

GOVERNMENT OF THE
VIRGIN ISLANDS
Ministry of Tourism, Culture
and Sustainable Development

NATIONAL TOURISM POLICY 2026 - 2036

Approved in Cabinet 17th June, 2026



NATIONAL TOURISM POLICY

*Statement by the **Premier and Minister for Tourism, Culture and Sustainable Development***

OFFICE OF THE PREMIER
GOVERNMENT OF THE VIRGIN ISLANDS



Honourable Dr. Natalio D. Wheatley

The approval of the National Tourism Policy marks a significant milestone in the development of The Virgin Islands and demonstrates our commitment to ensuring that tourism continues to serve as a powerful engine of economic growth, opportunity, and national development. As one of the principal pillars of our twin-pillar economy, tourism contributes substantially to national income, employment, government revenues, and business activity across our communities. Its continued success is therefore essential to the prosperity and well-being of our people.

This policy provides a clear strategic direction for the sector and establishes the framework through which Government will guide tourism development in a manner that is coordinated, sustainable, and responsive to emerging opportunities and challenges. It articulates a shared vision for the future of tourism in The Virgin Islands and identifies the priorities that will inform public investment, policy decisions, legislative reforms, infrastructure development, environmental stewardship, and destination management.

The National Tourism Policy is not an end in itself, but a roadmap for action. It provides Government with the tools necessary to align resources, strengthen institutional coordination, support private sector growth, and enhance the visitor experience while safeguarding the natural and cultural assets that define our destination. Importantly, it establishes measurable objectives and outcomes that will enable us to monitor progress and hold ourselves accountable for results.

As we look toward the future, this policy will help ensure that tourism growth remains inclusive, resilient, and beneficial to present and future generations. It represents our collective commitment to building a tourism industry that reflects the values, aspirations, and potential of The Virgin Islands while maintaining our position as one of the world's premier destinations.

Government of the Virgin Islands
Ministry of Tourism, Culture and Sustainable Development

NATIONAL TOURISM POLICY

*Statement by the **Junior Minister for Culture and Tourism***



Honourable Luce Hodge-Smith

The National Tourism Policy is the product of extensive and inclusive tourism consultations undertaken in The Virgin Islands. Its approval reflects the contributions of hundreds of individuals and organisations who shared their perspectives, experiences, concerns, and aspirations for the future of the tourism industry.

Throughout the policy development process, we engaged tourism practitioners, cultural stakeholders, environmental advocates, community organisations, youth representatives, public officers, investors, transportation providers, hospitality professionals, and residents across the Territory. Stakeholder consultations were conducted throughout Tortola, Virgin Gorda, Anegada, and Jost Van Dyke, alongside sector-specific discussions covering marine tourism, culture and heritage, events and entertainment, sports tourism, sustainability, culinary tourism, wellness tourism, agriculture, and workforce development.

The resulting policy is stronger because it is grounded in the realities and experiences of those who live and work within the sector every day. It reflects a shared understanding that the future success of tourism depends upon collaboration between Government, industry, communities, and visitors alike. The recommendations contained within the policy have been shaped by those who will ultimately help deliver them.

I extend my sincere gratitude to every stakeholder who participated in surveys, meetings, workshops, focus groups, and consultations. Your willingness to contribute ideas and engage in meaningful dialogue has helped create a policy that is both practical and ambitious. This policy belongs to all of us, and its successful implementation will depend upon maintaining the same spirit of partnership, cooperation, and shared responsibility that guided its development.

Together, we have established a vision for tourism that celebrates our culture, protects our environment, strengthens our communities, and creates opportunities for future generations of Virgin Islanders.

GOVERNMENT OF THE VIRGIN ISLANDS
Ministry of Tourism, Culture and Sustainable Development

NATIONAL TOURISM POLICY

*Statement by the **Permanent Secretary, Ministry of Tourism, Culture and Sustainable Development***



Mr. Joseph Smith-Abbott

The approval of the National Tourism Policy represents the successful completion of a rigorous policy development process founded upon evidence-based decision-making, broad stakeholder participation, and the principles of good governance. The policy reflects the Ministry's commitment to strengthening strategic planning and ensuring that public policy is informed by data, consultation, transparency, and accountability.

The development of the policy was guided by regional best practices, including the OECS Common Sustainable Tourism Policy Framework, while remaining firmly grounded in the unique circumstances and priorities of The Virgin Islands. Extensive stakeholder engagement, policy research, sectoral analysis, and public consultation informed the identification of strategic priorities and implementation actions. The result is a policy framework that provides clear direction while remaining sufficiently adaptable to respond to future changes within the tourism sector.

Equally important is the work that now lies ahead. Effective implementation will require robust institutional coordination, performance monitoring, legislative and regulatory review, data collection, stakeholder collaboration, and periodic policy evaluation. The Ministry will continue to strengthen the systems, processes, and partnerships necessary to translate policy objectives into measurable outcomes and tangible benefits for the Territory.

The National Tourism Policy also reflects the broader objectives of the Public Sector Transformation Programme by promoting evidence-based planning, cross-government collaboration, performance management, citizen engagement, and continuous improvement in public administration. As implementation progresses, the Ministry will continue to embrace stakeholder-led approaches to policy development and review, recognising that effective public policy is strongest when it is informed by those who are affected by it.

I wish to acknowledge the dedication and professionalism of the public officers, technical experts, stakeholders, and development partners whose contributions made this achievement possible. Their collective efforts have established a strong foundation upon which the future growth, resilience, sustainability, and competitiveness of the tourism sector can be built.

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Acronyms List

Acronym	Definition
AIS	Automatic Identification System
APP	Application
BOQ	Bill of Quantities
BVI	British Virgin Islands
BVIPA	BVI Ports Authority
BVITB	BVI Tourist Board
CAPEX	Capital Expenditure
CARICOM	Caribbean Community
CBA	Cost-Benefit Analysis
CDB	Caribbean Development Bank
CCRIF	Caribbean Catastrophe Risk Insurance Facility
CSO	Central Statistics Office
CXC	Caribbean Examinations Council
DMC	Destination Management Council
DoE	Department of Environment
ECLAC	Economic Commission for Latin America and the Caribbean
EIA	Environmental Impact Assessment
EqIA	Equity Impact Assessment
ETIL	Environmental and Tourism Improvement Levy
FIFA	International Federation of Association Football
GDP	Gross Domestic Product
HDPE	High-Density Polyethene
HLSCC	Hamilton Lavity Stoutt Community College
HoA	House of Assembly
IEC	Investment Evaluation Committee
KPI	Key Performance Indicator
MARPOL	International Convention for the Prevention of Pollution from Ships
MENRCC	Ministry of Environment, Natural Resources and Climate Change
MOF	Ministry of Finance
MOU	Memorandum of Understanding
MPA	Marine Protected Area
MRF	Monitoring and Reporting Framework
MSME	Micro, Small and Medium-Sized Enterprises
MTCSD	Ministry of Tourism, Culture and Sustainable Development
NGO	Non-Governmental Organisations
NPT	National Parks Trust of the Virgin Islands
NSDP	National Sustainable Development Plan
OECS	Organisation of Eastern Caribbean States
OPEX	Operating Expenditure
PO	Policy Objective
PPP	Public-Private Partnership
PSC	Public Service Commission

Acronym	Definition
SAF	Sustainable Aviation Fuel
SLA	Service Level Agreements
TSA	Tourism Satellite Account
UNDP	United Nations Development Programme
UNESCO	United Nations Educational Scientific Commission Organization
UNWTO	United Nations World Tourism Organisation
USD	United States Dollar
VIFEB	Virgin Islands Festival and Events Board
VIFFC	Virgin Islands Festival and Fairs Committee

Executive Summary

The Virgin Islands National Tourism Policy (2026–2036) establishes a binding framework for the development, management, and governance of the Territory's tourism sector. It defines the Government's policy position, sets out enforceable principles, and provides the institutional, economic, and regulatory structure required to transition the sector from a volume-driven model to a high-value, sustainable, and resilient tourism economy.

Tourism remains a central pillar of the Virgin Islands' economy; however, its growth has been characterised by fragmented governance, limited coordination, weak regulatory enforcement, and insufficient integration with national planning and fiscal systems. This Policy addresses these structural challenges by establishing a coherent and enforceable framework aligned with the National Sustainable Development Plan (NSDP 2036) and the Organisation of Eastern Caribbean States (OECS) Common Sustainable Tourism Policy.

The Policy introduces a managed tourism model based on three core principles: value over volume supported by a targeted demand strategy focused on high-value visitor segments and priority source markets, strengthened local economic retention, and strict adherence to environmental and infrastructure carrying capacity. Tourism growth shall be conditional upon infrastructure readiness, environmental thresholds, and compliance with statutory visitor management systems.

A central feature of this Policy is the establishment of a modern governance and regulatory structure. The Ministry of Tourism, Culture and Sustainable Development shall lead policy, regulation, and product development; the BVI Tourist Board shall focus on destination marketing and market intelligence; and a statutory Destination Management Council shall coordinate cross-agency delivery, enforce visitor management controls, and manage site capacity. These arrangements shall be formalised through the Tourism Act, which will establish binding licensing, data reporting, compliance, and enforcement mechanisms.

This Policy embeds tourism within the national economic and fiscal framework. Tourism shall be treated as a measurable economic sector, supported by the implementation of a Tourism Satellite Account (TSA), integration with the Medium-Term Fiscal Framework, and the establishment of a rolling Medium-Term Tourism Fiscal Envelope. All major tourism-related investments, incentives, and development decisions shall be subject to cost-benefit analysis, options appraisal, and fiscal impact assessment prior to approval.

To maximise national benefit, this Policy establishes a clear direction for increasing local value retention by strengthening domestic supply chains, expanding participation of Micro, Small and Medium Enterprises (MSMEs), and improving linkages with agriculture, fisheries, and the creative industries. Growth in tourism shall therefore be assessed not only by visitor numbers, but by economic value, retention, and multiplier effects across the economy.

This Policy is supported by a structured digital and data governance framework to ensure real-time monitoring, compliance, and performance management. Mandatory data submission, integrated

digital systems, and a national tourism performance dashboard shall underpin evidence-based decision-making and regulatory enforcement.

Delivery of this Policy shall be governed through a Monitoring and Reporting Framework, with clearly defined indicators, reporting obligations, and accountability mechanisms. Performance shall be reviewed continuously, with annual reporting to Cabinet and the House of Assembly, to ensure transparency, oversight, and adaptive management.

Lastly, this Policy establishes the direction within which all tourism-related strategies, plans, and investments must operate. It provides a clear and enforceable framework to guide decision-making, strengthen institutional coordination, and ensure that tourism development contributes to long-term national prosperity, environmental sustainability, and equitable economic participation across the Virgin Islands.

Policy Context and Background

The formulation of the Virgin Islands' National Tourism Policy is the result of an extensive territory-wide consultation series, built upon regional efforts. In January 2024, the Ministry of Tourism, Culture and Sustainable Development collaborated with representatives from the Organisation of Eastern Caribbean States (OECS) commission to advance a Common Tourism Policy. These initial meetings, funded by the World Bank's "Unleashing the Blue Economy in the Caribbean" initiative, aimed to gather input on measures and policies to enhance the role of tourism and the blue economy, ultimately positioning tourism as a sustainable and resilient sector within the Virgin Islands and the Eastern Caribbean Economic Union over a five-year period. This process reflects a dedicated effort to update the existing OECS Tourism Policy.

To bring the relevance of policy development to the Virgin Islands, the territory-wide consultations involved broad participation from key stakeholders, including the BVI Tourist Board, various government ministries and departments, destination management companies, and accommodation and rental companies. The OECS delegation, led by a Tourism Technical Specialist and supported by a Tourism Policy and Development Advisor, underscored the collaborative nature of these efforts. Sessions were held across various sister islands and sectors, ensuring that national priorities were reflected in the regional policy. Their engagement signifies the Virgin Islands' commitment to fostering national political, economic, and social development by enhancing the tourism sector through regional cooperation and strategic planning.

The resulting National Tourism Policy is deliberately organised around the OECS "policy house," which utilised eight pillars to frame the policy and guide its delivery in sustainable development. This framework emphasises inclusive growth, the blue economy, climate change and risk resilience, product and niche market development, biodiversity and resource conservation, access and transportation, destination management, and institutional capacity.

The Virgin Islands adapted the regional template by explicitly expanding its definition of sustainability to include service quality and a seamless, end-to-end visitor journey. The government continues to view tourism as a key economic pillar, with primary objectives including expanding business and employment opportunities, enhancing training in tourism-related careers, and increasing government revenue.

This Policy establishes policy direction, principles, and national positions. It does not prescribe project-level intervention, implementation sequencing, or detailed operational targets. These will be defined through:

- Medium-Term Tourism Strategy
- Annual Work Plans and Budget Estimates
- Implementation and delivery frameworks

Tourism Sector Challenges and Structural Issues

Tourism is one of the Virgin Islands' main economic pillars. Unlike Financial Services, tourism activities span other sectors to support the territory's overall economic performance. Notwithstanding its connections, the sector faces policy, governance, institutional and infrastructure gaps that threaten its sustainability, competitiveness, and equitable benefits. Findings from the consultations reveal that the Virgin Islands' tourism sector lacks a formal, coherent, and National Tourism Policy to guide its sustainability. The lack resulted in fragmented decision-making, inconsistent priorities across administrations, weak regulatory enforcement, and inadequate coordination among the Ministry, the Tourist Board, and other agencies. From the combined consultations, the key issues identified include:

Issue 1: Policy and Governance Gaps

i. Lack of a National Tourism Policy governing and providing direction to the sector
ii. Inconsistent strategic direction.
iii. Fragmented governance and coordination
iv. Outdated legislative framework
v. Slow pace of implementation (e.g. increasing fees)
vi. Excessive bureaucracy and delays
vii. Lack of policy integration
viii. Need for a comprehensive investment framework

Issue 2: Regulatory and Standardisation Issues

i. Lack of enforceable quality standards
ii. Unregulated accommodations
iii. Inconsistent fees and rules
iv. Lack of safety oversight
v. Unregulated transport

Issue 3: Infrastructure and Access Constraints

i. Limited air and sea Access
ii. Inadequate accommodation capacity
iii. Poor conditions at ports of entry
iv. Deficiencies in core infrastructure
v. Under-resourced health care
vi. Lack of site infrastructure and maintenance

Issue 4: Environmental and Sustainability Threats

i. Capacity exceeded at key sites
ii. Marine pollution and waste Management

iii. Threats to marine ecosystems
iv. Coastal degradation
v. Underutilisation of levy funds

Issue 5: Workforce and Human Capital Challenges

i. Dependence on expatriate labour across the tourism sector
ii. Lack of training and career pathways in tourism
iii. Inconsistent service quality
iv. Need for cultural knowledge

Issue 6: Data and Economic Planning Deficiencies

i. Lack of comprehensive visitor data
ii. Absence of economic measurement tools for measuring tourism benefits and impacts
iii. Absence data sharing protocols in the public and private sectors

Issue 7: Product and Diversification Issues

i. Over-reliance on marine/beach Tourism
ii. Underutilised cultural and heritage assets
iii. Lack of consistency and authentic culinary identity
iv. Insufficient sports and events infrastructure
v. Inequitable distribution of benefits across Sister Islands
vi. Need for stronger national identity and branding

Issue 8: Equity and Local Economic Participation

i. Barriers to local investment
ii. Competitive challenges for local entrepreneurs against foreign-owned operations.
iii. Limited “Trickle-down” benefits to local communities

Policy Purpose and Functional Scope

The National Tourism Policy of the Virgin Islands serves as the overarching framework to guide the development, management, and governance of the tourism sector over the next decade and beyond. Its function is to articulate a clear vision, mission, guiding principles, and strategic goals for tourism, ensuring that the sector makes meaningful contributions to national development.

This Policy provides direction and continuity by setting out what the Government, in partnership with the private sector, is committed to achieving in tourism, as well as the principles that will guide all decisions. It ensures that tourism growth is inclusive, creating opportunities for Virgin

Islanders; sustainable, safeguarding the Territory's natural and cultural heritage; and resilient, embedding climate adaptation and crisis preparedness into the sector.

The Policy's purpose is also to:

- **Align tourism with national priorities**, ensuring coherence with the National Sustainable Development Plan (NSDP 2036) and regional obligations under the OECS Common Sustainable Tourism Policy.
- **Anchor legislation and regulation**, providing the policy basis for modern laws, licensing, certification, and quality assurance mechanisms.
- **Guide investment and resource mobilisation**, by setting out clear priorities for public and private actors and ensuring that financing and partnerships are aligned with agreed outcomes.
- **Strengthen governance and accountability** through measurable commitments and a monitoring framework that tracks performance and ensures transparency.

The National Tourism Policy is both a vision statement and a governance instrument. It defines the role of tourism in the Territory's future, secures broad stakeholder consensus, and provides the foundation for actions that will ensure the Virgin Islands remain a competitive, resilient, and sustainable destination.

Policy Objectives and Intended Outcomes

Consistent with the purpose and function, the development of the National Tourism Policy is to establish a coherent, legally backed policy that will position the Virgin Islands as a sustainable, competitive, and inclusive high-quality destination by:

- **Policy Objective 1:** Strengthening governance and coordination across tourism institutions.
- **Policy Objective 2:** Embedding environmental sustainability and climate resilience into all tourism development.
- **Policy Objective 3:** Diversifying the tourism product beyond marine-based activities to include culture, heritage, culinary, sports, eco-tourism, and medical tourism.
- **Policy Objective 4:** Expanding infrastructure and access (air, sea, and inter-island transport) to improve visitor experiences.
- **Policy Objective 5:** Building a skilled, services-oriented local workforce through education and training.
- **Policy Objective 6:** Ensuring equitable distribution of tourism benefits to local communities, small businesses, and sister islands.
- **Policy Objective 7:** Using robust data and monitoring systems to guide evidence-based decision-making.

Success under this Policy will be reflected in a tourism sector that delivers higher economic value, protects environmental assets, enhances visitor experience, and provides broad-based benefits to the people of the Virgin Islands.

Policy Structure and Organisation

This Policy is deliberately structured to provide a clear, logical, and enforceable framework for tourism development in the Virgin Islands. The organisation of the document reflects the progression from problem identification to policy direction, system design, and delivery mechanisms.

The opening sections establish the context for intervention. The Policy Context and Background, and Tourism Sector Challenges and Structural Issues define the operating environment and identify the key constraints affecting the sector. This is followed by the Policy Purpose and Functional Scope, Policy Objectives and Intended Outcomes, and Policy Principles, which collectively set out the Policy's intent, scope, and guiding rules.

The Policy then establishes its authority and governance foundation. The Government Policy Position defines the national stance on tourism development, while the Legal Authority and Enforcement Framework, Institutional Accountability and Delivery Responsibility, and Implementation Control Principles set out the mechanisms for enforcing, implementing, and governing the Policy across the public sector.

This is followed by sections that establish legitimacy and alignment. The National and Regional Policy Alignment and Policy Development and Stakeholder Validation sections demonstrate coherence with national frameworks and reflect the Policy's consultative basis.

The Policy then sets out its strategic direction. The Strategic Policy Direction and Trade-offs section defines key policy choices and balances, while the Policy Hierarchy and Strategic Boundaries clarifies the distinction between policy, strategy, and implementation.

The core system architecture of the Policy is presented through a set of integrated frameworks. The Tourism Economic Value Framework, Tourism Growth and Yield Management Framework, Tourism Value Retention Framework, and Tourism Fiscal Integration Framework define how tourism generates, distributes, and retains economic value within the Territory. These are supported by the Digital Systems and Data Governance Framework, which provides the data infrastructure required for enforcement, monitoring, and decision-making.

Delivery of the Policy is organised through the Strategic Pillars and Policy Commitments, which translate national priorities into thematic areas of action across the tourism sector. Each pillar outlines the Policy’s commitments and priority actions within its respective domain.

Finally, the Policy establishes its performance and oversight mechanisms. The Performance Monitoring and Reporting Framework defines how progress will be measured, reported, and used to inform ongoing decision-making and policy adjustment.

This structure ensures that the Policy functions as a governing instrument, clearly linking policy direction to enforcement, delivery, and accountability, while maintaining alignment with national development priorities.

