

Proceedings of the consultative meetings at the National Level to formulate the OECS Regional Tourism Policy

15 – 19 January 2024, Premier’s Office First Floor Conference Room, Cutlass Building, Road Town



Context

10 In January 2024, the Ministry of Tourism, Culture and Sustainable Development engaged in a series of consultations with representatives from the Organisation of Eastern Caribbean States (OECS) Commission to advance a Common Tourism Policy, including opportunities in the Blue Economy. These meetings, held between January 15 and January 20¹, involved key stakeholders (70) such as the BVI Tourist Board, various government ministries and departments, destination management companies, and accommodation and rental companies. The objective was to gather input on measures and policies to enhance the role of tourism and the blue economy, aiming to position tourism as a sustainable and resilient sector within the Virgin Islands and the Eastern Caribbean Economic Union over a five-year period.

Premier and Minister of Finance, Honourable Dr. Natalio Wheatley, who also oversees tourism, emphasized the importance of these consultations in aligning with the administration's commitment to leveraging tourism for economic development. He highlighted that tourism had demonstrated resilience, with overall visitor numbers reaching the second-highest in the Territory's history during the 2023 season. Premier Wheatley expressed optimism about the sector's capacity for further expansion and underscored the necessity of strategic analysis to inform revised plans for the continued growth and development of the tourism product.

20 The OECS delegation, led by Tourism Technical Specialist Ms. Maria Fowell and supported by Tourism Policy and Development Advisor Dr. T. Jennifer Edwards, also paid a courtesy call to Premier Wheatley. This visit underscored the collaborative efforts between the Virgin Islands and the OECS Commission in formulating policies that promote sustainable tourism and capitalize on blue economy opportunities.

These consultations reflect the Virgin Islands' dedication to fostering national political, economic, and social development by enhancing the tourism sector through regional cooperation and strategic planning.

Introduction and Purpose of the Consultation

30 The session with Premier, Honourable Dr. Natalio Wheatley began with introductions and acknowledgments, with Maria Fowell (a representative from the OECS Commission) explaining that the purpose of the consultation was to gather national priorities that would feed into the revision of the OECS Tourism Policy. The existing policy dates back to 2011, and the update is being funded under the World Bank's Unleashing the Blue Economy in the Caribbean initiative.

¹ BVI Government's press release on advancing the Common Tourism Policy:

<https://bvi.gov.vg/media-centre/ministry-tourism-advancing-common-policy>

BVI Government's press release on Premier Wheatley's courtesy call with OECS consultants:

<https://bvi.gov.vg/media-centre/premier-wheatley-entertains-courtesy-call-oecs-consultants>

OECS Projects Overview page:

<https://oecs.oecs.org/en/our-work/projects>

The process involves engaging stakeholders across OECS member states to identify commonalities, gaps, and opportunities.

The representative emphasized that while the policy is regional, it will also reflect national priorities. The consultation process across member states is expected to conclude by the end of the month, followed by a regional consultation in February-March, and a draft policy will be presented to the OECS Council of Ministers of Tourism by June or July.

Tourism Policy and Strategic Vision for the BVI

40 The discussion transitioned to the BVI's tourism strategy, with Speaker 1 (Premier) explaining that the Ministry of Tourism was established to address gaps in tourism policy, planning, and coordination, which were previously not within the mandate of the BVI Tourist Board. The Premier outlined the government's vision for tourism as the primary economic pillar, recognizing the declining reliance on financial services due to external pressures.

The key goals for tourism in the BVI include:

- Increasing government revenue from tourism.
- Expanding business opportunities for local and foreign investment.
- Enhancing employment opportunities for residents, particularly school leavers.
- Strengthening exposure and training in tourism-related careers.

50 The Premier emphasized that tourism in the BVI extends beyond Tortola, as many overnight visitors stay in Virgin Gorda and other outer islands. There is a need to ensure that young people are exposed to career opportunities in tourism, particularly in high-end and marine-based tourism sectors.

Blue Economy and Luxury Tourism

The Blue Economy was highlighted as a key foundation of BVI's tourism product. The Premier noted that BVI is widely considered the sailing capital of the world, with a robust charter boat industry. The marine-based tourism sector includes major players like Nanny Cay, the Moorings, and Horizon Yacht Charters, among others. The government seeks to expand branded hotels and luxury accommodations to complement this industry, mentioning:

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- Plans to develop a five-star branded hotel with conference facilities at Prospect Reef.
 - Resort developments on Norman Island, Beef Island, and Peter Island, including Treasure Island (Norman Island) and Peter Island.
 - The reconstruction of Peter Island Resort after hurricane devastation.

Increasing overnight guests requires improving transportation infrastructure, including:

- Expanding the airport runway to accommodate larger aircraft from key markets like New York and Atlanta.

- Rebuilding the West End ferry terminal, which was destroyed in the hurricanes.
- Enhancing water taxi services between BVI and the US Virgin Islands.

Environmental Conservation and Heritage Tourism

70 A significant portion of the discussion focused on sustainable tourism and environmental conservation. The Premier highlighted the Environmental Levy, which funds the National Parks Trust, the Climate Change Trust Fund, and the Tourist Board to help mitigate climate change impacts and restore marine ecosystems.

One major issue discussed was the disposal of damaged boats post-hurricane, as many abandoned vessels remain in the waters due to high disposal costs. The government is considering legislative solutions, such as mandatory environmental insurance for charter boats.

Regarding heritage tourism, the Premier pointed out that BVI has significant but underutilized cultural assets. Notable initiatives include:

- Developing a National Museum, since existing museums (Main Street Folk Museum, Sugar Works Museum) were severely damaged by hurricanes.
- 80 • Promoting historical figures from BVI, such as the BVI-born designer of the US Capitol building.
- Leveraging sites of historical significance, like free communities of former enslaved persons.

There is a strong push to integrate culture more effectively into the tourism experience, including showcasing local food, performing arts, and historical sites.

Diversification of Tourism Products

The Premier outlined several strategies to diversify the tourism product beyond its traditional marine-based attractions:

- 90 1. Meetings and Conventions Tourism – The planned Prospect Reef Resort and developments in Norman Island and Beef Island aim to introduce conference tourism.
2. Sports Fishing – BVI plans to host one of its largest-ever sports fishing tournaments, capitalizing on the world-class fishing waters of the North Drop.
3. Sports Tourism – The government aims to leverage the international success of local athletes like Kyron McMaster and Adaejah Hodge to promote sports tourism.
4. Cruise Tourism Enhancements – In 2023, BVI recorded its highest-ever cruise tourism arrivals (800,000 passengers), second only to 2016’s 1.3 million visitors. However, facilities remain inadequate for properly accommodating passengers.

To address cruise tourism challenges, beach management plans have been developed for:

- Cane Garden Bay, which is experiencing overuse and environmental degradation.

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- Long Bay, Beef Island, where infrastructure like restrooms and kiosks are being installed.
 - Brandywine Bay and Brewers Bay, where new attractions and cultural experiences are planned.

There are also efforts to improve community-based tourism, ensuring that local vendors and small businesses benefit from cruise passenger spending.

Regulatory and Infrastructure Improvements

The discussion shifted to government services and infrastructure improvements needed to support tourism, including:

- 110
- More efficient work permit processing for tourism businesses.
 - Upgrading roads, water delivery systems, and electricity stability.
 - Improving internet services, as high-speed connectivity is crucial for the tourism industry.
 - Beautification policies, similar to those in the Bahamas and Bermuda, to maintain clean and attractive public spaces.

On the financial side, the government is reviewing outdated fee structures, particularly for:

- Fishing licenses, which are currently very low.
- Commercial Recreational Vessel Licenses, which have not been adjusted since 1992.
- Entry fees for national attractions, with a focus on cruise passengers as a revenue source.

A significant proposal is to increase fees for foreign charter boats, potentially raising rates by up to 5000% while keeping local rates more affordable. This aligns with efforts to attract high-value visitors and ensure a fair contribution to BVI's economy.

120 Mega-Yacht Expansion and Regional Collaboration

The Premier emphasized plans to attract more mega-yachts, with:

- A major expansion at Nanny Cay.
- Restoration of hurricane-damaged mega-yacht facilities in North Sound.

The OECS representatives noted that BVI's policy priorities align with regional efforts, particularly expanding resident involvement in tourism and ensuring the local economy benefits from visitor spending. The OECS Commission will work to identify regional initiatives that can support national efforts, whether in legislation, environmental protection, or tourism development.

Conclusion

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- The meeting concluded with mutual appreciation for the insights shared. The OECS Commission representatives acknowledged that BVI's tourism vision is well-structured, and their input will be

invaluable in shaping the updated regional policy. They emphasized the importance of documenting the policy formally and ensuring clear action plans are in place.

The BVI government reaffirmed its commitment to:

- Strengthening policy and planning within the Ministry of Tourism.
- Expanding sustainable and diversified tourism.
- Enhancing transportation, infrastructure, and local workforce participation.
- Improving regulatory frameworks and fee structures to maximize tourism revenue.

The OECS team will compile and share their findings, providing recommendations that align with both national and regional tourism priorities.

140 **Introduction and Objectives of the Meeting**

The session began with a discussion on scheduling logistics and the structure of meetings throughout the day. The purpose of the consultation was to engage the BVI Tourist Board (BVITB) staff and Board of Directors to understand their role, challenges, and vision for the future of tourism in the BVI. The OECS Commission representatives emphasized that the meeting was part of the regional consultation process aimed at updating the OECS Common Tourism Policy by identifying national priorities and areas for regional collaboration.

150 The BVI Tourist Board was recognized as the main entity responsible for tourism promotion, public relations, and product development. However, the limitations of their mandate and the division of responsibilities between the Tourist Board, the Ministry of Tourism, and other government agencies became a central theme of discussion.

Governance and Regulatory Framework of the BVI Tourist Board

Legislation and Mandate of the Tourist Board

The BVITB operates under a Tourist Board Ordinance, but the Board itself does not regulate standards or licensing for accommodations, restaurants, or other tourism-related businesses. It serves primarily as a policy-setting body, a marketing entity, and a liaison between industry stakeholders and the government.

- The Environment and Tourism Levy was highlighted as a source of funding allocated for tourism-specific projects, but it is controlled by the government.
 - The lack of enforcement power over tourism quality standards was acknowledged as a major gap, with the Board relying on voluntary compliance rather than regulatory authority.
 - There was discussion on the need for new legislation that would allow greater control over accommodation standards, service quality, and sustainability practices.
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Accommodation and Standards

The Tourist Board promotes accommodations but does not have the authority to enforce quality standards. There were concerns about:

- The absence of a formal accommodation rating system.
- The need for a licensing framework requiring properties to meet specific standards before operating.
- 170 • The impact of unregulated Airbnb and other rental accommodations, which may not adhere to national quality standards.

The Tourist Board inspects properties before listing them on its website, but these inspections do not carry legal weight. There was a consensus that establishing minimum operating standards for all accommodations is critical.

Structure of the Tourism Product in the BVI

Core Tourism Sectors

The BVI tourism industry is structured into various product categories, each managed under different departments:

1. Transportation (land, air, and sea, including taxis, ferries, and airlift).
- 180 2. Accommodation (hotels, villas, yacht charters).
3. Restaurants and Food Services.
4. Yachting and Marine Tourism (a major sector with over 12,000 yacht cabins compared to 1,500 land-based rooms).
5. Cruise and Marina Tourism.
6. Cultural and Heritage Tourism (still underdeveloped).

The Tourist Board actively promotes sailing and adventure tourism but does not regulate the yachting sector. Regulations for marine activities fall under the Shipping Registry and other agencies.

Marketing and Public Relations Strategy

190 The BVI Tourist Board's marketing strategy is heavily focused on:

- Affluent travellers, targeting individuals with incomes between \$100,000 and \$200,000 per year.
- Promoting luxury experiences rather than mass-market tourism.
- Utilizing public relations agencies across key markets (United States, Canada, Europe, Puerto Rico).
- Expanding sports fishing, romance tourism, and adventure tourism.
- Exploring culture and heritage tourism, though this is not yet a primary focus.

There was a disconnect between government priorities and the Tourist Board's marketing focus, as cultural and heritage tourism have not been major promotional themes.

200 **Challenges and Areas for Development**

Tourism Growth and Diversification

There was a clear recognition that BVI's tourism sector needs diversification, particularly in land-based accommodations and cultural tourism. Key challenges discussed included:

- Over-reliance on marine-based tourism, with more rooms on yachts than on land.
- Limited branded hotels, restricting the ability to host large groups and conventions.
- Limited integration of culture and heritage tourism, despite BVI's rich history.
- A lack of formal training programs for the tourism workforce.

Infrastructure and Accessibility

A major barrier to tourism growth was limited air and sea access:

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- The airport runway is too short to accommodate large international flights.
 - Ferries to Anegada have been reduced from daily service to three times per week, limiting access to key tourism areas.
 - Inconsistent and inconvenient inter-island transportation restricts visitor movement.

The Premier has prioritized extending the airport runway, but alternatives such as improving seaports were also discussed.

Data and Research Gaps

The Tourist Board does not have access to detailed visitor data beyond general arrival numbers from the Central Statistics Office. This limits:

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- Understanding where visitors come from.
 - Tracking where they stay.
 - Analysing spending patterns.
 - Making data-driven decisions for marketing and investment.

There was strong support for implementing a Tourism Satellite Account (TSA) to capture better economic data on visitor spending and industry contributions.

Policy and Institutional Gaps

Need for a National Tourism Policy

It was highlighted that BVI lacks a formal, documented National Tourism Policy. Without a guiding framework:

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- Tourism decisions fluctuate with political administrations, leading to inconsistent priorities.
 - There is no long-term strategic direction.
 - Key policy areas like incentives, labour development, and environmental sustainability remain fragmented.

The need for clear, legally backed tourism policies covering standards, incentives, and sustainable tourism was emphasized.

Institutional Coordination

One of the biggest weaknesses identified was a lack of coordination among government agencies:

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- The BVI Tourist Board is often not consulted on critical tourism policies and infrastructure projects.
 - Government agencies operate in silos, leading to inefficiencies and delays in decision-making.
 - There was a call for a Destination Management Council, bringing together all tourism-related agencies to improve coordination.

Vision for the Future of BVI Tourism

Each participant was asked to share their personal vision for what tourism in the BVI should look like in the future. Key themes included:

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1. A well-defined luxury brand – BVI must fully commit to being a luxury destination, improving service standards, infrastructure, and branding.
 2. Better airlift and inter-island transportation – Improving access is essential for tourism growth.
 3. Increased local ownership in tourism businesses – More locals should own and manage hotels, charter companies, and restaurants.
 4. Greater focus on culture and heritage – Tourism should integrate BVI's history, cuisine, and arts.
 5. Improved environmental and sustainability policies – Tourism should be climate-smart and eco-friendly.
 6. Tourism training and workforce development – A national training program should be introduced for customer service and tourism-related jobs.

