

GENERAL
LC/CAR/G.708
23 November 2002
ORIGINAL: ENGLISH

ST. MAARTEN
The Yachting Sector

Acknowledgement

The Economic Commission for Latin America and the Caribbean (ECLAC) Subregional Headquarters for the Caribbean wishes to acknowledge the assistance of Mr. Robbie Ferron in the preparation of this document.

This document is prepared as part of the Dutch-funded project NET/00/79 “Development of a Regional Marine-based Tourism Strategy”.

Table of contents

| | |
|----------------------------------------------------------------------------------------------------|----|
| SECTION 1: COUNTRY BACKGROUND | 1 |
| Introduction | 1 |
| 1.1 Country description | 1 |
| 1.2 Current data available | 2 |
| 1.3 Yachting compared to Cruise Ships | 3 |
| SECTION 2: DESCRIPTION OF THE YACHTING SECTOR | 4 |
| 2.1 Historical Background | 4 |
| 2.1.1 The fleet profile has changed strongly over the years | 5 |
| 2.1.2 Fleet profile | 6 |
| 2.2 Structure and dynamics of the industry | 10 |
| 2.2.1 Major events | 10 |
| 2.3 The following anchorages and harbours are on the Dutch side of St Maarten | 11 |
| 2.4 Patterns and levels of use | 13 |
| SECTION 3: EVALUATION OF YACHTING WITHIN THE NATIONAL SUSTAINABLE DEVELOPMENT FRAMEWORK | 16 |
| 3.1 Identification of developments | 16 |
| 3.1.1 Anchoring and docking: patterns | 17 |
| 3.2 Synergies with land based activity | 19 |
| 3.3 Identify gaps | 20 |
| 3.4 Dependent communities. | 21 |
| 3.5 Stakeholders and User conflicts. Land traffic vs vessel traffic | 21 |
| SECTION 4: EMPLOYMENT ASPECTS OF THE YACHTING SECTOR | 23 |
| 4.1 Direct employment generated | 23 |
| 4.2 Indirect employment generated. | 23 |
| 4.3 Employment practices | 25 |
| 4.4 Available Skills | 26 |
| 4.5 Training Facilities | 25 |
| 4.6 Participation of Caribbean Nationals | 27 |
| SECTION 5: THE SOCIAL ECONOMIC IMPORTANCE OF THIS INDUSTRY | 27 |
| 5.1 Public Sector Revenues | 27 |
| 5.2 Measuring economic impact | 27 |
| 5.2.1 Methodology | 28 |
| 5.2.2 Revenue base of the "Core" marine service industry | 28 |
| 5.3 Survey of core marine activity compared to total economic impact; the basis for a multiplier . | 30 |
| 5.4 Taxation Environment | 31 |
| 5.5 Industry strengths and weaknesses | 32 |
| 5.6 Towards a better database | 32 |
| 5.7 Industry Contribution to GDP | 33 |
| SECTION 6: ENVIRONMENTAL IMPLICATIONS OF YACHTING | 34 |
| 6.1 Anchorages | 35 |
| 6.1.1 The Simpson Bay Lagoon | 34 |
| 6.1.2 Oyster Pond | 35 |
| 6.1.3 Great Bay | 35 |
| 6.2 Liquid and solid waste | 35 |
| 6.2.1 Solid waste | 37 |