Policy Principles

The implementation of this Policy shall be underpinned by the following guiding principles:

1. **Sustainability** – Tourism development shall integrate environmental, socio-cultural, and economic sustainability in all planning, investment, and operational activities.
2. **Evidence-Based Decision-Making** – Policy and investment choices shall be guided by accurate research, data collection, and monitoring frameworks, including Tourism Satellite Accounts.
3. **Public–Private–Community Partnership** – Strong collaboration shall be fostered between Government, the private sector, and local communities to achieve common objectives.
4. **Inclusivity** – Opportunities for participation and benefit shall be broadened for youth, micro, small and medium-sized enterprises (MSMEs), and outer island communities.
5. **Innovation and Resilience** – Tourism development shall embrace digital transformation, blue economy opportunities, climate adaptation, and risk-resilient practices.
6. **Service Quality and Guest Experience** – High standards of service and seamless visitor experiences shall be institutionalised as central measures of success.

Government Policy Position

The Government establishes the following policy position to guide tourism development in the Virgin Islands

- Tourism growth shall be managed within defined environmental and infrastructure carrying capacity limits (This includes the management of tourism-related built development in accordance with defined planning, design, and infrastructure standards).
- Priority shall be given to higher-value, longer-stay visitor segments over volume-driven growth
- Cruise tourism shall be actively managed to minimise congestion and protect the overall visitor experience
- Tourism development shall align with national sustainability, climate resilience, and community well-being objectives

- The private sector shall be the primary driver of tourism investment, within a regulated and standards-based framework.

Regulatory Stance: tourism development shall not proceed without compliance with carrying capacity thresholds, environmental approvals, and infrastructure readiness certification.

Cruise Control Stance: cruise volumes shall be actively capped and managed, with authority vested in the Destination Management Council under the Tourism Act.

Investment Stance: public investment shall prioritise high-value, long-stay tourism infrastructure over volume-driven expansion.

Data Compliance Stance: submission of tourism data shall be mandatory for all licensed operators, with penalties for non-compliance

Local Participation Stance: all major tourism investments shall include enforceable localisation requirements (employment, procurement, skills transfer)

This Policy position should guide all sectoral strategies, regulatory decisions, and public investment in tourism. The Government recognises that trade-offs may arise between growth, sustainability, visitor experience, and economic participation. Policy decisions will seek to balance these considerations in a manner that supports long-term national interest.

Legal Authority and Enforcement Framework

The provisions of this Policy shall be operationalised through the Tourism Act and supporting regulations. The Act shall vest enforcement authority in the Ministry of Tourism, Culture and Sustainable Development and the Destination Management Council, including powers related to licensing, compliance monitoring, data submission, visitor management controls, and penalties for non-compliance. No tourism activity shall operate outside of this regulatory framework.

The Destination Management Council shall serve as the central coordination authority for tourism delivery, with defined decision rights over visitor flow management, site capacity enforcement, inter-agency coordination, and operational policy implementation. All relevant agencies shall be required to align operational decisions with the Destination Management Council directives under the Tourism Act.

All tourism-related regulatory, investment, and operational decisions shall be required to demonstrate alignment with this Policy.

Institutional Accountability and Delivery Responsibility

The Ministry of Tourism, Culture and Sustainable Development shall be accountable for overall policy delivery. The BVI Tourist Board shall be accountable for destination marketing and market intelligence. The Destination Management Council shall be accountable for cross-agency coordination, visitor management, and operational enforcement. All Ministries, Departments, and Statutory Bodies shall be required to align plans, budgets, and operations with this Policy. Performance shall be monitored through the national Monitoring and Reporting Framework, with annual reporting to Cabinet and the House of Assembly.

Implementation Control Principles

All tourism-related decisions, investments, and regulatory actions will be guided by the following principles:

- **Sustainability:** protecting natural and cultural assets for long-term use
- **Economic value:** maximising value retention and local economic participation
- **Feasibility:** ensuring that policies are operationally and financially realistic
- **Equity:** promoting balanced development across islands and communities
- **Evidence-based Decision-making:** using data and research to inform policy adjustment

National and Regional Policy Alignment

Integration with the National Sustainable Development Plan (NSDP 2036)

The National Tourism Policy has been deliberately designed to align with the National Sustainable Development Plan (NSDP 2036), which sets the overarching vision and outcomes for the Virgin Islands' long-term development. The NSDP was developed through one of the most extensive public engagement exercises ever undertaken in the Territory, with over seventy consultations across districts, sectors, and the diaspora. Tourism was consistently identified in these dialogues as both a cornerstone of the current economy and a sector requiring diversification, safeguards for sustainability, and resilience against external shocks.

By integrating the NSDP's priorities into the tourism policy process, the Government ensures that tourism development is not treated in isolation but as part of a whole-of-government, whole-of-society approach to sustainable development. The Policy draws directly on NSDP outcomes related to inclusive economic growth, resilient infrastructure, environmental protection, climate adaptation, and strong institutions, ensuring coherence between sectoral and national strategies. This integration also helps avoid duplication of efforts, anchors tourism reforms in established national outcomes, and provides a unified framework for mobilising resources from domestic, regional, and international partners.

Policy Alignment with the National Sustainable Development Plan

The National Tourism Policy is a central instrument for advancing the aspirations of the Virgin Islands as articulated in the National Sustainable Development Plan (NSDP) 2036, whilst supporting the region's OECS Common Sustainable Tourism Policy (2025–2035) and the OECS Climate Action Plan for Tourism (2025). The Strategic Goals outlined in this Policy are therefore expressly linked to the National Outcomes of the NSDP to ensure policy coherence, fiscal alignment, and whole-of-government delivery. The full alignment of the strategic pillars to the NSDP is found in Appendix II: Alignment of National Tourism Policy Pillars with NSDP Outcomes.

Policy Development and Stakeholder Validation

The Consultative Process

The National Tourism Policy has been shaped through an extensive programme of consultations that spanned communities, sectors, and stakeholder groups across the Virgin Islands (

Appendix I: Situational Analysis, Current Tourism Market and Key Stakeholder Roles). This approach was not incidental but foundational, ensuring that the policy reflects the voices, experiences, and aspirations of those who live and work within the tourism sector, as well as those whose livelihoods are connected to its success. By engaging with hoteliers, yachting operators, taxi drivers, artisans, cultural practitioners, youth, sister island communities, and the wider public, the policy has been anchored in legitimacy and shared ownership.

The importance of deriving the policy consultatively lies in three key areas. First, it strengthens democratic governance by embedding transparency, accountability, and inclusivity in national decision-making. The consultative process has allowed for divergent views to be heard, harmonised, and integrated into a coherent vision for the sector. Second, it ensures that the policy is grounded in lived realities rather than abstract prescriptions. Stakeholder insights about challenges such as cruise congestion, access to financing for MSMEs, inter-island transport, or the protection of natural assets provide actionable guidance that the government alone could not generate. Third, it fosters trust and buy-in, which are critical for successful implementation. Policies designed with, rather than for, the people are more likely to be supported, respected, and sustained. Refer to Appendix VII: Stakeholder Participation for a detailed analysis.

Consultative policymaking also situates the Virgin Islands within wider regional and global best practice. The process mirrors the participatory approach of the National Sustainable Development Plan (NSDP 2036), which underscored citizen ownership as essential to legitimacy and long-term success. Similarly, the OECS Common Sustainable Tourism Policy Framework and the OECS Climate Action Plan for Tourism both emphasise broad-based engagement and community leadership as critical to sustainability.

Regional Consultations – OECS Common Sustainable Tourism Policy 2025-2035

*The foundation of this Policy is rooted in the regional framework of the OECS Common Sustainable Tourism Policy 2025 to 2035 (**Figure 1: OECS Eight-Pillar Framework for the Common Sustainable Tourism Policy**.*

), developed through a comprehensive multi-country consultation process.

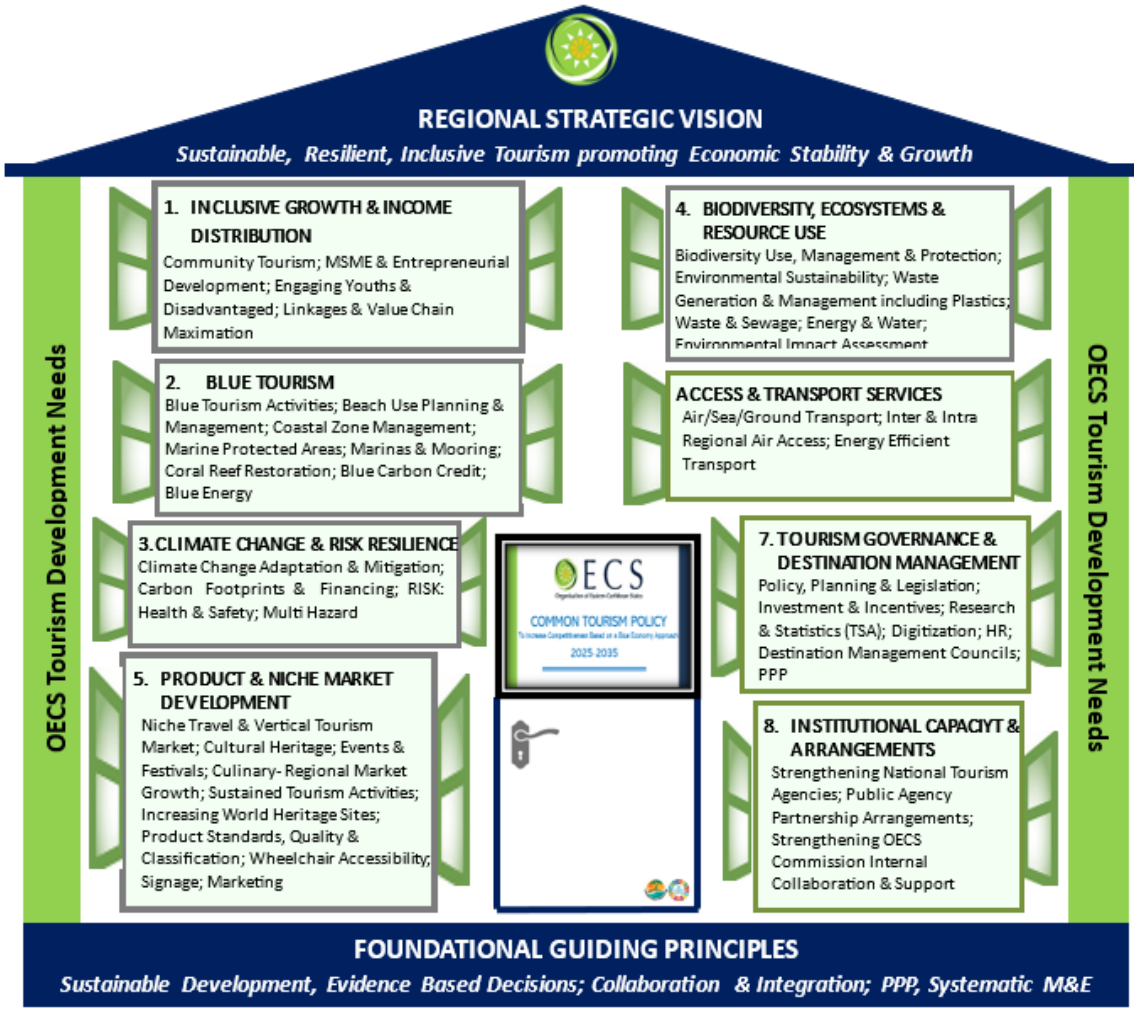


Figure 1: OECS Eight-Pillar Framework for the Common Sustainable Tourism Policy[1].

The OECS agenda emphasises transformative development across its Member States, seeking to optimise sustainable tourism as a driver of inclusive growth, climate resilience, and competitiveness within the Economic Union. Its regional agenda is guided by three overarching strategic goals: creating an enabling policy environment, supporting balanced growth, and enhancing quality of life across Member States. These goals are operationalised through eight thematic areas—ranging from inclusive growth and blue tourism to biodiversity protection and institutional capacity—that provide the benchmarks for national policy alignment (see ***Figure 1: OECS Eight-Pillar Framework for the Common Sustainable Tourism Policy****.*

above for details on the sub-pillars.

[1] *Snapshot of the OECS Common Tourism Policy framework 2025-2035. This is represented by a building with: (1) THE ROOF which is the overarching vision that all policies work towards achieving the foundation made up of the principles that guides all policies and actions (2) THE DOOR is the framework's entrance with the structure's title and validity period (3) THE WALLS comprising the common tourism development issues, challenges, needs that are addressed (4) THE WINDOWS made up of the policy development themes and the topics that address the common tourism issues (walls)*

For the Virgin Islands, alignment with this regional agenda ensures that its tourism sector remains competitive within the wider OECS and Caribbean marketplace, while also benefiting from shared initiatives such as joint marketing, harmonised data systems, and coordinated approaches to cruise, yachting, and aviation development. Harmonisation is particularly significant, as it reduces policy fragmentation across the sub-region, creates a common platform for investment promotion, and strengthens the collective bargaining power of small island states in international tourism forums.

When the Virgin Islands hosted its OECS consultation, Government and industry leaders shaped the articulation of the Territory's vision, emphasising its marine tourism strengths, the need for inclusivity, and the urgency of climate resilience measures. These contributions ensured that the OECS framework did not simply impose a regional blueprint but instead reflected local priorities and challenges. By embedding national perspectives within the regional agenda, the process laid the groundwork for a harmonised but flexible approach: one that strengthens regional competitiveness while safeguarding the Virgin Islands' distinct identity and aspirations.

National Consultations – Towards the Virgin Islands National Tourism Policy

The Virgin Islands undertook an extensive and inclusive national consultation process to contextualise the OECS framework into a Virgin Islands–specific National Tourism Policy. Conducted between January 2024 and mid-2025, these consultations engaged stakeholders across all sectors, islands, and demographic groups. The process was designed not only to gather ideas but to ensure that tourism policy reflected the lived realities of communities, the needs of industry, and the aspirations of the next generation.

The Virgin Islands Tourism Summit (January 2025) served as the flagship consultation. Its primary objective was to bring together government leaders, private-sector actors, regional partners, and community representatives in a single forum to debate the Policy's strategic vision, mission, and guiding principles. The Summit succeeded in generating high-level consensus around inclusivity, diversification, and sustainability, which now underpin the Policy's Strategic Goals. It also provided a rare platform for dialogue between policymakers and industry. However, participants noted that while the Summit was effective in setting broad direction, more space could have been given to detailed sector-specific discussions. These gaps were later addressed in the thematic and sectoral meetings. Importantly, the Summit helped consolidate political and stakeholder buy-in, creating a shared mandate for policy development.

Thematic and Sectoral Meetings followed, focusing on the marine and yachting sector, accommodations and hospitality providers, food and beverage operators, event organisers, and the creative industries. The objective of these meetings was to generate precise, actionable recommendations tailored to each subsector's unique needs. They met this objective by producing detailed proposals, including establishing reef restoration funds, hosting culinary festivals, introducing grading and certification frameworks, and strengthening procurement linkages among hotels, farmers, and fishers. A noted gap was the need for follow-up mechanisms to sustain industry engagement beyond the consultation stage, but these inputs were invaluable in translating broad principles into concrete policy actions.

Sister Islands Consultations were convened on Virgin Gorda, Jost Van Dyke, and Anegada to ensure that the perspectives of smaller communities were fully integrated. These consultations aimed to address issues of connectivity, equitable access to funding, and diversification of visitor experiences. They met this objective by producing targeted recommendations, such as inter-island ferry subsidies, community tourism funds, and youth apprenticeships. The consultations highlighted gaps in infrastructure and resource allocation that remain challenging, but ensured that the individuality of each island is explicitly recognised in the Policy, moving beyond a one-size-fits-all approach.

Youth Engagement was conducted through schools, the H. Lavity Stoutt Community College, and youth forums. Its objective was to capture the perspectives of young Virgin Islanders as future leaders of the sector. These sessions identified aspirations for career pathways, cultural pride, and ambassadorial roles among youth. The outcomes are now reflected in Priority Actions such as establishing youth advisory committees, apprenticeships, and integrating tourism into school curricula. A gap highlighted by youth participants was the need for clearer long-term career opportunities to prevent brain drain, which the Policy addresses through retention strategies.

Public Service Consultations were held with frontline agencies, including Immigration, Customs, Ports, Health, and Education. These sessions aimed to align service delivery with tourism standards and to foster inter-agency collaboration. They succeeded in generating cross-cutting commitments, including embedding service charters, joint training, and inter-agency memoranda of understanding. However, they also exposed gaps in institutional capacity and resource allocation, which will require continued reform and investment. Nonetheless, the process was instrumental in embedding a whole-of-government approach to tourism policy.

Taken together, these national consultations did more than collect recommendations; they created a shared understanding of tourism's challenges and opportunities, built legitimacy for the Policy, and directly shaped its Strategic Goals and Priority Actions.

Implementation – Staged Stakeholder Engagement

To sustain the legitimacy established during policy formulation, a formal Stakeholder Engagement Plan will operate throughout the implementation period (2026-2036). This plan, to be finalised and published within six months of the Policy's adoption, will specify:

- roles and responsibilities of key stakeholders during implementation
- a schedule of quarterly sector briefings and annual public progress forums
- a structured grievance and feedback mechanism accessible to all community members
- An online transparency portal providing real-time access to implementation progress, procurement opportunities and annual ETIL expenditure reports (see Appendix X: Stakeholder Engagement Plan (2026-2036)).

Synthesis and Drafting Process

All inputs — OECS regional, national consultations, sectoral meetings, Sister Islands dialogues, youth forums, public service discussions, NSDP linkages, and legislative reviews — were systematically categorised under the eight OECS policy pillars. Drafts of the Policy circulated among ministries, statutory bodies, and key industry actors for review, ensuring iterative refinement and validation.

The synthesis process produced a Policy that is wholly stakeholder-led:

- The **Guiding Principles** incorporate stakeholder emphasis on sustainability, inclusivity, innovation, service quality, and visitor care during crises.
- The **Strategic Goals** align with the NSDP outcomes and were drawn from sectoral aspirations (e.g., diversification, climate resilience, youth engagement).

*Each of the **eight pillars and sub-pillars** (Figure 1: OECS Eight-Pillar Framework for the Common Sustainable Tourism Policy.*

- on page 17) contains specific Priority Actions written directly from stakeholder recommendations, ensuring that the Policy is not abstract but operational

The Virgin Islands National Tourism Policy is therefore underpinned by a layered, comprehensive, and inclusive consultative process:

1. Regional alignment through OECS consultations;
2. National validation through the Tourism Summit and sectoral meetings;
3. Community inclusion through Sister Islands and youth dialogues;
4. Public service and legislative integration through inter-agency consultations and comparative legal review; and
5. National coherence through NSDP linkages.

This process guarantees that the Policy reflects not only the Government's strategic direction but also the lived experiences, priorities, and aspirations of Virgin Islanders. In so doing, it ensures legitimacy, broad ownership, and a framework robust enough to guide sustainable tourism development through 2036 and beyond.

Stakeholder Recommendation Disposition Summary

All stakeholder inputs were assessed and categorised as follows:

1. **Adoption Recommendations** – incorporated directly into policy pillars and priority actions, including:
    a. Community tourism development
    b. MSME integration into cruise supply chains
    c. Carrying capacity and visitor management systems
    d. Tourism Satellite Account and data governance

2. **Deferred Recommendation** – to be addressed in strategic and implementation plans:
    a. Detailed quantitative targets
    b. Site-specific infrastructure sequencing
    c. Market-specific airlift expansion plans

3. **Out-of-scope Recommendations** – not included due to policy boundaries of feasibility constraints:
    a. Project-level infrastructure proposals
    b. Private investment-specific requests
    c. Operational matters outside policy scope

Mapping of stakeholder input to policy responses is provided in Appendix VII and Appendix IV.

Strategic Policy Direction and Trade-offs

Strategic Goals

The National Tourism Policy shall be guided by a set of strategic goals that ensure alignment with the OECS Common Sustainable Tourism Policy while reflecting the aspirations and priorities of the Virgin Islands.

Overall Strategic Goals

1. **Sustainable Development** – Ensure that tourism contributes to the achievement of economic, social, cultural, and environmental sustainability across the Territory.
2. **Inclusive Growth** – Expand opportunities for participation and equitable benefit-sharing among residents, communities, and enterprises.
3. **Competitiveness** – Enhance the quality, innovation, and resilience of the Virgin Islands' tourism offerings to maintain global competitiveness.
4. **Cultural Integrity** – Safeguard and promote the Virgin Islands' cultural heritage, traditions, and identity as core elements of the tourism product.
5. **Environmental Stewardship** – Preserve and protect the natural environment, including marine and coastal ecosystems, as the foundation of the tourism economy.
6. **Institutional Strengthening** – Build robust governance, regulatory, and institutional frameworks to support effective tourism planning, management, and delivery.

