



Government of the Republic of Trinidad and Tobago

Ministry of Trade and Industry

YACHTING POLICY

OF TRINIDAD AND TOBAGO



2017-2021

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List of Acronyms

AGLA	-	Ministry of the Attorney General and Legal Affairs
CBA	-	Chaguaramas Bay Area
CED	-	Customs and Excise Division
CDA	-	Chaguaramas Development Authority
CPC	-	Chief Parliamentary Counsel
CSO	-	Central Statistical Office
EMA	-	Environmental Management Authority
GDP	-	Gross Domestic Product
IMA	-	Institute of Marine Affairs
IMO	-	International Maritime Organisation
LRC	-	Legislative Review Committee
MCDCA	-	Ministry of Community Development, Culture and the Arts
MOE	-	Ministry of Education
MOF	-	Ministry of Finance
MOLSED	-	Ministry of Labour and Small Enterprise Development
MPD	-	Ministry of Planning and Development
MOT	-	Ministry of Tourism
MTI	-	Ministry of Trade and Industry
MOWT	-	Ministry of Works and Transport
NEDCO	-	National Entrepreneurship Development Company Limited
NSB	-	National Statistical Body
NTA	-	National Training Agency
SDG	-	Sustainable Development Goal
STCW	-	Standard of Training, Certification and Watch keeping
TDC	-	Tourism Development Company Limited
THA	-	Tobago House of Assembly
TTCG	-	Trinidad and Tobago Coast Guard
UTT	-	University of Trinidad and Tobago
VAT	-	Value Added Tax
VEMS	-	Visitor and Expenditure Motivation Survey
YSATT	-	Yachting Services Association of Trinidad and Tobago
YSC	-	Yachting Steering Committee
YTEPP	-	Youth Training and Employment Partnership Programme

1. EXECUTIVE SUMMARY

The Official Policy Framework of the Government of the Republic of Trinidad and Tobago (GORTT) identified the maritime services sector, among others, as “having many of the ingredients necessary for successful penetration of international markets”. Leisure marine or yachting is seen as a sub-sector within the maritime services area which is economically viable given Trinidad and Tobago’s strategic geographic location below the hurricane belt. This is ideal for storage purposes and for the provision of world class yacht repair and maintenance services.

Trinidad and Tobago’s yachting industry was established in the mid-nineties when cruisers discovered Trinidad and Tobago’s strategic positioning below the hurricane belt, which provided a safe haven for yachts during the hurricane season. Since then, a large cluster of services related to repairs, maintenance, storage and ancillary services for yachts has been established in the Chaguaramas Bay Area. Furthermore, Trinidad and Tobago boasts of a cadre of highly skilled specialised labour that is available at regionally competitive prices. The Chaguaramas cluster has therefore positioned itself as the premier yacht repair hub in the Southern Caribbean with cruisers visiting Chaguaramas regularly for a complete overhaul of their vessels. In Tobago, the yachting product is primarily tourism based with yachts visiting to experience the ambience and tranquillity of the island.

Approximately one hundred and eighty (180) businesses are involved in the yachting industry which employs approximately seventeen hundred (1,700) persons. In 2002, the United Nations Economic Commission for Latin America and the Caribbean (ECLAC) estimated that the local yachting industry generated at least TT\$130 - \$150 million annually (US\$20 - \$25 million). A 2013 Economic Impact Assessment that was conducted by the Institute of Marine Affairs highlighted that approximately TT\$30 million could be generated from expenditure by cruisers during the high season arrivals from June to August, 2010. Following a period of significant growth in the nineties and early 2000s, however, the yachting industry is now predominantly in a state of decline.

The GORTT is keen on facilitating the growth of the yachting industry. Accordingly, a Standing Committee for the Development of the Maritime Sector of Trinidad and Tobago has been established. One of the areas under the purview of this Committee is the development of the local yachting industry. The first report of this Standing Committee was submitted to Cabinet on 23 September 2016 subsequent to which Cabinet agreed, *inter alia*, to the:

- i. introduction of a Single Harmonised Form;
- ii. amendment to the relevant legislation to give effect to the Single Harmonised Form; and noted that
- iii. an administrative change will be made by the Immigration Division, Ministry of National Security to increase the allowable stay for foreign yachts to six (6) months with the understanding that further extensions, as deemed necessary by the Immigration Division, will be considered based on circumstances.

Furthermore, during the 2017 Budget Presentation, the Minister of Finance announced that foreign yacht repair services would be VAT exempt from the first quarter of 2017. This decision was based on international best practices, research, representation from the boat repair industry and a desire to make Trinidad and Tobago competitive in the maritime sector.

Supplementary to these efforts to reinvigorate the local yachting industry and to facilitate its future growth, the Ministry of Trade and Industry commissioned the development of a Yachting Policy for Trinidad and Tobago to create a framework that will restore a high level of sustainable growth and expansion in the industry leading to increased employment and significant foreign exchange earnings.

Overall, the goal of the Yachting Policy is to improve the economic contribution of the yachting industry through increased foreign exchange earnings, increased employment and more business activity in the form of yachting related services. The specific objectives of the policy are to:

- Improve and expand Trinidad and Tobago's yachting product;
- Reform and strengthen the legal and regulatory framework;
- Improve the human resource and technical capacity in the yachting industry; and
- Improve the environmental and social sustainability of the yachting industry.

2. INTRODUCTION

The core responsibility of the MTI is to increase trade, business and investment, with emphasis on the development of the non-energy sectors of the economy. The Yachting Industry was identified as one of the non-petroleum industries targeted for development to reduce the economy's dependence on the hydrocarbon sector.

The yachting industry was initially targeted because of Trinidad and Tobago's strategic geographic location below the hurricane belt. This created a safe haven for yachts when other traditional Caribbean yachting destinations were devastated by strong hurricanes. Subsequently, an industrial cluster of repairs, storage and maintenance businesses sprung up in the Chaguaramas Bay Area in Trinidad to provide services to pleasure craft owners. Tobago provided a source of complementary tourism based services for visiting cruisers.

There are approximately one hundred and eighty (180) businesses involved in the yachting industry locally and the majority of them are micro and small enterprises. In terms of employment, approximately seventeen hundred (1,700) persons are employed full-time. A 2013¹ Economic Impact Assessment that was conducted by the Institute of Marine Affairs highlighted that approximately TT\$30 million could be generated from expenditure by cruisers during the high season arrivals from June to August, 2010. A study of the local yachting industry conducted by the United Nations Economic Commission for Latin America and the Caribbean (ECLAC) in 2002 conservatively estimated that yachting contributed approximately TT\$130 - \$150 million annually. Therefore, the industry has the potential to earn up to five times more than it is currently generating.

Between 1990 and 1994, annual yacht arrivals in Trinidad more than doubled from 637 to 1,459 (Customs and Excise Division, Ministry of Finance, 2012). Investment in storage and haul-out capacity as well as in support services stimulated further increases in arrivals, which climbed to 2,564 in the year 2000. Since then it has dropped to around 1000 annually. In Tobago annual arrivals have declined from 737 in 2001 to 121 or less each year.

There are several reasons for the current decline of the industry. Global factors such as declining economies and less disposable income are important considerations. Regional factors include the construction of more boatyards and marinas in the Caribbean islands that have better infrastructure, the thrust to improve yachting facilities and the ease with which yachts can enter and depart the other islands in the Caribbean. In recent years, there has also been a reduction in the number of hurricanes crossing the Caribbean coupled with newly introduced "tie down" methods for protecting yachts during hurricanes. Local factors have also contributed to the decline and subsequent stagnation in the industry namely, Trinidad and Tobago's tedious immigration and customs entry and departure procedures; an unpleasant attitude by some immigration and customs officials when dealing with yachting visitors; Trinidad and Tobago's perceived level of high criminal activity; rising local prices; diesel and oil spills, and the removal of locally priced diesel for yachts; piracy attacks on cruisers and the lack of identifiable no-wake and safety zones which sometimes result in accidents.

The decline has negatively impacted yachting businesses in Trinidad where some have ceased operations; some have reoriented their service incorporating non-yachting activities and

¹ No recent official studies have been commissioned to gather data on the local yachting industry.

others have relocated to other islands within the region. In Tobago, smaller arrival numbers have affected the tourism expenditure component of the yachting industry where the number of yachting tourists has also dropped relative to previous years.

The reduction in arrivals translates into smaller economic contributions across the board from yachting related services to the tourism sector to other subsidiary services such as accommodation or entertainment. The overall effect is a weakened yachting industry that is unable to substantially contribute to the diversification of the economy.

The lack of a framework to guide the development of the yachting industry has given rise to several problems that are described in detail above including, *inter alia*, deterioration and a lack of yachting infrastructure; lack of yachting specific laws and regulations. The net result has been a dramatic decline in yacht arrivals and subsequent stagnation of the industry.

In light of the above, the purpose of this policy is to create a framework that will restore a high level of sustainable growth and development in the yachting industry leading to increased employment and significant foreign income earnings.

As a small island developing state, Trinidad and Tobago is pursuing a national development agenda within the global context of sustainable development. Accordingly, the sustainable development goals of the National Development Strategy (NDS) 2016-2030, Vision 2030 and the United Nations Sustainable Development Goals (SDGs) were also considered as part of the policy development process. The objectives of the policy are linked directly to the following themes of the NDS:

1. Building globally competitive businesses
2. Good governance and service excellence
3. Quality infrastructure and transport
4. Valuing and enhancing our environment

In addition, the objectives of the policy are also directly linked to the following SDGs:

SDG Goal 8: Decent work and economic growth – Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.

SDG Goal 9: Industry, innovation and infrastructure – Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation.

SDG Goal 14: Life below water – Conserve and sustainably use the oceans, seas and marine resources for sustainable development.

SDG Goal 16: Peace, justice and strong institutions – Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels.

3. OBJECTIVES

The overall objective of this policy is to optimize the economic contribution of the yachting industry towards the sustainable development of Trinidad and Tobago by increasing the country's competitiveness as a yachting destination. This will be validated through increased foreign exchange earnings, increased employment and more business activity in the form of yachting related services. Within this framework, the specific objectives of the policy are to:

- Improve and expand Trinidad and Tobago's yachting product;
- Reform and strengthen the legal and regulatory framework;
- Improve the human resource and technical capacity in the yachting industry; and
- Improve the environmental and social sustainability of the yachting industry.