OECS Regional Priorities and Recommendations

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- At the end of the session, participants were asked what OECS should focus on in the next five years. Key recommendations included:

- Regional collaboration on climate action and resilience – Tourism must adapt to climate change, rising sea levels, and environmental sustainability.
- Improving inter-regional transportation – More affordable flights and ferries between OECS states.
- Strengthening tourism research and data collection – Establishing a regional Tourism Satellite Account system.
- Providing training and professional development opportunities – Expanding training programs for small tourism businesses.

270 **Introduction and Objectives of the Consultation**

The consultation session focused on exploring the role of culture and heritage in the BVI's tourism product. The OECS Commission representatives sought to understand how culture, heritage, and creative industries could be better integrated into tourism development in a way that preserves authenticity while generating economic benefits.

Participants included representatives from the Department of Culture, the Archives, and other key cultural stakeholders, who provided insights into the challenges, opportunities, and strategic priorities for cultural and heritage tourism in the BVI.

The Role of Culture in Tourism Development

Existing Cultural and Heritage Policy Framework

280 The Virgin Islands Culture and Heritage Policy and Strategy (2023) was highlighted as the guiding document for cultural integration across various sectors, including tourism. The policy aims to:

- Strengthen nation-building and cultural identity.
- Protect and promote tangible and intangible cultural heritage.
- Develop the creative and cultural industries (Orange Economy).
- Enhance cross-sector collaboration (e.g., with social development, sports, agriculture, health, and gender affairs).
- Improve the integration of cultural assets into tourism.

290 Despite the comprehensive policy framework, participants acknowledged significant gaps in implementation, particularly in terms of funding, infrastructure development, and coordination among agencies.

Cultural Expressions and Tourism Integration

Opportunities for Cultural Tourism

Participants agreed that culture and heritage tourism hold immense potential but are currently underdeveloped. Key cultural assets that could be enhanced include:

- Museums and heritage sites (e.g., the Lower Estate Sugar Works Museum, Government House Museum).
- Cultural festivals such as the Emancipation Festival, Foxy's Yachting Festival, and the Literary Festival.
- Culinary tourism, emphasizing local foods, traditional dishes, and food festivals.
- 300 • Music and performing arts, including the preservation and promotion of local music and dance.
- Visual arts and crafts, with a focus on integrating local artwork into tourism spaces such as hotels and public areas.

Current Limitations

1. Limited financial investment in cultural infrastructure.
2. Inadequate tourism experiences that showcase cultural elements beyond traditional sun, sea, and sand marketing.
3. Fragmentation of responsibilities among multiple agencies, leading to inefficiencies in planning and execution.
- 310 4. Lack of structured cultural education in schools beyond annual cultural week activities.

There was a strong call for the systematic integration of culture into tourism product development to create immersive, educational, and engaging visitor experiences.

Heritage Conservation and Storytelling

Challenges in Heritage Preservation

A significant issue raised was the lack of proper preservation and storytelling of heritage sites. Many historically and culturally significant locations are neglected, underfunded, or on private land, making development difficult. Some key examples discussed included:

- Anegada's historic stone walls, a unique architectural feature with roots in British and European traditions.
- 320 • Liberated African villages, one of only three in the Caribbean, representing an important piece of post-slavery history.
- Main Street Walk and other urban heritage sites.
- The old prison, which could be a major cultural attraction but is currently in disrepair.

The lack of interpretive signage and storytelling mechanisms was a recurring theme. Visitors often pass by heritage sites without knowing their significance, and there are no structured tour routes or experiences that ensure they engage with these locations.

The Role of the National Archives

The National Archives plays a crucial role in preserving historical records, but the hurricanes of 2017 severely damaged archive facilities, leading to a loss of some records and ongoing recovery

330 efforts. There is a pressing need to digitize and catalogue historical documents to improve accessibility and educational outreach.

Participants also stressed the importance of storytelling in cultural tourism. Many tour guides and taxi drivers provide inconsistent or inaccurate historical narratives, leading to misinformation. There was a strong recommendation for standardized training for tour guides and tourism workers to ensure authentic and accurate historical storytelling.

Festival Tourism and Cultural Authenticity

The Emancipation Festival, the largest cultural event in the BVI, was a major topic of discussion. Participants debated whether the festival still reflects BVI's cultural heritage or if it has become overly commercialized and influenced by external Caribbean cultures.

340 Concerns included:

- A shift towards a carnival-style event, with reduced emphasis on BVI's unique history and traditions.
- A growing presence of foreign artists and food vendors, diluting local cultural representation.
- A need for more structured cultural programming, including educational exhibits, traditional performances, and storytelling sessions.

There was consensus that cultural tourism should celebrate BVI's unique identity, rather than simply adopting pan-Caribbean cultural elements.

Heritage Tourism and the Sister Islands

350 Opportunities for Expansion

A recurring theme was the untapped cultural tourism potential of the Sister Islands (e.g., Anegada, Virgin Gorda, Jost Van Dyke). Key opportunities identified included:

1. Improving welcome signage and visitor orientation at immigration ports.
2. Enhancing the visibility of cultural and heritage sites with proper signage and educational materials.
3. Developing more structured cultural tourism experiences, such as:
 - Guided heritage and nature tours.
 - Archaeological and geological tourism (e.g., the coral formations of Anegada and geological features of the North Drop).
 - Interactive cultural workshops on local crafts, cuisine, and storytelling.

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The Sister Islands felt overlooked in tourism planning and wanted equal representation in national tourism strategies.

The Need for Heritage Investment

Heritage sites in the BVI lack formal protection and investment, particularly those on privately owned land. Many owners do not recognize the historical value of their properties, leading to neglect, unauthorized modifications, or outright destruction.

Participants recommended creating incentives for private property owners to preserve and maintain heritage sites, possibly through:

- Government grants or tax incentives for heritage conservation.
- 370 • Public-private partnerships for cultural tourism development.
- Community-led heritage preservation initiatives.

Gaps and Recommendations for Policy Development

Identified Policy Gaps

1. Lack of a coordinated cultural tourism strategy – No single entity manages cultural tourism, leading to fragmentation.
2. Limited funding for cultural preservation and site development.
3. Absence of training programs for tour guides and tourism professionals in cultural storytelling.
4. Minimal investment in public education about BVI's heritage.
- 380 5. Weak enforcement of heritage site protection laws.

Recommended Actions

- Create a centralized cultural tourism strategy that aligns culture, heritage, and tourism goals.
- Strengthen partnerships between the Department of Culture, the BVI Tourist Board, and the National Parks Trust to develop cultural tourism experiences.
- Enhance training for tour guides and tourism workers in historical accuracy and cultural storytelling.
- Increase funding for heritage site preservation, especially those on government land.
- Develop incentive programs for private owners of heritage properties to encourage preservation.
- 390 • Improve infrastructure for cultural tourism, including signage, walking trails, and visitor centres.

Conclusion and Next Steps

The session concluded with a discussion on OECS support for cultural and heritage tourism development. Participants identified funding and technical expertise as the most critical needs. While BVI has strong historical and cultural assets, it lacks the resources to fully develop and market them.

The next steps in the OECS Common Tourism Policy development process will include:

- A regional consultation with Ministries of Tourism to finalize policy priorities.
- Seeking funding for cultural tourism initiatives.

The BVI consultation provided valuable insights into the untapped cultural tourism potential, highlighting both challenges and opportunities for strengthening heritage preservation, storytelling, and economic development through tourism.

Here is a detailed summary of the BVI Tourist Board (BVITB) Board Consultation session regarding the OECS Common Tourism Policy Update:

Introduction and Objectives of the Consultation

The session opened with representatives from the OECS Commission explaining the purpose of the consultation. The OECS Common Tourism Policy, originally developed in 2011, is being updated with funding from the World Bank's Unleashing the Blue Economy in the Caribbean initiative. The consultation aimed to gather insights from the BVI Tourist Board (BVITB) Board on challenges, opportunities, and priorities for tourism development in the Virgin Islands.

The OECS team emphasized that the updated policy would reflect common priorities among member states while ensuring national concerns were considered. While the blue economy would be an essential part of the revision, the policy would also address broader tourism strategies.

Tourism Vision for the Next Five Years

Priorities for Growth

Board members expressed a clear vision for tourism growth in the next five years, focusing on:

- Increasing overnight visitor arrivals due to their higher spending per visitor compared to cruise passengers.
- Enhancing airlift access as a key constraint in tourism expansion.
- Expanding high-end accommodations, particularly five-star hotels and luxury resorts.
- Encouraging local participation and ownership in tourism investment projects.
- Strengthening the link between the tourism sector and the local economy, ensuring more direct benefits for Virgin Islanders.

Challenges and Constraints

The two primary barriers to growth identified were:

1. Limited Airlift Access – BVI's airport capacity does not allow direct flights from major hubs, forcing visitors to transit via San Juan, St. Thomas, or other Caribbean gateways.

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2. Insufficient Accommodation Capacity – There are few high-end branded hotels in the BVI, limiting the ability to attract affluent travellers. The Prospect Reef Hotel, a government-owned property, was highlighted as a lost opportunity due to its continued disrepair following hurricane damage.

The board strongly supported the Premier’s vision of developing more luxury resorts, particularly in Tortola and Virgin Gorda, to attract high-value visitors.

Investment and Infrastructure Development

Government-Led Investment in Tourism

The board emphasized that government intervention is needed to drive hotel development and airlift improvements. Several stalled or unrealized projects were mentioned, including:

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- Prospect Reef Hotel, which remains undeveloped despite its strategic location near Road Town.
 - Beef Island Development, which was previously proposed as a mixed-use resort, marina, and golf course but never materialized.
 - Airport expansion, which is a critical enabler for increased tourism growth.

While private investment is encouraged, the board noted that the government must take an active role in facilitating these projects.

Coordination with Investment Agencies

450 Investment promotion currently falls under the Premier’s Office, and there is no standalone tourism investment agency. The now-repealed Trade Commission Act was intended to address this gap, but investment facilitation remains unclear. The board agreed that a more structured approach to tourism investment is needed.

Tourism Workforce Development and Local Engagement

Training and Career Development in Tourism

A major concern for the board was the lack of local participation in the tourism sector, particularly in management and ownership roles. Virgin Islanders tend to favour financial services careers, leaving tourism dependent on expatriate labour.

To address this, the board is collaborating with H. Lavity Stoutt Community College (HLSCC) to:

- Develop tourism-focused training programs.
- Encourage young Virgin Islanders to see tourism as a viable career path.
- Balance the local-to-expatriate workforce ratio in the hospitality sector.

460 The board's goal is to create a workforce pipeline, ensuring locals benefit from tourism growth.

Public Awareness Campaign: "Tourism is Everybody's Business"

The board launched a public awareness campaign aimed at educating residents about the economic importance of tourism. Many Virgin Islanders do not fully understand the link between tourism and the broader economy, particularly in retail, beauty services, and other indirect sectors.

While the campaign had limited initial success, a major relaunch is planned to drive greater awareness and community engagement.

The Role of Marine-Based Tourism

The Importance of the Yachting Industry

470 The board emphasized that BVI's marine tourism industry is critical, with more overnight visitors staying on yachts than in hotels. Pre-hurricane statistics indicated a strong base of private yachts, but the sector suffered a significant decline due to Hurricanes Irma and Maria, followed by COVID-19 restrictions.

Several key issues were identified:

1. Loss of Long-Term Yacht Visitors – Many private yacht owners never returned after the hurricanes and COVID policies drove others away.
2. Shift Towards Charter Operations – The industry has transitioned toward a charter-based model, reducing the number of long-term private yachts staying in the BVI.
3. Environmental Concerns – Boaters tend to be eco-conscious, and strong environmental regulations are necessary to protect marine ecosystems.

480 The board expressed strong interest in reviving the marine industry, particularly by:

- Encouraging private yacht ownership and visitation.
- Improving marina infrastructure and services.
- Ensuring sustainable marine tourism practices.

Governance, Coordination, and Destination Management

The Role of the Tourist Board

The BVITB's core mandate is destination marketing, but the board is increasingly involved in broader tourism development issues, including:

- Product development and experience design.
- Airlift and access improvements.
- 490 • Event planning and cultural tourism initiatives.

Collaboration with Other Agencies

The BVITB works closely with key government entities, including:

- BVI Airports Authority – Airlift development.
- BVI Ports Authority – Cruise and ferry terminal management.
- Tortola Pier Park Board – Cruise tourism activities.
- Ministry of Financial Services, Labour, and Trade – Investment facilitation.

However, there is no centralized tourism authority, and coordination remains a challenge.

New Events and Cultural Tourism Initiatives

500 To diversify the tourism product, the BVITB created an Events Department focused on festivals and cultural tourism experiences. Plans include:

- Reintroducing a music festival to attract international and regional visitors.
- Expanding cultural tourism offerings, ensuring visitors experience BVI's heritage beyond beaches.

The board strongly supports using events to drive visitor arrivals and improve the tourism experience.

Tourism Standards and Policy Development

The Need for Tourism Standards

A major policy gap identified was the lack of enforceable tourism standards. While the board supports setting clear quality benchmarks, challenges include:

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- Resistance from businesses.
 - Enforcement difficulties.
 - Potential political interference.

Some OECS member states, such as Turks and Caicos, have successfully implemented tourism standards, and the BVI aims to adopt a similar model. The board stressed the need for external technical assistance to develop a robust regulatory framework.

Recommendations for OECS Support

Key Areas Where OECS Can Assist

The board highlighted several areas where OECS support would be valuable, including:

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1. Technical assistance for tourism standards development.
 2. Improved tourism data collection and analysis.
 3. Investment promotion support to attract high-end resorts.
 4. Strengthening marine tourism policies and sustainability frameworks.

The board emphasized that OECS collaboration could help address policy gaps and drive regional best practices.

Conclusion and Next Steps

The BVITB Board provided critical insights into BVI's tourism vision, emphasizing airlift, high-end accommodations, workforce development, and marine industry revival as key priorities for the next five years.

530 Here is a detailed summary of the BVI Tourism Plan Consultation session regarding the OECS Common Tourism Policy Update:

Introduction and Objectives of the Consultation

The session opened with representatives from the OECS Commission, explaining that the purpose of the consultation was to update the OECS Common Tourism Policy, which was last revised in 2011. This update is being funded by the World Bank's Unleashing the Blue Economy in the Caribbean initiative.

The OECS team emphasized that the updated policy would reflect regional priorities while ensuring national concerns were considered. The session aimed to engage stakeholders from the environmental and natural resource sectors to determine how environmental policies, coastal management, and sustainability concerns intersect with tourism development.

540 While the blue economy would be a major focus, the consultation also sought to address broader tourism-related issues, including policy gaps, sustainable development strategies, and governance concerns.