Specific Strategic Goals for the Virgin Islands

1. **Diversify Tourism Products and Markets** – Expand beyond marine tourism by developing cultural, heritage, culinary, sports, and events-based niches that showcase the Virgin Islands' distinctiveness.
2. **Strengthen the Blue Economy** – Consolidate the Virgin Islands' global positioning as the "Yachting Capital of the World" while ensuring sustainable management of marinas, moorings, reefs, and coastal zones.
3. **Empower Local Communities and MSMEs** – Provide training, financing, and market access to micro, small, and medium enterprises, artisans, and family-owned properties to increase local ownership in the visitor economy.
4. **Youth Engagement and Workforce Development** – Establish pathways for youth participation through advisory committees, vocational training, apprenticeships, and cultural ambassadorships to secure the future labour force.
5. **Upgrade Critical Infrastructure and Access** – Expand airlift through airport runway extension, upgrade ferry terminals, improve inter-island connectivity, and modernise tourism facilities such as Prospect Reef, West End, and key beaches.
6. **Legislative and Regulatory Reform** – Enact modern legislation to institutionalise standards, licensing, certification, and destination management councils, drawing on comparative models from the Turks and Caicos Islands and Saint Lucia.
7. **Enhance Research, Data, and Monitoring** – Establish a Tourism Satellite Account, improve visitor data collection, and adopt digital platforms for evidence-based policy and investment decisions.
8. **Promote Climate Resilience and Environmental Protection** – Implement beach management plans, expand marine protected areas, address sargassum, and establish environmental insurance requirements for charter vessels.
9. **Strengthen Public–Private Partnerships** – Institutionalise collaboration with industry associations, cruise lines, airlines, and community stakeholders in the design and implementation of tourism strategies.

Each Strategic Goal is associated with at least one SMART outcome target tracked through the Monitoring & Reporting Framework (Appendix VI). The following table provides headline targets.

Strategic Goal	**Headline SMART Target towards 2036**
Sustainable Development	Increased tourism operators meeting sustainability standards by 2036
Inclusive Growth	Increased participation of tourism procurement to local MSMEs by 2036, disaggregated by island
Competitiveness	Top-quartile visitor satisfaction score in OECS benchmarking
Cultural Integrity	Increased certified cultural/heritage tourism products launched by 2036
Environmental Stewardship	Reef health index improvement by a measurable margin, established by MENRCC/NPT within two years of the policy's approval
Institutional Strengthening	DMC to be operational within a year of the policy's approval,

Strategic Goal	Headline SMART Target towards 2036
Data & Evidence	TSA will be published as soon as the compilation is completed, Performance Dashboard will be live as soon as the first datasets are available

Strategic Consideration: Balancing Cruise Tourism and Luxury Tourism

The Virgin Islands' tourism sector stands at a critical crossroads, defined by two long-standing yet competing visions: cruise tourism and luxury, boutique tourism. Both have contributed to the sector's development, and both remain vital to its future. Cruise tourism, particularly through cruise arrivals and day-trippers, sustains hundreds of livelihoods and provides consistent volumes for local businesses. Luxury and boutique tourism, by contrast, elevates the Territory's brand, generates higher per-visitor spending, and places lower strain on fragile environments and infrastructure.

The challenge for policy-makers is not to choose one model over the other, but to achieve a sustainable balance that maximises benefits and mitigates risks. Cruise tourism carries significant pressures on infrastructure, services, and natural sites—most visibly at The Baths National Park, which must simultaneously serve cruise passengers and overnight guests. Luxury and boutique tourism risks being overshadowed if unmanaged congestion and environmental stress diminish the exclusivity and tranquillity sought by high-value visitors.

This Policy therefore recognises the coexistence of both segments as strategic and necessary. The approach will be one of careful market segmentation, where visitor flows are better managed, the carrying capacity of sensitive sites is respected, and investment is channelled into differentiated experiences across the islands. Virgin Gorda will prioritise boutique and heritage-based experiences, supported by robust visitor management systems at flagship sites. All visitor management and regulatory measures shall be designed and implemented to avoid unintended negative impacts on economic viability, visitor experiences, and sector competitiveness.

Anegada will focus on eco- and culinary tourism at controlled volumes, protecting its pristine environment. Jost Van Dyke will continue to host mass-event tourism, but with upgraded infrastructure, environmental safeguards, and safety systems. Tortola, as the Territory's primary gateway, will balance both cruise and boutique markets through urban revitalisation, cultural programming, and improved dispersal mechanisms.

By elevating this balance as a strategic consideration, the Policy signals that cruise and luxury tourism are not opposing forces but complementary pillars of resilience and inclusivity. The balance will be operationalised through the eight strategic pillars, including carrying capacity studies under Biodiversity and Ecosystem Protection (Pillar 5), niche market development under Product and Niche Market Development (Pillar 4), and dispersal and management mechanisms under Destination Management (Pillar 7). In this way, the Policy establishes a clear direction that protects the Virgin Islands' reputation, sustains livelihoods, and secures the Territory's place in a competitive global market.

To operationalise the delicate balance between cruise and luxury tourism, the Government will first commission island-specific carrying capacity and visitor flow studies for Virgin Gorda, Jost Van Dyke, Anegada, and Tortola. These studies will provide the evidence base for managing visitor volumes, identifying infrastructure needs, and safeguarding fragile environments. The findings will guide the introduction of tailored visitor management systems at high-traffic sites such as The Baths and White Bay. These systems will include measures such as daily quotas, timed entry slots, and differentiated service options to ensure that large numbers of visitors can be accommodated without diminishing the exclusive experiences sought by high-value overnight guests.

Building on this evidence base, a Market Segmentation Strategy will be developed to clearly define how the Virgin Islands positions itself within both the cruise and luxury segments. This strategy will clarify target visitor profiles, set out tailored marketing approaches, and provide direction on product development and investment priorities. Differentiation will be central to this process. Virgin Gorda can focus on boutique and heritage-based experiences supported by strong visitor management frameworks; Anegada can be positioned for eco- and culinary tourism at controlled volumes; Jost Van Dyke can continue to welcome event-driven and high-volume tourism, supported by upgraded infrastructure, safety systems, and environmental safeguards; while Tortola, as the Territory's gateway, can maintain a balanced model, combining cruise tourism with cultural programming and boutique offerings.

These island-specific approaches will be reinforced through targeted infrastructure investments, including ports, trails, restrooms, and transport systems, ensuring that amenities keep pace with the chosen segmentation strategies. Funding will be tied to site usage, tourism levies, and innovative financing mechanisms to guarantee sustainability. By embedding these measures across the islands, the Government will create a managed balance between cruise and luxury tourism that sustains livelihoods, protects natural and cultural assets, and strengthens the Virgin Islands' reputation as both a welcoming and exclusive destination.

Options Appraisal Approach

Effective policy implementation requires disciplined, evidence-based decision-making to ensure that limited public resources are directed toward interventions that deliver the greatest economic, social, and environmental value. This section establishes a structured approach for assessing alternative options, managing trade-offs, and ensuring that all major tourism-related initiatives are grounded in transparency, accountability, and value for money.

By applying a consistent appraisal framework, the Government strengthens decision-making quality, reduces the risk of suboptimal investments, and ensures that tourism development aligns with national priorities, fiscal constraints, and long-term sustainability objectives.

The Options Appraisal Approach provides a structured, transparent methodology for evaluating alternative policy, investment, and implementation options before decision-making. It ensures that all major tourism-related interventions are assessed against clearly defined criteria, including

impact, cost-effectiveness, feasibility, equity, and time to deliver, enabling the identification of the most appropriate and sustainable course of action.

The Options Appraisal Approach shall be applied to all flagship interventions identified under the Strategic Pillars. This includes, but is not limited to, the Tourism Act, Tourism Satellite Account, Destination Management Council, Prospect Reef redevelopment, Sister Islands ferry subsidisation, Marine Protected Area expansion, digital permitting systems, Environmental and Tourism Improvement Levy reallocation, workforce certification framework, UNESCO nomination programmes, and the MSME tourism finance window.

No tourism-related Cabinet submission shall proceed without an options appraisal and cost-benefit analysis in accordance with this framework. Each appraisal will include:

- A do-nothing baseline with projected costs of inaction
- At least two alternative delivery options with indicative cost ranges and benefit estimates
- A go/no-go recommendation informed by a multi-criteria scoring matrix (impact, cost, feasibility, time to deliver, equity)
- The preferred option with risk mitigation measures.

Appraisal findings shall be published in the Public Reporting Framework and tabled with the relevant Cabinet submission. (See **ETIL Governance and Transparency**

The Environmental and Tourism Improvement Levy (ETIL) shall be managed as a dedicated mechanism to support tourism development, environmental management, and destination enhancement.

The Government shall ensure transparency and accountability in the allocation and use of ETIL revenue through:

- Annual public reporting of ETIL collections and expenditure
- Clear linkage between EITL-funded projects and tourism policy priorities
- Defined allocation principles supporting infrastructure, environmental protection, and product development
- Integration of ETIL planning with the Medium-Term Fiscal Plan and Public Reporting Framework

ETIL resources shall be allocated in a manner that maximises long-term sector value, sustainability, and public benefit.

Appendix XI: Options Appraisal Framework for Flagship Interventions on page 171).

Evidence-Based Tourism Policy and Strategic Direction

Sound tourism policy requires a strong analytical foundation to ensure that strategic choices are informed, targeted, and responsive to changing conditions. This section establishes the commitment to grounding tourism development in reliable data, rigorous analysis, and validated insights, ensuring that policy direction is not driven solely by perception or anecdotal input.

By embedding evidence-based decision-making at the core of this Policy, the Government enhances strategic clarity, improves resource allocation, and strengthens the ability to respond to market dynamics, environmental constraints, and national development priorities.

The implementation of this Policy shall be supported by a robust evidence base that combines quantitative data, market intelligence, and qualitative stakeholder input to guide decision-making and strategic direction.

Tourism policy development and implementation shall be informed by:

- The Tourism Satellite Account (TSA), providing data on tourism's contribution to GDP, employment, and value retention
- Market research and demand analysis, including visitor profiles, source markets, spending patterns, and travel behaviours
- Carrying capacity and environmental assessments to guide sustainable use of natural and built assets
- Operational data from key tourism stakeholders, including accommodation providers, transport operators, and marine sector participants

Strategic priorities and interventions shall be based on verifiable data and analysis, ensuring that policy decisions are aligned with market realities, economic outcomes, and sustainable objectives.

Target Market and Segment Definition

A clear and focused understanding of priority markets and visitor segments is essential to ensuring that tourism development is strategic, competitive, and aligned with national objectives. This section establishes the basis for identifying and targeting the types of visitors that deliver the greatest economic value, align with the Territory's capacity, and support sustainable growth.

By defining and prioritising specific market segments, the Government ensures that tourism policy, investment, and promotion are directed toward opportunities that maximise returns, enhance visitor quality, and strengthen the sector's overall performance and resilience.

The Government shall define and periodically update priority tourism markets and visitor segments based on data-driven analysis. These segments shall be identified using criteria such as

visitor yield, length of stay, travel behaviour, and alignment with the Territory's infrastructure capacity and development objectives.

Market segmentation shall inform all aspects of tourism policy, including airlift strategy, product development, marketing, and investment prioritisation, ensuring a coherent and targeted approach to sector growth.

Tourism Research and Data Framework

Continuous improvement in tourism policy and performance requires a systematic approach to research, data collection, and analysis. Establishing a framework for generating reliable, timely, and relevant information to support strategic planning, performance monitoring, and evidence-based decision-making across the tourism sector is key to developing the policy.

By strengthening research capacity and integrating data systems, the Government enhances its ability to anticipate trends, evaluate outcomes, and respond effectively to emerging opportunities and risks, ensuring that tourism development remains informed, adaptive, and aligned with national priorities.

A structured framework for tourism research and data will be established to support continuous policy improvement and strategic planning. The framework shall include:

- Regular collection and publication of tourism statistics and performance indicators
- Commissioning of targeted research studies on market trends, visitor behaviour, and sector performance
- Integration of data systems across agencies to ensure consistency and reliability
- Use of digital platforms to support real-time monitoring and analysis

All data used for policy and decision-making shall be transparent, verifiable and subject to appropriate validation processes.

Policy Hierarchy and Strategy Boundaries

All strategies and implementation plans developed under this Policy shall be consistent with the policy position, principles, and constraints established herein and shall not contradict or dilute them.

- Policy defines direction, principles, and national commitments
- Strategy defines how objectives will be achieved
- Implementation plan defines when, where, and by whom actions are delivered

Where any provision of the strategy or implementation plan conflicts with this Policy, the Policy shall take precedence.

Tourism Economic Value Framework

Tourism is not measured only by visitor numbers but also by the value it generates across the economy. Hence, the use of a Tourism Economic Value Model provides a structured framework for understanding, measuring, and optimising how tourism generates, distributes, and retains economic value across the Virgin Islands. The model maps the full tourism value chain, from visitor arrival and expenditure through to local supply linkages, employment, and reinvestment, enabling evidence-based decisions that balance growth, sustainability, and equity. The tourism economic value model focuses on three interconnected outcomes: visitor expenditure, local economic retention, and multiplier effects.

Visitor expenditure is distributed across accommodation, transportation, food services, entertainment, retail, and excursions. Therefore, increasing visitor yield is a primary strategic objective. Increasing local economic retention will strengthen domestic enterprise development, employment creation and government revenue.

The effects of the tourism multiplier will occur when tourism spending circulates through other sectors, such as agriculture, fisheries, construction, transportation, financial services, and creative industries. The policy therefore adopts a strategic objective of shifting from a volume-based tourism model to a high-value tourism model, supported by stronger local supply chains and higher visitor yield.



Figure 2: Tourism Value Creation Framework.

Tourism Growth, Yield and Managed Volume Framework

Baseline Metrics

In parallel with the TSA, MTCSD will develop a Tourism Growth and Yield Model. The Tourism Growth and Yield Model will provide a structured framework for guiding tourism expansion based on economic value, capacity constraints, and sustainability considerations. It integrates visitor volumes, visitor yield, length of stay, and value retention to assess the quality and impact of tourism growth, enabling the Government to balance demand with infrastructure readiness, environmental thresholds, and national development priorities.

This model translates policy intent into quantified outcomes to guide investment prioritisation, enforce carrying capacity, and inform fiscal planning.

Targets

This Policy establishes the strategic direction for tourism development and shall be supported by detailed targets and performance benchmarks to be defined within the strategy, plan and implementation documents. These targets shall be:

- Aligned with national priorities, including the National Sustainable Development Plan, the Medium-Term Sustainable Development Strategy, the Medium- Term Fiscal Plan, and broader economic and environmental objectives.
- Focused on value over volume, prioritising visitor yield, length of stay, quality of experience, and local value retention rather than solely visitor numbers.
- Evidence-based and adaptive, informed by data from the Tourism Satellite Account, monitoring frameworks, and market intelligence, and subject to periodic review and adjustment
- Disaggregated where appropriate, to reflect differences across islands, tourism segments, and stakeholder groups, ensuring equitable and inclusive outcomes.
- Integrated across sectors, linking tourism performance with infrastructure, environmental management, labour market outcomes, and investment planning.
- Supported by a clear accountability mechanism, with responsible agencies identified and performance tracked through the national monitoring and reporting framework.

Specific quantitative targets, baselines, and timelines shall be defined within:

- Medium-Term Tourism Strategy and Action Plans
- Annual Work Plans and Budget Estimates
- The Monitoring and Reporting Framework supporting this Policy

Tourism Demand Strategy and Market Positioning

The long-term competitiveness and sustainability of the Virgin Islands' tourism sector depend on a clearly defined and actively managed demand strategy. Tourism growth shall be guided by a deliberate approach to market selections, visitor segmentation, and positioning, aligned with the Territory's infrastructure capacity, environmental limits, and economic objectives.

The Government established the following policy direction:

- Tourism marketing and airlift development shall prioritise high-value visitor segments characterised by longer stays, higher per capita expenditure, and lower environmental impact
- Source markets shall be strategically selected based on accessibility, yield potential, resilience to external shocks, and alignment with the Virgin Islands' product offering
- Cruise tourism shall be managed as a complement segment, with defined structured dispersal to minimises congestion and protect the stayover experience
- Visitor segmentation shall guide product development, pricing strategies, and investment decisions across the tourism sector
- The Virgin Islands shall position itself as a premium, low-density, high-quality destination, with a clear brand identity that differentiates it from mass-market Caribbean destinations.

Market intelligence, data analytics, and Tourism Satellite Account outputs shall be used to continuously assess visitor behaviour, spending patterns, and market performance. These insights shall inform adaptive marketing strategies, airlift planning, and policy adjustments over time.

Detailed market strategies, segmentation frameworks, and branding approaches shall be defined through supporting tourism strategies and implementation plans.

Tourism Value Retention Framework

This section forms part of the broader Tourism Economics Framework and should be read in conjunction with the Tourism Growth and Yield Model and the fiscal integration mechanism. While tourism contributes significantly to economic activity, a portion of visitor expenditure leaks from the domestic economy through imports, foreign ownership structures, and limited local supply chain integration. To ensure inclusive and sustained growth, the Government shall pursue a targeted strategy to increase domestic value retention.

Value Retention Direction

Tourism is a primary driver of economic activity within the Virgin Islands; however, the full benefits of this activity depend on the extent to which tourism-generated expenditure is retained within the domestic economy. This section establishes the Policy's approach to strengthening economic linkages, reducing leakages, and ensuring that tourism contributes meaningfully to local income generation, business development, and long-term economic resilience.

By prioritising value retention, the Government seeks to maximise the economic impact of tourism across sectors and communities, ensuring that growth translates into broad-based and sustainable benefits for the Territory.

This Policy prioritises increasing the proportion of tourism-generated expenditure retained within the Virgin Islands economy. Rather than prescribing fixed targets, the Government shall pursue continuous improvement in value retention through strengthened local supply chains, expanded participation in Micro, Small and Medium Enterprises (MSMEs), increased local employment, and greater integration of domestic goods and services into the tourism sector.

Progress in value retention shall be measured through the Tourism Satellite Account (TSA) and supporting monitoring frameworks, with specific benchmarks, baselines, and timelines defined within medium-term strategies, annual plans, and budget processes.

Other policy targets:

- **Local procurement share (food, fisheries, cultural services):** Priority categories could include fresh produce, seafood, cultural entertainment services, event services, and selected construction input, where viable
- **Share of Cruise Excursion Revenue Retained Locally:** This requires certified local excursion operators, reduced dependency on cruise-line-owned shore packages, and transparent revenue tracking

- **MSME Participation in Cruise Flows:** cruise passengers engage with certified MSMEs to be done through pre-booked local excursions, designated vendor zones, certified experience directors, and dispersal programmes

Strategic Instruments

To achieve these targets, the Government shall implement the following measures:

1. **Local Procurement Integration**
    a. Strengthen linkages between tourism operators and domestic agriculture, fisheries, and creative industries
    b. Promote certified local sourcing programmes for hotels, villas, and cruise excursions

2. **Cruise Value Capture Reform**
    a. Expand locally operated excursion offerings
    b. Increase participation of certified MSMEs in cruise supply chains
    c. Improve geographic dispersal of cruise spending beyond primary corridors

3. **Development Agreement Localisation Clauses**
    a. Require measurable local employment, procurement, and skills transfer provisions in major tourism investments
    b. Mandate periodic reporting on localisation commitments

4. **MSME Standards and Certification Support**
    a. Provide technical assistance to small operators to meet quality, safety and licensing standards
    b. Improve access to formal tourism markets through certification

5. **Import Substitution Where Economically Viable**
    a. Identify high-leakage goods and services with domestic production potential
    b. Encourage phased local substitution where feasible without compromising quality

Measurement and Accountability

Tourism value retention shall be reviewed annually through the TSA and reported in the Periodic Tourism Performance Report. Adjustments to policy instruments shall be made where leakage remains structurally high.

Tourism Fiscal Integration Framework

As one of the key pillars of the Virgin Islands' economy, tourism should be governed as a measurable, performance-driven economic sector within the national planning and fiscal

framework. Linking tourism economics to fiscal planning established the mechanism for quantifying, monitoring, and integrating tourism activity into fiscal decision-making, ensuring that growth is aligned with economic value, public investment efficiency, and long-term sustainability.

By linking tourism performance directly to budgeting, investment planning, and resource allocation, the Government ensures that tourism development is not only strategically guided but also fiscally disciplined and evidence-based.