4. METHODOLOGY

Qualitative as well as quantitative methods were employed in drafting this policy. Individual meetings were held with stakeholders in the industry to get an overall idea of the current state of the industry. Meetings were also held with the institutional organisations responsible for the development of the yachting industry namely, the Yachting Steering Committee (YSC) and the Yacht Services Association of Trinidad and Tobago (YSATT).

The information provided during these sessions was supplemented with desktop research about the yachting industry particularly from global and regional perspectives. A number of yachting related studies were referenced from organisations such as the United Nations Economic Commission for Latin America and the Caribbean (ECLAC); the Institute of Marine Affairs (IMA) and the National Training Agency (NTA). The Customs and Excise Division (CED) of the Ministry of Finance provided statistical data for the quantitative analysis of the local yachting industry. YSATT also provided data to help corroborate some of the findings.

The Yachting Steering Committee (YSC), was established by Cabinet in 2006 to oversee the implementation of the Strategic Plan for the Development of the Yachting Industry. This Committee ceased operating on coming into effect of the Standing Committee for the Development of the Maritime Sector. The YSC comprised representatives from both the public and private sector and the Committee was responsible for providing advice regarding the long-term sustainable development of the yachting industry. The membership was comprised as follows:

1. Ministry of Trade and Industry
2. Ministry of Tourism
3. Ministry of Finance, Customs and Excise Division
4. Ministry of National Security, Immigration Division
5. Ministry of Works and Transport, Maritime Services Division
6. Ministry of Planning and Development
7. Tobago House of Assembly
8. Tourism Development Company Limited
9. Chaguaramas Development Authority
10. Yacht Services Association of Trinidad and Tobago
11. Other private sector members as co-opted by the Committee

The issues affecting the yachting industry that would have been addressed via the YSC, are being pursued in the work programme of the Cabinet appointed Standing Committee for the Development of the Maritime Sector of Trinidad and Tobago.

5. SITUATION ANALYSIS

The Yachting Industry of Trinidad and Tobago caters principally to storage, maintenance and repair services for the cruising and crewed charter yachts and is concentrated in the Chaguaramas Bay Area (CBA) in Trinidad. The industry also offers day sailing, diving and game fishing tours mainly in Tobago and to a lesser extent, in Trinidad. The Industry is export oriented with over seventy to eighty per cent of its sales going to transient yachts. Regarding the tourism component, yachting draws on those economic sectors that supply the required tourism services such as eco and cultural tours and entertainment. In this regard, aspects of tourism are merged with those of manufacturing hence the yachting industry is multi-sectoral.

Compared to other tourists and cruise ship visitors the number of yachting tourists is low, but because of their long stay and expenditure on repairs and maintenance, their total spending is high. In 2002, the United Nations Economic Commission for Latin America and the Caribbean (ECLAC) estimated that yachting generated at least TT\$130 - \$150 million annually (US\$20 - \$25 million). Given the absence of reliable data, it was noted that the estimates could possibly be much higher².

Public sector management of the local yachting industry has been extremely fragmented which in turn has stymied its potential to significantly contribute to Trinidad and Tobago's diversification thrust. In the absence of streamlined administration, all of the Government organisations that play a role in the industry have been operating in silos and they seem to be unaware of their impact on the industry as a whole. This is exacerbated by a private sector that is either unregulated, for example as it relates to environmental concerns, or subject to laws and regulations that do not adequately address their needs, for example entry procedures that were originally designed for commercial maritime traffic.

5.1 Characteristics of the Regional Yachting Industry

A successful Yachting Industry in Trinidad and Tobago feeds off a robust Caribbean Yachting Industry. The island arc from Grenada to the Virgin Islands is attractive to sailors because they can go from island to island in easy day sails. On the other hand, yachting related developments in the region could also be a threat in terms of more competition for Trinidad and Tobago.

Within the Caribbean region there are four (4) main sub-sectors of yachting. At the top there is the highly seasonal mega or super yacht segment which is characterized by a demand for sophisticated goods and services that is matched by high expenditures. The second element consists of the crewed and bare boat charter market. Here expenditure patterns of charterers match those of four or five star hotel tourists. The third part is the cruisers who are characterized by long stays and, often, a more limited budget. Finally, there is the day sailing, yacht racing, diving and game fishing sub-sector, which are popular with local yachters.

Arrival data from the other islands do not quite compare with those of Trinidad and Tobago because the product mix in Trinidad differs from that of the rest of the Eastern Caribbean. To varying degrees, charter boats do play a role in the product mix of the other islands, but this

² Development of a Sub-regional Marine Based Tourism Strategy - Yachting in Trinidad and Tobago. ECLAC 2002. No more recent studies by ECLAC on Trinidad and Tobago's yachting industry are available.

market segment is largely missing from Trinidad and Tobago which relies on the cruising market. A charter boat could register 25 to 30 weeks of charter a year with trips that often include visits to other countries in the island chain. Such trips would be reflected in the country's yacht arrival data. In addition, data on yacht and yacht passenger arrivals throughout the region are sketchy and are often incomplete or non-existent.

Still, throughout the region there seems to be a trend of increased involvement by global professional marina management companies, which are largely focused on the mega and luxury yacht market. Examples include Island Global Yachting with marinas in St. Maarten, St. Thomas, Puerto Rico and St. Lucia; Camper and Nicholson, which operates the Port Louis Marina in Grenada and Victor International operating the YCCS Marina in Virgin Gorda, British Virgin Islands. Many of these marinas are operated in conjunction with resort and/or residential developments to provide a complete, upscale, recreational experience.

Further evidence of yachting industry development can be extracted from the renovation and refurbishment of existing marinas (e.g. Bitter End in Virgin Gorda, or Rodney Bay Marina and Marigot Bay, in St Lucia). In addition, new large marinas and boatyards have recently opened in St. Kitts and Grenada which also provide storage and yacht repair services that directly compete with Trinidad and Tobago's yacht product offering.

Such increased competition poses challenges to the domestic yachting industry which must be addressed for the industry to maintain and improve its competitiveness. While there is competition, it is the Caribbean island chain that attracts yachting tourists. In this sense, the success of yachting in Trinidad and Tobago depends on a vibrant yachting industry in the region. As a regional service centre, an increase in Caribbean Yachting offers prospects for renewed growth of the yachting industry in Trinidad and Tobago if advantage can be taken of the strengths and opportunities that characterize the industry, while simultaneously addressing weaknesses and threats.

5.2 Characteristics of the Local Yachting Industry

An Economic Impact Assessment (EIA) of the Yacht Services Industry Cluster in Trinidad and Tobago was completed by the Institute of Marine Affairs in 2013. A sampling methodology through the use of survey instruments was applied to derive at conclusions in the Final Report which revealed more specific characteristics of the local industry. Some of these findings are show in the table below and more details are illustrated in **Appendix I**.

Characteristic	Specific Findings
Length of Stay	The majority of cruisers stayed in Trinidad for over six months or between 181 – 365 days especially during the hurricane season which lasts from June to November.
Size of Crew	The average size of crew including the captain of the vessel is two (2) persons
Area of Origin	The majority of skippers (41%) originate from Europe followed by North Americans (29%)
Size of Yachts (Length Overall)	Sixty per cent (60%) of the visiting yachts fell within the category of 40 – 75ft

Characteristic	Specific Findings
Size of Yachting Businesses	<ul style="list-style-type: none"> • 84% - micro and small enterprises • 13% - medium sized enterprises • 3% - large enterprises
Employment Statistics	Three different studies conducted in 2009, 2011 and 2013 respectively resulted in an average level of employment of 1,700 persons full-time.

With respect to the length of stay, many yachting visitors come to Trinidad to avoid the hurricane season in the islands further north. They tend to stay in Trinidad and/or Tobago until November when they leave to sail the rest of the Caribbean archipelago. This practice has implications for the internal policy of the Immigration Division. In September 2016, approval was given for the Immigration Division to make an administrative change to increase the allowable stay for foreign yachts to six (6) months, with the understanding that further extensions, as deemed necessary by the Immigration Division, would be considered based on circumstances. It should be noted that in some other Caribbean islands, yachting visitors are allowed to stay for six (6) months to one (1) year before requiring an immigration extension.

The size of the crew has an impact on the economic contributions which are made particularly as it relates to ancillary services such as accommodation and entertainment.

Awareness of trends in the main markets, namely Europe and North America, is important for marketing and investment decisions, as well as planning and policy formation.

Given that the majority of visiting yachts fall within the category of 40 – 75ft, this suggests that Trinidad and Tobago captures long-term visitors and transients or people who generally live aboard their yachts. Some of the elements that motivate this segment of the yachting market include cost of services and cost of living, availability of technical skills, parts and spares, hospitality, availability of medical services and personal security among others. It is therefore important for Trinidad and Tobago to ensure that these elements are readily available at competitive prices to capture this market.

Plans for the development of the yachting industry must consider that over eighty per cent of the businesses are micro or small enterprises. This has an impact on incentives which might be developed specifically for this industry.

Although the industry employs a significant number of persons, labour shortages do exist. Businesses have expressed difficulty in sourcing labour for a number of reasons including: poor work ethic; high levels of absenteeism; inconvenient location (only 43% of employees are sourced from within the community); an unrealistic salary expectation relative to the level of skill and experience; and the unavailability of formal training.