| | | |
|-------------------------------------------------------------------------|-----------------------------------------------------------------------------|-----|
| 6.2.2 | Solid waste solutions..... | 36 |
| 6.2.3 | Anti fouling paints | 37 |
| 6.3 | Damages through anchoring..... | 37 |
| 6.4 | Oil and lubricant Pollution..... | 37 |
| 6.5 | St Maarten marine park | 38 |
| SECTION 7: GOVERNMENT AND PRIVATE SECTOR POLICIES | | 39 |
| 7.1 | Interest Groups and Associations | 39 |
| 7.2 | Tourism and yachting policies..... | 39 |
| 7.2.1 | Media | 41 |
| 7.3 | Government Institutional Arrangements | 41 |
| 7.4 | Tax Environment..... | 42 |
| SECTION 8: PROBLEMS AND STRUCTURAL WEAKNESSES FACING THE INDUSTRY | | 43 |
| 8.1 | Overcrowding | 43 |
| 8.2 | Composition of the Yachting Sector and the implications on seasonality..... | 43 |
| 8.3 | Level of yachting skills by visitors | 44 |
| 8.4 | Cruise ship tourism..... | 44 |
| 8.5 | Work Permits | 44 |
| 8.6 | Seasonality..... | 45 |
| 8.7 | Impact of Major Events | 45 |
| 8.8 | Harassment | 46 |
| 8.9 | Maintenance of Competitiveness as a yachting destination. | 46 |
| 8.10 | Data deficiencies..... | 47 |
| 8.11 | Inadequacies in organizational and personnel arrangements..... | 47 |
| 8.12 | Planning issues and shoreline alterations | 47 |
| 8.13 | Management of anchorage and mooring policies | 48 |
| 8.14 | Raising of the bar in marketing Activities | 48 |
| SECTION 9: RECOMMENDATIONS | | 49 |
| 9.1 | Data insufficiencies | 49 |
| 9.2 | Position of marine sector in St Maarten | 49 |
| 9.3 | Employment/Training..... | 49 |
| 9.4 | Events | 49 |
| 9.5 | Environmental protection | 50 |
| 9.6 | Seasonality..... | 50 |
| 9.7 | Public sector management..... | 50 |
| 9.8 | Responsibilities for marine affairs..... | 50 |
| 9.9 | Hurricane preparation | 50 |
| SECTION 10: FRAMEWORK FOR A YACHTING POLICY | | 51 |
| 10.1 | Bringing the public sector up to speed | 51 |
| 10.2 | Super yachts versus less than super..... | 51 |
| 10.3 | Identifying the needs of the marine cruise tourist in the future | 52 |
| 10.4 | Confirming a long term future..... | 52 |
| SECTION 11: SURVEY RESULTS | | 518 |
| SECTION 12: DOCUMENTATION RELEVANT TO THE YACHT GROWN ISSUE..... | | 63 |
| SECTION 13: CORE MARINE ESTABLISHMENTS | | 614 |
| SECTION 14: REFERENCES | | 61 |

SECTION 1: COUNTRY BACKGROUND

Introduction

St. Maarten's uniqueness pertains to the fact that two jurisdictions share a small island with open borders. This means that any review of the marine business on one side of the border is invariably affected by what transpires on the other side of the (invisible) border.

This review is about a marine leisure industry that has grown from nothing to a quite substantial industry in the last 25 years and may even be considered to be leading the comparable Caribbean destinations in the field. Inevitably as we review the industry we will be looking to find what it was that allowed this fast growth to occur. Some of the answers are going to be encountered in the economic climate that exists in the surrounding islands rather than what is present on St. Maarten/Saint Martin.

The growth of the yachting sector on St. Maarten is not consistent with the development of the rest of the economy. The growth of the economy, as a whole, has been at a consistent pace for the majority of the last 25 years with small hiccups after the major hurricanes. Only in the last few years has the particular growth of the marine business become conspicuous.

1.1 Country description

The island of St. Maarten/Saint Martin is only 34 square kilometers (13 square miles) and is divided into two political entities. (Source: Statistical Yearbook of the Antilles 2000). The northern section is a part of the Republic of France and resorts under the "department" of Guadeloupe for local government purposes.

The southern part, which is the subject area of this study, is part of the Kingdom of the Netherlands. The Caribbean parts of the Kingdom functions autonomously from the European part and consists of Aruba and the Netherlands Antilles. Dutch St. Maarten is a one of the five island territories of the Netherlands Antilles.

The "Federal" Government in Curacao takes care of a range of government functions such as police and justice. The local government is responsible for another range of responsibilities like roads, tourism promotion and some education. In areas like education and labor there are both federal and local government departments. The Kingdom Government is responsible for defense and foreign relations.

The most recently published population statistics (as measured in 1999) show the registered population of Dutch St. Maarten being 41,718 persons. (Source: Statistical Yearbook 2000). There is reason to believe that the actual number is substantially greater as a result of undocumented immigrants.

The population of the island has grown dramatically since the tourist boom that started in the early 1980s. In 1980, for instance, the total registered population of Dutch St. Maarten was only 13,156 (Source: Statistical Yearbook 2000). This has resulted in the situation where the percentage of the population whose parentage originates in St. Maarten is very low. Immigrant populations from territories like Dominica, Saint Lucia, St Kitts/Nevis, Anguilla, Dominican Republic, the other islands of the Netherlands Antilles and Haiti combined with persons from the European and American metropolis make up a very large part of the balance of the population. The 1997 census showed, for instance, that of the 32,221 persons on the island at that time only 12,268 had been born on the Netherlands Antilles. The rapid growth of the economy and the population, combined with limited planning capacities, has resulted in the public sector and public infrastructure lagging behind private investment.