Tourism-related expenditures and investments shall be guided by the Medium-Term Tourism Fiscal Envelope, ensuring alignment between policy ambitions and available financial resources. Tourism, therefore, shall be treated as a measurable economic sector and integrated into national fiscal planning. Fiscal integration should include:

1. **Tourism Satellite Account (TSA)** – The Government shall operationalise and publish a periodic Tourism Satellite Account to quantify tourism's contribution to GDP, employment, revenue generation, and value retention. Submission to tourism statistics shall be mandatory for licensed operations under the Tourism Act. The TSA shall provide annual updates to the Tourism Growth and Yield Model for tabling alongside the Budget Estimates.

2. **Tourism Data Governance Protocol** – minimum rules to include: purpose and lawful basis for data requests, method disclosure where data informs decisions, confidentiality and aggregation standards, validation window with affected operator before policy measures are applied, and retention and access rules.

3. **Integrated with Medium-Term Fiscal Planning** – Tourism performance indicators, including visitor volumes, visitor yield, length of stay, and value retention, shall be embedded in the Medium-Term Fiscal Framework. These indicators shall guide revenue forecasting, capital investment sequencing, infrastructure prioritisation, and environmental management allocations.

4. **Medium-Term Tourism Fiscal Envelope** – the Government will publish a 3 to 5-year OPEX and CAPEX envelope for tourism policy implementation, staffing and entity funding assumptions (MTCSD, BVITB, VIFFC, DMC support), ETIL allocation and any reprogramming, PPP exposure and contingency liability caps. The rolling 3 to 5-year tourism fiscal envelope will outline projected expenditure, funding sources, and institutional financing requirements.

5. **Mandatory Cost-Benefit Analysis** – All major tourism-related public investments, incentives, and Development Agreements shall be subject to a formal Cost-Benefit Analysis prior to approval. The analysis shall assess economic, fiscal, environmental, and distributional impacts, and demonstrate value for money, alignment with national development priorities, and long-term sustainability. All tourism-related capital investments and development proposals shall align with the built environment policy direction, including design, scale, and spatial integration requirements.

No major tourism intervention shall proceed without this process. All major tourism policy decisions, investments, and incentives shall be subject to Cabinet approval, supported by:

- Cost-Benefit Analysis
- Options Appraisal
- Fiscal impact assessment aligned to the Medium-Term Fiscal Framework.

Digital Systems and Data Governance Framework

Effective tourism governance requires integrated digital systems and enforceable data governance mechanisms to support measurement, monitoring, and decision-making. This framework establishes the system, standards, and protocols required to ensure that tourism data is consistently collected, validated, and used across the Government. Digital systems shall serve as the primary interface for licensing, compliance monitoring, statistical reporting, and performance tracking across the tourism sector.

Relevant institutions shall ensure coordinated implementation of demand management, built environment controls, quality standards, and data-driven decision-making across the tourism sector.

Core Digital Systems

The following systems shall be established or integrated:

1. **Tourism Operator Portal (Single Entry System)**
   A unified digital platform for
   a. Licensing
   b. Renewals
   c. Fee payments
   d. Mandatory statistical reporting submissions
   e. Compliance tracing and status verification

2. **Tourism Data Repository**
   A secure, centrally governed data environment consolidating:
   a. Visitor arrival data
   b. Accommodation statistics
   c. Cruise and marine activity data
   d. Procurement and value retention indicators

3. **Tourism Performance Dashboard**
   A structured reporting interface providing real-time and periodic updates:
   a. Visitor volumes
   b. Satisfaction indicators
   c. Compliance rates
   d. High-level economic performance metrics

4. **Cabinet Tourism Dashboard**
   A restricted-access dashboard providing disaggregated data:
   a. Full disaggregated tourism statistics
   b. Fiscal contribution indicators
   c. Operational tourism data, including TSA outputs
   d. Site capacity exceedance report

Tourism Satellite Account (TSA) delivery plan

The Government shall establish and institutionalise a Tourism Satellite Account (TSA) as the primary instrument for measuring tourism's contribution to the economy. The TSA will produce internationally comparable estimates of Tourism Direct GDP and value added, and shall serve as the core evidence base for policy, fiscal planning, and investment decision-making. It shall also serve as a core input into the Monitoring and Reporting Framework set out in Appendix VI

Given the current statistical capacity, the TSA shall be implemented through a phased approach. The initial phase shall focus on producing a first TSA estimate using existing national accounts data and a comprehensive Visitor Expenditure Survey covering both overnight and cruise visitors. This will enable the calculation of tourism ratios and the derivation of Tourism Direct GDP.

The second phase shall strengthen data systems and expand the scope of the TSA through regular survey implementation, improved supply-side data, and the inclusion of additional indicators such as employment and investment. The long-term objective shall be full TSA integration based on a Supply and Use Table, ensuring full alignment with international standards.

The Central Statistics Office shall lead TSA compilation in coordination with the Ministry of Tourism, Culture and Sustainable Development and relevant agencies. Submission of required data by licensed tourism operators shall be mandatory under the Tourism Act.

TSA outputs shall be integrated into national planning and fiscal systems, including the Medium-Term Fiscal Framework, and shall directly inform the Key Performance Indicators, baselines, and outcome targets. Tourism performance derived from the TSA shall be reported through the annual Tourism Performance Report and used to assess progress against policy objectives, guide resource allocation, and support Cabinet-level decision-making.

Data Governance and Compliance

Data governance shall be anchored in the Tourism Act and supported by clear protocols governing data collection, validation, sharing and use. All licensed tourism operators shall be required to submit data through approved digital systems. Compliance with data submission requirements shall form a condition of licensing and continued operation within the sector. The framework shall include:

- Standardised data definitions and reporting formats
- Validation and quality assurance procedures
- Data-sharing protocols across Government agencies
- Confidentiality and publication standards

Non-compliance with data reporting requirements shall result in restrictions on licensing incentives and participation in official tourism programmes.

Strategic Outcome

This Framework establishes a fully integrated digital and data system linking sector operations, economic measurement, and performance management. It enables real-time monitoring, strengthens regulatory enforcement, and ensures that tourism policy is implemented through a data-driven, accountable, and adaptive approach.

Strategic Pillars and Policy Commitments

The National Tourism Policy is structured around strategic pillars and policy goals that collectively define the long-term priorities for the tourism sector. These pillars are derived from the consultative processes undertaken nationally and regionally, including stakeholder meetings across the Virgin Islands, the Virgin Islands Tourism Summit, and the OECS Common Sustainable Tourism Policy framework. They represent the areas of greatest importance identified by Government, industry, and communities to ensure that tourism continues to drive national development.

Introducing the OECS Strategic Pillars

The National Tourism Policy of the Virgin Islands is deliberately anchored in the Organisation of Eastern Caribbean States (OECS) Common Sustainable Tourism Policy (CSTP), which provides the regional framework for building sustainable, resilient, and innovative tourism economies. The OECS framework is structured around eight thematic pillars: Inclusive Growth and Income Distribution; Blue Tourism; Climate Change and Risk Resilience; Product and Niche Market Development; Biodiversity and Resource Conservation; Access and Transport Services; Tourism Destination Management; and Institutional Capacity. These pillars form the "policy house" of the region, where sustainability and evidence-based decision-making are the foundation, and inclusive economic development is the overarching goal.

By adopting this framework, the Virgin Islands ensures that its national policy is both regionally coherent and locally grounded. The OECS pillars serve as organising windows through which the Territory's specific challenges and opportunities can be addressed. For example, the pillar on Inclusive Growth and Income Distribution translates into targeted actions for community tourism, small and medium enterprise development, and youth engagement, ensuring that the benefits of tourism extend to all communities and across generations. Similarly, the emphasis on Blue Tourism reflects the Virgin Islands' global leadership in marine and yachting tourism, aligning the

national policy with regional priorities for reef restoration, coastal planning, and marine protected areas.

The framework also allows for adaptation to local conditions. In the Virgin Islands, sustainability is interpreted not only in environmental and social terms but also through the lens of service quality and the visitor journey. As highlighted in the consultative process, the national policy explicitly links sustainability to guest experience—from pre-arrival engagement through to departure—ensuring that high service standards are integral to sustainable growth. Likewise, the regional pillars on climate resilience and biodiversity conservation are put into practice through site-specific carrying capacities, statutory eco-standards, and the strategic use of the Environmental and Tourism Levy to finance resilience-building initiatives.

Importantly, aligning with the OECS framework positions the Virgin Islands within a regional community of practice. This facilitates knowledge sharing, standard harmonisation, and collective advocacy in global forums on issues such as climate change, blue economy opportunities, and sustainable financing. It also ensures that the national policy contributes directly to the implementation of the Revised Treaty of Basseterre, which recognises tourism as a cornerstone of the Eastern Caribbean Economic Union.

The strategic pillars provide the thematic structure for the Policy, addressing the central challenges and opportunities facing the sector — from inclusive growth and blue tourism to climate resilience, product diversification, biodiversity protection, improved access, destination management, and institutional strengthening. Each pillar is accompanied by policy goals that set out the commitments and measurable outcomes the Government will pursue to translate broad priorities into action.

Together, these pillars and goals serve three critical functions:

- They align tourism development with national outcomes, particularly the National Sustainable Development Plan (NSDP 2036).
- They ensure that tourism growth is sustainable, inclusive, and resilient, embedding environmental stewardship, cultural integrity, and social equity.
- They provide a coherent framework for monitoring and accountability, enabling progress to be tracked transparently and outcomes to be reported to Cabinet, Parliament, and the public.

By adopting this structured approach, the Virgin Islands affirms its commitment to developing tourism that is not only globally competitive but also locally grounded, environmentally responsible, and socially equitable. The pillars and goals outlined in the following sections form the foundation for a tourism sector that will continue to contribute significantly to the Territory's prosperity through 2036 and beyond.

Built Environment and Tourism Development

The build environment is a central determinant of the Virgin Islands' tourism product quality, destination identity, and long-term sustainability. Tourism development shall be guided by a structured approach to the design, scale, and integration of the built environment, ensuring alignment with national development objectives and the Territory's environment and cultural assets.

The Government establishes the following policy direction:

- Tourism-related development shall reflect the architectural character, cultural identity and spatial context of the Virgin Islands
- Development scale and density shall be managed to avoid overdevelopment and preserve destination quality
- All tourism infrastructure and facilities shall align with environmental carrying capacity, climate resilience standards, and coastal protection requirements
- The design and provision of public infrastructure, amenities, and spaces shall enhance the overall visitor experience and support destination competitiveness
- Tourism development shall be integrated with community planning priorities, ensuring that local communities benefit from and are not displaced by tourism expansion.

All tourism-related construction and physical development shall be subject to national physical planning legislation, environmental approvals, and infrastructure readiness requirements. Tourism-related development shall not exceed the defined environmental and infrastructure carrying capacity threshold.

Detailed development standards, design guidelines, and spatial planning controls shall be defined through supporting legislation, planning instruments, and implementation strategies.

Tourism Product Quality and Standards Framework

The competitiveness of the Virgin Islands as a high-value tourism destination depends on the consistent delivery of high-quality products, services, and visitor experience across the entire tourism value chain.

The Government established a structured approach to tourism quality assurance, ensuring that all tourism-related services and facilities meet defined standards aligned with the Territory's positioning as a premium destination.

The Government establishes the following policy direction:

- All tourism operators shall be subject to licensing, certification, and compliance requirements aligned with defined quality and service standards
- Minimum standards shall apply across accommodation, transportation, tours, marine services, and visitor-facing businesses to ensure consistency in the visitor experience

- Service quality, safety, and professionalism shall be treated as core regulatory requirements, not discretionary practices
- Continuous improvement shall be promoted through training, capacity building, and performance monitoring across the tourism workforce
- Visitor feedback, inspection systems, and performance data shall be used to assess and enforce quality standards across the sector

A coordinated national quality assurance framework shall be developed to align standards, inspection regimes, and enforcement mechanisms across all relevant agencies. Compliance with quality standards shall be incorporated into licensing, certification, and regulatory enforcement mechanisms.

Detailed standards, certification systems, and service benchmarks shall be defined through supporting regulations, guidelines, and implementation strategies.

Issues - Policy Objectives - Priority Actions Matrix

The Issues-Policy Objectives-Priority Actions Matrix provides a clear line of sight between the challenges identified in the tourism sector and the strategic responses proposed through this Policy. By linking each core issue to specific policy objectives and corresponding priority actions, the matrix ensures that interventions are evidence-based, targeted, and measurable. This approach enhances policy coherence, fosters accountability, and facilitates more effective resource allocation. It also enables stakeholders to easily track how identified deficiencies are being addressed through actionable measures aligned with the Virgin Islands' sustainable tourism vision.

Additionally, the matrix acts as a practical tool for policymakers, planners, and stakeholders to coordinate efforts across ministries, industry partners, and community actors. Visualising the direct connections between problems, objectives, and solutions simplifies complex policy linkages, making implementation more transparent and manageable. Ultimately, the matrix will ensure that the Virgin Islands' tourism policy remains dynamic, adaptive, and responsive, focusing attention and resources where they will have the greatest impact in building a resilient, inclusive and competitive tourism sector.

Pillars

1. Inclusive Growth and Income Distribution

Tourism in the Virgin Islands must be a driver of inclusive development, ensuring that its benefits are distributed equitably across communities, social groups, and economic actors. The consultations made clear that while tourism has brought prosperity, there are gaps in how opportunities are shared—particularly for youth, small businesses, and communities in the Sister Islands. The policy therefore emphasises widening access to economic participation, empowering marginalised groups, and embedding mechanisms that spread the value of tourism throughout the

national economy. This pillar aligns with the OECS framework on Inclusive Growth and Income Distribution and directly supports the National Sustainable Development Plan's outcomes on building an enabling business environment, adaptive social protection, and a diversified and competitive economy.

Equity Impact Assessment

Sustainable tourism development requires that economic growth is balanced with fairness, inclusion, and equitable distribution of benefits across the Territory. The framework for systematically assessing how tourism policies and investments affect different communities, sectors, and groups, ensuring that development outcomes are shared and aligned with national priorities.

By embedding equity considerations into decision-making, the Government strengthens the social and economic impact of tourism, supports balanced development across islands, and ensures that opportunities for participation and benefit are accessible to all segments of society.

The Equity Impact Assessment (EqIA) provides a structured framework for assessing the distributive effects of tourism policies, investments, and regulatory measures across different population groups, geographic areas, and segments of the tourism economy. It ensures that the benefits and costs of tourism development are evaluated not only in aggregate terms but also in relation to their impact on income distribution, access to opportunities, and participation across the Territory.

The EqIA is a key mechanism for embedding fairness, inclusivity, strengthening the alignment of the National Sustainable Development Plan, and balancing development into tourism decision-making, which supports the commitment to inclusive growth by ensuring that interventions are assessed for their impact on Sister Islands committees, Micro, Small and Medium Enterprises, the informal sector, and vulnerable groups.

An EqIA will be conducted for selected Pillars, including MSME finance windows, vendor zone policies, pioneer status reform, and community tourism fund allocations. The EqIA will disaggregate projected impacts by island (Tortola, Virgin Gorda, Anegada, Jost Van Dyke), gender, age cohort, and formal/informal sector status, and will specify mitigation or compensation measures where negative distributional effects are identified.Appendix VI: Delivery-Based Monitoring & Reporting Framework . (See Appendix XII: Equity Impact Assessment (EqIA) Framework on page 174).

1.1. Community Tourism

Stakeholders strongly voiced the need for greater emphasis on community-based tourism. Many communities feel disconnected from the formal tourism economy despite possessing rich cultural

assets, unique traditions, and local stories that can enhance the visitor experience. The development of homestays, cultural trails, heritage tours, and craft markets was proposed to embed tourism activity at the community level. Policy direction will therefore encourage the creation of certified community tourism enterprises, ensure that local residents can design and manage their own offerings, and provide training in hospitality, cultural interpretation, and digital marketing. By doing so, the Virgin Islands will diversify its product base while empowering communities to capture a greater share of the tourism value chain.

Priority Actions:

1.1.1. Allocate resources to support Community Tourism Development through the establishment of a Community Tourism Fund and provide grants and technical support for local festivals, heritage trails, village tours, and storytelling initiatives across districts.
1.1.2. Integrate community-based tours (e.g., East End/Long Look heritage, Jost Van Dyke cultural sites) into national cruise and overnight visitor itineraries.
1.1.3. Implement revenue-sharing models so that park fees, cruise head taxes, and event revenues are channelled into district-based improvements.
1.1.4. Provide training and accreditation for community guides, cultural performers, and artisans, ensuring quality assurance and integration into the formal visitor economy.
1.1.5. Establish a mechanism for cruise tourism to generate direct benefits for local vendors and MSMEs, including guaranteed market spaces at terminals and access to excursion contracts.
1.1.6. Develop a Cruise Vendor Support Programme to provide training, micro-finance, and infrastructure support to small businesses in cruise hubs.
1.1.7. Embedding community excursions and heritage tours into cruise packages, ensuring revenue flows to Sister Islands and cultural groups/

1.2. MSME and Entrepreneurship Development

Small businesses are the backbone of the Virgin Islands' economy, yet many encounter barriers in accessing finance, training, and visibility in the tourism sector. The consultations highlighted the difficulties faced by artisans, food vendors, excursion operators, and family-run accommodations in scaling their businesses and meeting quality standards. Policy intervention will strengthen the enabling environment for MSMEs by introducing tailored financing instruments, business incubation services, and simplified licensing and certification schemes. This approach draws lessons from best practice, while responding to stakeholder calls for government-backed support to ensure that small businesses can compete fairly and thrive within the visitor economy.

Priority Actions:

1.2.1. Enact a Tourism MSME Incentive Policy, granting preferential access to concessions, fiscal incentives, and technical support for local entrepreneurs.
1.2.2. Establish dedicated vendor zones and concessions at all major events, cruise terminals, and national attractions to ensure MSMEs benefit directly from visitor spending.

1.2.3. Support the creation of an Agri-Food Innovation Fund providing micro-grants and incubation services for small farmers and fishers entering the agritourism supply chain.
1.2.4. Facilitate market access agreements between small guesthouses, boutique properties, and OTAs (online travel agencies), providing digitisation support to expand reach.
1.2.5. Implement a procurement policy that prioritises MSME and community suppliers for government tourism contracts, catering, and event services.
1.2.6. Provide business development training and mentorship for entrepreneurs in eco-tourism, hospitality, tour guiding, and creative industries, tied to certification and licensing requirements.
1.2.7. Strengthen MSME participation in cruise tourism through transparent stall allocations, improved vendor infrastructure, and fair contracting with cruise operators.

1.3. Youth Engagement

The role of youth in shaping the future of tourism was a recurrent theme in the stakeholder meetings. Participants underscored the importance of exposing young people to career pathways in tourism—particularly in emerging areas such as marine services, digital marketing, culinary arts, and event management. The policy therefore commits to establishing structured training and apprenticeship programmes in collaboration with H. Lavity Stoutt Community College and the Public Service Learning Institute, while also creating youth ambassador schemes to strengthen representation and leadership. By integrating youth into decision-making and supporting their entrepreneurial ventures, the Virgin Islands will secure the next generation of skilled tourism professionals and innovators.

A critical dimension of this commitment is the explicit focus on talent retention. Too often, young Virgin Islanders gain valuable qualifications and experience only to seek opportunities abroad, thereby draining the sector of skills and leadership. To counter this, the Policy will link youth engagement initiatives with long-term career development strategies that create viable futures within the Virgin Islands. This will include mapping clear career pathways in tourism and hospitality, incentivising businesses to retain and promote local talent, and expanding access to financing and mentorship for youth-led enterprises. Furthermore, partnerships with regional and international institutions will ensure that Virgin Islands youth receive global exposure while being anchored to opportunities at home, including scholarships tied to return-service agreements and recognition of entrepreneurial achievement through national tourism awards. By aligning training, entrepreneurship, and career progression, the Virgin Islands will transform youth engagement from a temporary initiative into a sustainable mechanism to keep young people invested in the future of the Territory's tourism industry.

This focus on retention and professional development also strengthens the Policy's alignment with Pillar 1: Inclusive Growth and Income Distribution. By embedding strategies that keep Virgin Islanders in tourism and create pathways to leadership, the Policy ensures that the benefits of growth are shared equitably across generations, reducing brain drain and building a resilient, home-grown workforce.