5.2.1 S.W.O.T Analysis of the Local Yachting Industry

An analysis of the strengths, weaknesses, opportunities and threats (S.W.O.T) of the Trinidad and Tobago yachting industry is depicted in the table below. It shows the areas where actions could be taken to enhance strengths, build on opportunities while simultaneously addressing the weaknesses and threats currently plaguing the Industry.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Location below the hurricane belt; • Good haul-out, storage and repair facilities; • Skilled labour force; • Links with industrial base provides greater synergy; • Wide range of available yachting support and ancillary services; • Concentration of yachting services in one area (cluster); • Availability of locally grown plantation teak for boat construction; • Strong social, cultural, entertainment recreation and environment attributes; • Good cooperation between Government and private sector; • Well-developed communications, air links; • Good medical and shopping facilities; • Attractive exchange rates; • Relatively inexpensive fuel. 	<ul style="list-style-type: none"> • Cumbersome immigration and customs procedures, poor attitudes and policies; • Over the counter sales are not VAT free; • Cruiser restrictions - Need to clear customs in moving from one anchorage to another and between Trinidad and Tobago; • Lack of proper infrastructure (such as moorings, lighting) and safety zoning areas • No yachting infrastructure in Tobago; • Chaguaramas is a multi-use area and lacks sufficient space for expansion; • Pollution by land-based sources, sewage, hydro carbons and potential oil spill during repair of boats; • Limited data to guide policy and marketing; • No formal training and skill certification available for the Yachting Industry; • No yachting specific legislation; • Weak business management skills of micro-and small businesses; • Yachting not in mainstream tourism marketing thrust.
Opportunities	Threats
<ul style="list-style-type: none"> • An increase in yachting activities in the region; • Increased national recognition of yachting development potential; • Growth of micro and small enterprises; • Expansion of recreational yachting; • Potential for the development of yachting infrastructure in Tobago; • Broadening the scope of yachting services offered in Trinidad and Tobago; • Expansion of the repair and services component in other areas of Trinidad; • Regattas, game fishing tournaments; • Competitive rates for local insurance for yachting activities. 	<ul style="list-style-type: none"> • Increased competition from other recreation oriented destinations that move into yacht services and repair; • Increased facilitation of all aspects of yachting by other Caribbean countries; • Inflation and consequent loss in competitiveness; • Perception of crime; • Piracy and robbery in surrounding waters; • Conflicts between the yachting industry and the fisher folk in the area.

5.2.2 Trinidad and Tobago Yachting Product

In the context of this Policy, the Trinidad and Tobago yachting product refers to the complex interrelationship between and among yachting infrastructure; the cluster of services related to repairs, maintenance, storage and ancillary services; marketing and promotion of the industry; business incentives and tourism related services.

There is a need to develop an integrated product under the Trinidad and Tobago yachting banner while at the same time ensuring that the yacht services component is robust enough to be able to withstand the challenges of international competition. This means the development of strategic products that will enhance the appeal and competitiveness of Trinidad and Tobago as a leisure marine destination.

Yachting Infrastructure

The yachting industry in Trinidad remains oriented to boatyards that provide storage and repair services for cruising yachts, light commercial marine and fishing vessels. CrewsInn Marina in Chaguaramas and the Trinidad and Tobago Yacht Club in Bayshore form the exception since these have primarily a recreational function. Tobago does not offer any marina or boatyard facilities. The lack of yachting infrastructure in Tobago poses a challenge for expansion of the industry.

At present Chaguaramas is the focal point for the yachting industry in Trinidad and Tobago but space is at a premium and while options for expansion exist, they remain limited. Indeed, space limitations already constrain growth and a shortage of marina space has been observed. Therefore consideration should be given to the establishment of marina facilities outside of the Chaguaramas Bay Area.

According to the United Nations (UN), “inclusive and sustainable industrial development is the primary source of income generation, allows for rapid and sustained increases in living standards for all people, and provides the technological solutions to environmentally sound industrialization.” In keeping with the UN’s 9th SDG, and the themes of quality infrastructure and transportation and building globally competitive businesses in the NDS, it is recognised that quality yachting infrastructure must be developed in a sustainable and resilient manner to ensure that it supports Trinidad and Tobago’s economic development and the well-being of human, animal and plant lives.

A pre-feasibility study for Marina sites in Trinidad and Tobago was conducted by a consultant in October 2011. In Trinidad, four sites were proposed, based on the following criteria:

- Safe Harbour – exposure to winds, storm wave impact and the water depth;
- Carrying capacity of the Marina – accommodation for berths;
- Marine Infrastructure – dredging costs and the need for breakwater options;
- Availability of land space and land use considerations – plans for real estate development;
- Environmental impacts – exposure to water borne pollution; destruction of wetlands; oil spillage from commercial vessel traffic

In Tobago, three sites were proposed, on the basis of the following criteria:

- Proximity to people services and proximity to tourism infrastructure;

- Proximity to transportation;
- Proximity to yacht traffic;
- Separation of sites from competing/existing activity;
- Marine infrastructure costs; and
- Environmental impacts

With respect to Tobago, the study also mentioned that the predominant factor that led to the selection of these sites was the identification of a marina basin that could offer shelter and safe navigation within a conceivable physical and economic framework. All other possible sites were faced with either navigation issues or prohibitive costs and in some instances, insurmountable environmental constraints.

The criteria for site selection are different for Trinidad, than for Tobago because development of the yachting industry is at different stages for both islands. Additionally, the profiles of the yachting markets between the two territories are distinctly different with Trinidad having a focus on storage and repairs and Tobago having a focus on tourism and recreation.

A comprehensive environmental impact assessment will also need to be conducted on the potential environmental risks and social implications of any proposed marina developments.

Yacht Service Offerings in Trinidad and Tobago

The range of services offered by the local yachting industry is arranged by major groups and broken down as follows:

Category of Services	Sample of Sub-Categories	Percentage
Repairs and Maintenance	Fibreglass work; welding; woodworking; upholstery services, sail making, electronics and electrical work, painting and rigging.	64%
Marina Services	Hospitality services; haul-out facilities; storage facilities and dock spaces	19%
Other Services	Retail shops; travel agencies and yacht brokerage	17%

Regional competition for the range of services that Trinidad provides is increasing. In addition, boatyards in storm prone islands are employing improved technologies and management plans to secure the boats during bad weather. Hence, the location based competitive advantage that Trinidad and Tobago previously enjoyed has diminished somewhat. Furthermore, yacht traffic regulations in the Eastern Caribbean have eased and these islands are now more yachting friendly than Trinidad and Tobago.

Regattas and Game Fishing Tournaments

The hosting of international regattas and game fishing tournaments such as the Angostura Regatta, the Trinidad-Tobago Great Race and the International Game Fishing Tournament in Tobago provides visible branding of Trinidad and Tobago as a yachting destination. However, the level of international participation leaves significant room for improvement.

Nevertheless, it should be noted that under the Income Tax Act, profits that result from the organisation of such sporting events are free from income tax.

Marketing and Promotion

Repeat customers are an important segment of the local market. A 2009 YSATT survey indicates that 79% of the yachters had been in Trinidad before, with 56% visiting the island five (5) times or more. Furthermore, a survey that was conducted by the Institute of Marine Affairs in 2013 also indicated that repeat customers were an important segment of the market and that 60% of the cruisers who responded to the questionnaire were repeat customers.

As Trinidad and Tobago enhances its yachting brand the market will become more segmented. The challenge for effective marketing will be to ensure that potential yachting visitors become aware of the quality and range of the Trinidad and Tobago yachting product.

In addition to the “word-of-mouth” mechanism, other tactics used to promote the local yachting industry include full page advertisements in international magazines; participation in international boat shows and use of social media with a heavy focus on good quality repairs, maintenance and hurricane free storage. To date, these approaches have had lacklustre success as they have not been done in a coordinated manner.

Small Businesses

A substantial portion of the Trinidad and Tobago yachting industry comprises small and micro enterprises. It has been observed that many of these firms show weaknesses in basic business skills such as time scheduling and costing. The owners and operators of these businesses need training in specific business management areas so that they can become more international in their approach and increase their capacity to cater to a wider range of international clientele. Some of these areas include costing and pricing; scheduling; providing excellent customer service and human resource management.

5.2.3 Institutional, Regulatory and Investment Framework

During the 1990s, development of the yachting industry was aided by some institutional changes such as the establishment of the Yacht Services Association of Trinidad and Tobago. However, this situation has changed considerably and there is now an urgent need for institutional reform in order to restore a high level of growth in the yachting industry.

The UN’s 16th SDG aims to promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels. Additionally, the NDS advocates for good governance and service excellence. In this regard, it must be recognised that a strong yachting industry can be facilitated by ensuring that the relevant government institutions are efficient, effective and transparent at all levels. Furthermore, laws and regulations should be enforced in a non-discriminatory manner.

Immigration and Customs Laws and Regulations

Customs and Immigration procedures and regulations in Trinidad and Tobago were primarily established for commercial shipping at a time when the yachting industry was virtually non-

existent. The current documents and procedures for yachting visitors are ambiguous, cumbersome and subject to the interpretation of the Officer in Charge (OC) on any given day. In an effort to streamline the process for all stakeholders involved, the introduction of a single harmonised form, that incorporates all information required by border agencies, has been approved by Cabinet. The necessary steps to effect implementation of the form are being undertaken.

Currently, under the regulations of the Immigration Act, Harbour Act and Customs Act, there are differences in the time allotted for departure after a yacht has cleared to depart Trinidad and Tobago. There is a need to establish unambiguous guidelines on the interpretation of overtime for yachts arriving in and departing from Trinidad and Tobago. Standardization of these time allotments through amendment of the relevant regulations is recommended.

Standardization is also required for procedures associated with the clearing and transit of spare parts for repairs. Cruisers who hire local contractors to conduct repair and maintenance while out of the country are often faced with difficulties from Customs officers regarding the release of parts which results in extended delays.

In Trinidad and Tobago, yachting visitors need to clear customs when moving from anchorage to anchorage within each of the islands. In addition, resident and transient yachts need clearance for voyages between Trinidad and Tobago. Other countries in the region have abandoned this requirement as it was felt that this was a strong disincentive to visiting yachts, particularly as other tourists and visitors are free to travel throughout the country. Consideration should be given to ease the customs clearance requirement for anchorages within the wider Chaguaramas area, as well as for anchorages between Trinidad and Tobago. The border agencies with responsibility for national security have suggested that technology could facilitate this process while simultaneously ensuring the adequacy and efficiency of border security measures.

The establishment of an **electronic Pre-Arrival Notice** (ePAN) system has been proposed by the national security agencies. This is a system whereby notification of the presence of a vessel entering or calling on port facilities can be made online, 24 hours a day, 7 days a week. The system facilitates the capture of critical vessel statistics and assists with the efficient monitoring of the vessel's movements. International ePAN standards require that vessel owners provide information on their last 10 ports of call, as well as information on the occupants on board the vessel. Yachts entering T&T waters should be required to give security officials at least 72 hours' notice before their arrival so that the relevant safety and security arrangements can be put in place. Once the arrival time of a yacht is known, it can be monitored by use of radar. Additionally, once the Coast Guard is informed that heavy yachting is expected during a particular time period, deterrence patrols can be conducted.