Tourism and Environmental Management

The Role of the Ministry of Environment, Natural Resources, and Climate Change

Representatives from the Ministry of Environment, Natural Resources, and Climate Change explained that while tourism is not a direct part of their mandate, they play a critical role in managing environmental assets that support the tourism sector.

Tourism-related concerns often arise in their development review processes, which include:

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- Environmental Impact Assessments (EIAs) for major tourism projects.
 - Coastal and marine developments such as marinas, jetties, and reclamation projects.
 - Water quality monitoring and climate adaptation strategies.
 - Land use planning and environmental conservation.

The Technical Review Committee (TRC) within the Ministry evaluates all tourism-related development proposals, particularly those that involve crown land, seabed usage, or coastal infrastructure.

Challenges in Policy Implementation

560 While the BVI government has adopted the rhetoric of "building back better" after hurricanes Irma and Maria, there have been no significant policy or legislative changes to enforce this principle. Several critical laws and regulations remain in draft form, including:

- The Physical Planning Act regulations, which have yet to be passed.
- The Comprehensive Environmental Bill, which has been under development for over a decade.
- A proposed update to the Building Code, which remains unimplemented.

The lack of enforcement mechanisms means that many tourism-related environmental issues remain unaddressed, particularly regarding flooding, coastal erosion, and the degradation of marine ecosystems.

Tourism and the National Parks Trust

The Role of National Parks in Tourism

570 The National Parks Trust (NPT) plays a central role in tourism, managing some of the BVI's most visited attractions, including The Baths, Sage Mountain, and marine conservation areas. However, funding remains a major issue, with the NPT receiving significantly less government support than the BVI Tourist Board, despite maintaining critical tourism infrastructure.

The NPT operates under outdated legislation, and climate change considerations are not formally included in their mandate. A Protected Areas System Plan is currently being updated, but it lacks formal integration with tourism planning.

Overcrowding and Carrying Capacity Issues

580 The BVI's most popular attractions are experiencing severe overcrowding, particularly The Baths, where visitor numbers have skyrocketed. In December 2023 alone, The Baths saw 21,000 visitors, far exceeding its established carrying capacity of 800 visitors per day. This has led to:

- Increased safety concerns, including frequent injuries on deteriorating trails.
- Environmental degradation, including erosion and damage to rock formations.

- Strained infrastructure, as existing visitor facilities are inadequate for current demand.

In response, the NPT is planning to introduce a reservation system, requiring visitors to book time slots to reduce congestion and improve visitor experience. However, there has been political pushback against stricter enforcement measures.

Conflict Between Tourism Growth and Environmental Protection

590 The government's focus on increasing cruise tourism has exacerbated environmental pressures, with National Parks Trust officials often side-lined in key tourism decisions. Despite contributing to tourism infrastructure, the NPT is rarely consulted on major tourism policies.

A major concern is the misallocation of funds from the Environmental and Tourism Levy, which is intended to support environmental conservation but is often diverted elsewhere. The lack of financial support for conservation efforts threatens the long-term sustainability of BVI's tourism product.

Marine Tourism and the Blue Economy

The Importance of Marine-Based Tourism

BVI's tourism sector is heavily reliant on the marine industry, including:

- Yachting and charter boats.
- Scuba diving and snorkelling.
- 600 • Marine protected areas and eco-tourism.

However, marine tourism is facing significant environmental threats, including coral reef degradation, illegal anchoring, and pollution. The BVI lacks a comprehensive marine spatial plan, leading to overcrowding in popular bays and conflicts between different user groups.

Challenges with Mooring Management

The National Parks Trust manages over 155 moorings, but the system is outdated, and many anchorages are now too small to accommodate modern yachts. There are no official carrying capacity limits for major bays, leading to:

- Boats anchoring in sensitive coral areas, causing irreversible reef damage.
- Conflicts between private yacht owners and charter companies.
- 610 • Political interference in mooring allocations, with government officials overruling expert recommendations.

The lack of sewage treatment facilities at marinas is also a growing problem, with yacht waste being discharged directly into the ocean.

The Need for Strategic Planning

Stakeholders agreed that BVI must balance growth in marine tourism with stronger environmental regulations. Recommendations included:

- Developing a marine spatial plan to regulate yachting activities.
- Improving enforcement of existing marine protection laws.
- Investing in infrastructure for sustainable marine tourism, such as pump-out stations and managed anchorages.

620

Beach Management and Coastal Development

The Beach Management Crisis

BVI's beaches are among its most valuable tourism assets, but they are under serious threat due to overcrowding, commercial exploitation, and erosion. Key issues include:

- Unregulated beach chair rentals, which cover entire beaches, limiting public access.
- Conflicts between vendors and environmental authorities, with political interference preventing enforcement.
- Severe erosion, worsened by coastal development, climate change, and poor land-use planning.

630

While a Beach Use Policy exists, it lacks enforcement mechanisms, and responsibility for beach management is fragmented across multiple agencies.

Unregulated Coastal Development

Many beachfront developments have been approved without considering long-term environmental impacts. Issues include:

- Hotels and restaurants being built too close to the shoreline, eliminating natural dunes.
- Poor wastewater management, leading to sewage discharge into the ocean.
- Limited coastal resilience planning, despite rising sea levels and more frequent storm surges.

Key Recommendations for OECS Policy

640

Policy Priorities for BVI

Stakeholders identified several critical areas where OECS could support policy development and funding efforts:

1. Developing a comprehensive National Tourism Strategy – BVI currently lacks a cohesive strategy to balance growth and sustainability.
2. Conducting carrying capacity assessments for key attractions – Overcrowding is damaging the visitor experience and the environment.
3. Enhancing marine spatial planning and coastal zoning – Stronger regulations are needed to manage yachting and protect marine ecosystems.
4. Strengthening beach management and enforcement – Clear guidelines and enforcement mechanisms are required to control unregulated tourism activities.
5. Improving tourism infrastructure – Investments should focus on wastewater management, erosion control, and sustainable visitor facilities.

The Role of OECS in Supporting BVI

The OECS team confirmed that tourism priorities identified across multiple member states could be incorporated into regional funding applications.

Conclusion

The consultation highlighted the urgent need for better planning, stronger environmental protections, and improved tourism governance in the BVI. Without a strategic approach, unchecked tourism growth could undermine the very assets that make the Virgin Islands a desirable destination. The OECS policy update offers a crucial opportunity to align regional best practices with local priorities, ensuring BVI's tourism industry remains both profitable and sustainable.

Summary of the OECS Tourism Plan Consultation with the Ministry of Financial Services, Labour, and Trade

Introduction and Objectives of the Consultation

The consultation session was led by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. The purpose of the session was to gather insights from the Ministry of Financial Services, Labour, and Trade regarding the role of tourism within the BVI's economic and workforce development, as part of the broader effort to update the OECS Common Tourism Policy.

The OECS representatives clarified that while the updated policy is regional in scope, it must reflect national priorities to ensure alignment with the realities on the ground. This consultation was one of several being conducted across OECS member states, with a focus on identifying common gaps and opportunities for policy development.

Economic Role of Tourism in the BVI

Tourism as an Economic Pillar

680

The Ministry of Financial Services, Labour, and Trade was recently established after the 2023 general elections, and its portfolio includes financial services, trade, labour, statistics, and digital transformation. Representatives confirmed that financial services remain the leading revenue generator for the government, contributing nearly 50-60% of national revenue. However, from an economic impact perspective, tourism plays a more expansive role, supporting hotels, restaurants, taxis, supermarkets, and a wide range of businesses.

The BVI's economy is currently dominated by two primary sectors:

1. Financial Services – The largest contributor to government revenue.
2. Tourism – The sector with the most widespread economic impact, influencing multiple industries and providing direct and indirect employment.

690

While there are small contributions from agriculture, fisheries, and construction, these sectors are not currently significant drivers of economic growth. The government recognizes the need for diversification, particularly within the blue economy, to strengthen the resilience of the tourism industry.

Investment and Economic Planning

The Ministry acknowledged that economic planning in the past has been heavily focused on fiscal policy, with limited integration of broader economic development strategies. However, the establishment of this new ministry presents an opportunity to adopt a more structured approach to economic planning, including:

- Linking labour needs to national economic priorities.
- Developing tourism and financial services in alignment with workforce capabilities.
- Integrating environmental sustainability considerations into economic planning.

700

The Medium-Term Fiscal Plan, which includes economic indicators and forecasts, serves as a guiding document for government decision-making. However, stakeholders noted that the BVI lacks a comprehensive National Tourism Policy, making it difficult to align economic planning, investment strategies, and workforce development with tourism growth.

Workforce Development and Labour Market Considerations

Labour Force Composition and Skills Gaps

The BVI has a large expatriate workforce, which has historically filled gaps in key industries. The reasons for this include:

- A small local population, limiting the available workforce.
- Skill gaps, particularly in hospitality and specialized tourism services.
- A preference among BVI Islanders for careers in financial services, rather than tourism.

710 While there is a policy preference for hiring local talent, the Ministry recognized that many jobs in the tourism sector continue to be filled by expatriates due to a lack of trained and available locals. There is now a renewed push for labour reform, aimed at:

- Better identifying the country's workforce needs.
- Aligning educational programs with industry demands.
- Encouraging greater local participation in tourism-related careers.

Streamlining Labour and Immigration Processes

720 The government has recognized that labour and immigration processes contain excessive red tape, which delays employment approvals and impacts business efficiency. Complaints from businesses about long processing times for work permits have prompted discussions on how to streamline approvals and make the system more efficient.

The Ministry aims to balance the need for an efficient labour force with policies that prioritize local employment. However, officials acknowledged that meaningful labour market reform requires cross-sector collaboration, particularly with education, tourism, and workforce development agencies.

Tourism Data Collection and Economic Analysis

The Need for Better Tourism Data

The Ministry relies on arrival statistics from the Central Statistics Office (CSO) as a key tourism indicator. However, officials acknowledged that arrival numbers alone do not provide a complete picture of the economic impact of tourism.

730 A Tourism Satellite Account (TSA) was previously in place, but it is now outdated. Officials recognized the need to revive the TSA to obtain more detailed insights into tourism's contribution to GDP, employment, and spending patterns.

Integrating Environmental Considerations into Economic Planning

While the Ministry historically focused on fiscal policy, officials admitted that environmental sustainability has not been a central consideration in economic planning. However, there is growing awareness of the need to balance economic growth with environmental protection.

740 Discussions highlighted the importance of including environmental and sustainability indicators in economic planning, particularly in coastal and marine tourism development. There was broad agreement that future tourism expansion must be guided by clear sustainability principles to protect the BVI's natural assets.

The Blue Economy and Tourism Expansion

Potential for Growth in the Marine Sector

The marine environment is the foundation of BVI's tourism industry, with more overnight visitors staying on yachts than in hotels. The government recognizes opportunities to further develop the blue economy, but challenges remain. Key issues discussed included:

- Environmental degradation – Coral reefs and marine ecosystems are under stress due to pollution, overuse, and climate change.
- Lack of infrastructure – There is a shortage of sewage treatment facilities and sustainable waste management systems for marine tourism.
- 750 • Regulatory gaps – Mooring and anchorage policies need updating to accommodate the changing size of vessels.

Challenges with Superyacht and Mega-Yacht Tourism

The BVI's limited infrastructure for superyachts and mega-yachts poses a challenge for expanding high-end marine tourism. While the territory has seen an increase in luxury vessels, the availability of appropriate facilities remains inadequate.

Stakeholders discussed the need for investment in mega-yacht marinas, specialized services, and sustainable marine tourism policies to attract higher-value visitors while protecting marine ecosystems.

Policy and Revenue Considerations

760 Reviewing Fee Structures for Tourism Revenue

A recurring theme was the need to reassess government fees related to tourism, including:

- Entry and head taxes.
- Mooring fees for charter boats.
- User fees for national attractions.

Many existing fees have not been updated in decades, and there is concern that the BVI is undervaluing its tourism assets. However, there is political resistance to increasing fees, driven by concerns that higher costs might discourage visitors.

770 Stakeholders emphasized that fee adjustments should be based on clear benchmarking and economic analysis, ensuring that fees reflect the true value of services while remaining competitive with regional markets.

Key Recommendations for OECS Policy Support

Priority Areas for OECS Assistance

Stakeholders identified several areas where OECS could support the BVI:

1. Developing a regional air and sea transportation strategy – Improving connectivity and reducing travel costs across OECS member states.
2. Creating a unified regional tourism marketing strategy – Promoting OECS destinations collaboratively, rather than competing for the same visitors.
3. Enhancing tourism workforce training programs – Expanding opportunities for BVI Islanders in hospitality, marine tourism, and eco-tourism.
4. Supporting marine spatial planning and environmental protection – Strengthening sustainable management of BVI's marine resources.
5. Assisting with data collection and tourism impact assessments – Reviving the Tourism Satellite Account (TSA) to provide more accurate economic data.

Conclusion

The consultation highlighted critical gaps in tourism policy, workforce development, and environmental planning, while also identifying significant opportunities for sustainable growth. The BVI government is prioritizing tourism expansion, but success will depend on better planning, stronger regulations, and improved infrastructure. The OECS has a role to play in supporting these efforts, particularly in regional coordination, data collection, and policy development.

Summary of the OECS Tourism Plan Consultation with the BVI Ports Authority, Immigration, and Airport Authorities

Introduction and Purpose of the Consultation

The consultation session was facilitated by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. The objective was to gather insights from key stakeholders in transportation and border management—including the BVI Ports Authority, Immigration, and Airport Authorities—to assess tourism's role in the sector, challenges in infrastructure, policy gaps, and opportunities for improvement.

The OECS representatives clarified that the updated OECS Common Tourism Policy aims to reflect regional priorities while incorporating national-level realities. The session focused on port operations, cruise tourism, airport expansion, inter-island connectivity, and the efficiency of immigration processes.

Role of the BVI Ports Authority in Tourism

Overview of Responsibilities

The BVI Ports Authority (BVIPA) oversees cruise ship scheduling, berthing, and ferry operations but does not manage general yachting or fishing activities, which fall under the Shipping Registry and other maritime authorities. The Port Authority is responsible for:

- Managing cruise ship traffic at the Road Town cruise pier.
- Overseeing ferry terminals in Road Town, West End, Virgin Gorda, and Jost Van Dyke.
- 810 • Operating the cargo port at Port Purcell and Virgin Gorda.
- Ensuring customs and immigration facilities are available at seaports.

The BVI receives significant cruise tourism revenue, but stakeholders noted concerns about sustainability, overcrowding, and infrastructure limitations.

Cruise Tourism Revenue and Head Tax

Cruise passengers pay a head tax of \$15 per visitor, which is collected entirely by the Ports Authority. This revenue is used to repay a loan from First Caribbean International Bank, which financed the development of the Tortola Pier Park. Despite the financial benefits, the Ports Authority must balance revenue generation with maintaining environmental and infrastructure sustainability.

