of departure (airports, ferry and cruise ship terminals) where there is often a captive audience, which allows for a large number of interviews within a short period of time. This may not be the case in the yachting sector where the throughput of yachting tourists is much slower. Since interviewers would expect to earn a certain amount of money per day, the lower throughput implies a cost increase per completed questionnaire.

In addition, non-yachting tourists tend to stay for one or two weeks. Hence a survey period of two to four weeks tends to sample one or two groups of tourists who sojourned at the destination. Average length of stay of a yachting tourist can be much longer than the typical one or two week stay of the land based tourist, and in fact a period of one or two weeks may not sample sufficient yachting tourists to obtain meaningful results. The concern is particularly relevant for cruisers who can stay for months on a particular island.

In a country that largely depends on (bareboat) chartering these objections may not apply as the typical charter tourist resembles a land-based tourist and points of departure are likely to be the same airports and ferry terminals that other tourists use. However, the country needs to have a charter tourist population that is large enough, compared to the total tourist population, to obtain statistically significant results. If the number of charter tourists is low relative to the total number of tourists (as in many countries) the results are unlikely to be representative (incidentally sport fishing and diving face similar problems).

For some yachting tourists the cost of operations and maintenance (O&M) of the yachts should be included in their expenditures, while for others, O&M form part of their business expenses. In the former situation these expenses should be accounted for as yachting tourist expenditures while for the latter category such cost of O&M are to be considered as intermediate expenses and should not be included as yachting tourist expenditures. An example of the latter are the bareboat companies where, presumably an allowance for O&M is included in the charter fee. The situation is somewhat more complex for crewed and mega yacht charters since these vessels are rarely full time residents.
The longer stay also has the problem of recollection of expenditures. Large expenditure items such as repairs and maintenance are usually remembered (or documented), but the cost of detailed living and holiday expenses can rarely be recollected beyond one or two weeks. Hence a shorter time period for these questions would increase the reliability of the survey data.

A final problem arises when the owner or crew of a vessel departs the jurisdiction while the vessel remains. The above approach would resolve such issues.

Some of these complications make the conduct of a survey more difficult and expensive; others embody the danger that significant estimation errors can be made.

**Partners**

Any effort to collect information would need partnering to bring the effort to a meaningful resolution. Obvious counterparts include:

- Customs and Excise
- Immigration
- Tourism Authorities
- Statistical Office
- National Marine Association
- Fisheries Department
- National Sport Fishing Association
- Event Organizers
- Individual marinas and boatyards
• Ancillary businesses
• Management authority of marine parks

Challenges

The collection and dissemination of yachting information faces a number of challenges that must be overcome for any successful attempt. Challenges include:

• Lack of accepted definitions that apply nationally and regionally. (For example, neither the CTO, the World Tourism Organization or IMO has a definition of yacht)
• Questionnaire design. The design of a questionnaire depends very much on the product mix of any particular island.
• Limited institutional memory.
• Sustainability. While a one shot effort would already be a major improvement the strength of the information collection effort becomes really useful when it is sustained and emerging trends can be discerned.
• Consultants who do not leave a copy of the original data set with the country
• Cost
• Willingness to cooperate
• Confidentiality
• Double counting
• Analysis of the data
• Explanation and dissemination of the results
• Lack of time by otherwise interested parties

Recommendations

Agree on basic information and data set
A suggested set, in order of priority, would include:

• basic vessel information
• basic yachter statistics
• basic facility data
• usage of the facilities
• yachting expenditures and satisfaction levels
• facility value-added

Identify and explore existing, administrative sources of information

Achieve agreement on information collection and dissemination

Obtain an understanding of the islands’ product mix
Conduct a VEMS and business survey with the conduct of the VEMS as a higher priority

Design and test an appropriate questionnaire

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