It was also noted that there are no standardised rules or criteria for the granting of visa allowances and cruisers often face difficulties in having their stay extended. Furthermore, the processing of extensions for cruisers, which was previously done in Chaguaramas, is now only done in Port-of-Spain which can be challenging particularly for first time visitors to Trinidad and Tobago. Additionally, cruisers returning with one-way tickets often encounter challenges when clearing customs and immigration at the airport. These onerous issues are not faced by cruisers when visiting other islands and must be addressed.

It is critical to note that the core functions of the border agencies (Immigration, Customs and Maritime Services Divisions) that is, national security, revenue collection and maritime safety are of paramount importance even in the context of facilitation for the yachting industry. All proposed measures are meant to improve the efficiency of their operations in support of their core functions.

Data and Research

The Government is aware that data availability in the yachting industry is limited. It is only data on yacht arrivals and departures that are systematically collected by the Immigration and Customs and Excise Divisions respectively. The Central Statistical Office (CSO) and the Tourism Development Company Limited (TDC) conduct tourism expenditure and satisfaction surveys for land-based and cruise ship tourism, as well as during special events and seasons such as carnival, Easter and summer. These have not been expanded to include the yachting industry. However, it is acknowledged that targeted marketing and informed policy decision making depend on a solid information base about the local industry, as well as regional and global developments.

Ministry of Trade and Industry (MTI)

The Ministry of Trade and Industry (MTI) has primary responsibility for the development of the yachting industry. This is pursued through ongoing dialogue with the private sector to ensure that investment facilitation, training and capacity building are relevant and will support the industry to become more competitive and sustainable.

Yacht Services Association of Trinidad and Tobago (YSATT)

The Yacht Services Association of Trinidad and Tobago (YSATT) is a non-profit private sector organisation that works with the Government to facilitate the development of the yachting industry. The YSATT office interacts with cruisers and industry businesses on a daily basis to address any issues which may arise. As a non-profit organisation, YSATT receives a monthly subvention from the Tourism Development Company (TDC) to operate a Tourist Information Centre in Chaguaramas which is extremely helpful to cruisers who visit the island.

Yachting Legislation

Administration of the yachting industry is governed by legislation that was created for the commercial maritime industry under the following: *Customs Act 78:01*; *Immigration Act 18:01*; and the *Harbours Act 50:06*. The yachting industry is also guided by the *Shipping Act (Chap 50:10)*. There is a need for legislation that is specific to the type of yachting and pleasure craft activities that take place in Trinidad and Tobago. The Customs and Excise Division, the Immigration Division and the Maritime Services Division are the regulatory bodies that are directly involved in the yachting industry.

The Maritime Services Division (MSD) of the Ministry of Works and Transport is the administrative body, established by statute, charged with the regulation of vessels in Trinidad and Tobago waters. The MSD is responsible for the registration and licensing of ships, matters relating to crews, safety of life at sea and matters incidental thereto.

The following conventions, incorporated in varying degrees within the provisions of the

Shipping Act, directly impact on yachting operations in Trinidad and Tobago waters:

The International Convention for the Safety of Life at Sea (SOLAS 74/78) – specifies minimum standards for the construction, equipment and operation of all ships, (save and except pleasure yachts not engaged in trade, as per SOLAS Regulation 3), which are compatible for their safety.

The International Convention on Standards of Training, Certification and Watch keeping for Seafarers (STCW) 1978, as amended in 1995 – sets the standards for training and certification for seafarers working onboard ships engaged in international voyages. Some countries have found strict compliance with the provisions of STCW too onerous in respect of yachts, especially regarding the amount of sea time required to achieve STCW certification. Therefore, these countries have adopted other international codes of qualification, the most popular being the UK's Maritime and Coastguard Agency (MCA) yacht certification.

The International Regulations for Preventing Collisions at Sea (COLREGS) 1973 – sets out the rules of operations for vessels at sea, including rules governing steering and sailing, the conduct of vessels in sight of each other, and the conduct of vessels in restricted visibility. These apply to all ships, including yachts.

With an emphasis on expansion of the Trinidad and Tobago yachting industry, the proposed legislation should address, *inter alia*:

1. An indigenous definition of yacht or pleasure craft;
2. Set out the conditions for qualifications of captain and crew;
3. Set out the conditions for crewed or bare boat charter fleets to operate in Trinidad and Tobago;
4. Clearly set out incentives for the development of the yachting industry;
5. Establish regulations for international best practices as it relates to treatment of the environment; and
6. Streamline all regulatory and institutional activities relevant to the industry.

Incentives and Investment Promotion

Currently, opportunities for investment in the local yachting industry are limited to the need for infrastructural development. This is seen as a primary need for the growth of the industry.

Incentives are provided under various laws including the Tourism Development Act, Customs Act, the Corporation Tax Act and the Fiscal Incentives Act most of which cater to large companies. With respect to small enterprises, the entitlement to incentives is not always clear, hence available incentives are not always utilised to the extent as was foreseen when the legislation was introduced.

Nonetheless, investments in (i) those activities that promote and broaden the scope of the Trinidad and Tobago yachting product and (ii) those that enhance the level of high value expertise and services should be encouraged.

5.2.4 Human Resource Development

In Trinidad and Tobago, yachting is less seasonal than in many other countries of the Region which is a characteristic that allows for career development, upward mobility of workers and significant potential for long term employment.

In 2012³, a Labour Market Study was conducted by the National Training Agency. The review concluded that in the absence of formal training, skilled labour was hard to find, therefore employees needed years of informal on-the-job training to master their crafts. Additionally, no mechanism existed to formally validate competence levels.

The maintenance and repair of yachts require varied skills from basic to high level specialization. For the industry to improve and transition into one that is efficiency driven, it is recognised that Trinidad and Tobago will need to supply a work force that is customer oriented and is able to apply a high level of craftsmanship. Shortages of skills have been identified in areas such as stitching, painting, welding, semi-skilled workmen and technicians among several others. A critical need to improve skills includes the availability and accessibility of yachting training programmes and certification to meet the needs of the individuals seeking advancement and to address the skill shortages that currently exist.

Furthermore, a trend of the arrival of larger yachts has been observed in Chaguaramas over the last ten (10) years. The owners and captains of these larger crafts have exacting standards and expectations for the quality of workmanship and therefore the servicing of such yachts demand increased technical expertise. This will entail the use of specialized skills and sometimes custom made equipment. High level skills training will be needed for captains, boatswains, engineering officers, chefs, stewards and much more.

Currently, the Centre for Maritime Studies at the University of Trinidad and Tobago (UTT) is accredited by the Maritime and Coastguard Agency (MCA) of the United Kingdom for a number of maritime programmes and it is also an approved training centre for the Royal Yachting Association.

The Ministry of Trade and Industry has proposed the development of an apprenticeship programme to cater to the growing needs of the maritime industry under the ambit of the National Training Agency (NTA), the UTT, and other agencies under the Ministry of Education. It is expected that this programme will provide graduates with the technical and vocational skills that are needed within the sector.

The Government can accelerate the economic contribution of the yachting industry through the creation of quality jobs and decent working conditions. This will impact the foreign exchange earning potential of the industry through more satisfied yachting visitors, and also positively impact on employment. The provision of fulfilling employment for all is also included on the agenda of the UN via **SDG 8** that seeks to facilitate sustainable economic development through full and productive employment, decent work for all and social protection. This is also mirrored in the theme building globally competitive businesses in the NDS.

³ No recent labour studies have been commissioned to gather employment data on the local yachting industry.

5.2.5 Yachting Tourist Satisfaction Levels

Historically, YSATT has conducted several, albeit somewhat limited, ad-hoc visitor and expenditure motivation surveys (VEMS) but they lack the resources to do these on a systematic and sustained basis. Nevertheless, the insight gained suggested that Trinidad and Tobago rated very low in terms of visitor satisfaction. Some of the reasons given included among others, poor customer service; contractors' inability to meet deadlines; and archaic immigration and customs laws. It should be noted, that yachting is a "word-of-mouth" industry therefore negative experiences are likely to have adverse impacts on visitation decisions by other cruisers. In an attempt to restore growth to the industry, there is a need to focus on the reduction of negative experiences and perceptions as expressed by yachting visitors. In the past, yachting visitors' satisfaction levels have also been affected by incidents of crime.

5.2.6 Safety and Security

The matter of safety and security, in particular incidents of piracy, remain an area of great concern to cruising yachts. The presence of crime, or the perception thereof, is a deterrent to visitation by yachts, even as indicated by yachtsmen in the other islands. The Chaguaramas Development Authority (CDA) has initiated measures to reduce crime within the Chaguaramas peninsula and while the incidents against yachting tourists have been reduced, it is important to simultaneously promote Trinidad and Tobago as a safe and secure yachting destination. In this regard, maintaining contact and stakeholder relationships with the Trinidad and Tobago Coast Guard (TTCG) and the North Post Radio Station⁴ is also imperative.

The development of the yachting industry must also take into consideration the critical issue of border-protection and the possible security risks associated with yachts entering the country. Border agencies have expressed serious concern with the possible involvement of persons in the yachting industry in criminal activities. There is need for a delicate balancing act that will facilitate the growth of the yachting industry while simultaneously ensuring the safety and security of everyone in and around Trinidad and Tobago.

5.2.7 Environmental Protection

Owing to social, coastal and land spatial limitations there will be a need to balance competing uses of coastal areas, bays and anchorages. Diligence has to be exercised to ensure that coastal infrastructure, and the construction thereof, and other activities associated with yachting and other forms of leisure marine do not cause pollution or deterioration of the coastal environment. The potential impacts of yachting on the marine and coastal environment can be minimised by ensuring that boat builders, marinas and boatyards incorporate pollution and other environmental control measures into their operating procedures and development plans.

