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## **Acronyms**

ISPS Code	International Ship & Port Facility Security Code
JTB	Jamaica Tourist Board
MAJ	Maritime Authority of Jamaica
SCUBA	Self-Contained Underwater Breathing Apparatus
TPDCo	Tourism Product Development Company

## **1. Introduction**

### ***1.1. Project Background***

With the growing number of visitors to Jamaica over the past decade, there has come an increase in the number of hotels, and the number and variety of water sports offered around the island. Additionally, the growth of the hotel and leisure water-sport industry throughout the country has reportedly had a significant impact on the coastal and marine ecology of several of our resort areas. This has also had impacts on health and safety, with reports being made of frequent marine accidents. These issues have the potential to negatively affect tourism in Jamaica.

The Maritime Authority of Jamaica, in conjunction with the Ministry of Industry and Tourism along with other concerned agencies, is interested in streamlining the management of leisure water-sporting activities, and to integrate this into an overall framework for inter-sectoral management of tourism products, coastal environmental health and marine safety.

As such they have commissioned a study, to be coordinated and managed by the Tourism Product Development Company (TPDCo), *to determine the capacity and safety in marine recreational areas in Jamaica*. Specifically, the areas to be assessed are:

1. St. Ann to St. Mary (including Ocho Rios, Tower Isle to Mammee Bay Point, Runaway Bay and Discovery Bay);
2. Negril (Bloody Bay to Norman Manley Sea Park);
3. Montego Bay (Bogue Lagoon to Rose Hall Beach);
4. Port Antonio (East and West Harbours);
5. Kingston (Lime Cay to Port Royal); and
6. St. Elizabeth (Black River up to Broad River).

### ***1.2. Objectives***

There are five (5) primary objectives for this project. These are to:

- Establish optimum capacity(ies) for water sports operations in selected marine and riverine recreational areas;
- Provide guidelines for the delimitations of zones for water sports activities in the determined focus locations, especially in Marine Parks;

- Document the environmental impacts of the water sports on the focus areas;
- Provide guidelines for the overall development of water-sports activities in Jamaica in relation to safety, security and marine/riverine pollution prevention; and
- Recommend better environmental management systems for the marine protected areas.

Additionally, the TPDCo is interested in determining the potential impact of zoning and leisure-craft regulations on the tourism product (visits by tourists to the island) and as such requires that a marketing study be done to ascertain such information and to guide the development of marketing and promotions pertaining to regulated water sports activities.

This document is the **inception report** for the project, and presents the progress of the study, including the activities to date, the initial findings and the identified information gaps.

## **2. Study Activities**

### ***2.1. Original Project Schedule***

The project has been divided into two phases as follows:

**Phase I:** This first phase will include the *Assessing and Review of Existing Information*, as well as the *Site Visits and Marketing Assessments* for three (3) of the determined locations: St. Ann to St. Mary, Negril and Port Antonio.

**Phase II:** This will include the studies of the remaining three locations (Montego Bay, Kingston and St. Elizabeth) as well as the *Comparative Assessment* of carrying capacity and safety management in two other locations: The Bahamas and Fort Lauderdale. A final report will be submitted at the completion of Phase II.

Phase I is to be conducted over a four (4) month period, and is due for delivery by February 15, 2005. Phase II is to be delivered by March 18, 2005.

### ***2.2. Access and Review of Existing Information (Phase I)***

The *review of the existing information* pertaining to watersports operations, marine safety and environmental health is well underway. Information on watersports operators, recorded marine incidents and marine park operations have been provided by TPDCo. Further information on environmental issues

and management objectives in the study areas has been obtained from NEPA. The MAJ has provided information on the registered vessels around the island.

Despite the efforts and assistance received from many of these agencies, there have been delays in obtaining some vital information, and there is still specific information that needs to be obtained. These include the details of watersports operators licenses (the period of validity of licenses, the activities licensed etc.), and the application of the ISPS Code in Jamaica.