- 820 Stakeholders noted that the head tax has remained unchanged since 2014, raising discussions about the potential for fee adjustments.

Cruise Passenger Distribution and Overcrowding

Cruise tourism brings in up to 800,000 visitors annually, but the majority of passengers concentrate in a few key locations, including:

- The Baths in Virgin Gorda – Regularly overburdened with visitors.
- Cane Garden Bay Beach – Another popular but overcrowded destination.
- Road Town Shopping Areas – While some visitors explore, many remain on board their ships.

- 830 Stakeholders emphasized the need to develop more attractions and activities to spread visitor traffic more evenly across the territory. This includes supporting local businesses in creating new experiences.

Expansion of Cruise Tourism and Infrastructure Limitations

While the Ports Authority welcomes increased cruise traffic, infrastructure constraints limit growth. Officials stated that any expansion of cruise tourism must be accompanied by investments in roads, visitor facilities, and new attractions. The Western Ferry Terminal was identified as a priority for redevelopment, with plans for a modernized structure to improve passenger experience.

The BVIPA is actively pursuing summer cruise traffic, expanding beyond the traditional October-April peak season to ensure a more balanced year-round tourism economy.

Airport Infrastructure and Expansion Plans

840 Capacity and Growth Trends

The Terrance B. Lettsome International Airport (EIS) is the primary gateway for international air travel. The airport peaked at 397,000 passengers in 2006 but has since stabilized at around 205,000 to 235,000 passengers per year. Growth is occurring incrementally, with new and expanded services from American Airlines, Silver Airways, and upcoming flights from Caribbean Airlines.

Private jet travel accounts for 40% of arrivals, highlighting the importance of high-end tourism in the BVI.

Challenges and Expansion Efforts

The government has ambitious plans for airport expansion, including:

- A longer runway to accommodate larger aircraft.
- A redesigned terminal to improve passenger flow.
- Increased capacity to reduce reliance on St. Thomas for air travel.

Officials acknowledged concerns about delays in the airport expansion project. While previous feasibility studies were conducted, a new business case is now being prepared, delaying the project's timeline.

Stakeholders stressed the need for better alignment between airport expansion and tourism development, ensuring that hotel capacity and tourism demand justify the investment.

Inter-Island and Regional Connectivity Issues

860 A major barrier to tourism growth is limited air connectivity within the OECS. Currently, many BVI travellers must transit through Miami, Puerto Rico, or St. Thomas, rather than flying directly to other Caribbean destinations.

Stakeholders called for regional collaboration to improve inter-island flights, emphasizing the need for an integrated approach to Caribbean air travel.

Immigration and Border Management

Tourism Data Collection and Sharing

The Immigration Department holds critical tourism data, including:

- Traveller origin and purpose of visit.
- Duration of stay.
- Accommodation type (hotels, Airbnb, yachts, etc.).

870 Currently, data collection is manual, leading to inconsistencies and inefficiencies. However, the department is transitioning to an electronic system, which will:

- Capture traveller data online before arrival.
- Reduce manual entry errors.
- Facilitate better decision-making for tourism marketing and planning.

Stakeholders agreed that improved data-sharing mechanisms between Immigration, the BVI Tourist Board, and policymakers will enhance tourism development strategies.

Workforce and Fee Structure Considerations

The BVI's immigration system is currently revenue-neutral, with no significant fees for visitor processing. However, officials noted that fee structures are under review, particularly for high-end travellers using private yachts and jets.

880 There was broad agreement that the government should explore ways to generate more revenue from tourism-related immigration services, particularly for luxury travellers.

Yachting and 24/7 Port Access

The BVI is a major destination for yachting and charter tourism, yet current immigration protocols require vessels arriving outside standard hours (8 AM - 8 PM) to remain onboard until officers are available.

Stakeholders discussed the feasibility of:

- Extending port hours for yachting clearance.
- Introducing pre-arrival electronic processing to speed up entry.
- Ensuring seamless clearance for major events and festivals.

890 Officials confirmed that protocols are in place for off-hour clearances, but requests must be approved in advance.

Key Recommendations for OECS Support

Priority Areas for Regional Collaboration

Stakeholders identified several areas where OECS could play a role in supporting tourism development:

1. Improving regional air and sea transportation – Enhancing inter-island connectivity to make travel easier between OECS territories.
2. Developing a regional tourism data-sharing system – Ensuring that immigration and tourism boards can access real-time visitor statistics.
- 900 3. Providing training for tourism and hospitality workers – Expanding regional training programs to enhance customer service and tourism management skills.
4. Enhancing marine tourism policies – Establishing a regional approach to managing yachting and cruise tourism impacts.
5. Supporting climate resilience in port and airport infrastructure – Ensuring that new tourism infrastructure projects align with climate change adaptation strategies.

Conclusion

910 The consultation provided valuable insights into the challenges and opportunities facing tourism-related infrastructure in the BVI. While the BVI Ports Authority, Airport, and Immigration Department play critical roles in tourism facilitation, issues such as inter-island connectivity, infrastructure limitations, and outdated policies remain key obstacles.

The OECS Common Tourism Policy update should incorporate strategies to improve air and sea travel, expand tourism-related data collection, and promote sustainable growth in the cruise and yachting industries. Moving forward, stakeholders emphasized the importance of aligning infrastructure development with tourism expansion goals, ensuring that economic benefits are maximized while preserving the BVI's unique natural environment.

Summary of the OECS Tourism Plan Consultation on Sports, Marine Tourism, and Infrastructure Development in the BVI

Introduction and Purpose of the Consultation

920 The consultation session was led by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. The objective was to engage stakeholders in sports, marine tourism, and event management to explore how these industries intersect with tourism and economic development in the British Virgin Islands (BVI).

The OECS team emphasized that the updated OECS Common Tourism Policy is regional in scope but must reflect national priorities. This session provided an opportunity for sports federations, marine operators, and event organizers to discuss their challenges, needs, and opportunities for growth. The consultation also aimed to inform BVI's tourism plan, ensuring that policy development aligns with economic realities and stakeholder needs.

The Role of Sports in Tourism Development

930 Football and International Sporting Events

The BVI Football Association (BVIFA) plays a significant role in sports development and has the potential to enhance tourism through international competitions. BVIFA representatives explained that:

- Football activities run year-round, including youth leagues, national team training, and local tournaments.
- The BVI hosts international matches, drawing teams from Puerto Rico, Anguilla, and other Caribbean nations.
- Visiting teams generate economic activity, benefiting hotels, transportation services, and local vendors.

940 Despite these benefits, sports tourism remains underfunded and under-promoted. The BVIFA called for greater collaboration with the tourism sector to:

- Market sporting events as tourism attractions.
- Secure government investment in sports tourism.
- Improve facilities to meet international hosting standards.

Challenges in Facility Development

A major barrier to expanding sports tourism is the lack of adequate facilities. The BVIFA highlighted the absence of FIFA-standard venues in the BVI, noting that:

- Existing facilities lack lighting, limiting evening matches and televised events.
- There are no dedicated football stadiums, requiring BVIFA to depend on multi-purpose government facilities.
- FIFA funding is available to support infrastructure, but the BVIFA cannot access it without a long-term lease agreement for land.

950 BVIFA has been waiting for over two years for the government to finalize a 25-year lease, which is a requirement for FIFA investment in sports facilities. Delays jeopardize the ability to host major tournaments, which could otherwise attract visitors, generate revenue, and raise BVI's international profile.

Diversifying Sports Tourism

Stakeholders agreed that BVI must identify sports that are best suited for tourism development. Some suggestions included:

- 960
- Sailing regattas, which already draw international participants.
 - Track and field events, such as the Carifta Games.
 - Junior and youth competitions, since parents tend to travel with young athletes, increasing visitor spending.

One key recommendation was to develop a sports tourism strategy that aligns with existing infrastructure and market demand.

Marine-Based Tourism and International Regattas

BVI Spring Regatta and Marine Tourism

970 The BVI Spring Regatta is one of the largest international events in the territory, drawing participants from over 18 countries. Representatives from the event outlined key aspects of its impact:

- The regatta generates \$4.5 to \$5 million annually in direct spending.
- Sailing teams, support crews, and spectators contribute to hotels, restaurants, and transportation services.
- Many visitors return as repeat tourists, some even purchasing property in the BVI.

Despite its success, the event faces logistical and financial challenges:

- Accommodation shortages limit the number of participants and visitors.
- Sponsorship and marketing costs are high, requiring continuous financial support.
- There is no dedicated event space or conference centre to host associated activities.

Accommodation and Infrastructure Constraints

980 A recurring issue across all major events is the limited availability of accommodation. During regatta season:

- Hotels and villas are fully booked a year in advance.
- Participants often sleep on boats, but this is not viable for all visitors.
- Alternative lodging solutions, such as temporary cruise ship accommodations, have been considered but never implemented.

Event organizers suggested that government and private investors should explore expanding lodging capacity, possibly by:

- Developing new hotel properties.
- Encouraging private homeowners to list vacation rentals.
- Partnering with cruise lines to provide temporary floating accommodations.

Regulatory Challenges in Marine Tourism

While marine tourism is a major economic driver, outdated policies and regulatory barriers limit business expansion. One example cited was jet ski operations, which are currently restricted to only two operators in the entire BVI due to a ban imposed in the 1980s.

Marine tourism operators argued that:

- Regulations should be modernized to allow for controlled expansion of water sports.
- Licensing processes need to be streamlined for new businesses.
- Safety and environmental policies should be formalized to prevent negative impacts on marine ecosystems.

1000 Stakeholders called for a comprehensive marine tourism policy that balances economic growth with environmental sustainability.

Education, Workforce Development, and Local Involvement

The Need for Skilled Workers in Tourism and Marine Industries

Participants expressed concern about the lack of trained professionals in event management, marine operations, and hospitality services. The BVI Marine College and H. Laverty Stoutt Community College (HLSCC) offer training programs, but there is insufficient coordination between education providers and industry needs.

Recommendations included:

- Expanding apprenticeship programs to provide hands-on training in sailing, event planning, and marine operations.
- Establishing partnerships between schools and tourism businesses to ensure students gain relevant experience.
- Providing government-supported scholarships for specialized tourism-related fields.

A major concern was that local youth are not being engaged early enough in marine careers, despite BVI's reliance on the blue economy.

Policy and Governance Recommendations

Improving Government Support for Sports and Marine Tourism

Stakeholders emphasized the need for clearer government policies to support sports and marine-based tourism. Key recommendations included:

- 1020
- Creating a dedicated National Sports Policy that defines:
 - Funding mechanisms for local athletes.
 - A structured plan for hosting international sporting events.
 - Guidelines for public-private partnerships in facility development.
 - Developing a National Marine Tourism Policy to:
 - Address licensing and regulatory barriers.
 - Expand water sports opportunities while ensuring sustainability.
 - Improve infrastructure for sailing and yachting events.

Enhancing Regional and International Marketing

- 1030
- Participants stressed that BVI needs stronger international marketing efforts for sports and marine tourism. Suggestions included:

- Increasing government funding for tourism promotion.
- Strengthening partnerships with the BVI Tourist Board to market events internationally.
- Encouraging the use of social media and digital influencers to expand BVI's reach.

Tourism Data Collection and Economic Impact Studies

Stakeholders expressed concern about the lack of reliable tourism data, particularly for sports and event tourism. The government was encouraged to:

- 1040
- Regularly conduct economic impact studies to measure the contribution of sports and marine tourism.
 - Improve collaboration between tourism agencies and event organizers to share visitor data.
 - Revive the Tourism Satellite Account (TSA) to provide detailed insights into tourism's role in the economy.

Conclusion

The consultation provided valuable insights into the untapped potential of sports and marine tourism in the BVI. While major international events already generate significant revenue, challenges such as accommodation shortages, outdated regulations, and limited government support continue to hinder growth.

1050 The OECS Common Tourism Policy should incorporate strategies to address these barriers, ensuring that sports, sailing, and marine activities play a greater role in BVI's economic development. Moving forward, stakeholders emphasized the importance of policy reform, infrastructure investment, and workforce development to enhance BVI's position as a premier destination for sports and marine tourism.

Summary of the OECS Tourism Plan Consultation on Marine, Conservation, and Tourism Development in the BVI

Introduction and Purpose of the Consultation

The consultation was led by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. The objective was to gather insights from key stakeholders in marine tourism, conservation, and tourism development to inform both the OECS Common Tourism Policy update and BVI's national tourism strategy.

1060 The OECS team explained that while the policy is regional, it must also reflect national priorities. The project is being funded under the World Bank's "Unleashing the Blue Economy in the Caribbean" initiative, focusing on marine tourism, conservation, and sustainable development. The session included representatives from marine charters, dive operations, water sports businesses, conservation groups, and tourism development experts.

Stakeholders were asked to provide their perspectives on:

- Tourism's role in the BVI economy.
- Challenges facing marine and conservation tourism.
- Infrastructure needs, policy gaps, and recommendations for sustainable development.
- The future vision for BVI's tourism industry.

1070 The Role of Marine Tourism in BVI's Economy

Yachting, Charters, and Moorings

Stakeholders agreed that marine-based tourism is the backbone of the BVI economy, with yachting and charter services contributing significantly to GDP. Representatives from charter companies and the BVI Charter Yacht Society confirmed that 100% of their business relies on tourism.

One major concern raised was the increasing size of yachts and the lack of appropriate moorings for vessels over 60 feet. Currently, many of these yachts anchor instead of using moorings, leading to:

- Environmental degradation, particularly damage to seagrass beds.
- Increased congestion in key anchorages.

- 1080
- Safety concerns due to limited deep-water mooring facilities.

Stakeholders advocated for expanding mooring fields to accommodate larger yachts while ensuring that environmental protections remain a priority. Some participants suggested that private sector operators should be given permits to install moorings, similar to systems in St. Thomas and St. John.

Barriers to Growth in Marine Tourism

Several barriers to marine tourism expansion were identified, including:

- 1090
1. Limited access to the BVI due to high air travel costs and poor connectivity.
 2. Inconsistent regulations for charter boat licensing and inspections.
 3. Slow and cumbersome permitting processes for business expansion.
 4. A lack of enforcement of environmental and marine regulations.

Stakeholders agreed that BVI needs a clearer marine tourism policy that addresses these challenges while promoting sustainable practices.

Conservation, Environmental Sustainability, and Tourism

The Role of Conservation in Tourism Development

Representatives from Beyond the Reef and the BVI Dive Operators Association emphasized that conservation is integral to maintaining the BVI's tourism product. They noted that:

- 1100
- Many dive sites and marine ecosystems are at full capacity, and further expansion must be carefully managed.
 - Tourists are increasingly seeking sustainable tourism experiences, including conservation-focused diving and eco-tourism.
 - Enforcement of environmental regulations remains weak, particularly regarding illegal anchoring and reef protection.

Some participants argued that BVI should focus on attracting higher-value tourists rather than increasing visitor numbers. This means prioritizing conservation, improving infrastructure, and targeting eco-conscious travellers.