The Environmental Management Authority (EMA) is primarily responsible for ensuring the effective management of the marine environment in Trinidad and Tobago. The overarching

⁴ The North Post Radio Station/TSTT discharges some of Trinidad and Tobago's responsibilities under international treaties known as Safety of a Life at Sea (SOLAS 1974) and the Maritime Search and a Rescue (SAR 1979) as well as the United Nation's Convention of the Laws of the Sea.

framework for environmental regulation in Trinidad and Tobago is the Environmental Management Act (Chapter 35:05) which mandates the EMA, *inter alia*, to develop environmental rules and regulations. In keeping with this mandate several subsidiary rules were developed including the Certificate of Environmental Clearance (CEC) Rules, 2001. These Rules aim to regulate the environmental impacts arising from forty-four (44) Designated Activities contained within the Certificate of Environmental Clearance (Designated Activities) Order.

The Designated Activity that is most relevant to the yachting industry is Designated Activity 13 which encompasses:

- a. “the establishment, modification, expansion, decommissioning or abandonment (inclusive of associated works) of marinas, piers, jetties, slipways and other coastal features”
- b. “the establishment, modification or expansion (inclusive of associated works) of artificial reefs or other offshore structures”
- c. “the dredging or cutting of coastal or marine areas”

Under this Designated Activity, marinas granted CECs are legally obligated to adhere to conditions contained therein which are informed by international best practices for marinas and boatyards.

Additional regulations and programs that add to the effective management and wise use of the marine environment include:

1. Implementation of a permitting system of point-source effluent discharge to marine areas through the Water Pollution Rules (as amended);
2. Development of Ambient Water Quality Standards (inclusive of marine water quality standards) under the Public Sector Investment Programme (PSIP) 2014/2015 and 2015/2016. This exercise is ongoing;
3. Establishment of an Emergency Response and Investigations Unit (ERI) which responds to environmental incidents including incidents threatening coastal resources; and
4. On-going work of the Environmental Police Unit (EPU) to safeguard marine resources.

Special consideration was given to the UN’s **SDG 14** which highlights the need for the conservation and sustainable use of the oceans, seas and marine resources for sustainable development. This is directly linked to the theme of valuing and enhancing our environment in the NDS. Of the targets which have been identified, the Government is particularly supportive of the need to:

- Significantly reduce marine pollution of all kinds, in particular from land-based activities, including marine debris and nutrient pollution;
- Sustainably manage and protect marine and coastal ecosystems to avoid significant adverse impacts, including by strengthening their resilience, and take action for their restoration in order to achieve healthy and productive oceans; and
- Increase the economic benefits to Small Island Developing States (SIDS) and least developed countries from the sustainable use of marine resources.

5.2.8 Social Considerations

The support of the people of Trinidad and Tobago is essential to the quality and sustainability of the yachting product. Due to its relative isolation in Chaguaramas and the negative perception by the public, the contribution of the yachting industry is not fully appreciated. This translates into a need for a national yachting awareness programme to stimulate community involvement at all levels.

The yachting industry can become a part of the economic base of small communities including Tobago, and it can attract complementary businesses through the tourism element which can lead to the formation of social, cultural and economic multiplier effects. The surrounding communities should be encouraged to participate in the management and supply of services for yachts. Social events and fundraisers can also be encouraged as a means of promoting community interaction and socially responsible projects. It is proposed that mechanisms be introduced for more effective consultation between communities and yachting and other marine stakeholders.

6. POLICY FRAMEWORK

This policy framework was prepared in an effort to facilitate the growth of the yachting industry in Trinidad and Tobago. The overarching goal of the policy is to achieve sustainable growth and development of the local yachting industry by addressing the myriad issues which have been outlined. This framework will also lay the foundation for improving the competitiveness of the industry, with a view to securing this country's position as a premier yachting destination.

The policy framework aims to achieve these objectives using a comprehensive approach by looking at four thematic areas namely: i) product development; ii) the legal and regulatory framework; iii) human resource development; and iv) environmental and social considerations. The specific strategies associated with each of these themes are intended to address existing problems and also to ensure the sustainable future development of the yachting industry. These strategies are outlined below.

6.1 Product Development

Expansion of the yachting industry in Trinidad and Tobago requires a multi-faceted approach to product development. In this regard, the Government will:

1. **Conduct regular visitor expenditure and motivation surveys (VEMS)** – With a view towards influencing policy decisions, the national statistical body (Central Statistical Office) will conduct VEMS periodically each year in collaboration with the Yacht Services Association of Trinidad and Tobago (YSATT) to measure and assess expenditure patterns of yachting tourists as well as their levels of satisfaction in the Trinidad and Tobago market.
2. **Source investors to construct marinas in Trinidad and Tobago** – A feasibility study will be conducted to identify the geographical location of potential sites, tenure of the land, the infrastructure that will be required at these sites and any associated natural constraints. The national investment promotion agency will then source investors to facilitate the construction of upscale full-service marinas that cater to the needs of the high-end yachting market and also adhere to international best practices for sustainable development through certification by Green Globe⁵, Blue Flag⁶ or other similar global standards.
3. **Host at least one major yachting event annually** – Government will partner with the private sector to facilitate the hosting of one major yachting event such as a regatta or a game fishing tournament. This event will be hosted annually and attempts will be made to have it included in regional and international yachting circuits.

⁵ The Green Globe Programme recognises and rewards sustainable environmental practices for organisations within the tourism and travel industry.

⁶ Blue Flag is a voluntary eco-label that speaks to the sustainable development of beaches and marinas through strict criteria dealing with Water Quality, Environmental Education and Information, Environmental Management, and Safety and Other Services.

4. **Develop and implement a Yachting Marketing and Promotional Plan** – A comprehensive plan will be developed to promote the yachting industry of Trinidad and Tobago to foreigners. This plan will coordinate all yachting related marketing and promotion activities and streamline the efforts of all the stakeholders involved. The major objective of the plan will be to attract more yachts to Trinidad and Tobago for repairs, maintenance and storage. This will serve to develop the yachting industry and increase its contribution to the economy.
5. **Develop and implement a Programme for Business Training** – This programme will specifically target the needs of the micro, small and medium enterprises in the yachting industry. The programme will be developed on the basis of a needs assessment and will have a strong export-oriented focus.
6. **Conduct infrastructural upgrades and develop necessary zoning plans for the Chaguaramas area (on land)** – The Chaguaramas Development Authority (CDA) will work toward upgrading the infrastructure in the Chaguaramas area including the transportation systems, pavements, and lighting. These improvements would assist in enhancing the area as a yachting tourism destination.
7. **Implement a safety programme to mitigate against instances of piracy and robbery at sea against cruisers** – This safety programme will provide comprehensive guidelines for cruisers to reduce the likelihood of these attacks and increase awareness of international best practices which seek to deter, delay or avoid these attacks.

6.2 Legal and Regulatory Framework

Development of the yachting industry is predicated upon the active involvement of many Government ministries and agencies. In light of this, the Government will implement the following initiatives:

8. **Implement a Single Harmonised Form** – Border clearance procedures must be simplified starting with implementation of a single harmonised form for the Customs and Excise Division, Immigration Division, Maritime Services Division and any other border patrol agencies.
9. **Facilitate the movement of yachting traffic between Trinidad and Tobago** – Government will ease the requirement to clear Customs and Excise when moving from anchorage to anchorage between Trinidad and Tobago. The number of checkpoints could be reduced. However the yachts should still be checked by Customs and Excise once they enter certain sectors of the island. This strategy should be complemented with an increased use of technology to monitor the movement of yachts in and out of Trinidad and Tobago's waters to ensure the adequacy and efficiency of security operations for boats. Specifically, an electronic Pre-Arrival Notice (ePAN) system should be implemented.
10. **Conduct Customer Service Training and develop Standard Operating Procedures for border agency officers at yachting ports of entry** – Border agency procedures and requirements will be explicitly detailed for both the officers and visiting cruisers. The regulations will clearly identify allowable reasons for extensions

in addition to all associated charges for longer stays by yachting visitors. Moreover, all border agency officers will be trained to provide a high level of customer service to yachting visitors.

11. **Develop yachting legislation** – Develop and enact a Yachting Act to provide a clear distinction from commercial maritime laws and to provide clear definitions, regulations and operating procedures. The proposed legislation will also address marine safety, zoning and environmental management considerations.
12. **Establish a Yachting Data Repository with the National Statistical Body** – The national statistical body (Central Statistical Office) will collect relevant data about the yachting industry using, among other sources, the Single Harmonised Form. Recommended aggregations for the data will include:
 - No. of yacht arrivals and departures
 - Length of vessel (in feet)
 - Size of crew
 - No. of yacht arrivals by previous port or country
 - No. of yacht departures by destination port or country
 - Purpose of stay (e.g. repairs, storage, tourism)
 - Length of stay

6.3 Human Resource Development

Training must be formalised and entrenched in plans for development of the people of Trinidad and Tobago with particular emphasis being placed on technical and vocational skill areas as well as customer service skills. Therefore, the Government will:

13. **Assess and formalise existing skills within the yachting industry** – The National Training Agency (NTA) will develop the criteria for competency based qualifications in the yachting industry. This will be done in the form of the Trinidad and Tobago National Vocational Qualification (TTNVQs) and/ or the Caribbean Vocational Qualification (CVQ) for specific yachting related skills.
14. **Implement a national plan for training and certification** – A national plan for skills training and certification in the yachting industry will be developed. The plan will include, but not be limited to training for middle and senior management; use of foreign expertise or expatriates who are skilled in yard management; an apprenticeship scheme for recent graduates; short term bridging courses to provide vertical movement from tradesman to foreman to manager and a work permit policy that facilitates employment of highly skilled foreign nationals.
15. **Develop a scholarship programme for advanced skills training** – Government will provide scholarships for high level skills training. Partnerships between local academic institutions and international organisations or foreign universities will also be pursued. Scholarships will target human resource development for the mega and superyacht market segments to provide employment opportunities as captains, deck officers, engineering officers and stewards to name a few.