### ***2.3. Site Visits and Marketing Assessments (Phase I & II)***

The *marketing assessments* have commenced in the Phase I locations with a survey instrument being administered to watersports users (visitors) in those areas. The intended verification visits for Phase I, however, have yet to be definitely scheduled, as information required to carry out an effective field investigation has not been obtained.

The marketing assessments for the Phase II locations are expected to be carried out by the end of January 2005.

### ***2.4. Comparative Analysis***

Phase II visits have not yet begun. However, aspects of the *Comparative Analysis* have started. Information has been requested from the Client about the rationale behind the selection of Fort Lauderdale and the Bahamas as the sites for the comparative assessment. This information is needed to facilitate the assessment of which site is the most suitable for the required comparative analysis visit. As such, the visit required under this component of the study has not yet been scheduled.

### ***2.5. Revised Project Schedule***

Based on the delays in receiving and assessing some of the information required for the implementation of the field assessments and the comparative analysis location visit, it is now necessary to examine the options for rescheduling the delivery of the individual location reports (Phase I and Phase II) and for the submission of the final report of the study. This will need to be discussed as soon as possible with the Client.

### **3. Initial Findings**

#### **3.1. Watersports Operators**

Information provided by TPDCo indicates that there are currently 86 licensed watersports operators around the island. Of these, 27 are registered in the Montego Bay area, 27 in the Negril area and 32 in the Ocho Rios (St. Ann) area. There are no operators licensed for Port Antonio, Kingston or Black River.

The available information on watersports operators neither indicates the period for which the operators are licensed to carry out business, nor does it indicate the specific activities/categories that the operators are licensed for.

The Jamaica Tourist Board (JTB) and the TPDCo recognize three main categories of watersports, as specified in the Tourist Board (Water Sports) Regulations, 1985. These classifications are:

##### **a. SCUBA Diving**

According to the Tourist Board (Watersports) Regulations, 1985, *SCUBA diving* is the act of a person diving with the aid of compressed air from a self-contained underwater breathing apparatus enabling him to remain underwater for prolonged periods.

##### **b. Para-sailing & water skiing, and jet-skiing**

*Parasailing* refers to the use of a parachute-like device to provide an aerodynamic lift enabling a person to glide through the air while being towed by a boat, while *water skiing* refers to the act of a person (whether or not equipped with floats/skis fastened underfoot) being towed through the water by a boat or vessel, aircraft, hydrofoil or hover-craft.

##### **c. Sunfish sailing and board sailing.**

*Board sailing* refers to the act of a person moving through the water by means of a craft equipped with a stabilising fin-keel, and propelled by wind acting on a sail mounted on a universally jointed mast and having an elliptical boom for steering or maneuvering. *Sunfish sailing* refers to a person sailing a craft having a shallow-draught hull not exceeding twelve feet in length, and a centre board and rudder with a fixed mast and lateen sail not exceeding forty square feet in dimension.

No clear definition of Jet Skiing has been identified in the regulations.

### **3.2. Watersports Vessels**

Information obtained from MAJ indicates that there are more than 780 small vessels registered in Jamaica (to at least December 2005). These include both personal and commercial vessels, and cover both mechanized and non-mechanised vessels e.g. outboard boats, Hobie Cats, Kayaks, Aquacycles, sun-fish, windsurfers, and jet skis.

The listing from the MAJ reflects primarily tourism related vessels based on the JTB Tourism License requirement that operators must have a certificate from the MAJ.

The information provided by the MAJ reflects only those vessels *certified* by the Authority, and does not consider the many *uncertified* personal vessels imported and in use around the island.

Specifically, the recorded distribution of certified vessels around the island is as follows:

<i>Location</i>	<i>No. Motorised Vessels</i>	<i>No. Non-Motorised Vessels</i>	<i>Total No. Vessels (Registered)</i>
Negril (Lucea)	120	205	325
Port Antonio	2	-	2
Ocho Rios	69	64	133
Rio Bueno	13	64	77
Montego Bay	35	139	174
Falmouth	7	9	16
Kingston	8	-	8
Black River	8	8	16
Oracabessa	1	-	1
Other Personal/Recreational	22	-	22
<b>Total</b>	<b>285</b>	<b>489</b>	<b>774</b>