Marine Conservation Initiatives and Challenges

Stakeholders shared updates on marine conservation projects, including:

- 1110
- Artificial reef installations, such as the wreck of the Shark plane and other sunken structures that promote coral growth.
 - A new coral restoration garden being developed off Cooper Island.

- Educational programs to increase awareness of marine conservation among tourists and residents.

Despite these efforts, several challenges remain:

- Tourists and cruise passengers frequently damage coral reefs due to lack of awareness and poor signage.
- No clear government policy exists to support conservation tourism initiatives.
- Funding for conservation projects is inconsistent, and stakeholders must compete for limited resources.

1120 Participants suggested that government funding from the Environmental and Tourism Levy should be allocated more transparently and efficiently to support conservation initiatives.

Tourism Infrastructure and Policy Gaps

Lack of a National Tourism Policy

Stakeholders expressed frustration that BVI lacks a clear, unified tourism policy. Key concerns included:

- Unclear government regulations for expanding tourism businesses.
- No formal strategy for balancing cruise tourism with overnight visitors.
- A lack of structured investment in tourism infrastructure.

1130 Some participants noted that previous tourism plans were never fully implemented, leaving businesses without clear guidance on government priorities. They urged the new Ministry of Tourism to develop a formal national tourism policy that defines BVI's identity and vision for the future.

Cruise Tourism vs. Overnight Tourism

A major topic of discussion was the impact of cruise tourism on overnight guests and the environment. Several stakeholders argued that BVI should limit cruise passenger numbers to protect high-end tourism and maintain a boutique destination appeal.

Key concerns about cruise tourism expansion included:

- Overcrowding at major attractions like The Baths and Cane Garden Bay.
 - Environmental damage from unregulated beach access and poor waste management.
 - Disruption to luxury and eco-tourism markets, where guests seek exclusivity and tranquillity.
- 1140

Some participants supported a balanced cruise tourism strategy, where visitor numbers are controlled and environmental management is improved.

Improving Visitor Experience and Tourism Offerings

Many stakeholders agreed that BVI's tourism offerings need to diversify beyond beaches and sailing. Suggested improvements included:

- Developing cultural and heritage attractions, such as museums, art installations, and historical tours.
- Enhancing customer service training across all tourism sectors.
- Strengthening the national identity and branding of the BVI as a luxury, eco-conscious destination.

1150

Participants called for greater investment in cultural tourism, arguing that the BVI's rich history and local traditions are currently underutilized in marketing efforts.

Regulatory and Business Challenges

Complex Licensing and Business Expansion Processes

Business owners expressed frustration with cumbersome regulations and bureaucratic delays in obtaining:

- Work permits for specialized tourism professionals.
- Licenses for charter boats, water sports, and marine operators.
- Customs clearances for importing tourism equipment.

1160

Several participants noted that rules change frequently, with little communication from government agencies. Some businesses have experienced delays of several months in securing operational approvals, impacting their ability to expand.

Stakeholders recommended that the government streamline business licensing processes to reduce administrative burdens and encourage investment.

Tourism Workforce Development

A recurring issue was the shortage of skilled tourism workers in the BVI. Participants acknowledged that H. Lavity Stoutt Community College (HLSCC) has improved its marine and hospitality training programs, but:

- Many young BVI Islanders do not see tourism as a viable career path.
- There is a lack of structured apprenticeship programs linking students to tourism businesses.
- Workforce mobility within the OECS is limited, making it difficult to recruit talent from other Caribbean islands.

1170

Stakeholders recommended strengthening tourism education and workforce development initiatives, ensuring that BVI has a pipeline of trained professionals in marine and hospitality sectors.

Recommendations for OECS Support

Priority Areas for Regional Collaboration

1180 Stakeholders identified several areas where OECS could support tourism development in the BVI, including:

1. Developing regional marine tourism policies to address licensing, environmental protections, and sustainable growth.
2. Improving regional air and sea connectivity to enhance inter-island travel for tourists.
3. Providing technical assistance for data collection and tourism impact assessments.
4. Promoting best practices in environmental sustainability, including plastic waste reduction and conservation tourism initiatives.
5. Strengthening tourism workforce mobility within the OECS to address skill gaps and labour shortages.

Conclusion

1190 The consultation reinforced that marine tourism, conservation, and sustainable development are central to BVI's future as a high-value tourism destination. Stakeholders emphasized the need for:

- A clear national tourism policy.
- Better infrastructure and business-friendly regulations.
- Stronger conservation efforts and environmental enforcement.
- Balanced growth that prioritizes quality over quantity.

The OECS Common Tourism Policy should incorporate strategies to support BVI's unique strengths, ensuring that tourism remains a sustainable and profitable industry for future generations.

Summary of the OECS Tourism Plan Consultation on Ground

1200 **Transportation and Taxi Services in the BVI**

Introduction and Purpose of the Consultation

The consultation was led by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. The session focused on ground transportation and taxi services in the British Virgin Islands (BVI) and their role in the tourism sector. The consultation was part of the broader effort to update the OECS Common Tourism Policy, while also gathering insights for BVI's national tourism strategy.

The taxi industry plays a vital role as the first and last point of contact for tourists arriving in the BVI. The session aimed to assess:

- 1210
- Opportunities for growth in ground transportation services.
 - Challenges in licensing, training, and business operations.
 - The impact of government regulations on the sector.
 - The potential for improving visitor experiences through better taxi services.

Stakeholders were encouraged to share their experiences and challenges, with assurances that feedback would be anonymized in the final report.

The Role of the Taxi Industry in BVI's Tourism Sector

Taxi Operators as Ambassadors of Tourism

1220 Taxi operators serve as the first and last impression of the BVI for tourists, making their role critical to the visitor experience. Stakeholders emphasized that professionalism, knowledge, and service quality are essential in ensuring that visitors leave with a positive perception of the territory.

The BVI taxi industry is rich in history, with many drivers being second or third-generation operators, passing down knowledge and skills to younger family members. However, there is no formal system to transfer taxi licenses within families, making it difficult for younger generations to inherit or continue in the industry.

Training and Certification Requirements

Taxi operators are required to undergo formal training and certification to ensure high service standards. Training includes:

- 1230
- Historical knowledge of the BVI, including its cultural and natural heritage.
 - Customer service best practices.
 - Safety regulations and defensive driving techniques.
 - Tourism-focused training, including programs provided by Disney and Aquila.

New taxi applicants must pass an exam before receiving their certification. However, some stakeholders noted that training should be more structured and continuous, with regular refresher courses to maintain high industry standards.

Tourism Demand and Taxi Service Saturation

Stakeholders debated whether the taxi industry was oversaturated, with some arguing that there are enough taxis to serve the current visitor volume, while others suggested that demand fluctuates based on cruise ship arrivals.

1240 A key challenge identified was that not all cruise ships bring high-spending tourists. Some ships contribute significantly to the local economy, while others bring budget-conscious visitors who spend less on transportation and tours.

Despite this, taxi operators acknowledged that BVI has managed to balance cruise tourism without overwhelming the territory, unlike other Caribbean destinations where excessive cruise tourism leads to congestion and poor visitor experiences.

Challenges in Licensing and Business Expansion

Regulatory Hurdles and Political Influence

A major concern raised was the politicization of the taxi industry, with stakeholders emphasizing that regulatory decisions are often influenced by political connections rather than clear policy guidelines.

1250 To obtain a taxi license in the BVI, applicants must:

1. Receive written authorization from the Minister of Communications and Works.
2. Pass a written exam covering tourism knowledge, safety, and customer service.
3. Undergo training provided by the BVI Tourist Board and other agencies.
4. Obtain a police record and medical clearance.
5. Secure a trade license and register with the BVI Taxi and Livery Commission.

While this process is intended to ensure high standards in the industry, some operators argued that the minister's discretionary power in issuing licenses creates inconsistencies. Additionally, there are long delays in obtaining approvals, affecting new entrants trying to join the industry.

Lack of Transparency in License Issuance

1260 Stakeholders noted that there is a freeze on new taxi licenses, yet some individuals still manage to obtain licenses through political influence. This creates frustration among legitimate operators who follow the required procedures but face obstacles in obtaining approval.

Additionally, business owners cannot transfer taxi licenses to their children or employees, making it difficult for family-run taxi services to continue across generations.

Multiple Licensing Categories and Loopholes

The BVI has multiple categories of transportation licenses, including:

- Taxi licenses, which allow full operation across the sector.
- Tour licenses, which limit operators to pre-arranged tours.
- Shuttle licenses, which are restricted to hotel and airport transfers.
- 1270 • Livery licenses, which permit pre-arranged transportation services only.

While taxi licenses offer the most flexibility, loopholes exist in the system, allowing non-taxi operators (e.g., businesses, supermarkets, and hotels) to obtain shuttle or livery licenses and operate transportation services, reducing business for legitimate taxi drivers.

Stakeholders called for stricter enforcement to prevent unfair competition and ensure a level playing field within the industry.

Infrastructure and Business Investment Challenges

Vehicle Standards and Duty Concessions

1280 Maintaining a high-quality fleet is essential for BVI's image as a luxury tourism destination. Stakeholders reported that while taxi operators are eligible for duty concessions on new vehicles, there are no standardized vehicle requirements, leading to varying levels of service quality.

Operators suggested that:

- There should be a clear policy on vehicle standards, ensuring that all taxis meet high safety and comfort requirements.
- Concessions should be more widely available, making it easier for operators to upgrade their fleets regularly.

Public Transportation Needs

There is no formal public transportation system in the BVI, meaning that taxis fill the gap for both tourists and residents. However, stakeholders noted that:

- 1290
- A structured public transportation network could help improve mobility for residents while allowing taxis to focus primarily on the tourism market.
 - The government should consider investing in a limited bus service, particularly for high-traffic areas.

Some operators expressed concern that introducing a public transport system could negatively impact their business, while others welcomed the idea, believing it would reduce congestion and improve efficiency.

Policy Recommendations and Future Vision

Developing a Clear Ground Transportation Policy

1300 Stakeholders agreed that BVI lacks a comprehensive transportation policy, leading to inconsistencies in regulation and business expansion challenges. They recommended that the government:

- Develop a clear policy for taxi licensing and vehicle standards.
- Establish transparent procedures for passing taxi businesses to the next generation.
- Ensure fair competition by closing loopholes in livery and shuttle licensing.

Enhancing Taxi Tourism Services

Taxi operators suggested that BVI should:

- Invest in infrastructure improvements, including better roads and designated taxi stands.
- Offer continuous professional development training for drivers.
- Strengthen collaborations between taxi operators and the BVI Tourist Board to enhance visitor experiences.

1310 Balancing Growth with Service Quality

While stakeholders acknowledged the potential for expanding transportation services, they emphasized that growth must be balanced with maintaining high service standards. Increasing visitor numbers should not come at the expense of the quality of experiences offered to guests.

Some participants suggested that BVI should focus on high-value tourism rather than mass tourism, ensuring that taxi services cater to affluent visitors willing to pay for premium transportation experiences.

Recommendations for OECS Support

Stakeholders identified several areas where OECS could provide regional support, including:

1. Developing a regional best-practice guide for taxi and transportation services.
2. Standardizing tourism transportation training across OECS member states.
3. Creating a model policy for fair competition in the transportation sector.
4. Supporting digitalization of taxi services, including online bookings and fare transparency.

Conclusion

The consultation reinforced that taxis are a critical component of the BVI tourism industry, but challenges in licensing, regulatory enforcement, and business sustainability must be addressed.

Stakeholders emphasized that policy improvements are needed to ensure fair competition, maintain service quality, and support business expansion. They also called for greater collaboration between taxi operators and tourism authorities to enhance visitor experiences.

- 1330 The OECS Common Tourism Policy should incorporate strategies to improve ground transportation efficiency, ensuring that BVI remains a competitive and well-organized tourism destination. Moving forward, stakeholders recommended that the government streamline

licensing, increase investment in transportation infrastructure, and establish clear policies for the future of the taxi industry.

Summary of the OECS Tourism Plan Consultation on Hospitality, Sustainability, and Policy Development in the BVI

Introduction and Purpose of the Consultation

1340 The consultation session was facilitated by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. The purpose of the session was to gather insights from key stakeholders in the hospitality and tourism sector, focusing on accommodation providers, environmental sustainability, and policy gaps within the British Virgin Islands (BVI).

The OECS representatives clarified that the consultation was twofold:

1. To update the OECS Common Tourism Policy, which was last revised in 2011.
2. To provide input for the BVI's national tourism strategy, as the Ministry of Tourism, Culture, and Sustainable Development is in the process of formulating a national tourism plan.

Stakeholders were encouraged to share their challenges, opportunities, and recommendations, with the assurance that their feedback would be used to inform both national and regional policies.

The Role of Accommodation in BVI's Tourism Industry

1350 Current State of the Accommodation Sector

The session included representatives from major resort properties, boutique hotels, and yachting-based accommodations, all of whom confirmed that accommodation plays a central role in BVI's tourism industry. The discussion revealed that:

- The number of available rooms is currently insufficient to support a major expansion of tourism.
- Several properties are in the process of expansion, aiming to increase room capacity in the coming years.
- Accommodation offerings are diverse, ranging from high-end resorts on private islands to beachfront hotels and eco-lodges.

1360 Stakeholders agreed that the BVI's small-scale, high-value accommodation model differentiates it from mass-market Caribbean destinations. However, they also acknowledged that more investment in room stock is needed to remain competitive.

Challenges Facing the Hospitality Sector

Despite the sector's importance, accommodation providers face several barriers to growth, including:

1. High operating costs, particularly for utilities such as electricity and water.
2. Limited government incentives for hotel expansion and refurbishment.
3. Difficulties in obtaining skilled labour, particularly for hospitality management roles.
4. Cumbersome bureaucratic processes for business expansion, including delays in securing concessions and approvals.

A key concern was that BVI lacks a comprehensive tourism investment framework, making it difficult for investors to navigate regulatory requirements.

Environmental Sustainability and Tourism Development

The Need for Stronger Environmental Protections

Stakeholders emphasized that BVI's natural environment is the foundation of its tourism industry, making sustainability a critical issue. However, several environmental challenges threaten the sector's long-term viability, including:

- Unregulated waste disposal and inadequate sewage treatment.
- Damage to marine ecosystems due to anchoring and pollution from yachts and superyachts.
- The increasing presence of sargassum seaweed, which affects beach quality and marine life.

Several participants expressed frustration at the lack of enforcement of environmental regulations, arguing that BVI must take stronger action to protect its reefs, beaches, and coastal waters.

Proposed Solutions for Environmental Management

Stakeholders suggested several policy interventions to improve environmental sustainability, including:

- Mandatory pump-out facilities for yachts to prevent sewage dumping into the ocean.
- Stronger anchoring regulations and an expansion of mooring fields for superyachts.
- Investment in renewable energy, such as solar power, to reduce the tourism sector's carbon footprint.
- A national recycling initiative, as BVI currently lacks an effective waste management system.