6.4 Environmental and Social Development

The sustainability of the yachting industry depends on a plethora of social and environmental considerations. The development of the industry must factor in environmental best practices as well as the active involvement of the surrounding communities. Accordingly, the Government will pursue the following activities:

16. **Facilitate the use of sustainable environmental practices and technologies** – The EMA will collaborate with the relevant stakeholders to develop voluntary compliance standards and alternative incentive programs, as well as international best practices for marinas and boatyards.
17. **Implement an environmental awareness and sustainability programme for the yachting industry** – The EMA will lead a committee of stakeholders to facilitate implementation of a programme of activities to raise awareness among the yachting community of environmental challenges and responsibilities. It is expected that this programme will shape the attitudes and behaviours of all stakeholders in the context of industry development.
18. **Implement a national sensitization campaign for the yachting industry** – In an effort to increase participation from surrounding communities and to inform the entire population about the benefits of developing the local yachting industry, a national sensitization campaign targeted at citizens of Trinidad and Tobago will be launched. It is expected that this campaign will stimulate interest from investors, the business community and from young persons who are seeking to pursue maritime oriented careers among others.

7. MONITORING AND EVALUATION FRAMEWORK

Goal: Sustainable growth and development of the local yachting industry

Objective	Improve and expand Trinidad and Tobago's yachting product				
	INDICATOR	BASELINE	TARGET	MEANS OF VERIFICATION	ASSUMPTIONS
Outcomes	Increased satisfaction with the yachting infrastructure in Trinidad and Tobago	Zero	50% by December 2024	Visitor and expenditure motivation surveys	MOT and NSB (CSO) have the resources to conduct the VEMS on a systematic and sustained basis
	Increased arrivals of foreign owned yachts to Trinidad and Tobago	1030	10% by December 2021	Publications from the NSB (CSO) A data repository within the MTI	The NSB (CSO) is fully functional and has the capability and capacity to collect and store the data
	Increased foreign exchange earnings	Zero	10% by December 2021	Visitor and expenditure motivation surveys	MOT and NSB (CSO) have the resources to conduct the VEMS on a systematic and sustained basis
	INDICATOR	BASELINE	TARGET	MEANS OF VERIFICATION	ASSUMPTIONS
Outputs	1. A Visitor and Expenditure Motivation Survey (VEMS)	1 VEMS (2016)	1 VEMS by December 2017	Report from MOT	MOT and NSB (CSO) have the resources to conduct the VEMS on a systematic and sustained basis

	INDICATOR	BASELINE	TARGET	MEANS OF VERIFICATION	ASSUMPTIONS
Outputs	2. Two (2) marinas developed in Tobago One (1) marina developed in Trinidad	Zero 8 marinas in Trinidad (2015)	1 marina in Tobago by December 2020 1 marina in Tobago by December 2022 9 marinas in Trinidad by December 2020	1 marina is built in Tobago 1 marina is built in Tobago 1 marina is built in Trinidad	Investors are sourced and facilitated Investors are sourced and facilitated
	3. A local flagship yachting event	Zero	1 annual regatta hosted in May 2019	There is press coverage of the regatta locally, regionally and internationally	Funding and support are available
	4. A yachting marketing and promotional plan	Draft Strategy for the export of Yachting Services (2012)	1 yachting marketing and promotional plan by October 2018	A yachting marketing and promotional plan will be adopted by the Ministry of Trade and Industry	Funding and support are available
	5. Programme for Business Training	Zero	2 courses executed by April 2018	Report from the National Entrepreneurship Development Company (NEDCO)	Funding and resources are available and business owners are willing to participate
	6. Needs Assessment and implementation plan for infrastructural upgrades in the Chaguaramas area	Zero	Needs Assessment and Implementation Plan by January 2019	The Chaguaramas Development Authority will implement the plans outlined	Funding and support are available
	7. A Safety Programme to mitigate against instances of piracy and robbery	Zero	Safety Programme by January 2018	Ministry of National Security will work with stakeholders to implement the measures outlined	Funding and support are available

Objective	Reform and strengthen the legal and regulatory framework for the yachting industry				
	INDICATOR	BASELINE	TARGET	MEANS OF VERIFICATION	ASSUMPTIONS
Outcomes	An improved level of satisfaction among yachting visitors to Trinidad and Tobago	Zero	40% by December 2021	Visitor and expenditure motivation surveys	YSATT has the resources to conduct the VEMS on a systematic and sustained basis
	An improved percentage of repeat customers	Zero	20% by December 2021	Visitor and expenditure motivation surveys	YSATT has the resources to conduct the VEMS on a systematic and sustained basis
	INDICATOR	BASELINE	TARGET	MEANS OF VERIFICATION	ASSUMPTIONS
Outputs	8. A Single Harmonised Form (SHF) for arrivals and departures	11 forms for arrival and 3 forms for departure (2015)	1 SHF form implemented by August 2018	Customs and Immigration legislation and regulations amended	The necessary legislative changes will be effected by August 2017
	9. Streamlined process and ePAN system for yachting traffic	Zero	Streamlined process and ePAN system implemented by December 2019	Correspondence from the Customs and Excise Division	Customs and Excise Division willing and able to facilitate implementation
	10. Customer Service Training and Standard Operating Procedures (SOPs) for Customs and Excise and Immigration Officers	Zero	A SOPs manual is available to Customs and Immigration Officers by December 2017	Report on training and the SOPs manual is available in hardcopy and electronically throughout Customs and Immigration Offices	Customs and Immigration Officers will apply the contents of the training and follow the contents of the manual
	11. Yachting legislation enacted	Zero	A Yachting Act by August 2021	Proclamation of the final yachting legislation as part of Trinidad and Tobago laws	Government support and prioritization of the yachting industry

	INDICATOR	BASELINE	TARGET	MEANS OF VERIFICATION	ASSUMPTIONS
	12. Repository for yachting data	Arrival and departure data from Customs and Excise (2015)	A data repository for yachting statistics by August 2018	<ul style="list-style-type: none"> • Publications from the national statistical body (CSO) • A data repository within the Ministry of Trade 	The national statistical body is fully functional and has the capability and capacity to collect and store the data
Objective	Improve the human resource and the technical capacity in the yachting industry				
	INDICATOR	BASELINE	TARGET	MEANS OF VERIFICATION	ASSUMPTIONS
Outcomes	Increased employment in the yachting industry	1,700	10% by December 2021	Publications from the national statistical body A data repository within the Ministry of Trade	The national statistical body is fully functional and has the capability and capacity to collect and store the data
	An improved level of value-added maintenance and repair services available	Zero	40% by December 2021	Visitor and expenditure motivation surveys	YSATT has the resources to conduct the VEMS on a systematic and sustained basis
	Trained and certified employees in the yachting industry	Zero	100 employees trained and certified in the yachting industry by September 2018	National Training Agency labour market study	Employers will be willing to release and fund the employees for training
	INDICATOR	BASELINE	TARGET	MEANS OF VERIFICATION	ASSUMPTIONS
Outputs	13. Trinidad and Tobago National Vocational Qualifications (TTNVQs) and Caribbean Vocational Qualifications (CVQs) implemented	Zero	2 TTNVQs and 2 CVQS implemented by September 2018	The National Training Agency (NTA) will offer the relevant certification	Industry experts are willing and available to help develop certification standards

	INDICATOR	BASELINE	TARGET	MEANS OF VERIFICATION	ASSUMPTIONS
	14. A national plan for training and certification in the yachting industry	Zero	1 training and certification plan by September 2018	A National Training Plan for the yachting industry will be adopted by the NTA	Funding and support are available
	15. Tertiary level scholarships for careers in the yachting industry	Zero	2 scholarships available by December 2020	Ministry of Education will provide scholarships with a focus on yachting	There is cooperation from the Ministry of Education
Objective	Improve the environmental and social sustainability of the local yachting industry				
	INDICATOR	BASELINE	TARGET	MEANS OF VERIFICATION	ASSUMPTIONS
Outcomes	Increased level of environmental awareness and environmentally friendly practices by cruisers	Zero	20% by December 2021	Visitor and expenditure motivation surveys	YSATT has the resources to conduct the VEMS on a systematic and sustained basis
Outputs	16. A policy advocating for the use of sustainable environmental practices and technologies by marinas and boatyards	Zero	1 policy to facilitate adoption of sustainable environmental practices and technologies by marinas and boatyards by November 2020	A policy document	EMA has the necessary resources
	17. An awareness programme for local yachting businesses about environmental sustainability	Zero	1 awareness campaign by September 2019: <ul style="list-style-type: none"> • 1 large seminar • 2 television advertisements • 2 brochures 	Various forms of information sharing – television; radio; newspaper advertisements and seminars	EMA has the necessary resources
	18. A national sensitization campaign for citizens about the local yachting industry	Zero	1 sensitization campaign by March 2020: <ul style="list-style-type: none"> • 1 large seminar • 2 television advertisements • 2 brochures 	Various forms of information sharing – television; radio; newspaper advertisements and seminars	Funding and support are available

8. IMPLEMENTATION PLAN

Ref #	RECOMMENDATIONS	ACTIVITIES	RESPONSIBILITY	TIMEFRAME When must the activity be completed by?	BUDGET How much will it cost to implement the activity?	BUDGET SOURCE Where will the funding come from?	STATUS Is the activity not started, in progress, or complete?
1.	Conduct regular visitor and expenditure motivation surveys	Identify the data needs of the industry	<ul style="list-style-type: none"> • YSATT • MOT • MTI 	August 2017	Zero	N/A	Not started
		Develop the survey instrument	<ul style="list-style-type: none"> • MOT • MTI • NSB (CSO) • YSATT 	September 2017	Zero	N/A	Not Started
		Execute the survey	<ul style="list-style-type: none"> • MOT • NSB (CSO) • YSATT 	December 2017	\$20,000	National Budget	Not started
2.	Develop marinas in Trinidad and Tobago and source investors to construct marinas	Conduct a feasibility study for marina locations in both Trinidad and Tobago	<ul style="list-style-type: none"> • MTI • THA • CDA • EMA • MOT • MOWT 	January 2018	\$100,000	National Budget	Not started

Ref #	RECOMMENDATIONS	ACTIVITIES	RESPONSIBILITY	TIMEFRAME When must the activity be completed by?	BUDGET How much will it cost to implement the activity?	BUDGET SOURCE Where will the funding come from?	STATUS Is the activity not started, in progress, or complete?
		Source investors	<ul style="list-style-type: none"> • MTI • invesTT 	August 2018	Zero	N/A	Not started
		Provide a Certificate of Environmental Clearance once all criteria have been met	<ul style="list-style-type: none"> • EMA • invesTT 	August 2019	\$100,000	National Budget	Not started
		Commence construction of the new marinas	<ul style="list-style-type: none"> • Investors 	December 2020	TBD	Investors	Not started
3.	Host one major yachting event	Engage the Trinidad and Tobago Sailing Association	<ul style="list-style-type: none"> • TTSA • MTI • MOT • YSATT • MNS • THA 	October 2017	Zero	N/A	Not started
		Plan the event	<ul style="list-style-type: none"> • TTSA • YSATT • MTI • MOT • MNS • THA 	December 2019	\$550,000	National Budget	Not started