Priority Actions:

1.3.1. Establish Youth Tourism Advisory Committees and appoint youth representatives to statutory boards and planning bodies.
1.3.2. Launch school tourism clubs and integrate tourism awareness and cultural heritage into curricula at primary, secondary, and tertiary levels.
1.3.3. Expand apprenticeships and internships within the accommodations, cruise, and marine sectors to create career pathways for young people.
1.3.4. Fund youth-led projects in sports tourism, culinary arts, and creative industries as avenues for entrepreneurship and destination branding.
1.3.5. Integrate customer service certification (CXC and HLSCC-based) into high schools and tertiary institutions, making it a precondition for tourism-related employment.
1.3.6. Reintroduce patriotic and cultural education in schools (national heroes, pledge, festivals) to instil pride and strengthen youth identity as cultural ambassadors.
1.3.7. Expand mentorship programmes pairing youth with established entrepreneurs, creatives, and tourism leaders.
1.3.8. Introduce retention strategies such as return-service scholarships, local career progression frameworks, and incentives for businesses to invest in the professional growth of young Virgin Islanders.

1.4. Value Chain Linkages

Strengthening linkages between tourism and other productive sectors emerged as a clear priority. Farmers, fishers, and creative industry stakeholders noted that tourism demand often bypasses local suppliers, with imports dominating the supply chain. Policy measures will therefore focus on establishing procurement programmes that prioritise local produce in hotels and restaurants, promoting farm-to-table culinary tourism, and encouraging partnerships between charter companies and local fishers. In addition, the creative industries—music, visual arts, design, and performing arts—will be integrated more deliberately into the visitor economy. This will ensure that tourism stimulates broader economic activity, circulating wealth within the Territory and reducing leakages.

Priority Actions:

1.4.1. Embed tourism service standards across all frontline ministries (Immigration, Customs, Ports, Postal, Health), ensuring visitors experience consistent quality.
1.4.2. Build direct linkages between agriculture, fisheries, and hospitality, supported by a digital Seasonality and Supply Coordination Platform to match farm outputs with chef and event demand.
1.4.3. Institutionalise cross-ministry investment teams (tourism, infrastructure, trade, planning) to coordinate approvals for major tourism projects.
1.4.4. Adopt a “local first” procurement framework for hotels, cruise ships, and festivals, requiring sourcing of food, music, crafts, and services from Virgin Islands suppliers wherever feasible.

1.4.5. Promote joint planning across sports, culture, hospitality, and education sectors to create multi-sectoral festivals and events.
1.4.6. Provide training for licensing, customs, and immigration officers to align customer service with tourism value-chain expectations.
1.4.7. Incentivise formal contracts between cruise lines and local suppliers, increasing domestic value retention from cruise arrivals.
1.4.8. Support technology adoption for value chain efficiency, such as shared logistics hubs, cold storage, and e-commerce for local suppliers.

Closing Statement for the Pillar

By embedding inclusivity, equity, and participation in the tourism sector, the Virgin Islands will transform its visitor economy into a more resilient, people-centred development engine. Community enterprises, small businesses, youth leaders, and value chain partners will all have structured avenues to benefit, ensuring that tourism's economic footprint extends across all islands and social groups. This approach not only aligns with the OECS regional vision for inclusive growth but also directly responds to the aspirations of Virgin Islanders who have called for tourism to be more accessible, equitable, and locally empowering.

2. Blue Tourism

The Virgin Islands' identity as a leading tourism destination is inextricably tied to its marine environment, coastal ecosystems, and world-renowned sailing and yachting experiences. As the "Yachting Capital of the World," the Territory derives much of its visitor arrivals and economic activity from marine-based tourism, including yacht charters, diving, sport fishing, and regattas. However, consultations underscored the urgent need to balance this economic advantage with stronger stewardship of the fragile marine ecosystems upon which the sector depends. Concerns were raised about overcrowding of mooring fields, reef degradation, beach erosion, and insufficient infrastructure to support sustainable expansion. This pillar, therefore, commits to consolidating the Virgin Islands' position in the global blue tourism market while embedding practices that ensure resilience, conservation, and community benefit. It aligns with the OECS regional framework on Blue Tourism and the NSDP outcomes on environmental sustainability, hazard risk reduction, and the blue economy.

2.1.Blue Tourism Expansion

Stakeholders widely supported strengthening the Virgin Islands' reputation as a premier yachting and marine destination but called for greater attention to sustainability and diversification of experiences. Proposals included developing structured inter-island itineraries that highlight smaller islands, heritage attractions, and cultural stops, rather than concentrating solely on the main mooring hubs. Expanding marine tourism to integrate fisheries, dockside demonstrations, and maritime festivals was seen as a way to enhance visitor experiences while broadening community participation. Policy direction will therefore balance expansion with regulation by introducing

carrying capacity limits, strengthening oversight of charter operators, and ensuring marine fees are reinvested into infrastructure and conservation.

The policy recognises the diversity within the marine tourism sector, including charter and private yachting segments, and commits to ensuring that regulatory, infrastructure, and service frameworks are appropriately differentiated to support each segment's contribution to the economy.

Priority Actions:

2.1.1. Institute a Visitor Use Management Plan (VUMP) for high-traffic bays and channels, setting daily berth/anchorage limits and time-of-day rotations to prevent overcrowding.
2.1.2. Reinvest marine use fees (cruising, moorings, park permits) into channel markers, moorings, pump-outs, reef restoration, and enforcement capacity, with annual public reporting. (Annual Public Report will show each fee type, collection entity – treasury, NPT, Ports, private operators where applicable, allocations and reinvestment projects, audited or verified totals, and published on the Online Transparency Portal).
2.1.3. Deploy a digital cruising permit and mooring reservation system (with AIS integration2) to manage carrying capacities in real time and reduce congestion at peak periods.
2.1.4. Develop multi-island itineraries that deliberately route visitors to Sister Islands (Virgin Gorda, Anegada, Jost Van Dyke), pairing marine stops with cultural/heritage experiences.
2.1.5. Adopt Blue Flag/Green Marina certifications for priority beaches and marinas and incentivise private uptake through reduced regulatory turnaround times.
2.1.6. Publish a coordinated regatta and maritime events calendar, aligning permits, safety resources, and marketing to spread benefits throughout the season.
2.1.7. Introduce anchoring exclusion zones over sensitive habitats (seagrass/coral) and require the use of eco-moorings in designated areas.
2.1.8. Formalise data-sharing protocols with charter companies, dive shops, and marinas (occupancy, movements, waste offload volumes) to inform adaptive management.

2.2.Coral Reef Restoration

The health of coral reefs was consistently identified as critical to sustaining diving, snorkelling, and coastal tourism. Consultations with dive operators, NGOs, and conservationists highlighted the damage from anchorages, pollution, and climate-related bleaching events. Policy measures will institutionalise reef stewardship by scaling restoration programmes in partnership with marine NGOs, dive shops, and community groups. Financing mechanisms, such as visitor contributions or environmental levies, will be directed to fund rehabilitation projects. By embedding reef

[2] In the context of the National Tourism Policy, AIS can support: visitor use management by monitoring yacht and cruise ship traffic in sensitive bays; safety and security through real-time vessel tracking and collision avoidance; and enforcement by geo-fencing marine protected areas and alerting authorities when vessels enter restricted zones.

restoration within the tourism policy, the Virgin Islands will reinforce its position as a responsible marine destination while protecting one of its most valuable natural assets.

Priority Actions:

2.2.1. Scale a Territory-wide coral nursery network with standardised out-planting protocols and annual restoration targets for priority reefs.
2.2.2. Dedicate a fixed share of marine fees to reef restoration and monitoring, augmented by a voluntary visitor conservation contribution at the point of permit/ticket sale.
2.2.3. A reef-safe sunscreen policy (education first, followed by phased restrictions at MPAs and high-use beaches).
2.2.4. Introduce graduated penalties and restitution for anchor/scour damage, funding rapid-response re-stabilisation and re-planting.
2.2.5. License restoration partners through clear permitting guidelines and biodiversity safeguards.
2.2.6. Implement a citizen science reporting app (bleaching, disease, anchor damage) feeding a national reef health dashboard.
2.2.7. Require post-storm reef triage plans, including debris removal protocols and emergency mooring checks.

2.3.Beach Use Planning and Coastal Zone Management

Beaches are among the most iconic features of the Virgin Islands but face challenges of overcrowding, erosion, and poor waste management. Community stakeholders emphasised the need for zoning policies, daily visitor limits, and stronger enforcement of coastal use protocols, particularly at popular sites such as The Baths, Cane Garden Bay, and Jost Van Dyke. Policy direction will strengthen coastal zone management frameworks, regulate access to sensitive sites, and ensure equitable access for residents alongside visitors. The introduction of controlled visitor permits for uninhabited islands was recommended to reduce ecological impact while creating new streams of revenue for conservation.

Priority Actions:

2.3.1. Set site-specific daily visitor quotas and timed entry/reservation systems for sensitive sites (e.g., The Baths), with equity provisions for resident access.
2.3.2. Complete coastal erosion management plans (dune restoration, mangrove replanting, engineered protections where necessary) before any new coastal tourism approvals.
2.3.3. Lifeguard coverage, signage, and accessible amenities (ramps, restrooms) at priority beaches, backed by a ring-fenced maintenance budget.
2.3.4. Protected Sites and Parks Financing Model, to include resident access and equity approach (differentiated fees or exemptions), ring-fencing rules, what gets funded (maintenance, wardens, sanitation, restoration), annual park site accounts published on the portal, and link to marine fee allocations where appropriate.

2.3.5. Enforce vendor licensing & codes of conduct (waste, noise, safety) and designate orderly vending zones to reduce conflict and clutter.
2.3.6. Establish a routine water-quality testing regime with public posting (online/on-site) and rapid advisories/closures when thresholds are exceeded.
2.3.7. Implement quiet-hours and speed-limit zones in near-shore areas to reduce user conflicts and wildlife disturbance.

2.4.Environmental Impact Assessments (EIA)

The stakeholder consultations highlighted weaknesses in the current application of EIAs for tourism-related developments, particularly around marinas, jetties, and coastal accommodations. Concerns included inconsistent enforcement and limited post-construction monitoring. Policy commitments will strengthen the regulatory framework by mandating comprehensive EIAs for all marine and coastal tourism developments, ensuring that climate resilience, waste management, and carrying capacity thresholds are fully integrated. Post-development monitoring will be institutionalised to guarantee compliance and accountability.

Priority Actions:

2.4.1. Mandate comprehensive EIAs (with climate-risk screening and nature-based solutions) for marinas, dredging, coastal hotels, and shoreline modification.
2.4.2. Require cumulative impact assessments where multiple projects interact within the same bay/coastal cell.
2.4.3. An independent peer-review panel for major marine/coastal EIAs, with public disclosure of findings.
2.4.4. Require environmental performance bonds and/or parametric insurance to assure post-construction compliance and remediation.
2.4.5. Conduct post-construction environmental audits at set intervals, with enforceable corrective actions.
2.4.6. Integrate EIAs with a Marine Spatial Plan, ensuring zoning and carrying capacities guide approvals.
2.4.7. Empower regulators with stop-work authority and escalating penalties for non-compliance.

2.5.Marine Protected Areas (MPAs)

Marine Protected Areas are central to both conservation and tourism sustainability, yet participants highlighted inadequate enforcement and the need for expansion. Stakeholders recommended strengthening the National Parks Trust's authority to regulate vessel traffic, collect user fees, and enforce protective measures. The policy will expand the network of MPAs to safeguard biodiversity hotspots while integrating licensing conditions that link operator permits to compliance with MPA regulations. This dual approach will preserve ecological integrity while ensuring high-value recreational use.

Priority Actions:

2.5.1. Establish visitor use management plans for high-volume bays and anchorages frequented by cruise vessels, including anchoring restrictions and mooring requirements.
2.5.2. Reef protection and beach carrying capacities, ensuring cruise visitor numbers do not exceed ecological thresholds at sensitive sites.
2.5.3. Expand and re-zone the MPA network based on science (no-take cores, recreation zones, seasonal closures for spawning).
2.5.4. Strengthen ranger capacity (patrol boats, training, communications, evidence handling) and enable joint enforcement with Police/Customs.
2.5.5. Digital permitting and geo-fencing (AIS/APP alerts) to reduce inadvertent incursions and enable targeted compliance checks.
2.5.6. Tie operator licences (charter, dive, tour) to MPA compliance history, with incentives for exemplary stewardship.
2.5.7. Earmark MPA user fees to fund monitoring, moorings, and community stewardship grants.
2.5.8. Implement standardised biodiversity monitoring (coral cover, fish biomass, water quality) with annual public reports.

2.6.Marinas, Jetties and Moorings

The rapid growth of charter and yacht traffic has placed increasing pressure on existing marine infrastructure. Stakeholders called for regulating the number of moorings, improving waste disposal facilities, and better planning of jetties to avoid environmental degradation. Policy direction will include preparing a Visitor Use Management Plan for high-traffic areas, investing in eco-friendly mooring systems, and introducing modern waste reception facilities at marinas. These measures will ensure that infrastructure expansion is sustainable, environmentally responsible, and aligned with global best practices.

Operational safeguards and safety overrides will consider bad weather and nightfall safety override rule, emergency anchorage protocol, stage enforcement and transition periods, vessel size standards for moorings (addressing 60ft+ suitability), and dispute resolution and real-time communication protocols (VHF, app alerts, port notices)

Priority Actions:

2.6.1. Set caps on mooring numbers per bay and require eco-moorings (helical/screw systems) in sensitive substrates.
2.6.2. Designate no-discharge zones and require pump-out stations at strategic marinas, backed by compliance logs and random inspections.
2.6.3. Oily-bilge and solid-waste reception facilities meeting MARPOL-equivalent standards, with tracked manifests.
2.6.4. Adopt design standards for new marinas/jetties (storm surge, sea-level rise, habitat buffers, lighting/noise guidelines).

2.6.5. Implement storm refuge and evacuation protocols for vessels, including pre-season briefings and berth allocation rules during watches/warnings.
2.6.6. Introduce standardised mooring booking/ID systems and routine inspection/maintenance schedules published annually.
2.6.7. Enact aquatic invasive species prevention measures (hull fouling controls, cleaning locations, best-practice guidance).

2.7.Blue Tourism Awareness Building and Human Capital

A recurrent theme was the need for awareness programmes and training to ensure that all actors in the marine sector—from boat captains to dive instructors—understand their role in preserving marine ecosystems. Policy commitments will embed blue economy and reef stewardship curricula into schools, vocational programmes, and professional certification schemes. Collaboration with the Virgin Islands Shipping and Maritime Authority will provide integrated training in marine safety, conservation, and hospitality. This will ensure that the marine tourism workforce is both technically skilled and environmentally responsible.

Priority Actions:

2.7.1. Require environmental induction training (reef etiquette, waste, MPAs, safety at sea) for charter crews, captains, dive guides, and tour operators as a condition of licensing.
2.7.2. Establish a professional certification pathway (with HLSCC and partners) for marine guides, dive masters, and skippers that integrates conservation, customer service, and emergency response.
2.7.3. School and youth programmes (sailing, snorkelling, reef-guardian clubs) to build a domestic blue-skills pipeline.
2.7.4. Launch an annual Blue Stewardship Awards recognising operators and communities with exemplary environmental performance.
2.7.5. Formalise SAR (search and rescue) coordination protocols and joint drills with operators, integrating visitor-care standards.
2.7.6. Provide micro-grants for innovation (reef-safe product lines, waste-to-value pilots, eco-tour design) and require grantees to share results openly.
2.7.7. Embed operator data reporting (waste offload volumes, pump-outs, mooring usage) as a licence condition to support adaptive management.

Closing Statement for the Pillar

By embedding conservation, regulation, and education within blue tourism, the Virgin Islands will secure its reputation as a world-class marine destination that offers exceptional experiences while safeguarding its ecosystems. The combination of sustainable expansion, reef restoration, coastal zone management, and human capital development will not only protect the Territory's marine assets but also distribute benefits more widely across communities. This approach aligns with the

OECS regional call for responsible blue tourism while advancing the Virgin Islands' national outcomes on sustainability, hazard resilience, and a thriving blue economy.

3. Climate Change and Risk Resilience

The Virgin Islands, like its Caribbean neighbours, faces heightened vulnerability to climate change and natural hazards. Tourism stakeholders repeatedly underscored that the very assets that make the Territory attractive—its beaches, reefs, marinas, and coastal communities—are also its greatest vulnerabilities. Hurricanes Irma and Maria highlighted the fragility of the infrastructure, while more recent sargassum blooms, coastal erosion, and extreme heat events continue to disrupt tourism activity. This pillar commits the Virgin Islands to embedding climate resilience into every aspect of tourism development, operations, and governance. It aligns with the OECS Climate Action Plan for Tourism, which calls for destinations to integrate adaptation, mitigation, and risk reduction into their strategies, and supports the NSDP outcomes on environmental sustainability and hazard risk reduction.

Practical and Enforceable Environment Measures

Effective environmental protection within the tourism sector requires a balance between strong policy intent and practical implementation. The approach to designing environmental measures that are not only aligned with sustainability objectives but are also realistic, enforceable, and capable of delivering measurable outcomes. By prioritising enforceability, clarity, and proportionality, the Government ensures that environmental regulations are supported by appropriate institutional capacity, encourage compliance, and contribute meaningfully to the protection of natural assets without imposing unmanageable burdens on operators or visitors.

Environmental protection measures under this Policy shall be practical, enforceable, and proportionate, ensuring that regulatory requirements can be implemented effectively within existing institutional and operational capacities.

Priority shall be given to measures that can be monitored and enforced through clear rules, defined responsibilities, and available enforcement mechanisms, including licensing conditions, site management controls, and penalties for non-compliance.

Educational and behaviour interventions, including the promotion of reef-safe practices, shall be supported through awareness campaigns, industry engagement, and a voluntary compliance mechanism, rather than relying on direct inspection or verification of individual visitor behaviour.

Targeted Environmental Enforcement

Enforcement is essential to ensuring that environmental policies translate into real and measurable outcomes. A targeted enforcement approach, focusing on areas where interventions can deliver the

greatest impact while remaining practical and enforceable within existing institutional capacity. By prioritising high-risk and high-impact activities, the Government strengthens compliance, improves resource efficiency, and ensures that enforcement efforts are consistent, transparent, and aligned with broader environmental and tourism management objectives.

Enforcement efforts shall focus on activities with the greatest environmental impact and highest feasibility of monitoring, including anchoring practices, mooring use, waste disposal, and compliance with designated protected areas.

Penalties and enforcement mechanisms shall be applied in a manner that is consistent, transparent, and supported by adequate institutional capacity, including coordination between relevant agencies.

3.1. Climate Change Adaptation and Mitigation

Stakeholder consultations revealed strong support for mainstreaming climate adaptation across the sector. Hoteliers, marina operators, and community groups stressed the need for resilient building codes, flood control systems, and the retrofitting of existing tourism infrastructure. Policy action will prioritise nature-based solutions, such as mangrove restoration and dune reinforcement, alongside engineered protections, such as seawalls and hurricane-resistant structures. Mitigation will focus on energy-efficiency measures in accommodations, expanding renewable energy use, and promoting sustainable design in all new tourism projects.

Priority Actions:

3.1.1. Mandate climate-resilient design standards (wind loads, storm surge, flood elevations) for all new and major refurbished tourism infrastructure, with third-party verification.
3.1.2. Integrate climate adaptation measures into cruise port infrastructure, including drainage, energy efficiency, and storm surge protection.
3.1.3. Require site-specific climate risk assessments (coastal erosion, heat stress, flood pathways) as part of planning approval and tie conditions to enforceable adaptation measures.
3.1.4. Prioritise nature-based solutions—mangrove restoration, dune rebuilding, coral and seagrass rehabilitation—before grey infrastructure, with maintenance plans and funding.
3.1.5. Implement catchment-scale drainage upgrades in tourism hubs (roads, ports, town centres) to reduce flash-flood risk and protect attractions and businesses.
3.1.6. Publish coastal setback and rolling-easement guidelines and prohibit hardening in no-build buffers, except where critical infrastructure is demonstrably at risk.
3.1.7. Resilient Retrofits Programme (grants/loans, technical assistance) for hotels, marinas and attractions to strengthen roofs, glazing, utilities and backup power.
3.1.8. Adopt heat-smart tourism standards (shade, hydration points, scheduling guidance) for outdoor sites and events during extreme heat advisories.
3.1.9. Require insurance and continuity-of-operations plans for licensed properties, including staff training and backup data/communications.

3.2. Alternate and Blue Energy

Tourism stakeholders, particularly on the Sister Islands, identified high energy costs as a barrier to competitiveness and sustainability. There was a clear call for integrating solar and wind energy into tourism facilities. The policy will support pilot projects that demonstrate the viability of alternative and blue energy systems for resorts, marinas, and ferry operators. Incentives will be introduced to encourage private sector uptake of renewable energy technologies, while government-led projects will focus on installing clean energy infrastructure at key tourism sites. This approach will reduce operating costs, enhance energy security, and demonstrate the Virgin Islands' leadership in sustainable island tourism.