One hotel representative stated that BVI could distinguish itself as a global leader in eco-tourism if it prioritizes environmentally responsible policies and investments.

Balancing Marine and Land-Based Tourism

The Relationship Between Yachting and Resort Tourism

A significant portion of BVI's visitors arrive on yachts rather than staying in hotels. While this has been beneficial for the marine sector, it has created an imbalance between land-based and marine-based tourism revenues.

- 1400 Historically, yachting visitors would spend a few nights on land before or after their sailing trips, but this practice has declined in recent years. Some stakeholders suggested incentivizing charter guests to stay in hotels before or after their trips, ensuring that both sectors benefit from tourism growth.

Superyacht Management and Environmental Concerns

The increasing number of superyachts in the BVI has led to concerns about environmental degradation, particularly:

- Anchor damage to reefs.
- Sewage dumping in territorial waters.
- Congestion in key marine areas.

- 1410 Stakeholders called for a formal superyacht management strategy, which would include:

- Designated mooring zones for large vessels.
- Stronger environmental regulations for waste disposal.
- Improved facilities for superyacht provisioning and refuelling.

Several participants agreed that BVI should continue attracting high-net-worth yachting visitors, but it must regulate the sector effectively to prevent long-term environmental harm.

Tourism Workforce Development and Education

The Decline of Local Participation in Tourism

One of the most pressing challenges identified was the declining number of BVI Islanders working in the tourism sector. Several factors have contributed to this issue:

- 1420
- The financial services sector is perceived as more prestigious and better-paying than tourism.
 - Many young people do not see tourism as a viable long-term career.
 - There are limited opportunities for professional growth within the industry.

Stakeholders stressed the need for better education and training programs to encourage local participation in hospitality, marine tourism, and sustainable tourism management.

Recommendations for Workforce Development

Participants proposed several solutions to improve workforce training, including:

- 1430
- Integrating tourism education into school curriculums from an early age.
 - Expanding vocational training programs in hospitality and marine services.
 - Offering government-sponsored scholarships for tourism-related degrees.
 - Creating apprenticeship programs in partnership with hotels, marinas, and tour operators.

One stakeholder noted that BVI's workforce development efforts must focus on training for managerial and high-skilled positions, rather than just entry-level hospitality jobs.

Policy and Governance Recommendations

The Need for a Comprehensive National Tourism Plan

Stakeholders expressed concern that BVI lacks a clear national tourism policy, leading to:

- Fragmented decision-making and inconsistent regulations.
- Limited coordination between government agencies and the private sector.
- Unclear long-term objectives for tourism development.

- 1440 They urged the government to develop a structured, data-driven tourism plan, which would outline:
1. A vision for sustainable tourism growth.
 2. Investment priorities for accommodation, infrastructure, and environmental management.
 3. A balanced strategy for land-based and marine tourism.
 4. Workforce development initiatives.

Streamlining Business Regulations

Several accommodation providers described significant challenges in obtaining business approvals, concessions, and work permits. They called for:

- 1450
- A faster and more transparent process for hotel investment and expansion.
 - Tax incentives for sustainable tourism initiatives.
 - Clearer policies for foreign investment in the tourism sector.

One stakeholder noted that many potential investors are discouraged by long bureaucratic delays, causing BVI to lose out on valuable tourism-related developments.

Recommendations for OECS Support

Stakeholders identified several areas where OECS could provide regional support, including:

1. Developing regional sustainability guidelines for tourism businesses.
2. Supporting a regional marketing strategy for eco-tourism and sustainable travel.
3. Facilitating workforce mobility within the OECS to address skill shortages.
4. Providing technical assistance for data collection and tourism impact assessments.

Conclusion

1460 The consultation reinforced that BVI's tourism sector has strong growth potential, but it requires better planning, stronger regulations, and investment in sustainability. Stakeholders emphasized that:

- A national tourism strategy must be developed.
- Environmental protections must be strengthened.
- Workforce development should be a priority.
- Tourism infrastructure and regulatory frameworks need improvement.

1470 The OECS Common Tourism Policy should incorporate strategies to support sustainable tourism development, environmental management, and workforce training. Moving forward, stakeholders urged the government to develop clear policies that align economic growth with environmental responsibility and long-term sustainability.

Summary of the OECS Tourism Plan Consultation on Festivals, Events, Hospitality, and Policy Development in the BVI

Introduction and Purpose of the Consultation

The consultation session was facilitated by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. The session focused on festivals, events, hospitality, and tourism policy development in the British Virgin Islands (BVI).

1480 The OECS representatives clarified that the consultation was intended to inform the update of the OECS Common Tourism Policy, which was last revised in 2011, while also contributing to the development of a national tourism plan for the BVI.

The BVI Ministry of Tourism, Culture, and Sustainable Development is leveraging this regional initiative to gain direct input from industry stakeholders, ensuring that the national tourism strategy reflects the needs and priorities of local businesses, event organizers, and hospitality providers.

The Role of Festivals and Events in Tourism Development

Structure and Governance of Festivals and Events

The consultation included representatives from the Festivals and Fairs Committee, which oversees the planning and execution of major cultural and tourism events in the BVI. Stakeholders discussed:

- 1490
- The structure of festival planning, which involves multiple subcommittees focusing on different aspects such as entertainment, logistics, parade management, and cultural exhibitions.
 - The relationship between the Festivals and Fairs Committee and the BVI Tourist Board, which has recently taken on a more active role in supporting and promoting local events.
 - The need for a more structured national events calendar, ensuring that both national and private events are effectively marketed to international and regional audiences.

There was a strong consensus that festivals play a vital role in attracting visitors, stimulating economic activity, and preserving BVI's cultural heritage. However, stakeholders noted that more investment, strategic planning, and infrastructure development are needed to maximize their impact.

1500 Challenges in Festival Management

While festivals generate significant tourism revenue, they face several challenges:

1. Funding constraints and inconsistent government support.
2. Lack of long-term planning for festival growth and infrastructure development.
3. Difficulty in securing international artists and talent due to work permit regulations.
4. Limited data collection on visitor demographics and spending patterns.

Stakeholders emphasized the need for a structured, multi-year plan for festivals, with predictable funding and strategic marketing support from the government.

Hospitality and Tourism Business Development

Perspectives from Accommodation and Restaurant Operators

1510 The session included representatives from the accommodation and restaurant sectors, who provided insights into the operational challenges of running hospitality businesses in the BVI. Key points included:

- The high cost of operating in the BVI, particularly due to import duties, electricity rates, and supply chain issues.

- Limited government incentives for business expansion, including slow and bureaucratic processes for securing investment approvals and concessions.
- A shortage of skilled hospitality workers, requiring many businesses to recruit employees from outside the BVI.

1520 Participants agreed that tourism businesses require more direct support from the government, including grants, streamlined licensing processes, and business-friendly policies.

Workforce Development and Training

A major concern raised was the declining number of BVI Islanders entering the tourism and hospitality workforce. Factors contributing to this issue include:

- A perception that financial services offer better career opportunities.
- Lack of structured career progression in tourism-related fields.
- Inadequate vocational training and apprenticeships in the hospitality sector.

Stakeholders recommended expanding training programs at the H. Lavity Stoutt Community College (HLSCC) and establishing partnerships between businesses and educational institutions to improve workforce readiness.

1530 Environmental Sustainability and Tourism

Integrating Sustainability into Hospitality and Events

Participants acknowledged the importance of sustainability in maintaining BVI's reputation as a premier tourism destination. However, they noted that current government policies do not sufficiently encourage or mandate sustainable practices.

Several businesses have independently implemented eco-friendly measures, such as:

- Using biodegradable packaging and reducing plastic waste.
- Installing solar panels to reduce electricity costs.
- Implementing water conservation strategies.

1540 However, there was no clear national policy incentivizing businesses to adopt sustainable practices. Stakeholders suggested that tax breaks and grants should be offered to tourism businesses that invest in green technology.

Marine Conservation and Waste Management

One of the most pressing environmental issues discussed was the impact of marine tourism on BVI's waters. Stakeholders highlighted:

- Sewage dumping from yachts and superyachts, with insufficient pump-out facilities in marinas.
- Damage to coral reefs caused by anchoring and unregulated marine activity.
- Lack of effective waste management and recycling programs.

1550 Several participants emphasized that the government must enforce stronger environmental regulations, particularly regarding waste disposal, marine protection, and land-based pollution.

The Role of Government in Supporting Tourism Growth

Fragmentation of Tourism Governance

A key concern raised was the fragmented nature of tourism governance in the BVI. The BVI Tourist Board has traditionally been responsible for marketing, but it now plays a larger role in product development and event planning.

Stakeholders questioned whether there should be:

1. A centralized tourism authority overseeing all aspects of tourism planning, marketing, and regulation.
2. Better coordination between the Tourist Board, the Festivals and Fairs Committee, and other tourism-related agencies.
3. More direct government intervention in providing incentives for tourism business growth.

Regulatory Challenges and Bureaucracy

Participants expressed frustration with bureaucratic delays and inconsistent regulations affecting tourism businesses. Key concerns included:

- Slow processing of trade licenses and business approvals.
- Complex and lengthy application processes for concessions and incentives.
- Lack of transparency in policy decisions affecting tourism businesses.

Stakeholders urged the government to simplify administrative processes and provide clearer guidance for tourism businesses.

1570 Recommendations for OECS Support

Stakeholders identified several areas where OECS could provide regional support, including:

1. Developing a standardized regional events and festivals strategy, allowing for greater collaboration between OECS member states.
2. Improving regional air and sea transportation connectivity, making it easier for tourists to travel between OECS destinations.

3. Facilitating knowledge-sharing and best practices in festival management, sustainable tourism, and hospitality training.
4. Assisting with tourism data collection and impact assessments, ensuring better decision-making and planning at the national level.

1580 **Conclusion**

The consultation reinforced that festivals, hospitality, and sustainability are critical to BVI's tourism sector, but significant policy and structural improvements are needed.

Key takeaways included:

- BVI's festivals and events are major tourism drivers, but require better funding, strategic planning, and integration into the broader tourism strategy.
- Hospitality businesses face significant operational challenges, including high costs, workforce shortages, and regulatory hurdles.
- Environmental sustainability must be prioritized, particularly in waste management, marine conservation, and sustainable tourism practices.
- 1590 • A more structured tourism governance framework is needed, with better coordination between government agencies and the private sector.

The OECS Common Tourism Policy should incorporate strategies to support tourism events, sustainability initiatives, and business-friendly policies, ensuring that BVI's tourism sector remains competitive and resilient in the years ahead.

Summary of the OECS Tourism Plan Consultation on Virgin Gorda: Festivals, Accommodation, Environmental Sustainability, and Policy Development

Introduction and Purpose of the Consultation

1600 The consultation session was facilitated by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. The session, held on Virgin Gorda, aimed to gather insights from stakeholders in the hospitality, tourism, events, and environmental sectors.

The OECS is in the process of updating its Common Tourism Policy, last revised in 2011, with support from the World Bank's "Unleashing the Blue Economy in the Caribbean" initiative. The consultation also served as a platform for informing the BVI's national tourism strategy, allowing stakeholders to highlight challenges, opportunities, and policy gaps in the industry.

The Ministry of Tourism, Culture, and Sustainable Development is using this regional engagement as a springboard to develop a structured tourism plan for the BVI, with a particular focus on ensuring tourism benefits both the private sector and the wider community.

Tourism and Economic Development in Virgin Gorda

1610 Importance of Tourism to the Local Economy

Stakeholders emphasized that tourism is the lifeblood of Virgin Gorda, with nearly every resident engaged in the industry, whether directly through hotels, restaurants, and charters, or indirectly through construction, retail, and professional services. The economy is primarily sustained by overnight visitors, villa rentals, and high-end yachting tourism, as opposed to mass-market cruise tourism.

A major issue raised was the lack of comprehensive data on visitor numbers, occupancy rates, and economic impact, making it difficult for businesses and policymakers to make data-driven decisions. Stakeholders urged the government to improve tourism data collection and develop a Tourism Satellite Account (TSA) to better track the industry's contributions.

1620 Challenges in Business Operations

Hospitality and tourism business owners highlighted several operational challenges, including:

- High costs of utilities, import duties, and business operations, which reduce profitability.
- Bureaucratic delays in securing trade licenses, work permits, and investment approvals.
- Lack of government incentives for expanding tourism businesses and infrastructure.

Some stakeholders suggested that a dedicated investment agency for tourism-related projects could streamline approvals and support business growth.

Festivals and Events as Tourism Drivers

Cultural Festivals and Economic Impact

1630 Festivals play a crucial role in attracting visitors to the BVI, yet they lack consistent funding and long-term planning. Stakeholders discussed several key cultural events:

- Emancipation Festival, which is currently under-promoted in the regional market.
- Easter Festival, which has the potential to expand and attract international visitors.
- Lobsterfest in Anegada, which has successfully extended the tourism season.

One major issue raised was that regional visitors are not adequately targeted in BVI's tourism marketing strategy. Stakeholders suggested that more emphasis be placed on attracting Caribbean tourists who are already familiar with the region's culture and travel during off-peak seasons.

Seasonality and Off-Season Strategies

A key concern was the existence of a “low season,” particularly from August to October, which leads to widespread business closures. Stakeholders recommended:

- 1640
- Targeting alternative markets such as Caribbean travellers and European tourists.
 - Developing off-season events and activities to encourage year-round travel.
 - Strengthening partnerships with airlines and ferry operators to maintain steady visitor flows.

There was consensus that BVI’s tourism industry should move away from the concept of a “low season” by diversifying its offerings and markets.

Accommodation, Luxury Tourism, and Investment

Expanding Accommodation Capacity

Stakeholders noted that BVI’s accommodation stock is not sufficient to support long-term tourism growth. While yachting visitors remain a major segment, land-based accommodation needs expansion and upgrading. Issues discussed included:

- 1650
- The lack of major hotel investments, despite demand for branded luxury properties.
 - Unregulated Airbnb and villa rentals, which impact tax collection and quality control.
 - Challenges in attracting new investors due to bureaucratic hurdles.

The government was encouraged to facilitate investments in boutique hotels, eco-lodges, and resort expansions, particularly in underdeveloped areas such as Copper Mine Ruins, Spring Bay, and other coastal locations.

Defining “Luxury Tourism”

A key debate was whether BVI’s reputation as a luxury destination is based solely on pricing or service quality. While the cost of travel to BVI is high, stakeholders noted that service excellence and exclusivity are what truly define a luxury destination.

- 1660

There was a strong call for hospitality training programs, ensuring that local workers are equipped to provide high-end service standards. Some stakeholders also suggested reintroducing the AAA rating system to maintain consistent hospitality standards.