Ref #	RECOMMENDATIONS	ACTIVITIES	RESPONSIBILITY	TIMEFRAME When must the activity be completed by?	BUDGET How much will it cost to implement the activity?	BUDGET SOURCE Where will the funding come from?	STATUS Is the activity not started, in progress, or complete?
		Execute the event	<ul style="list-style-type: none"> • T TSA • Y SATT • M TI • M OT • M NS • T HA 	May 2020	\$1,000,000	<ul style="list-style-type: none"> • National Budget • Sponsorship 	Not started
4.	Develop and implement a yachting marketing and promotional plan	Procure a consultant	<ul style="list-style-type: none"> • M TI • M OT 	December 2017	\$60,000	National Budget	Not started
		Conduct in depth research and analysis	<ul style="list-style-type: none"> • M TI • M OT • Y SATT • Consultant 	March 2018	TBD	TBD	Not started
		Conduct widespread stakeholder consultations	<ul style="list-style-type: none"> • M TI • M OT • Y SATT • Consultant 	July 2018	TBD	TBD	Not started
		Develop the yachting marketing and promotional plan	<ul style="list-style-type: none"> • Consultant 	September 2018	TBD	TBD	Not started
		Commence implementation of the marketing and promotional plan	<ul style="list-style-type: none"> • M TI • M OT • Y SATT 	October 2018	TBD	TBD	Not started

Ref #	RECOMMENDATIONS	ACTIVITIES	RESPONSIBILITY	TIMEFRAME When must the activity be completed by?	BUDGET How much will it cost to implement the activity?	BUDGET SOURCE Where will the funding come from?	STATUS Is the activity not started, in progress, or complete?
5.	Develop and implement a programme for business training	Conduct a needs assessment for SMEs in the yachting industry	<ul style="list-style-type: none"> • NEDCO • YSATT • MTI 	January 2018	Zero	N/A	Not started
		Develop a training programme for SMEs	<ul style="list-style-type: none"> • NEDCO • YSATT • MTI • exporTT 	March 2018	Zero	N/A	Not started
		Implement the training programme	<ul style="list-style-type: none"> • NEDCO • YSATT • MTI • exporTT 	April 2018	\$50,000	National Budget	Not started
6.	Conduct infrastructural upgrades and develop necessary zoning plans for the Chaguaramas area	Conduct Needs Assessment to identify infrastructural upgrades	<ul style="list-style-type: none"> • CDA • YSATT • MPD • MOWT 	June 2018	TBD	National Budget	Not started
		Develop an implementation plan for infrastructural upgrades and zoning	<ul style="list-style-type: none"> • CDA • YSATT • MPD • MOWT 	September 2018	TBD	National Budget	Not started

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		Commence infrastructural upgrades and zoning	<ul style="list-style-type: none"> • CDA • MPD • MOWT 	January 2019	TBD	National Budget	Not started
7.	Implement a safety programme to mitigate against instances of piracy and robbery attacks against cruisers	Identify industry best practices to avoid, deter and delay piracy attacks	<ul style="list-style-type: none"> • YSATT • MNS 	September 2017	Zero	N/A	Not started
		Establish Codes of Safe Practices	<ul style="list-style-type: none"> • YSATT • MNS 	December 2017	TBD	N/A	Not started
		Implement and promote Codes of Safe Practices	<ul style="list-style-type: none"> • YSATT • MNS 	January 2018	TBD	N/A	Not started
8.	Implement a Single Harmonised Form	Identify the laws and regulations that need to be amended	<ul style="list-style-type: none"> • CED • Immigration Division 	August 2017	Zero	N/A	In progress
		Prioritise the legislative and regulatory amendments on the Legislative Agenda	<ul style="list-style-type: none"> • MNS • MOF • MTI • AGLA 	December 2017	Zero	N/A	Not started
		Completion of legislative review process	<ul style="list-style-type: none"> • LRC 	August 2018	Zero	N/A	Not started

Ref #	RECOMMENDATIONS	ACTIVITIES	RESPONSIBILITY	TIMEFRAME When must the activity be completed by?	BUDGET How much will it cost to implement the activity?	BUDGET SOURCE Where will the funding come from?	STATUS Is the activity not started, in progress, or complete?
9.	Facilitate the movement of yachting between Trinidad and Tobago	Map the existing process and requirements for customs clearance from one anchorage to another	<ul style="list-style-type: none"> • CED • MTI 	March 2018	Zero	N/A	Not started
		Identify any legislative or regulatory amendments that will be needed	<ul style="list-style-type: none"> • CED 	March 2018	Zero	N/A	Not started
		Approve the amendments	<ul style="list-style-type: none"> • Cabinet 	July 2018	Zero	N/A	Not started
		Streamline the process and requirements to make it easier	<ul style="list-style-type: none"> • CED 	August 2019	Zero	N/A	Not started
		Establishment of an Electronic Pre-Arrival Notice (ePAN) system	<ul style="list-style-type: none"> • CED • Immigration Division • TTCG • YSATT 	December 2019	TBD	TBD	Not started
10.	Conduct Customer Service Training and develop Standard Operating Procedures for border agency officers at yachting ports	Identify the regulations that are ambiguous	<ul style="list-style-type: none"> • Immigration Division • CED • YSATT 	June 2017	Zero	N/A	In progress

Ref #	RECOMMENDATIONS	ACTIVITIES	RESPONSIBILITY	TIMEFRAME When must the activity be completed by?	BUDGET How much will it cost to implement the activity?	BUDGET SOURCE Where will the funding come from?	STATUS Is the activity not started, in progress, or complete?
	of entry	Consult with industry stakeholders to clearly identify their needs	<ul style="list-style-type: none"> • Immigration Division • CED • YSATT 	July 2017	Zero	N/A	In progress
		Develop Standard Operating Procedures (SOPs)	<ul style="list-style-type: none"> • Immigration Division • CED • YSATT 	October 2017	Zero	N/A	Not started
		Conduct customer service training	<ul style="list-style-type: none"> • Immigration Division • CED 	December 2017	Zero	N/A	Not started
11.	Develop Yachting Legislation	Procure Consultant	<ul style="list-style-type: none"> • MTI • YSATT 	October 2019	50,000	National Budget	Not started
		Conduct widespread stakeholder consultations	<ul style="list-style-type: none"> • Consultant • YSATT • MTI • MNS • MOF • MOWT • AGLA 	December 2020	50,000	National Budget	Not started

Ref #	RECOMMENDATIONS	ACTIVITIES	RESPONSIBILITY	TIMEFRAME When must the activity be completed by?	BUDGET How much will it cost to implement the activity?	BUDGET SOURCE Where will the funding come from?	STATUS Is the activity not started, in progress, or complete?
		Develop a legislative brief to send to CPC	<ul style="list-style-type: none"> • Consultant 	January 2021	150,000	National Budget	Not started
		Draft the legislation	<ul style="list-style-type: none"> • CPC 	March 2021	Zero	N/A	Not started
		Approve the legislation	<ul style="list-style-type: none"> • Cabinet 	August 2021	Zero	N/A	Not started
12.	Establish a yachting data repository with the national statistical body (Central Statistical Office)	Perform a gap analysis for data needs for public and private sector planning	<ul style="list-style-type: none"> • MTI • YSATT • NSB (CSO) 	January 2018	\$50,000	National Budget	Not started
		Identify sources of data	<ul style="list-style-type: none"> • MTI • YSATT • NSB (CSO) • Immigration Division • Customs and Excise Division 	March 2018	Zero	N/A	Not started
		Implement systems for data collection	<ul style="list-style-type: none"> • MTI • YSATT • NSB (CSO) • Immigration Division • Customs and Excise Division 	May 2018	\$50,000	National Budget	Not started

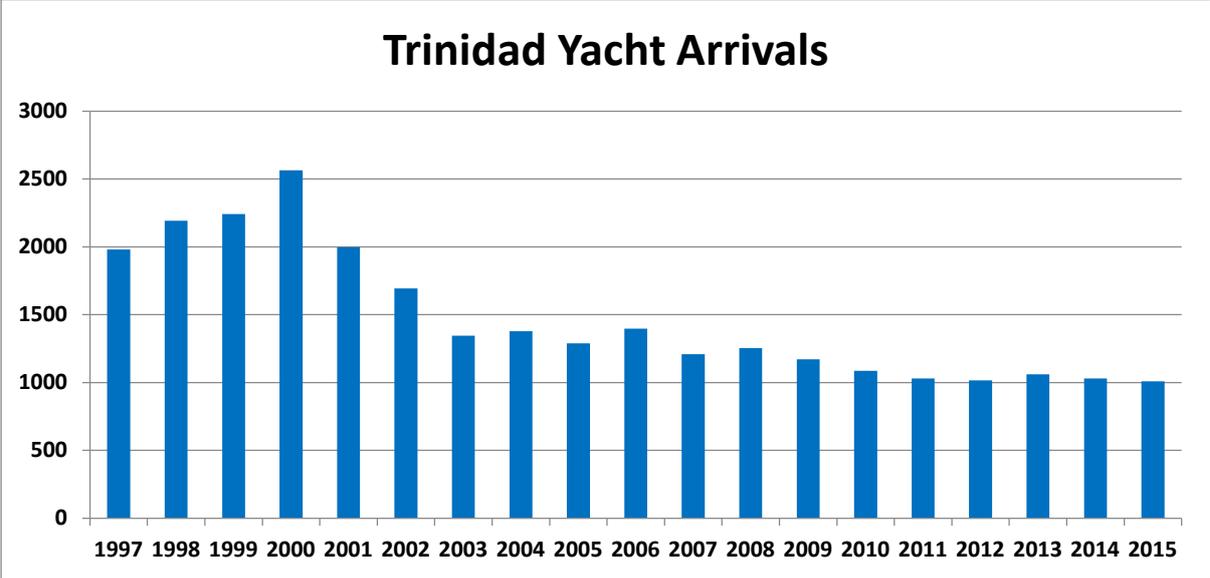
Ref #	RECOMMENDATIONS	ACTIVITIES	RESPONSIBILITY	TIMEFRAME When must the activity be completed by?	BUDGET How much will it cost to implement the activity?	BUDGET SOURCE Where will the funding come from?	STATUS Is the activity not started, in progress, or complete?
		Activate data repository	<ul style="list-style-type: none"> • MTI • YSATT • NSB (CSO) • Immigration Division • Customs and Excise Division 	August 2018	\$50,000	National Budget	Not started
13.	Assess and formalise skills within the yachting industry	Consult with local and regional training institutions	<ul style="list-style-type: none"> • NTA 	January 2018	TBD	National Budget	Not started
		Develop standards for national and regional certification	<ul style="list-style-type: none"> • NTA • YSATT 	July 2018	TBD	National Budget	Not started
		Assess and certify existing employees in the industry	<ul style="list-style-type: none"> • NTA • YSATT 	September 2018	TBD	National Budget	Not started
14.	Implement a plan for training and certification	Conduct a Labour Market Survey of the Yachting Industry to identify gaps and skills needs	<ul style="list-style-type: none"> • NTA • MOLSED • YSATT • MTI • MOE • UTT • YTEPP 	January 2018	\$75,000	National Budget	Not started