Priority Actions:

3.2.1. Establish renewable energy uptake targets for the tourism sector (solar PV, solar thermal, wind, where feasible), linked to licensing incentives and concessional finance.
3.2.2. Implement net-metering and streamlined interconnection for hotels and marinas, and support battery storage to enhance grid stability and outage resilience.
3.2.3. Sister Islands microgrids for critical tourism clusters (clinics, shelters, ports, water) to maintain services during grid failures.
3.2.4. Provide energy audits and benchmarking for accommodations and attractions and publish sector performance dashboards.
3.2.5. EV/low-emission fleets for ground transport (taxis, shuttles, tour coaches) with charging infrastructure at ports, airports and major sites.

3.3. Carbon Neutral Tourism

Participants across the consultations raised the importance of positioning the Virgin Islands as a carbon-conscious destination. Policy measures will aim to reduce emissions through low-carbon transport, green hotel certification, and sustainable event management. The establishment of a voluntary carbon offset programme linked to marine conservation and reforestation projects was widely supported. Visitors will have the option to offset their carbon footprint through transparent, locally managed initiatives, thereby enhancing the Territory's brand as a responsible tourism destination.

Priority Actions:

3.3.1. Develop a destination carbon inventory and roadmap for tourism (scope 1–3), setting phased reduction targets with annual public reporting.

3.3.2. Green building and operations certification (energy, water, waste) as a requirement for star-grading and marketing partnerships.
3.3.3. Launch a local carbon-offset platform funding verified reef, mangrove and reforestation projects, offered at the point of booking and permitting.
3.3.4. Promote sustainable aviation partnerships (SAF advocacy3, joint marketing for efficient routings) with carriers serving the Territory.
3.3.5. Adopt green event protocols (renewable power, procurement, waste diversion) for publicly supported festivals and conferences.

3.4. Sargassum Management

Sargassum influxes were highlighted as a recurring disruption to coastal tourism, particularly affecting beaches, marine operators, and small businesses dependent on visitor access. Stakeholders called for coordinated collection, disposal, and reuse systems. Policy direction will establish a national sargassum response framework that combines monitoring, early warning, and clean-up protocols, supported by regional research partnerships. Pilot projects for converting collected sargassum into fertiliser, biofuel, or other by-products will be explored to create a circular economy model.

Priority Actions:

3.4.1. Establish a national sargassum monitoring and early-warning system with seasonal forecasts and site-specific response triggers.
3.4.2. Formalise a sargassum task force with ports, environment and tourism representatives.
3.4.3. Standardise environmentally safe collection protocols (boom deployment, mechanical removal limits) and prohibit practices that damage beaches or nearshore habitats.
3.4.4. Rapid-response contracts with vetted operators, including performance SLAs, Health and Safety requirements and transparent activation criteria.
3.4.5. Designate approved staging, composting and valorisation sites and support pilots that convert sargassum into fertiliser, biogas or materials with environmental safeguards.
3.4.6. Create a Business Impact Support Window (micro-grants/working capital) for MSMEs and fishers affected by severe sargassum events.
3.4.7. Provide real-time public advisories (water quality, beach conditions, safe alternatives) through a unified visitor information platform.
3.4.8. Coordinate regional research partnerships to improve forecasting, ecological impact assessment and valorisation technology transfer.

[3] Low-carbon alternatives to conventional jet fuel, produced from renewable sources such as waste oils, agricultural residues, or other sustainable feedstocks. SAF can reduce lifecycle carbon emissions from aviation by up to 80%, making it a key tool for destinations — like the Virgin Islands — that rely heavily on airlift but want to advance towards carbon-neutral tourism.

3.5. Crisis and Risk-Resilient Action

The consultations emphasised the need for clear protocols to protect both residents and visitors during hazard events. Stakeholders identified gaps in evacuation planning, mass casualty response, and inter-agency coordination. Policy commitments will strengthen collaboration between the Department of Disaster Management, the Ministry of Health, and tourism operators to ensure readiness for hurricanes, earthquakes, tsunamis, and pandemics. Training for tourism workers and community volunteers will be expanded, while emergency shelters and communication systems will be upgraded to meet international standards for visitor care. The integration of risk management into tourism certification processes will ensure that resilience becomes a defining feature of the Virgin Islands' destination brand.

Priority Actions:

3.5.1. Update and enforce destination-wide emergency plans for hurricanes, earthquakes, tsunamis, pandemics and mass-casualty incidents, aligned to the national incident command system.
3.5.2. Require property-level emergency plans (evacuation/shelter, medical triage, communications, backup power/water) as a licensing condition, with annual drills.
3.5.3. Visitor-care protocols (shelter-in-place standards, medical referral pathways, special-needs support) and designated tourism shelters with minimum amenities.
3.5.4. Implement a multi-channel emergency communications system (SMS/app/push notifications, multilingual templates) for visitors and operators, integrated with travel trade partners.
3.5.5. Formalise MOUs with airlines, ferry operators and cruise lines for pre-planned evacuation/waiver arrangements and surge capacity after all-clear.
3.5.6. Conduct joint simulation exercises (ports, hotels, marinas, attractions) at least annually and publish after-action improvements.
3.5.7. Data and situational awareness tools (visitor counts by site, occupancy, mobility heatmaps) to support targeted, real-time crisis decisions.
3.5.8. Integrate risk-management competencies (first aid, crowd safety, crisis communications) into mandatory training for licensed operators and frontline staff.

Closing Statement for the Pillar

By embedding climate change adaptation, clean energy solutions, carbon-neutral initiatives, and crisis management into its tourism framework, the Virgin Islands will safeguard its tourism-dependent economy against future shocks. The policy ensures that visitors and residents alike benefit from resilient infrastructure, efficient emergency systems, and a sustainable environment. This approach aligns with the OECS Climate Action Plan and advances the NSDP's goals of hazard risk reduction and environmental sustainability, positioning the Virgin Islands as a global leader in climate-smart tourism.

4. Product and Niche Market Development

The Virgin Islands have long been recognised for its pristine marine environment, yachting, and natural beauty. However, consultations revealed broad agreement that the tourism product must be diversified to remain competitive, attract higher-value markets, and extend visitor spending across a wider range of experiences. Stakeholders emphasised the need to invest in cultural, heritage, culinary, and event-based tourism, as well as to elevate standards and accessibility across the sector. This pillar, therefore, commits to a structured expansion into niche markets, building on the Virgin Islands' unique identity and leveraging global demand for authentic, experiential travel. The policy aligns with the OECS framework for Product and Niche Market Development and supports the NSDP outcomes on diversification of the economy, globally competitive industries, and cultural preservation.

The government will work in partnership with the private sector to support tourism investment, improve service standards, encourage innovation in tourism products, and strengthen linkages between tourism and other sectors of the economy, such as agriculture, fisheries, and the creative industries.

Tourism development will be pursued in a manner that strengthens linkages with other sectors of the Virgin Islands economy. Strengthening these linkages ensures that tourism spending generates wider economic benefits across the Territory. The Government will support initiatives that connect tourism demand with local supply chains, including agriculture, fisheries, creative industries, transportation services, and small businesses.

Where possible, tourism operators will be encouraged to source goods and services locally, supporting domestic businesses and increasing the proportion of tourism expenditure that remains within the Virgin Islands economy.

These linkages will contribute to increasing tourism value retention, job creation, and economic diversification.

4.1. Accommodation Capacity and Investment Strategy

Adequate and appropriately aligned accommodation capacity is fundamental to achieving sustainable tourism growth and delivering high-quality visitor experiences. This Policy establishes the approach to expanding and optimising accommodation supply in a manner that supports target market segments, enhances competitiveness, and aligns with the Territory's infrastructure, environmental capacity, and spatial development priorities.

By guiding investment toward quality, resilience, and market alignment, the Government ensures that accommodation development contributes to increased visitor value, improved sector performance, and long-term economic sustainability. The Government shall actively support the expansion and upgrading of accommodation capacity to meet current and projected tourism demand, with a focus on quality, resilience, and alignment with target market segments.

Investment decisions shall be informed by demand analysis, cost-benefit assessment, and alignment with the Tourism Growth and Yield Model to ensure that expansion increases visitor value rather than relying solely on volume.

Priority Actions:

4.1.1. Facilitate investment in hotel, villa, and mixed-use developments through clear policy guidance and investment frameworks
4.1.2. Redevelopment and optimisation of existing tourism assets
4.1.3. Create diverse accommodation types, including boutique, luxury, and community-based offerings
4.1.4. Align accommodation development with infrastructure capacity, environmental thresholds, and spatial planning priorities.

4.2. Cultural Heritage Tourism

Stakeholders consistently expressed a desire to see greater incorporation of Virgin Islands history, heritage, and cultural assets into the tourism product. Consultations highlighted the underutilised potential of historic sites, folk traditions, and festivals to differentiate the Territory from its competitors. Policy action will focus on restoration and adaptive reuse of heritage sites, investment in interpretive centres and signage, and development of guided tours that highlight cultural narratives. Festivals such as Emancipation and Fungi Fest will be positioned not only as celebrations of identity but as marketable tourism experiences that connect visitors to the living culture of the Virgin Islands.

Priority Actions:

4.2.1. Task a Product Development & Niche Markets Unit within MTCSD that will oversee the development of Cultural Heritage Tourism, Culinary Tourism, Entertainment Tourism and Sports Tourism
4.2.2. Allocate dedicated funding and staff to restore and interpret historic sites such as plantation ruins, churches, and free villages, integrating them into heritage trails and visitor circuits with incentives for private landowners to open heritage assets to visitors under clear standards.
4.2.3. Institutionalise cultural storytelling by training and certifying guides, artists, and performers in heritage interpretation, embedding authentic narratives into visitor experiences across the islands.
4.2.4. Expand the cultural and culinary offering at cruise ports, including certified craft markets, live performances, and food festivals linked to cruise itineraries.
4.2.5. Formalise community museum networks and cultural centres across districts to showcase music, oral traditions, and crafts, linked to school curricula and tourism itineraries.
4.2.6. Incentives for private restoration of heritage properties (tax relief, grants, conservation easements) to expand heritage-based accommodations and attractions.

4.2.7. Embed storytelling and cultural performances into cruise and overnight packages, with contracts ensuring direct payments to local artists and cultural groups.
4.2.8. Strengthen creative industries entrepreneurship by providing technical assistance, small grants, and visibility platforms for musicians, artisans, designers, and performers to access tourism markets.
4.2.9. Integrate cultural and culinary education into school curricula and create mentorship schemes that link youth with cultural entrepreneurs and heritage practitioners, fostering pride and continuity.
4.2.10. Adopt cultural protection measures by enforcing the Preservation of Names and Places Act, promoting Virgin Islands artists at national events, and embedding cultural identity safeguards in tourism legislation.

4.3. Culinary Tourism

Food and drink emerged as a powerful connector between visitors and local culture. Stakeholders highlighted opportunities to expand culinary tourism through farm-to-table dining, food festivals, and promotion of traditional dishes prepared by local chefs and vendors. The integration of local agriculture and fisheries into culinary experiences was strongly encouraged, supporting value chain linkages while enhancing authenticity. Policy direction will therefore encourage culinary training, incentivise restaurants to source local ingredients, and create platforms for showcasing Virgin Islands cuisine regionally and internationally.

Priority Actions:

4.3.1. Develop a National Culinary Programme that brands and promotes Virgin Islands cuisine, re-establishes the national culinary team, and supports farm-to-table linkages between farmers, fishers, and restaurants and is supported by a digital platform for seasonal supply coordination.
4.3.2. Expand the cultural and culinary offering at cruise ports, including certified craft markets, live performances, and food festivals linked to cruise itineraries.
4.3.3. Create street food and culinary market zones in key visitor hubs (Road Town, Virgin Gorda, Anegada), equipped with sanitation and licensing support.
4.3.4. Food festivals and competitions (BVI Flavours Month, fish fry circuits, rum festivals) to showcase local cuisine and drive inter-island visitor traffic.
4.3.5. Incentivise farm-to-table integration through procurement contracts, tax credits, and promotion of agritourism experiences on small farms and fisheries.

4.4. Events and Festivals

Stakeholders from across the creative industries, event organisers, and hospitality operators called for more structured support to transform events and festivals into viable tourism products. The

lack of coordination, marketing, and sustainable financing were identified as weaknesses. Policy action will involve the formalisation of the Festivals and Events Board, aligning events with national tourism branding, and introducing grant and sponsorship frameworks. Signature events, including regattas, music festivals, and cultural celebrations, will be positioned as anchor experiences that attract regional and international markets while stimulating local business activity.

Tortola shall be positioned as the primary hub for large-scale tourism events, including conferences, meetings, incentives, sports tourism, and cultural gatherings, reflecting its relative infrastructure capacity, accessibility, and central role within the Territory. There is a need to support the development and upgrading of facilities capable of hosting large-scale events, including conference venues, multi-purpose event spaces, and accommodation clusters of sufficient scale and standard to meet international requirements.

Development of large-scale event infrastructure shall be guided by demand analysis, cost-benefit assessment, and alignment with the Territory's Tourism Growth and Yield Model, ensuring that investments are commercially viable and fiscally sustainable. Large-scale event development shall be spatially aligned, with Tortola serving as the primary location of major events, while Sister Islands focus on complementary, small-scale, and specialised experiences.

Priority Actions:

4.4.1. Strengthen the Festival and Events Board framework to professionalise planning, financing, and accountability for signature events, while safeguarding cultural authenticity.
4.4.2. Establish multi-year funding agreements for flagship festivals (Emancipation, Fungi Fest, Christmas in July) to enable long-term marketing and vendor preparation.
4.4.3. Develop an Events Calendar with carrying capacities for beaches, villages, and venues, supported by safety, sanitation, and crowd-management protocols.
4.4.4. Integrate sports, music, and maritime events into the national branding strategy, aligning sponsorships, logistics, and international promotion to diversify visitor markets.
4.4.5. Thematic excursions (heritage, culinary, adventure, wellness) targeted at cruise visitors to increase spending and diversification.
4.4.6. Enable the hosting of regional and international conferences, sporting events, and business tourism activities
4.4.7. Strengthen linkages between accommodations, transport, and event facilities
4.4.8. Support year-round tourism demand and reduce seasonality
4.4.9. Generate high-value visitor expenditure and extended stays

4.5. Entertainment Tourism

Entertainment emerged strongly in the national consultations as a promising avenue to diversify the Virgin Islands' tourism product, especially by addressing gaps outside the traditional tourism cycle. Stakeholders highlighted that entertainment can serve as a year-round draw, helping to stabilise visitor arrivals during low seasons and creating continuous opportunities for local

communities. The discussions made clear that entertainment tourism is not limited to festivals or headline events; it encompasses a broad ecosystem of musicians, producers, event planners, sound engineers, stage managers, and vendors, all of whom play critical roles in delivering a seamless visitor experience.

Consultations revealed the dual value of entertainment: enriching the visitor journey while also serving as a platform for economic empowerment. Musicians and performers are central to the Virgin Islands' identity and can transform everyday tourism encounters into cultural experiences. Producers, sound technicians, and event professionals, meanwhile, provide the technical backbone that allows entertainment to reach international standards. Strengthening this ecosystem will require investment in professional training, equipment upgrades, and institutional support to ensure that events are not ad hoc but planned, marketed, and executed consistently.

Stakeholders also recognised that entertainment tourism can create a regional competitive advantage. Integrated packages that combine performances with culinary showcases, sailing regattas, or sports tournaments were cited as examples of how the Virgin Islands could differentiate itself in the OECS market. Such integrated tourism offerings would extend visitor stays, spread economic benefits more broadly, and position the Territory as a cultural hub rather than solely a marine playground.

At the same time, the consultations acknowledged persistent challenges. Entertainment professionals often face financial barriers, with limited access to start-up capital, sponsorships, or structured incubation programmes to scale their work. Event promotion costs remain high, and heavy reliance on volunteers undermines sustainability. To address these issues, participants proposed establishing institutional mechanisms within the national tourism agency to coordinate events, streamline marketing, and facilitate cross-ministerial collaboration between Tourism, Culture, Sports, and Infrastructure.

Importantly, sustainability was also raised. Entertainment tourism, particularly when linked to large-scale events, must be managed with guidelines on waste minimisation, noise, and crowd management to protect communities and the environment. The aim is to create a sector that not only entertains but also sustains livelihoods and safeguards the Territory's long-term attractiveness.

In summary, entertainment tourism represents a significant opportunity to strengthen the Virgin Islands' tourism offering by mobilising a wide creative ecosystem, extending the tourism cycle, and embedding culture more deeply into the visitor experience. The National Tourism Policy commits to positioning entertainment as a core driver of diversification and competitiveness, supported by institutional reform, professional capacity-building, and a deliberate focus on sustainability.

Priority Actions:

An Entertainment and Events Calendar will be established, ensuring that cultural and entertainment activities are scheduled year-round to stimulate arrivals outside the traditional peak season. This calendar will be integrated with destination marketing campaigns and linked to

transport and accommodation planning so that events are leveraged as tourism drivers rather than isolated activities.

4.5.1. Invest in professional capacity-building for musicians, producers, sound engineers, event planners, and other supporting professionals, creating certification and apprenticeship pathways in collaboration with H. Lavity Stoutt Community College and regional cultural agencies. Complementary to this, an Entertainment Support Fund will be created to provide small grants, sponsorship facilitation, and equipment-sharing schemes for local performers and producers, reducing barriers to entry and improving the quality of delivery.

4.5.2. Strengthen institutional coordination by designating an entertainment desk within the tourism authority to serve as a liaison between artists, promoters, ministries, and investors. This office will ensure timely permitting, provide technical guidance, and promote local talent on regional and international stages.

4.5.3. Adopt event management standards, including waste reduction protocols, noise management, and safety frameworks. These requirements will ensure that entertainment not only enhances the visitor experience but also safeguards communities and the environment.

4.5.4. Position entertainment tourism as part of its niche market diversification, integrating concerts, cultural showcases, and creative industry products with sports tournaments, culinary festivals, and regattas. This integrated approach will extend visitor stays, amplify economic linkages, and establish the Territory as a cultural hub within the wider Caribbean.

4.6. Sports Tourism

Sports tourism is both a powerful engine for diversification and a mirror of the Territory's coordination gaps. A widely held view converged on a central message: the Virgin Islands can host credible, revenue-generating sporting spectacles—on land and at sea—if Government institutionalises advance planning, invests in fit-for-purpose venues, aligns policies across ministries, and treats events as year-round export products rather than ad hoc activities.

There has been a consistent planning deficit. Successful sports and event tourism hinges on long lead times—marketing 6–12 months out, synchronising with airlines, ferry operators and hoteliers, and locking in sponsorship early. Without a centralised national events calendar and predictable promotion windows, federations, promoters, and private partners cannot budget or scale, and the Territory loses share to better-organised regional competitors. Stakeholders therefore called for a single, publicly accessible calendar tied to permitting, destination marketing, and transport scheduling, so that product development, room inventory, and air/sea lift can be mobilised coherently.

Current facilities fall short of the standards required to bid for and host regional or international events. Track and field venues require certification and seating capacity upgrades; multipurpose spaces and an amphitheatre concept were discussed; and venue management must incorporate international grading (e.g., FIFA/World Athletics) and universal accessibility. Crucially, these investments must be decentralised so that Virgin Gorda, Jost Van Dyke, and Anegada also benefit,

not only Tortola. Private marinas and hospitality operators signalled readiness to partner—particularly in shoulder and off-season periods—but they need timely notice and a coherent calendar to package rooms, berths, and services.

Sports tourism is an ecosystem, not just a venue. The Territory lacks ancillary capacities—sports physiotherapy, event medicine, technical officiating, and specialist logistics—that international federations and teams expect. Building these capabilities (through training, certification pathways, and event-day protocols) is as vital as concrete and seats. Equally, the total visitor experience matters: competitively priced accommodation, reliable utilities, food and entertainment options, and efficient border services all shape athletes' and spectators' willingness to return. Past opportunities were lost because the broader experience did not align with the event itself.

There are accommodation constraints during peak events and suggested creative solutions—from temporary seating and modular lodging to short-term use of cruise vessels as floating accommodation and curated homestay schemes—paired with rigorous standards and community benefits. On the marine side, the Territory's comparative advantage is clear: sailing regattas and maritime competitions attract multi-country participation and stimulate broad value chains (accommodation, transport, vendors, entertainers), provided that environmental management (waste minimisation, moorings, anchoring rules) is embedded from the start.