Environmental Sustainability and Tourism

Coastal and Marine Protection

Environmental sustainability remains a major concern, particularly due to yachting-related damage to reefs and seagrass beds. Issues identified included:

- Sewage dumping by yachts due to insufficient pump-out facilities.
- Damage to coral reefs from unregulated anchoring.
- 1670 • Lack of enforcement of environmental regulations.

Stakeholders recommended:

- Expanding mooring fields to prevent anchor damage.
- Mandating pump-out stations at all marinas.
- Stronger regulations for superyachts and larger vessels.

Waste Management and Pollution

Another pressing issue was poor waste management and pollution control, particularly regarding businesses and laundries dumping wastewater into public drainage systems. Stakeholders urged the government to:

- Enforce existing environmental laws.
- 1680 • Invest in proper waste management infrastructure.
- Develop public awareness campaigns on environmental responsibility.

There was strong consensus that BVI's natural beauty is its most valuable asset, and proactive conservation measures are needed to protect it.

Regulatory and Governance Challenges

Fragmentation in Tourism Governance

Stakeholders expressed concerns that BVI's tourism sector is governed by too many disconnected agencies, leading to:

- Inefficient policy implementation.
- Overlapping responsibilities between ministries, the BVI Tourist Board, and other agencies.
- 1690 • Slow response times to industry concerns.

There was widespread agreement that a centralized tourism authority should be established to streamline decision-making and improve coordination between government agencies and private sector stakeholders.

Tourism Data Collection and Policy Development

A major gap identified was the lack of comprehensive tourism statistics, making it difficult to:

- Assess the true economic impact of tourism.
- Plan marketing campaigns effectively.
- Monitor business performance and visitor trends.

1700 Stakeholders recommended that the government revive the Tourism Satellite Account (TSA) and ensure that data is collected and shared transparently.

Recommendations for OECS Support

Stakeholders identified several areas where OECS could support BVI's tourism sector, including:

1. Developing a regional best-practice guide for luxury and sustainable tourism.
2. Facilitating training programs for hospitality workers and tour operators.
3. Providing technical assistance for tourism data collection and impact assessments.
4. Promoting regional cooperation in marine conservation and environmental protection.
5. Advocating for better air and sea connectivity between OECS destinations.

Conclusion

1710 The consultation reinforced that Virgin Gorda and the wider BVI tourism sector face significant challenges, but also have substantial opportunities for growth and sustainability.

Key takeaways included:

- Festivals and events need more investment and structured planning.
- Luxury tourism must be defined by service quality, not just price.
- Environmental sustainability must be a priority, especially in marine conservation.
- Tourism governance needs streamlining to improve efficiency.
- Reliable data collection and tourism impact assessments are critical for future planning.

1720 The OECS Common Tourism Policy should incorporate strategies to support BVI's tourism growth while ensuring sustainability, competitiveness, and community involvement. Moving forward, stakeholders urged continued engagement between the government, private sector, and regional organizations to create a more resilient and thriving tourism industry.

Summary of the OECS Tourism Plan Consultation on Jost Van Dyke: Tourism Expansion, Environmental Sustainability, Infrastructure, and Policy Development

Introduction and Purpose of the Consultation

The consultation session was facilitated by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. The session, held on Jost Van Dyke, was part of the ongoing regional effort to update the OECS Common Tourism Policy and gather insights for BVI's national tourism plan.

- 1730 The Ministry of Tourism, Culture, and Sustainable Development emphasized that while tourism has always been a priority for the government, this newly established ministry is now tasked with creating a formal national tourism plan. The consultation was an opportunity for local business owners, environmental advocates, and community representatives to voice their perspectives on tourism development, economic opportunities, and policy gaps.

The OECS policy update is funded by the World Bank's "Unleashing the Blue Economy in the Caribbean" initiative, which includes a strong focus on marine and coastal tourism sustainability. The discussion focused on tourism expansion, environmental concerns, infrastructure challenges, and governance improvements.

Tourism and Economic Development on Jost Van Dyke

1740 Tourism as the Economic Driver

Stakeholders agreed that tourism is the foundation of Jost Van Dyke's economy, with yachting, beach bars, and boutique accommodations being the primary revenue generators. The island is best known for its white sand beaches, relaxed atmosphere, and small-scale hospitality businesses.

The yachting sector remains the dominant segment, with most visitors arriving via private boats, catamarans, and charter yachts. However, there has been a notable increase in cruise ship day visitors, which has raised concerns about sustainability, overcrowding, and economic benefits for local businesses.

While some business owners support the growth of cruise tourism, others fear that large-scale visitor inflows could degrade the island's exclusivity and long-term appeal.

1750 Expanding Tourism Offerings

Stakeholders discussed the need to expand tourism experiences beyond the beach and bars, noting that:

- Jost Van Dyke lacks structured cultural tourism experiences.

- There are limited adventure tourism options, aside from recent quad bike tours.
- Nature-based tourism, such as guided hikes and eco-tours, remains underdeveloped.

While stakeholders recognized the potential for expanding cultural and eco-tourism, they also acknowledged challenges in infrastructure, investment, and regulatory clarity.

Environmental Sustainability and Conservation

Marine and Coastal Protection

1760 The growing presence of large cruise ships and high boating traffic has raised serious environmental concerns, particularly:

- Anchor damage to reefs and seagrass beds.
- Lack of regulations on where cruise ships can anchor.
- Waste disposal issues, including concerns about yachts discharging sewage into local waters.

While mooring balls have helped reduce anchor damage, stakeholders emphasized that Jost Van Dyke needs a stronger marine protection strategy, including:

- Enforced zoning for anchoring and mooring locations.
 - Stricter wastewater disposal regulations for visiting yachts.
 - Expanded environmental monitoring and conservation programs.
- 1770

Stakeholders also noted that Jost Van Dyke's mangrove ecosystems were severely damaged during hurricanes, and restoration efforts have been slow.

Waste Management and Pollution

Another major issue discussed was solid waste management, particularly:

- High levels of waste generated by the tourism sector.
- Limited recycling and waste separation programs.
- Dependence on barge transportation to remove garbage from the island.

Stakeholders called for government incentives to encourage waste reduction, particularly among hospitality businesses. They suggested:

- Providing tax incentives for businesses that adopt sustainable practices.
 - Developing a centralized glass and plastic recycling facility.
 - Expanding composting programs for organic waste.
- 1780

The lack of a working incinerator in Tortola was also identified as a territory-wide issue affecting waste management efficiency.

Tourism Infrastructure and Accessibility

Roads, Utilities, and Telecommunications

Stakeholders identified several major infrastructure gaps, including:

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- Poor road conditions, particularly around tourist sites.
 - Unreliable electricity and water supply, making it difficult for businesses to operate consistently.
 - Slow internet connectivity, which affects both businesses and visitors.

The lack of reliable infrastructure negatively impacts visitor experiences, particularly for high-end tourists who expect consistent utilities and digital connectivity.

Healthcare and Emergency Services

A major concern was the absence of a resident doctor on Jost Van Dyke, which poses serious risks for both locals and visitors. The island currently relies on:

- A single district nurse, who provides basic medical care.
- Emergency evacuation services, which are expensive and logistically challenging.
- Limited healthcare infrastructure, making it difficult to respond to medical emergencies.

- 1800
- Stakeholders urged the government to prioritize healthcare improvements, emphasizing that tourism growth must be accompanied by essential services to ensure visitor safety.

Tourism Governance and Policy Challenges

Fragmentation in Tourism Oversight

Stakeholders expressed frustration over the fragmented governance of tourism in the BVI, stating that:

- Different agencies handle different aspects of tourism, leading to inefficiencies.
- There is no clear leadership on tourism policy and enforcement.
- Local businesses struggle to navigate government regulations and approvals.

- 1810
- Many participants suggested that the BVI should establish a single, centralized tourism authority to oversee policy, planning, and enforcement.

Regulatory Barriers and Bureaucratic Delays

Several business owners highlighted the difficulties of navigating BVI's regulatory system, noting:

- Long delays in securing business licenses and permits.
- Lack of transparency in tourism-related funding and incentives.
- Limited access to financing for small tourism operators.

Some stakeholders proposed that the government create a "one-stop shop" for tourism-related business approvals, streamlining licensing, investment applications, and regulatory compliance.

Cultural and Community-Based Tourism

Enhancing Local Involvement in Tourism

1820 Stakeholders expressed concern that younger generations are not being actively encouraged to participate in the tourism industry. They noted that:

- There are limited training programs in hospitality, business management, and marine tourism.
- Many young people prefer to seek opportunities outside of the BVI.
- There is a lack of structured mentorship programs for aspiring tourism entrepreneurs.

They recommended integrating tourism education into the school curriculum, ensuring that students see the industry as a viable career path.

Promoting Cultural Heritage

1830 Several participants advocated for stronger efforts to preserve and showcase Jost Van Dyke's cultural history. Proposed initiatives included:

- Developing a local cultural centre showcasing island history and traditions.
- Encouraging the revival of traditional crafts, storytelling, and culinary experiences.
- Expanding community-led tourism programs, such as guided historical tours.

Stakeholders emphasized that cultural tourism could differentiate Jost Van Dyke from other Caribbean destinations, making it more appealing to high-value travellers.

Recommendations for OECS Support

Stakeholders identified several areas where OECS could provide regional support, including:

- 1840
1. Facilitating training programs for hospitality, marine tourism, and cultural tourism.
 2. Supporting regional air and sea transportation connectivity to improve accessibility.
 3. Developing regional policies for environmental conservation and sustainable tourism.
 4. Advocating for a standardized tourism investment framework across OECS territories.
 5. Assisting with tourism data collection and economic impact assessments.

Conclusion

The consultation highlighted Jost Van Dyke's unique position within BVI's tourism landscape, emphasizing the need for sustainable growth, improved infrastructure, and stronger regulatory frameworks.

Key takeaways included:

- Tourism expansion must be balanced with environmental protections.
- Waste management and marine conservation require urgent attention.
- 1850 • Healthcare and emergency response infrastructure must be improved to support visitors and residents.
- The tourism industry should create more structured career pathways for local youth.
- Cultural heritage should be integrated into tourism offerings to enhance visitor experiences.

The OECS Common Tourism Policy should incorporate strategies to support small-island tourism sustainability, infrastructure development, and economic diversification. Moving forward, stakeholders called for continued collaboration between the government, private sector, and regional organizations to ensure a resilient and thriving tourism industry in Jost Van Dyke.

Summary of the OECS Tourism Plan Consultation on Fisheries, Agriculture, and Sustainable Tourism Development in the BVI

1860 Introduction and Purpose of the Consultation

The consultation session was facilitated by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. The discussion focused on the intersection between tourism, agriculture, and fisheries in the British Virgin Islands (BVI).

The OECS Commission is currently updating its Common Tourism Policy, with funding from the World Bank's "Unleashing the Blue Economy in the Caribbean" initiative. This policy update aims to integrate sustainability principles into regional tourism strategies, ensuring that tourism development aligns with marine conservation, agriculture, and economic diversification.

- 1870 At the national level, the Ministry of Tourism, Culture, and Sustainable Development is formulating a comprehensive tourism policy for the BVI, using stakeholder input to shape policy decisions. The discussion centred on opportunities to strengthen linkages between tourism, agriculture, and fisheries, as well as governance challenges, environmental concerns, and infrastructure needs.

The Link Between Agriculture, Fisheries, and Tourism

Decline of Agriculture and Its Impact on Tourism

Historically, agriculture played a significant role in BVI's economy, but with the growth of tourism, the sector declined in importance. Unlike some Caribbean islands where tourism and agriculture are deeply intertwined, the BVI's expansion of tourism led to a reduction in agricultural output, creating a greater reliance on food imports.

1880 Despite this decline, there are still strong informal linkages between local farmers, fishers, and the hospitality sector. Many farmers and fishers supply directly to hotels and restaurants, particularly with:

- Fresh seafood, including pelagic fish, lobster, and conch.
- Limited local produce, such as lettuce from hydroponic farms and small-scale vegetable farming.

However, there is no centralized system for tracking the volume of agricultural and fishery products supplied to the tourism sector, making data collection a major challenge. Stakeholders emphasized the need for better statistical tracking of local food production and supply chains.

Agricultural Tourism and Farm-to-Table Experiences

1890 While agriculture is not a dominant economic sector, there is growing interest in agritourism. Some farmers have already developed farm tour experiences, including:

- A hydroponic farm specializing in lettuce production, which serves both local retailers and hotels.
- Farm-based hiking tours, where visitors learn about traditional farming practices.
- Plans to develop interactive cooking classes, where visitors can harvest produce and participate in food preparation.

Stakeholders suggested that the government and tourism agencies should promote these experiences as part of a sustainable tourism strategy, ensuring that agriculture plays a more active role in the visitor economy.

1900 Fisheries and Marine-Based Tourism

Tourism's Impact on Fisheries and Seafood Demand

The fisheries sector is closely linked to tourism, with the majority of commercial fishers supplying directly to hotels and restaurants. Stakeholders noted that:

- Deep-sea fishing operators cater almost exclusively to the tourism industry.

- Lobster, conch, and pelagic fish are in high demand by the hospitality sector.
- There is a lack of data on the actual volume of seafood consumed by visitors, making it difficult to measure tourism's true impact on fisheries.

One of the biggest concerns raised was the sustainability of marine resources, as increased demand from the tourism sector could lead to overfishing. There was a strong call for better monitoring, stricter catch limits, and sustainable fishing practices.

Sport Fishing and Economic Opportunities

Sport fishing has been identified as a major growth opportunity for marine-based tourism, but the BVI currently lacks clear policies to regulate and monetize the sector effectively. Stakeholders noted that:

- High-end sport fishing tourists are willing to pay premium fees, yet the BVI's licensing fees for sport fishing remain low.
- Many foreign vessels participate in sport fishing tournaments in BVI waters but land their catches in the USVI, meaning the BVI loses economic benefits from these activities.
- Other Caribbean destinations have successfully increased revenue from sport fishing by adjusting fee structures and requiring catches to be landed locally.

There was a strong recommendation to reform sport fishing policies, ensuring that the BVI captures more economic value from these activities.

Waste Disposal and Marine Pollution

One of the biggest environmental challenges identified was marine pollution caused by yachting and cruise tourism. Stakeholders noted that:

- Sewage dumping by yachts and cruise ships remains a problem, as there are insufficient pump-out facilities in BVI marinas.
- Anchoring in sensitive marine areas continues to damage reefs and seagrass beds.
- Regulations on waste disposal need to be strictly enforced, particularly for foreign vessels visiting the territory.

Stakeholders called for a stronger regulatory framework to manage marine waste, including:

- Mandatory pump-out stations at all marinas.
- Stricter penalties for illegal sewage dumping.
- Expanded marine protected areas (MPAs) to safeguard fragile ecosystems.