Investment in education is relatively high, but the actual increase of educational level in the workforce is limited by the substantial emigration to other countries, especially the Netherlands to which access is unrestricted.

1.2 Current data available

The marine industry does not appear to have been a consideration in the make up of almost all-statistical data. In the National Statistical Yearbook of the Netherlands Antilles, the sector cannot be distinguished from any of the sector categories. In the National Statistics the movements of vessels do not separately count non-piloted vessels and therefore exclude the majority of marine leisure vessels by far.

In the review of establishments in the statistical yearbook there is a figure for the number of establishments whose main activity is “water transport” and for St. Maarten in 1998 this figure is 8. The exact form of water transport is however not known.

In 1997 a Tourism Expenditure Survey was done in St. Maarten which reviewed the patterns of cruise tourism (such as national origin, occupational status and size of ships) as well as their expenditure patterns. In the study there is an analysis of the expenditures of tourists by region of origin, which was conducted at the island’s major airport, as they left the island. It would appear from the study that nobody was accommodated on a boat, which is patently unlikely. One of the investigations of this study was the activity of land based tourists. The results show that a little less than 20% took a boat trip. It is not clear from the study, however, whether this was a boat trip with or without accommodations. This study could well have included marine tourism without extra cost and with a clear advantage to the accuracy of the reporting.

Statistics are collected in St. Maarten by the Federal government primarily (Centraal Bureau voor de Statistiek) which collects data for the entire country. The local government has a Department of Economic Affairs whose interest is far more in the specific matters that relate to Dutch St Maarten, but here, too, there has been no data collection up to now.

Both agencies do intend to proceed with introducing categories that will reflect activity in this sector in the future. They are highly interested and motivated to include this sector in the future.

However, they have little or no experience with the industry so the definition of categories to organize the statistical data is going to require guidance from agencies with resources in that field.

The common denominator amongst all statistical material that is available is the lack of recognition by the compilers that the marine leisure industry is significant or potentially significant. Indications from informal contacts are that there is the beginning of a shift in this perception, which in a shorter or longer period converts into the commencement of data collection that is useful to the industry.

1.3 Yachting compared to Cruise Ships

This study will draw some conclusions about the total economic impact of the industry. Inevitably comparisons may be made with other significant tourist industries and the cruise ship industry is one that is obvious

The 1997 expenditure survey shows that there were a total of 885,956 cruise tourists arriving on the island in that year. The estimate on expenditure per tourist was \$120.00 per tourist on the Dutch side of the island and US\$7.00 on the French side. This would suggest a total figure of US\$106 million as being the total expenditure of cruise ship passengers.

SECTION 2: DESCRIPTION OF THE YACHTING SECTOR

2.1 Historical Background

In 1980 the marine industry in St Maarten consisted of:

- A small slipway and short dock at Bobby's Marina, Great Bay (approx 12 slips)
- A small dock at Great Bay Marina (approx 10 slips)
- A small dock at Island Water World (approx 15 shallow water slips)
- A catamaran construction company next to the Lagoones Restaurant location today

At that time the charter and cruising boats that halted in St Maarten considered it a stop at one of the quieter islands as they traveled between the Virgin Islands and Antigua, which were the yachting hubs of the Caribbean.

By 2002 the marine cruise industry in St Maarten has grown at a faster pace than most of the other comparative destinations in the Eastern Caribbean. In 1980 the marine industry was practically non-existent but is today in some respects the leader in the Caribbean.

Areas in which St Maarten has excelled:

1. Trading of marine equipment at a level that is not seen elsewhere.
2. Provision of high quality marine technical services, especially electronics rigging and fabrication.
3. Level of investment of marinas and related infrastructure.

It may be of value to assess what the critical factors were that allowed this growth to occur. A polling of the members of the Marine Trades Association resulted in the following opinions:

1. There is not one single cause but a combination of conditions and inputs.

预览已结束，完整报告链接和二维码如下：

https://www.yunbaogao.cn/report/index/report?reportId=5_2949