A recurrent theme was policy harmony. The sports portfolio must interlock with tourism and culture, avoiding duplication and mandate confusion. Stakeholders proposed cross-ministerial MoU and a Sports & Events Tourism Advisory mechanism to unify planning, funding, and standards, with the BVI Tourist Board developing a dedicated strategy for sports/events marketing (including athlete-ambassador programmes). This approach aligns with recommendations to classify events (national, regional, local) and link that classification to resourcing, permitting, accessibility, sustainability requirements, and destination promotion.

Financing and sponsorship emerged as structural constraints. Stakeholders asked for predictable, rules-based public support, clearer pathways to non-profit eligibility, and stronger corporate participation—some advocating a formalised Corporate Social Responsibility framework to ensure major firms consistently contribute to community sports, culture, and events. In parallel, private sector partners reiterated that early notice and data on expected demand are preconditions for meaningful co-investment.

Sports should be positioned as a signature niche with deliberate regional market growth and bundled experiences (sport, culture and culinary) to lift spend and extend stays. With a functioning national calendar, certified facilities across multiple islands, professionalised event operations, and harmonised policy, the Virgin Islands can convert proven interest—especially in maritime events and football—into a reliable pipeline of anchor events that drive off-season arrivals, spread benefits beyond Road Town, and showcase national pride through sport.

Priority Actions:

4.6.1. Establish a National Events and Sports Calendar that consolidates all major cultural, entertainment, and sporting events, tied to destination marketing, airline and ferry scheduling, and accommodation planning.
4.6.2. Upgrade and certify sports facilities to meet regional and international standards (e.g., World Athletics, FIFA), ensuring accessibility and readiness for hosting regional tournaments, while decentralising investments to Virgin Gorda, Anegada, and Jost Van Dyke.
4.6.3. Create an Events and Sports Tourism Advisory Committee bringing together tourism, culture, sports, and private sector stakeholders to harmonise planning, permitting, funding, and marketing.
4.6.4. Support capacity-building for event operations by training and certifying local professionals in event logistics, officiating, physiotherapy, and safety management, paired with an event-day medical and crowd control framework.
4.6.5. Develop innovative accommodation solutions for peak events, including temporary modular lodging, cruise ship berths, and certified homestay schemes, to expand carrying capacity without overbuilding.
4.6.6. Formalise a sponsorship and financing framework with transparent public support rules and incentives for corporate CSR contributions to sports, culture, and entertainment events.
4.6.7. Promote sports and events tourism as an integrated niche product, bundling athletics, maritime regattas, cultural festivals, and culinary experiences into marketable visitor packages to extend stays and diversify spending.

4.7. Medical and Academic Tourism

In mid-2025, Ponce Health Sciences University (PHSU) announced the opening of a medical school in Tortola, Virgin Islands, with preliminary accreditation from the Accreditation Commission on Colleges of Medicine (ACCM). The inaugural class of 50 students began in August 2025, with local instruction in the first two years, followed by clinical rotations in the U.S. or Puerto Rico. The university has partnered with H. Lavity Stoutt Community College (HLSCC) and local medical facilities to host classes and labs in Tortola.

It is part of a strategic pivot toward the integration of edu-tourism and medical-tourism. PHSU's model is designed to blend seamlessly with the Territory's tourism ambitions. The first two years of preclinical training will occur in BVI, establishing a presence of resident students, faculty, and staff who will use services and amenities in Tortola daily. Given this context, the Virgin Islands is uniquely positioned to cultivate a medical/academic tourism niche that complements its cultural, wellness, and nature-based tourism. As PHSU's presence matures, the Territory can attract additional health science programmes, host regional conferences, foster public-private clinical partnerships, and package education-plus-recreation offerings (e.g., visits with relatives, medical tourism visits, health check packages).

The policy must ensure that the local health system is not overwhelmed, that education quality is world-class, and that foreign enrolment is balanced with scholarships for local students. It

recognises that medical and academic tourism should be deliberately institutionalised—not left to chance. It must be aligned with infrastructure plans (housing, digital networks, campus facilities), regulatory frameworks (medical licensing, accreditation, cross-border patient standards), and marketing positioning (globally, regionally, and domestically).

Medical tourism represents an emerging area of opportunity for the Virgin Islands as part of a broader strategy to diversify and strengthen the tourism product. Across the Caribbean, destinations with strong healthcare facilities, wellness centres, and supportive regulatory frameworks have successfully positioned themselves to attract international patients seeking elective procedures, diagnostics, rehabilitation, and wellness retreats. This aligns closely with global trends, where rising healthcare costs in developed countries and the demand for holistic, wellness-oriented travel have made medical tourism a growing niche market.

The Virgin Islands' potential lies in leveraging its reputation for safety, natural beauty, and hospitality while exploring strategic partnerships to expand healthcare and wellness services. With investments in modern medical infrastructure, facility accreditation, and the integration of wellness tourism, the Territory could position itself as a boutique destination for elective medical procedures, cosmetic and dental services, and rehabilitation programmes that combine professional healthcare with recuperation in a serene island environment.

Critical to this development will be ensuring the highest standards of medical quality, patient safety, and ethical practices, supported by international accreditation and regulatory oversight. Equally, the Government must assess the local health system's capacity to serve both residents and visitors, ensuring that medical tourism does not create competition for resources but instead strengthens national healthcare delivery. Complementary opportunities exist in expanding wellness tourism—such as spa services, yoga retreats, mental health and mindfulness programmes, and nutrition-focused experiences—that can be integrated with medical tourism to appeal to a broader market.

The introduction of medical tourism as a niche market will therefore require a feasibility study and careful policy design, but it represents a promising pathway to extend visitor stays, generate high-value economic activity, and enhance the Virgin Islands' global competitiveness while simultaneously improving healthcare access for its own population.

Priority Actions:

4.7.1. Conduct a National Medical and Academic Tourism Feasibility Study to identify viable niches (elective procedures, wellness packages, rehabilitation, conferences) and to assess the economic, regulatory, and healthcare system implications of PHSU's presence.

4.7.2. Develop a Wellness Tourism Package Framework that complements medical education and healthcare services, combining spas, yoga retreats, mental health and mindfulness programmes, and farm-to-table nutrition experiences.

4.7.3. Create a Medical and Academic Tourism Marketing Strategy to position the Virgin Islands as a boutique destination for education and health, targeting both regional students and patients, while showcasing a safe, beautiful, and culturally rich environment for study, recovery, and wellness.

4.8. World Heritage Recognition and Protection

Several consultations highlighted the potential of pursuing UNESCO World Heritage recognition for select sites, particularly those of cultural and natural significance. This was seen as a way to raise the Virgin Islands' profile on the global stage, attract specialised markets, and secure funding for conservation. Policy action will include feasibility studies, stakeholder engagement, and preparation of nomination dossiers for heritage sites that meet UNESCO criteria. At the same time, protective measures will be strengthened to ensure that heritage assets are preserved and sensitively developed.

Priority Actions:

4.8.1. Submit nomination dossiers for potential UNESCO World Heritage listings (e.g., heritage landscapes, former free villages, marine heritage sites).
4.8.2. Allocate resources to inventory, conserve, and interpret candidate sites in collaboration with UNESCO advisors and local communities.
4.8.3. Site management plans and protective legislation to meet World Heritage conservation standards.
4.8.4. Mobilise international funding and technical support for heritage conservation linked to World Heritage candidacy.

4.9. Grading, Certification, and Accessibility

Concerns were raised during the consultations about inconsistent quality standards and limited accessibility for persons with disabilities. Policy direction will introduce a robust grading and certification framework for accommodations, attractions, and tour operators, benchmarked against regional best practices. Accessibility standards will be embedded in the certification process to ensure inclusive participation for all visitors. This will not only raise confidence in the quality of Virgin Islands tourism but also align with global demand for accessible travel experiences.

Priority Actions:

4.9.1. Implement a destination-wide accommodation grading and star-rating system, harmonised with OECS standards and enforced by law.
4.9.2. Establish grading criteria for non-traditional accommodations (villas, Airbnb, charter yachts), ensuring quality, safety, and service consistency.
4.9.3. Publish national grading registers online, making classification transparent to visitors and trade partners.
4.9.4. Tie access to fiscal incentives, marketing platforms, and licences to compliance with grading standards.
4.9.5. Mandate baseline accessibility standards (ramps, signage, restrooms) for all licensed accommodations, attractions, and transport services.

4.9.6. Establish a national certification scheme for eco- and cultural-tourism products, linked to OECS and global sustainability standards.
4.9.7. Service quality certification and customer service training across all tourism touchpoints, making certification a licensing requirement.
4.9.8. Provide fiscal incentives and technical grants to operators investing in accessibility retrofits, universal design, and international certification (Green Globe, EarthCheck).

4.10. Global Competitiveness and Emerging Tourism Trends

The Virgin Islands must continuously adapt to remain competitive in a rapidly evolving global tourism market. While traditional products such as yachting, cruise, and sun-and-sand remain central to the Territory's identity, emerging global trends present opportunities to diversify and future-proof the industry. These include the rise of digital nomadism, driven by remote work and long-stay tourism; the adoption of artificial intelligence (AI) and smart technologies in marketing, service delivery, and visitor management; and the expanding appeal of wellness and lifestyle tourism, which integrates health, fitness, culinary experiences, and holistic well-being into the visitor journey.

Harnessing these opportunities requires strategic foresight and proactive positioning. For digital nomadism, the Virgin Islands can leverage its safety, connectivity, and natural environment to attract knowledge workers seeking long-stay visas, coworking facilities, and integrated community experiences. The integration of AI technologies into tourism businesses and government agencies can improve data analysis, enhance customer relationship management, and tailor marketing campaigns to high-value visitor segments. Similarly, wellness tourism offers the opportunity to blend cultural traditions, culinary heritage, and natural assets into distinctive experiences that align with global demand for health-conscious, restorative travel.

By engaging with these emerging trends, the Virgin Islands can broaden its appeal beyond traditional markets, tap into higher-value segments, and position itself as a forward-looking destination that blends authenticity with innovation. This approach also builds resilience, reducing dependency on a narrow set of products and ensuring that the Territory can adapt to shifting global consumer behaviours.

Priority Actions:

4.10.1. Develop a Digital Nomad and Remote Work Visa Programme to attract long-stay knowledge workers, supported by improved internet infrastructure, co-working hubs, and integration into local community experiences.
4.10.2. Promote wellness tourism clusters by supporting investments in spas, wellness retreats, farm-to-table culinary initiatives, and outdoor activity trails that combine health, culture, and the natural environment.

4.10.3. Adopt artificial intelligence and smart technologies in tourism marketing and visitor management, enabling real-time data analysis, personalised promotions, and improved customer relationship management systems.
4.10.4. Facilitate business innovation in tourism SMEs by establishing an innovation fund and training programmes that encourage the use of digital platforms, AI tools, and e-commerce to expand market reach.
4.10.5. Build global partnerships with platforms, wellness networks, and digital nomad communities to market the Virgin Islands as a forward-looking, lifestyle-oriented destination.
4.10.6. Undertake continuous environmental scanning and market intelligence exercises to identify and evaluate emerging subsectors ensuring that policy and investment frameworks remain responsive to global trends.

4.11. Regional and International Market Development

Stakeholders noted the need to diversify beyond traditional source markets, with calls for greater engagement with Latin America, Europe, and the wider Caribbean. Policy measures will therefore support strategic partnerships with airlines and cruise operators to access new markets, targeted marketing campaigns to promote the Virgin Islands' niche offerings, and strengthened participation in international trade shows. Regional market development will also involve closer collaboration with OECS neighbours to promote multi-destination packages, particularly in areas of shared cultural and environmental interest.

Priority Actions:

4.11.1. Establishing minimum spend agreements with cruise lines, encouraging longer stays and bundled packages with local attractions.
4.11.2. Negotiate reciprocal marketing agreements with neighbouring territories (USVI, Puerto Rico, OECS states) to promote multi-destination packages.
4.11.3. Expand inter-island ferry and air service subsidies for events and holiday weekends to encourage regional visitor flows.
4.11.4. Target promotions for diaspora and regional travellers (weddings, reunions, conventions), with bundled travel and accommodation discounts.
4.11.5. Position the Virgin Islands as a regional conference and sports tourism hub, leveraging new infrastructure (Prospect Reef redevelopment, sports complexes) and regional athlete ambassadors.

4.11. Private Yacht Segment Integration

A balanced and well-functioning marine tourism sector requires recognition of the distinct roles and contributions of both charter and privately owned vessels. This Policy establishes the approach to integrating the private yacht segment into national tourism planning, ensuring that policy, infrastructure, and regulatory frameworks reflect the diversity of vessel types, usage patterns, and

economic contributions. By explicitly incorporating the private yacht segment, the Government strengthens sector inclusivity, improves alignment with market realities, and supports the sustainable growth and competitiveness of the Virgin Islands as a leading yachting destination.

This Policy also recognises the private yacht segment as a distinct and strategically important component of the Virgin Islands tourism economy, alongside the charter yacht sector. Private yachts contribute to visitor expenditure, marine usage, provisioning, maintenance services, and extended stays, and shall be explicitly integrated into tourism planning, infrastructure development, and regulation frameworks.

Policy measures affecting marine tourism shall therefore be designed to reflect the operational characteristics and needs of both charter and private vessels, ensuring that neither segment is disproportionately advantaged or constrained.

Priority Actions:

4.11.1. Support marina infrastructure, berthing and servicing capacity for private vessels
4.11.2. Facilitate efficient entry, clearance, and permitting processes
4.11.3. Ensure access to anchorages and moorings based on transparent and equitable rules
4.11.4. Strengthen linkages between private yacht visitors and local goods and services
4.11.5. Market development strategies to position the Virgin Islands as a premier destination for both charter and privately owned vessels.

Closing Statement for the Pillar

By diversifying its tourism offerings and investing in cultural heritage, culinary experiences, events, and niche markets, the Virgin Islands will strengthen its competitiveness and broaden the base of community and business participation in tourism. The integration of certification, accessibility, and international recognition will elevate the Territory's profile as a boutique destination that delivers authentic, high-quality experiences. This approach reflects stakeholder aspirations and aligns with OECS regional commitments to develop diversified, competitive, and resilient tourism products.

5. Biodiversity and Ecosystems Protection and Resource Conservation

The Virgin Islands' natural assets—its forests, wetlands, coral reefs, beaches, and coastal waters—are the foundation of its tourism economy. Stakeholders consistently emphasised that without healthy ecosystems, tourism cannot thrive, as visitors are drawn primarily by the Territory's natural beauty and biodiversity. However, rapid tourism growth, unregulated development, and climate change are placing mounting pressure on fragile environments. Concerns raised included ineffective waste management, overuse of plastics, degradation of sensitive habitats, and inefficient resource use. This pillar, therefore, commits to embedding biodiversity protection and resource conservation at the heart of tourism development. It aligns with the OECS framework on

sustainable tourism and with the NSDP outcomes on environmental sustainability and hazard risk reduction.

5.4. Biodiversity and Ecosystem Protection

Stakeholders highlighted the urgent need to preserve critical habitats that support tourism experiences, including mangroves, seagrass beds, and coral reefs. Policy commitments will strengthen enforcement of protected area legislation, expand conservation zones, and integrate biodiversity safeguards into planning approvals for tourism projects. Partnerships with NGOs and community groups will be formalised to support monitoring, restoration, and education initiatives. This approach ensures that tourism expansion is balanced with ecological integrity, protecting the very resources upon which the visitor economy depends.

Priority Actions:

5.4.1. Expand and enforce terrestrial and marine protected areas, with clear zoning for conservation, recreation, and restricted use.
5.4.2. Establish co-management agreements with NGOs and community groups to monitor sensitive ecosystems and implement restoration projects.
5.4.3. A National Biodiversity Monitoring System, publishing annual data on coral cover, mangrove health, bird populations, and endangered species.
5.4.4. Legislate stricter conservation safeguards for development permits near critical habitats, requiring ecological offsets where impacts are unavoidable.
5.4.5. Integrate ecosystem services valuation into national accounts, ensuring the economic contribution of biodiversity is visible in policy and budget planning.
5.4.6. Establish an Environmental Compliance desk within MTCSD - either in the Product Development & Niche Markets Unit or as a standalone.

5.5. Waste Minimisation and Management

Waste management was raised as a persistent challenge across all islands, with stakeholders citing littered beaches, inadequate disposal facilities, and limited recycling options as deterrents to both residents and visitors. The policy will address this by introducing mandatory waste management plans for tourism operators, expanding recycling and composting infrastructure, and incentivising circular practices within hotels and resorts. Cruise ship waste management protocols will also be strengthened, with stricter monitoring and penalties for non-compliance. These measures will ensure cleaner environments, enhance visitor experiences, and protect ecosystems.

Priority Actions:

5.5.1. Implement a mandatory waste management plan requirement for all licensed tourism properties and attractions.
5.5.2. Expand waste collection infrastructure at beaches, marinas, and cruise hubs, with clear separation for recycling, composting, and landfill waste.

5.5.3. Establish a national recycling and composting facility, prioritising plastics, glass, and organic waste from hotels, restaurants, and events.
5.5.4. Enforce cruise ship waste offloading protocols with independent inspections, penalties for non-compliance, and public reporting of disposal volumes.
5.5.5. Introduce a green tax rebate system for hotels and operators that demonstrate verifiable reductions in waste output.

5.6. Circular Tourism

Consultations encouraged a shift towards circular-economy principles, in which waste is reduced, resources are reused, and tourism operations are designed to minimise environmental footprints. Policy action will promote circular tourism through initiatives such as repurposing sargassum, converting food waste into compost for community farms, and encouraging the reuse of materials in events and festivals. Hotels and attractions will be supported to adopt circular business models that reduce costs while enhancing their sustainability credentials.

Priority Actions:

5.6.1. Support pilot projects for waste-to-value initiatives such as sargassum-based fertiliser, compost production, and upcycled crafts.
5.6.2. Embed circular economy training modules into hospitality, event management, and vendor certification courses.
5.6.3. Incentivise reuse and product take-back systems for beverage containers, packaging, and event supplies.
5.6.4. Establish a grant window for circular business innovation, requiring knowledge-sharing of results across the sector.
5.6.5. Integrate circular economy targets into annual sustainability reports for the tourism sector.

5.7. Reduction of Plastics and Styrofoam

Plastic pollution was highlighted as a visible and urgent issue. Stakeholders called for stricter bans on single-use plastics and styrofoam, particularly in food service and event settings. Policy commitments will extend current restrictions, promote biodegradable alternatives, and incentivise vendors and MSMEs to transition to sustainable packaging. Public awareness campaigns will reinforce behaviour change, positioning the Virgin Islands as a leader in marine conservation and eco-friendly tourism practices.

Priority Actions:

5.7.1. Legislate a phased ban on single-use plastics and styrofoam in the food service, accommodation, and events sectors, aligned with regional OECS policies.

5.7.2. Promote biodegradable alternatives through fiscal incentives and duty-free importation schemes.
5.7.3. Public awareness campaigns to reinforce behaviour change among residents, vendors, and visitors.
5.7.4. Enforce compliance through spot inspections and penalties, tied to licensing conditions.
5.7.5. Create plastic-free pilot zones at flagship beaches, events, and ports to demonstrate global leadership in sustainable tourism.

5.8. Resource Efficiency: Water and Energy Conservation

Concerns were raised about the heavy resource footprint of the tourism sector, especially regarding water consumption and reliance on fossil fuels. Stakeholders emphasised the need for more efficient systems in hotels, marinas, and cruise facilities. Policy direction will mandate water-conservation technologies, such as rainwater harvesting and greywater recycling, while incentivising the adoption of energy-efficient appliances and renewable energy installations. These initiatives will reduce operating costs, improve resilience, and enhance the Virgin Islands' branding as a sustainable tourism destination.

Priority Actions:

5.8.1. Require water conservation technologies (rainwater harvesting, greywater recycling, low-flow fixtures) in all new and licensed accommodations.
5.8.2. Mandate energy audits and reporting for large hotels and marinas, with phased adoption of efficiency benchmarks.
5.8.3. Fiscal incentives (tax credits, accelerated depreciation) for renewable energy installations and energy-efficient appliances.
5.8.4. Create a Green Tourism Standards Code, requiring operators to demonstrate progress in energy and water efficiency as a condition for star-grading and certification.
5.8.5. Install real-time water and energy monitoring systems at major public tourism facilities (airports, ports, beaches) and publish performance dashboards.