### **3.3. Fishing Vessels**

As of December 2004, the Fisheries Division had a total of 4,326 registered fishing boats around the island, and 15,002 fishermen registered. The number of registered fishing vessels in the study areas is as follows

Black River	81
Discovery Bay	65
Ironshore	1
Kingston	86
Mammee Bay	25
Negril	11
Ocho Rios	92
Port Antonio	34
Port Royal	65
Priory	39
Prospect	16
Runaway Bay	46
Salem	39
St. Ann's Bay	77
White River	100

### ***3.4. Marine Incidents***

The JTB provided data on the reported watersports accidents for the Period January 2001 to December 2003. The data indicates that of the 43 incidents reported for the considered period 31 (more than 70%) involved jet skis (personal water craft). Of the incidents reported, ten (10) involved unlicensed (illegal) watersports operators.

The results of the incidents were mostly personal injuries (broken bones) and damage to property (boats). However, five (5) fatalities were reported, three (3) of which involved swimming/snorkeling , one (1) was a scuba diving incident, and the fifth was the result of a jet ski collision.

Of the areas under consideration in this study, Negril and Ocho Rios have the greatest number of reported incidents (18 and 17 respectively). Eight operators had more than one reported incident, which can be seen as either an indication of proper reporting or inadequate safety practices.



### ***3.5. Marine Parks, Protected Areas & Environmental Issues***

There are two legally recognized marine parks in Jamaica, the Montego Bay Marine Park and the Negril Marine Park. There is a proposal for a marine park in Ocho Rios and management plans have been prepared for this location.

The existing and proposed zoning as well as the management approaches for each of these parks has been obtained. Information on the sensitive coastal ecosystems in the vicinity of each of the study areas also been received, and data on the particular environmental issues in these areas is currently being collected.

### ***3.6. Relevant Legislation, Regulations and Policies***

A detailed review of relevant legislation, regulations and policies has started. The specific findings of the review will be presented in the final report for the study, and will include recommendations for any changes deemed necessary to promote safe and environmentally-responsible watersporting operations in the study locations.

The legislation that has been identified as relevant for this study include:

1. The Tourist Board Act, 1955;
2. The Tourist Board (Water Sports) Regulations, 1985;
3. The Tourist Board (Water Sports) Order, 1985;
4. The Tourist Board (Tourism Enterprise) Order, 1985;
5. The Shipping Act, 1998 (re the licensing and regulation of small vessels);
6. The Trade Act, 1955 (re the importation of particular water sport equipment);
7. The Customs Act, 1941 (re entry into island of particular water sport equipment);
8. The Standards Act, 1969;
9. The Natural Resources Conservation Authority Act, 1991;
10. The Natural Resources (Marine Parks) Regulations, 1992;
11. The Natural Resources (Montego Bay Marine Park) Order, 1992;
12. The Natural Resources (Negril Marine Park) Order, 1998; and
13. The River Rafting Act, 1970

## **4. Information Gaps**

As mentioned previously, there are some gaps in the information obtained to date, that are impeding the effective progress of the study. Specifically, the details of licenses issued to watersports operators. This information is integral to assessing the level of compliance of watersports operators, and will therefore affect our ability to make sound recommendations as to the future management and safety of watersports operations in the study locations

Other information gaps include:

1. The application of the ISPS Code in Jamaica. We have been referred to the Port Authority for this information. However, to date we have not been successful in obtaining the details of the application of the Code in the study areas.
2. The rationale and any other information supporting the selection of the two sites for Comparative Analysis.

## **5. Next Steps**

The next steps planned for the study are as follows:

1. Obtain outstanding information on watersports operators' licenses, and the comparative analysis rationale.
2. Make field verification visits to Phase I locations.
3. Prepare Phase I draft location reports.
4. Present reports to stakeholders.
5. Complete Phase I location reports.
6. Conduct Phase II marketing assessments and field verification visits.
7. Prepare Phase II draft location reports.
8. Present reports to stakeholders.
9. Complete Phase II location reports.
10. Make Comparative Analysis Field Visit.
11. Complete Final Study Report.