Ref #	RECOMMENDATIONS	ACTIVITIES	RESPONSIBILITY	TIMEFRAME When must the activity be completed by?	BUDGET How much will it cost to implement the activity?	BUDGET SOURCE Where will the funding come from?	STATUS Is the activity not started, in progress, or complete?
		Develop a training plan	<ul style="list-style-type: none"> • NTA • MOLSED • YSATT • MTI • MOE • UTT • YTEPP 	March 2018	\$50,000	National Budget	Not started
		Introduce a comprehensive plan for training and certification	<ul style="list-style-type: none"> • NTA • MOLSED • YSATT • MTI • MOE • UTT • YTEPP 	September 2018	TBD	National Budget	Not started
15.	Develop a scholarship programme for advanced skills training	Consult with the Scholarship Selection Committee and the Scholarship Review Committee	<ul style="list-style-type: none"> • MOE 	June 2020	Zero	N/A	Not started
Consult with relevant local, regional and international academic institutions		<ul style="list-style-type: none"> • MOE 	July 2020	Zero	N/A	Not started	
Develop a scholarship programme for advanced skills training		<ul style="list-style-type: none"> • MOE 	December 2020	Zero	N/A	Not started	

Ref #	RECOMMENDATIONS	ACTIVITIES	RESPONSIBILITY	TIMEFRAME When must the activity be completed by?	BUDGET How much will it cost to implement the activity?	BUDGET SOURCE Where will the funding come from?	STATUS Is the activity not started, in progress, or complete?
16.	Facilitate the use of sustainable environmental practices and technologies	Identify best practices and the requirements	<ul style="list-style-type: none"> • EMA • YSATT • MPD 	May 2020	Zero	N/A	Not started
		Develop voluntary compliance standards	<ul style="list-style-type: none"> • EMA • YSATT • MPD 	August 2020	Zero	N/A	Not started
		Enforce and promote voluntary standards	<ul style="list-style-type: none"> • EMA • YSATT • MPD 	November 2020	Zero	N/A	Not started
17.	Implement an awareness programme for yachting businesses about environmental sustainability	Procure a consultant	<ul style="list-style-type: none"> • MTI 	April 2019	\$100,000	National Budget	Not started
		Develop an environmental awareness programme	<ul style="list-style-type: none"> • Consultant 	August 2019	Zero	N/A	Not started
		Implement the environmental awareness programme	<ul style="list-style-type: none"> • EMA • YSATT • MPD • CDA • MTI 	September 2019	TBD	TBD	Not started

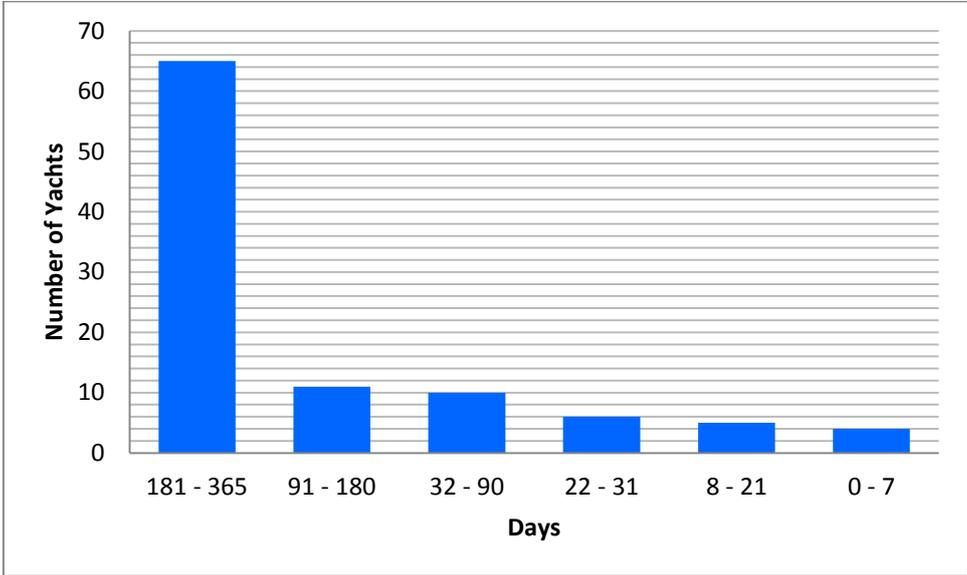
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18.	Implement a national sensitization campaign about the yachting industry	Procure a consultant	<ul style="list-style-type: none"> • MTI 	October 2019	\$100,000	National Budget	Not started
		Develop a national sensitization programme	<ul style="list-style-type: none"> • Consultant • MTI • YSATT • MCDCA 	February 2020	Zero	N/A	Not started
		Implement the national sensitization programme	<ul style="list-style-type: none"> • MTI • YSATT • MCDCA 	March 2020	TBD	TBD	Not started

Figure 1: Yacht Arrivals in Trinidad for the Period 1997 to 2015



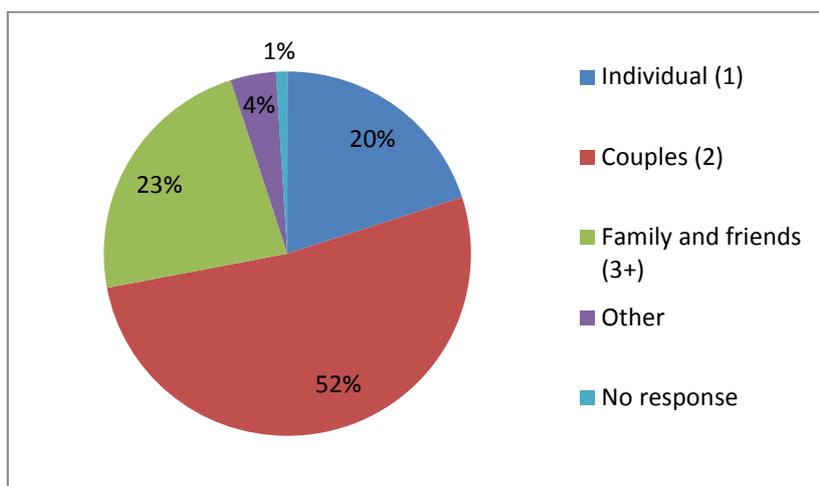
Source: Customs and Excise Division

Figure 2: Length of Stay



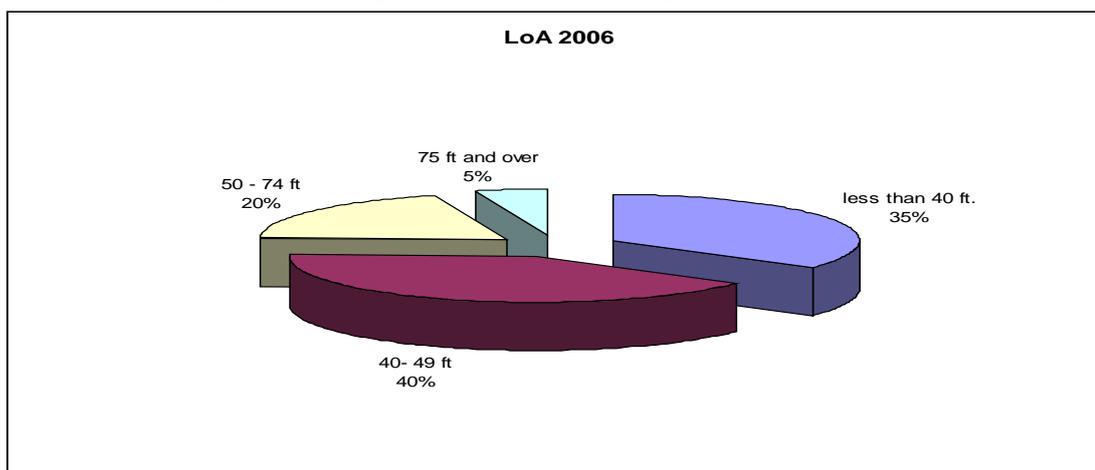
Source: Economic Impact Assessment, Institute of Marine Affairs, 2013

Figure 3: Size of Crew



Source: Economic Impact Assessment, Institute of Marine Affairs, 2013

Figure 4: Length Overall of visiting yachts, 2006



Source: Based on Customs and Excise data

Table 1: Areas of origin and the distribution (%) of the owners of visiting vessels

AREA OF ORIGIN	DISTRIBUTION (%)
USA and Commonwealth	29
Eurozone and Switzerland (This list includes Austria, Belgium, Denmark, Finland, France, Germany, Norway, Holland and Spain)	24
United Kingdom	17
T&T and Barbados	11
South Africa, Australia and New Zealand	9
Canada	6
South America	4
TOTAL	100

Source: Economic Impact Assessment, Institute of Marine Affairs, 2013