Cultural and Sustainable Tourism Initiatives

Revitalizing Local Cultural Events

Stakeholders discussed several initiatives aimed at strengthening local cultural tourism, including:

- Cultural Thursdays in Carrot Bay, a weekly event featuring local cuisine, fresh seafood, and cultural performances.
- Plans to introduce a Last Friday Fish Fry, where local fishers and chefs showcase BVI seafood.
- Opportunities for expanding heritage tourism, including historical tours and traditional food experiences.

The idea behind these initiatives is to create authentic, community-driven experiences that attract both visitors and residents. Stakeholders emphasized that these cultural events must be marketed more effectively to increase visitor participation.

Regulatory and Policy Challenges

Weak Governance and Fragmented Oversight

Stakeholders expressed concerns about the fragmented governance of tourism, agriculture, and fisheries, stating that:

- Different government agencies operate in silos, leading to inefficiencies in policy implementation.
- There is no centralized strategy for integrating tourism with agriculture and fisheries.
- Regulations on environmental protection and marine resource management are not effectively enforced.

Several participants advocated for a more unified policy approach, suggesting that a centralized agency should oversee the intersection of tourism, agriculture, and fisheries.

Limited Business Support for Farmers and Fishers

Agriculture and fisheries stakeholders highlighted the lack of business training and financial support for local entrepreneurs. They noted that:

- Many farmers lack business skills, making it difficult to scale their operations.
- Government support is often unreliable, with limited access to grants or investment incentives.
- There is no structured business development program to help farmers and fishers navigate market opportunities.

One suggestion was for the government to collaborate with the private sector in creating business development programs for agricultural and fisheries entrepreneurs, ensuring that local producers can supply the growing tourism industry effectively.

Recommendations for OECS Support

1970 Stakeholders identified several areas where OECS could provide regional support, including:

1. Developing a regional agritourism framework, supporting farm-to-table tourism initiatives.
2. Providing technical assistance for marine conservation and sustainable fishing regulations.
3. Facilitating business training programs for farmers and fishers, ensuring they can access tourism markets.
4. Standardizing sport fishing policies across the OECS region, allowing for better regulation and economic capture.
5. Promoting cultural and heritage tourism through regional marketing initiatives.

Conclusion

1980 The consultation reinforced that tourism, agriculture, and fisheries in the BVI must be better integrated to create a more sustainable and diversified economy.

Key takeaways included:

- Agriculture must be revitalized and linked more effectively to tourism.
- Fisheries policies need urgent reform, particularly regarding sport fishing and marine conservation.
- Sustainable tourism initiatives, such as farm tours and cultural festivals, must be actively promoted.
- Regulatory frameworks for environmental protection and marine waste management must be strengthened.
- The governance of tourism-related sectors should be more coordinated and streamlined.

1990 The OECS Common Tourism Policy should incorporate strategies to support the development of agritourism, sustainable fisheries, and cultural tourism, ensuring long-term economic resilience for the BVI and the broader region. Moving forward, stakeholders emphasized the importance of continued collaboration between government agencies, private sector partners, and regional organizations to build a more sustainable and inclusive tourism economy.

Summary of the OECS Tourism Plan Consultation on Institutional Framework, Tourism Policy Development, and Governance in the BVI

Introduction and Purpose of the Consultation

2000 The consultation session was facilitated by Maria Fowell, Senior Technical Specialist for Tourism at the OECS Commission, and Dr. Jennifer Edwards, consultant for the OECS tourism project. This session focused on institutional arrangements, legislative reform, and the development of a comprehensive national tourism policy for the British Virgin Islands (BVI).

The OECS Common Tourism Policy is being updated with support from the World Bank's "Unleashing the Blue Economy in the Caribbean" initiative, aiming to integrate sustainability principles into regional tourism strategies. At the national level, the Ministry of Tourism, Culture, and Sustainable Development is responsible for developing a structured policy framework for the BVI tourism industry.

The discussion centred on governance challenges, the need for a structured institutional framework, and the role of policy development in ensuring sustainable tourism growth.

2010 The Need for Legislative Reform and Institutional Restructuring

Existing Governance Challenges

Stakeholders acknowledged that the current legislative framework governing tourism in the BVI is outdated and requires significant reform. The tourism sector has grown organically over the years, but without a cohesive legislative and policy framework, its governance has remained fragmented.

It was emphasized that tourism policymaking and implementation require a structured, long-term approach, rather than ad hoc decision-making. However, achieving this will require a change management process that involves extensive consultation and institutional reorganization.

Optimal Institutional Arrangements for Tourism Development

2020 One of the key discussion points was determining an optimal institutional structure for tourism governance. The Ministry of Tourism is responsible for planning and policy development, while the BVI Tourist Board (BVITB) primarily focuses on marketing and promotion. However, there is overlap in functions, and unclear lines of authority, leading to inefficiencies.

Stakeholders suggested that there should be a clear delineation of roles, with the Ministry focusing on policy, legislation, and governance, while the Tourist Board remains dedicated to marketing and destination branding.

It was recommended that a formal institutional mapping exercise should be conducted to assess:

- The existing structure of tourism governance.
- Gaps and inefficiencies in policy implementation.
- 2030 • A model institutional framework for improved coordination.

This institutional restructuring would help define the leadership role of the Ministry of Tourism in policy direction, regulatory oversight, and inter-agency coordination.

Developing a Comprehensive National Tourism Policy

From a Tourism Plan to a Policy Framework

A major point of discussion was whether the BVI needs a tourism plan or a tourism policy. While stakeholders agreed that a master plan is needed in the long term, it was acknowledged that a national tourism policy must first be developed.

The Ministry's current priority is to create a policy document that provides strategic direction, which will eventually guide the development of a detailed tourism master plan. This policy will:

- 2040 • Set a clear vision for tourism growth.
- Define roles and responsibilities among government agencies.
- Establish key regulatory and legislative reforms.
- Ensure alignment with the OECS Common Tourism Policy.

Stakeholders agreed that without a national tourism policy, it would be impossible to create a meaningful tourism plan, as policy serves as the foundation for structured implementation.

Key Components of a National Tourism Policy

The policy framework should cover several critical areas, including:

1. Institutional Arrangements – Defining governance structures and responsibilities.
2. Legislative and Regulatory Frameworks – Outlining necessary legal reforms.
- 2050 3. Tourism Economic Impact – Ensuring tourism contributes more effectively to government revenue and local economic development.
4. Sustainability and Blue Economy Integration – Aligning tourism growth with environmental conservation and sustainable marine resource management.
5. Product Development and Community Tourism – Expanding tourism offerings beyond traditional sun-and-sea tourism.

Stakeholders agreed that a well-structured policy document would provide clarity on these issues and create a roadmap for implementation.

The Role of OECS in Supporting BVI's Tourism Development

Regional Coordination and Policy Guidance

2060 The OECS plays a crucial role in shaping regional tourism policies, providing guidance on best practices, regulatory models, and sustainable development strategies.

Stakeholders recommended that the OECS should assist the BVI in the following areas:

- Providing a model institutional framework for tourism governance.
- Supporting legislative reform efforts by offering technical expertise.
- Facilitating inter-agency collaboration to improve policy implementation.
- Offering structured guidelines for developing a national tourism policy.

The OECS has already been supporting other member states in developing national tourism policies, and similar assistance could be provided to the BVI.

Funding and Programmatic Support

2070 Another important discussion point was access to funding for tourism development initiatives. Stakeholders suggested that the OECS could assist the BVI in identifying funding opportunities for:

- Sustainable tourism projects.
- Tourism infrastructure development.
- Training and workforce development programs.

It was recommended that the OECS should play an advocacy role, ensuring that regional funding mechanisms are accessible to all member states.

Next Steps in the Policy Development Process

Creating Terms of Reference for a Tourism Policy Consultant

2080 The Ministry of Tourism has allocated resources for hiring a consultant to develop a national tourism policy. The next step is to draft a Terms of Reference (TOR) that outlines the scope of the consultancy.

Stakeholders agreed that the TOR should include:

- An institutional review to assess governance structures.
- A regulatory gap analysis to identify legislative needs.
- Engagement with tourism stakeholders to ensure industry input.
- Recommendations for a structured implementation roadmap.

By defining these key components, the consultancy will provide a clear direction for the future of BVI tourism governance and policy development.

2090 **Raising Public Awareness and Stakeholder Engagement**

The consultation also highlighted the need for increased public awareness about tourism policy development. Many stakeholders, including business owners and tourism operators, are unaware of the ongoing policy formulation efforts.

To address this, it was recommended that the Ministry engage in more public outreach and media engagement, ensuring that:

- Stakeholders understand the objectives of the national tourism policy.
- There is transparency in the policy development process.
- Public input is actively incorporated into decision-making.

2100 By fostering greater awareness and engagement, the policy development process will have stronger industry and community buy-in.

Conclusion

The consultation reinforced the need for a structured and well-defined institutional framework to govern tourism in the BVI.

Key takeaways included:

- The existing tourism governance model needs restructuring to clarify roles and improve efficiency.
- A national tourism policy must be developed before a master plan can be implemented.
- Legislative reforms are essential to ensure tourism contributes more effectively to economic development.
- 2110 • The OECS can provide valuable technical assistance in governance, policy development, and funding access.
- Stakeholder engagement and public awareness efforts must be prioritized to ensure widespread support for the policy initiative.

The OECS Common Tourism Policy should incorporate strategies to support BVI's transition toward a more structured, well-regulated, and sustainable tourism industry. Moving forward, the Ministry of Tourism will focus on finalizing the Terms of Reference for a national tourism policy consultant, ensuring that the policy framework is in place to guide future planning and legislative reform efforts.

Summary of the Meeting with the Central Statistics Office on Tourism Data Collection and Policy Development

Introduction and Objectives of the Meeting

The meeting, held on January 25, 2024, focused on enhancing the collection, analysis, and management of tourism-related data within the territory. The discussion revolved around improving data acquisition methods, integrating more comprehensive information beyond basic tourist arrivals, and leveraging data for better tourism planning and policy development.

Key areas of discussion included the implementation of an exit survey, the development of a tourism satellite account, and collaborating with various government agencies to improve data-sharing mechanisms. Additionally, the meeting addressed the challenges of system limitations and privacy concerns, as well as potential technological and methodological solutions to enhance data accuracy.

Enhancing Data Collection and Analysis for Tourism

Expanding Beyond Basic Arrival Data

One of the central themes of the meeting was the need to expand beyond simply tracking tourist arrival numbers. The current data collection framework focuses primarily on the number of visitors entering the territory, but does not provide insights into their activities, destinations, spending habits, or transportation modes.

The team discussed several approaches to capture more detailed information, including:

- Tracking tourist movements within the territory to determine the balance between land and sea-based explorations.
- Collecting information on how tourists travel between islands, particularly whether they use ferries, charter boats, or flights.
- Monitoring the length of stay and accommodation types, whether in hotels, villas, Airbnb rentals, or yachts.

The introduction of an exit survey was identified as a potential method for gathering this missing data, providing a clearer picture of tourist experiences, satisfaction levels, and spending patterns.

Implementation of an Exit Survey

The group proposed an exit survey as a method to capture real-time visitor insights at the point of departure. This survey would allow the government to gather data on tourist satisfaction, spending behaviour, and preferred activities. Potential implementation methods discussed included:

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- Placing kiosks or tablets at departure points (airports and seaports) where visitors can complete the survey.
 - Using mobile applications or QR codes to encourage online survey participation.
 - Training support staff to assist tourists in completing surveys before departure.

Exit surveys are widely used in global tourism markets and would help policymakers better understand the strengths and weaknesses of the current tourism product.

Integration of a Tourism Satellite Account

Tracking the Economic Contribution of Tourism

2160 The concept of a tourism satellite account (TSA) was introduced as a means to quantify tourism's contribution to the national economy. A TSA would allow the Central Statistics Office (CSO) to track tourism's impact on GDP, employment, and revenue generation.

Currently, the BVI lacks a systematic way to measure the economic impact of tourism, leading to gaps in policy development and resource allocation. Establishing a TSA would:

- Provide accurate and reliable economic indicators related to tourism.
- Help policymakers assess which tourism sectors are most profitable.
- Support the government in making data-driven investment decisions.

The meeting participants agreed on the importance of integrating TSA methodologies but noted that technical expertise and financial resources would be needed to implement the system.

Addressing Data Collection Challenges

Privacy Concerns and System Limitations

2170 One of the major challenges in improving tourism data collection is ensuring compliance with privacy regulations while also enhancing data-sharing among relevant agencies. There were concerns about data security and access restrictions, particularly regarding traveller information collected by customs and immigration.

The team discussed the potential of:

- Automating the Embarkation/Disembarkation (E/D) card at immigration to improve access to accurate demographic data.
 - Implementing data anonymization techniques to protect personal information while still allowing for statistical analysis.
 - Leveraging online data sources and social media insights to supplement traditional data collection methods.
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Technological and Collaborative Solutions

To address data collection inefficiencies, the team explored potential collaborations with key agencies, including:

- Immigration, ports, and airports, to ensure that data is collected consistently and accurately.
- IT departments, to develop a centralized tourism database for real-time data analysis.
- The Florida Cruise Association, to enhance data collection on cruise passenger activity at the two main ports.

Additionally, there was discussion about the potential hiring of a data processing consultant to improve data management capacity within the Central Statistics Office.

2190 **Future Actions and Policy Recommendations**

Enhancing Tourism Research and Market Analysis

The team acknowledged that stronger data collection would support better tourism marketing strategies. By analysing visitor demographics and travel behaviour, the BVI can:

- Refine its marketing campaigns to attract high-value visitors.
- Develop targeted promotions based on tourist preferences.
- Assess visitor spending patterns to optimize tourism revenue streams.

To achieve this, ongoing monitoring of travel patterns through digital tools and surveys was recommended.

Developing a Structured Plan for Data Collection

2200 The meeting concluded with a set of actionable recommendations to improve tourism data collection and analysis. These included:

- Finalizing a framework for implementing the exit survey.
- Determining key tourism indicators for the TSA and securing technical assistance.
- Assessing costs and feasibility for hiring enumerators and data processing consultants.
- Holding follow-up discussions with CHATA, ELA, and the IMF for technical support.

Conclusion

The meeting underscored the critical need for enhanced tourism data collection in the BVI, with a focus on expanding beyond basic arrival numbers to gain deeper insights into visitor behaviour and economic impact.

2210 Key takeaways included:

- Tourism data must be expanded to include movement patterns, spending behaviour, and accommodation usage.
- An exit survey should be introduced to collect real-time visitor feedback.
- A tourism satellite account is essential for tracking the true economic contribution of tourism.
- Privacy concerns and system limitations must be addressed through technological solutions.
- Collaboration with key agencies such as immigration, ports, and IT departments is necessary for streamlined data collection.

2220 By implementing these strategies, the BVI will be better equipped to make data-driven tourism policy decisions, improve visitor experiences, and maximize the economic benefits of its tourism sector.