Closing Statement for the Pillar

By embedding biodiversity protection, waste minimisation, circular practices, and resource efficiency into tourism development, the Virgin Islands will ensure that its natural capital is preserved for future generations. These measures address stakeholder concerns while aligning with the OECS Sustainable Tourism Framework and the NSDP's vision for environmental sustainability. In doing so, the Territory strengthens both its ecological integrity and its long-term competitiveness as a destination renowned for its natural beauty and responsible stewardship.

6. Access and Transport Services

The success of the Virgin Islands' tourism industry depends heavily on reliable, affordable, and sustainable access. Consultations consistently revealed that stakeholders view transportation—by air, sea, and land—as both a critical enabler and a persistent constraint. Challenges cited included limited international airlift, high intra-regional fares, insufficient ferry capacity, congestion at key ports, and gaps in inter-island connectivity that disadvantage the Sister Islands. At the same time, opportunities exist to improve energy efficiency in transport systems, modernise port and airport infrastructure, and enhance visitor experience from the point of entry to the final destination. This pillar, therefore, commits to strengthening air, sea, and ground transport services to improve accessibility, affordability, and resilience. It aligns with the OECS policy framework on access and transport, and supports NSDP outcomes on transportation and logistics, sustainable energy, and digital connectivity.

To ensure balanced tourism development across the Territory, the Government will implement a Sister Islands Air Access Programme covering runway safety, lighting, terminal standards, regulatory compliance, and commercial viability for Virgin Gorda and Anegada. Improved aviation connectivity for the Sister Islands will support diversified tourism models, including boutique, eco-culinary, and heritage-based tourism, while reducing pressure on Tortola as a sole gateway.

6.4. Cost-Effective Inter- and Intra-Regional Air Access

Stakeholders across the consultations emphasised that airlift remains the single most pressing challenge for tourism growth. Limited direct flights from key markets, high fares, and scheduling inconsistencies reduce competitiveness. The policy will pursue multi-pronged strategies, including negotiations with international carriers for direct services, development of regional airline partnerships, and targeted incentives to increase flight frequency and capacity. The extension of the airport runway and the modernisation of the terminal were widely supported to accommodate larger aircraft and improve passenger flow. By addressing air access constraints, the Virgin Islands will strengthen its ability to attract higher-yield markets and remain competitive regionally and globally.

The Territory will pursue an airlift strategy grounded in commercially viable, regional integration, and alignment with target tourism markets. Priority will be given to strengthening connectivity through established regional and international hub networks, while ensuring that any expansion of direct long-haul services is evidence-based, financially viable, and aligned with national infrastructure capacity.

Priority Actions:

6.4.1. Negotiate direct international air services from priority markets (North America, Europe, Latin America) through targeted carrier partnerships and route development incentives.

6.4.2. Complete the airport runway extension and terminal upgrades, ensuring compliance with international safety, security, and passenger comfort standards.
6.4.3. Subsidise regional airlift during peak tourism events and low-season periods to sustain connectivity and reduce fare volatility.
6.4.4. Introduce a Virgin Islands Air Access Task Force, engaging carriers, hoteliers, and tourism bodies to coordinate long-term demand forecasting and marketing support.
6.4.5. Establish public-private partnerships for the development of new air routes and seasonal charters, including air taxi and seaplane services to Sister Islands.
6.4.6. Create a transparent air service agreement framework, including performance-based subsidies tied to seat guarantees and service reliability.

6.5. Ferry Services and Maritime Connectivity

As a multi-island destination, the Virgin Islands depends heavily on efficient ferry services to connect visitors between islands and with neighbouring territories. Consultations highlighted the need for improved scheduling, safety standards, and passenger facilities. Policy direction will focus on modernising ferry terminals, upgrading vessels to international safety and emissions standards, and introducing digital ticketing systems for greater efficiency. The Government will also work with operators to develop inter-island routes that strengthen tourism linkages with Virgin Gorda, Anegada, and Jost Van Dyke, reducing over-reliance on Tortola as the main hub.

Priority Actions:

6.5.1. Modernise ferry terminals (Road Town, Virgin Gorda, Anegada, Jost Van Dyke) with upgraded safety, customs, immigration, and passenger amenities.
6.5.2. Establish a digital ferry ticketing and reservation system, integrated with air arrivals and tourism apps to improve visitor convenience.
6.5.3. Fleet modernisation programmes for ferry operators, incentivising the adoption of low-emission, fuel-efficient, and accessible vessels.
6.5.4. Negotiate reciprocal ferry agreements with USVI and OECS states to expand cross-border connectivity and support multi-destination tourism.
6.5.5. Require service reliability and safety performance standards for all licensed ferry operators, with public reporting on delays and compliance.
6.5.6. Introduce inter-island ferry subsidies to strengthen Sister Islands connectivity, particularly for cultural and sporting events.

6.6. Air, Sea, and Ground Transport Integration.

The visitor experience often suffers from fragmented transport systems that do not provide seamless connections between airports, seaports, ferries, and ground operators. Stakeholders highlighted missed opportunities for better coordination, especially during peak cruise and air arrivals. Policy action will prioritise integrated transport planning that ensures smooth transfers,

efficient baggage handling, and improved signage and information systems at ports of entry. Collaboration with taxi and tour operators will be institutionalised through licensing and certification to enhance quality of service.

Priority Actions:

6.6.1. Implement integrated transport hubs at key entry points, providing seamless connections between ferries, taxis, car rentals, and inter-island flights.
6.6.2. Establish a unified transport information system (app, kiosks, online portals) with real-time updates on flights, ferries, taxis, and shuttles.
6.6.3. License reforms for taxis and tour operators, requiring customer service, safety, and accessibility certification.
6.6.4. Create a coordinated cruise passenger management system, aligning port schedules with ground transport capacity to reduce congestion and wait times.
6.6.5. Introduce smart signage and wayfinding at ports and airports, using multilingual, digital, and accessible formats.

6.7. Market-Aligned Airlift Strategy

Effective air access is critical to the competitiveness and sustainability of the Virgin Islands tourism sector. A market-driven approach to air service development, ensuring that connectivity is aligned with demand, target visitor segments, and the Territory's economic and infrastructure realities. By prioritising commercially viable routes and strengthening linkages through key regional and international hubs, the Government ensures reliable, efficient, and sustainable air access that supports tourism growth while minimising fiscal risk.

Air service development for the Virgin Islands shall be guided by commercially viable market demand and alignment with target visitor segments. This Policy priorities strengthening connectivity through major regional and United States hub airports, recognising the role of hub-and-spoke networks in sustaining reliable and cost-effective air services. All air service development initiatives shall be informed by demand analysis aligned with the territory's targeted demand strategy, prioritising routes and markets that deliver high-value visitors consistent with the Virgin Islands' tourism positioning, route feasibility assessments, and cost-benefit evaluation to ensure fiscal sustainability and long-term viability.

Priority Actions:

6.7.1. Secure and maintain consistent service to key hub airports in the United States and the wider Caribbean region
6.7.2. Leverage hub connectivity to expand access to the international source markets without reliance on direct long-haul routes.
6.7.3. Support multi-destination travel within the region through coordinated scheduling and partnerships

6.7.4. Align flight frequency, timing, and capacity with target tourism segments, particularly higher-value, longer-stay visitors

6.8. Energy-Efficient and Sustainable Transport

Consultations revealed strong support for reducing the environmental footprint of tourism transport. Stakeholders endorsed investment in low-emission ferries, hybrid buses, and electric vehicle fleets for ground transport. Policy measures will incentivise operators to adopt green technologies, while government infrastructure projects will include charging stations, energy-efficient port facilities, and improved traffic management systems. These initiatives will not only reduce carbon emissions but also demonstrate the Virgin Islands' leadership in sustainable island transport, in alignment with the OECS Climate Action Plan.

Priority Actions:

6.8.1. Establish EV and hybrid vehicle incentives, including reduced duties, charging station networks, and preferred access at ports and attractions.
6.8.2. Introduce low-emission maritime corridors, supporting LNG/electric ferries and mandating stricter emissions standards for licensed vessels.
6.8.3. Pilot green airport ground operations (electric baggage carts, shuttles, and service vehicles) at Terrance B. Lettsome International Airport.
6.8.4. Adopt a Sustainable Transport Master Plan integrating land-use, climate resilience, and decarbonisation strategies for tourism mobility.
6.8.5. Implement mandatory annual emissions testing for taxis, buses, and rental fleets, with phased adoption of clean vehicle standards.
6.8.6. Support cycling and pedestrian infrastructure in urban tourism hubs, linking hotels, restaurants, and cultural attractions.

Closing Statement for the Pillar

By addressing airlift constraints, modernising ferry services, integrating transport systems, and investing in sustainable mobility, the Virgin Islands will improve accessibility, enhance visitor satisfaction, and reduce environmental impact. These reforms respond to longstanding stakeholder concerns while positioning the Territory as a more connected and resilient destination. In doing so, the policy strengthens alignment with OECS regional initiatives and advances NSDP outcomes on transportation, logistics, and sustainable energy, ensuring that access becomes a competitive advantage rather than a constraint.

7. Tourism Destination Management

The consultations confirmed that while the Virgin Islands enjoys strong brand recognition as a premier marine and leisure destination, there are persistent weaknesses in how the destination is managed. Stakeholders identified fragmented decision-making, inadequate data collection, weak

labour planning, and inconsistent legislative support as key barriers to effective destination management. The proposed shift from a marketing-centric Tourist Board to a broader framework that integrates product development, research, human capital, and regulation was welcomed across the industry. This pillar, therefore, commits to establishing destination management as a central function of tourism governance, with an emphasis on coordination, evidence-based planning, and inclusivity. It aligns with the OECS framework on destination management and the NSDP outcomes on governance effectiveness, research and innovation, and diversified economic competitiveness.

Visitor flow and site capacity management shall be governed by enforceable thresholds established under the Tourism Act. High-traffic beaches, marine zones, cruise corridors, and peak-event destinations shall operate within defined daily and hourly capacity limits.

In relation to the marine sector, structured participation from representative bodies, including the Charter Yacht Society and other relevant industry associations, shall be included to ensure that operational realities and sector-specific considerations inform policy implementation.

On the environmental side, compliance measures at marine and coastal sites shall prioritise enforcement action, including anchoring restrictions, mooring requirements, and protected area regulations, supported by clear signage, monitoring systems, and on-site enforcement capacity.

Operational guidance, site-level threshold templates and enforcement mechanisms are provided in Appendix VIII: Carrying Capacity and Visitor Management Framework on page 165. These provisions shall not be discretionary and shall apply where site utilisation exceeds established trigger thresholds.

7.4. Vessel Class Capacity Management

Marine management requires a differentiated approach that recognises the varying characteristics, impacts, and operational needs of different vessel types. This Policy establishes the framework for managing capacity within the marine and yachting sector to ensure safety, optimise infrastructure use, and support sustainable and equitable access across the Territory. By incorporating vessel class considerations into capacity management, the Government strengthens its ability to address congestion, protect sensitive marine environments, and balance the needs of diverse users while maintaining the overall quality and competitiveness of the destination.

Differentiated capacity guidelines for key vessel categories, including bareboat vessels, crewed yachts, and large or mega yachts, will be established. These guidelines shall reflect differences in space requirements, infrastructure suitability, environmental impact, and economic contributions. Capacity thresholds shall be determined based on site-specific assessments and operational data. The Government may implement operational controls, including limits by vessel type or size at specific locations, allocation systems for moorings, and designated areas for large vessels where infrastructure constraints exist.

Visitor capacity within the marine and yachting sector shall be managed not only at the aggregate level, but also by vessel class to ensure safe, equitable, and sustainable use of anchorages, moorings, and marine infrastructure. Visitor management measures within the marine sector shall apply equally to charter and private vessels, with operational rules designed to reflect differences in vessel use patterns, stay duration, and infrastructure requirements. Vessel distribution and capacity by type will be monitored and reported through the Policy's Monitoring and Reporting Framework.

Priority Actions:

7.4.1. Maintain safe navigation and anchorage conditions
7.4.2. Ensure appropriate allocation of mooring, including provisions for vessels exceeding 60 feet
7.4.3. Prevent overconcentration of specific vessel types
7.4.4. Support environmental protection and overall carrying capacity limits

7.5. Marina Management Control

Effective marina management requires a balanced approach that safeguards environmental integrity and safety while supporting efficient, practical operations in the marine sector. This Policy supports the framework for implementing marina-related controls in a manner that is proportionate, phased, and responsive to real-world operational conditions. By prioritising practicality, flexibility, and continuous review, the Government ensures that marina management measures remain effective, enforceable, and aligned with sector needs, while contributing to sustainable marine use and an improved visitor experience.

Marina infrastructure and operational controls shall be designed and implemented in a manner that is proportional, practical, and aligned with the operational realities of the marine sector. The introduction of measures such as mooring capacity limits, booking systems, inspection regimes, storm refuge protocols, and environmental controls shall be guided. Measures will be prioritised and implemented in phases, with a clear distinction between mandatory requirements, recommended practices, and long-term development objectives. Additionally, marine and marine-related controls shall be subject to periodic review and adjustment based on monitoring data, stakeholder feedback, and observed operational impacts.

Priority Actions:

7.5.1. Operational feasibility and administrative efficiency
7.5.2. Alignment with existing infrastructure and service capacity
7.5.3. Stakeholder engagement and industry input.

7.6. Cruise Tourism

Cruise tourism remains a vital component of the Virgin Islands' visitor economy, but the sector faces pressing challenges that must be addressed to sustain its contribution. Stakeholders highlighted that the current model lacks a clear, unified vision, with fragmented efforts and reactive planning undermining the industry's potential. While the Territory has successfully positioned itself to accommodate mega ships carrying 4,000–6,000 passengers, the supporting infrastructure—such as restrooms, activity hubs, signage, and transport facilities—has not kept pace. This mismatch between vessel capacity and land-based amenities risks eroding the visitor experience and straining local communities.

A key challenge is the overconcentration of cruise activity in Road Town and at iconic sites such as The Baths and Cane Garden Bay. These sites face overcrowding, generating visitor dissatisfaction and community tension. Opportunities exist to diversify the shore-excursion portfolio, drawing visitors to underutilised or emerging destinations such as Salt Island, Smuggler's Cove, and heritage sites. However, many promising heritage sites lie on private land. While landowners have shown interest in developing these resources, high upfront costs and uncertainty about visitor flows discourage investment. Without financial incentives and guarantees of consistent cruise passenger demand, these sites remain underdeveloped.

The commercial realities of cruise tourism also constrain local entrepreneurs. Operators must sell excursions to cruise lines at relatively low wholesale rates, while cruise companies charge passengers significantly more. This model limits margins for local vendors and creates challenges in offering high-quality, interactive experiences—such as re-enactments at heritage sites—that are financially sustainable. Greater collaboration with cruise lines, including predictable scheduling, marketing support, and co-investment in new excursions, is therefore critical to developing a diversified product base that benefits both the Territory and the cruise industry.

There are also land-use planning conflicts that compromise tourism value. Poorly coordinated decisions, such as allowing marina development adjacent to heritage zones, reduce opportunities for integrated tourism experiences. This underscores the need for inter-agency planning frameworks that embed tourism priorities into land-use decisions.

Despite these challenges, opportunities abound. Year-round cruise calls, which were once uncommon, signal the growing strength of the Caribbean and the Virgin Islands in the global cruise market. This trend creates space for new product offerings and more balanced visitor flows throughout the year. Sites such as Salt Island exemplify untapped potential, combining cultural heritage, hiking, and beach experiences that align with passenger interest in authentic, immersive excursions. By strengthening partnerships with cruise operators, providing incentives for private landowner participation, and adopting a long-term infrastructure and amenity plan, the Virgin Islands can position itself as a cruise destination that balances volume with quality, disperses benefits beyond Road Town, and safeguards the natural and cultural assets that underpin its appeal.

The Government is committed to developing structured programmes to distribute cruise passengers to sister islands and community-based attractions, ensuring that Virgin Gorda, Jost Van Dyke, and Anegada capture a fairer share of the cruise economy. This will include the creation of

certified excursion packages that highlight local culture, cuisine, music, and heritage trails, designed and delivered in partnership with community organisations and SMEs.

The Policy also calls for the establishment of dedicated community tourism markets within cruise excursions, integrating local artisans, vendors, and cultural practitioners into the visitor experience. Mechanisms will be developed to guarantee vendor participation in cruise flows, supported by training and certification programmes to ensure quality, safety, and consistency.

To manage volumes responsibly, the Government will adopt a Cruise Carrying Capacity Policy, setting daily limits for visitor numbers at Road Town and sensitive sites, while actively promoting alternative excursions that reduce pressure on high-traffic locations.

Through these measures, cruise tourism will evolve from a model of concentrated activity in Road Town to one that creates broad-based economic opportunities across the Virgin Islands, strengthens cultural identity, and enhances visitor satisfaction through more authentic, community-driven experiences.

Priority Actions:

7.6.1. Upgrade visitor infrastructure and amenities to ensure that facilities such as restrooms, signage, transport hubs, and shaded areas can accommodate the passenger volumes of cruise ships.
7.6.2. Diversify shore excursions beyond Road Town by incentivising private landowners and communities to develop heritage and cultural sites, supported by a dedicated product development fund co-financed with cruise partners.
7.6.3. Strengthen community integration in cruise tourism by guaranteeing vendor participation for artisans, food vendors, and performers, and by formalising predictable scheduling agreements that support local business confidence.
7.6.4. Negotiate improved commercial terms with cruise operators to increase margins for local providers, including co-marketing arrangements and revenue-sharing models that reinvest part of excursion sales into destination development.
7.6.5. Adopt a cruise carrying capacity and dispersal policy to manage visitor flows at high-traffic sites such as Cane Garden Bay and The Baths, while promoting certified alternative community-based excursions across the Territory.
7.6.6. Embed cruise tourism priorities in land-use planning to prevent conflicting developments near heritage and natural sites, ensuring that tourism value is protected and enhanced.
7.6.7. Establish a Cruise Tourism Subcommittee under the Destination Management Council with representation from cruise operators, SMEs, community organisations, and sister islands to oversee scheduling, dispersal, and benefit-sharing strategies.
7.6.8. Establish certified excursion packages that actively direct passengers to Virgin Gorda, Jost Van Dyke, and Anegada, featuring heritage trails, eco-experiences, and cultural activities.
7.6.9. Formalise vendor participation through designated community markets at cruise hubs and excursion sites, ensuring inclusion of artisans, food vendors, cultural performers, and SMEs.

7.6.10. Set and enforce daily passenger and ship quotas for Road Town, Cane Garden Bay, The Baths, and other sensitive sites, while promoting alternative community excursions to manage flows sustainably.
7.6.11. Provide training, certification, and small grants for local businesses, vendors, and guides to deliver high-quality, safe, and authentic experiences for cruise passengers.
7.6.12. Introduce an annual reporting mechanism on the geographic and community spread of cruise revenues, including SME participation, visitor satisfaction, and community feedback.

7.7. Research and Statistics (Tourism Satellite Accounts)

Stakeholders consistently emphasised the lack of reliable, timely data as a critical weakness in tourism planning. The lack of a Tourism Satellite Account, limited visitor segmentation data, and weak systems for tracking economic impact constrain the evidence base for policy. Policy action will establish a Tourism Statistical Unit within the Ministry, mandated to compile, analyse, and publish regular reports. The re-introduction of a Tourism Satellite Account will enable the government to measure the sector's contribution to GDP, employment, and foreign exchange. This system will support stronger fiscal planning and provide investors and policymakers with credible data to guide decision-making.

Priority Actions:

7.7.1. Adopt a cruise carrying capacity policy, setting limits on the number of ships and passengers per day at Road Town and Sister Island ports.
7.7.2. Establish Tourism Statistical and Research capacity within the Ministry of Tourism, mandated to collect, analyse, and publish visitor and sector data.
7.7.3. Implement a Tourism Satellite Account (TSA) to accurately measure tourism's contribution to GDP, employment, and foreign exchange earnings with a commitment to conduct periodic reviews and updates.
7.7.4. Mandatory reporting requirements for accommodations, marinas, and tour operators, supported by digital submission systems.
7.7.5. Publish quarterly tourism performance reports with visitor arrivals, occupancy rates, expenditure profiles, and forecasts, accessible to all stakeholders.
7.7.6. Formalise data-sharing agreements with Customs, Immigration, Ports, and airlines/ferry operators to support integrated statistics.

7.8. Use of Technology

Digitalisation was highlighted as an opportunity to modernise both visitor services and government operations. Stakeholders supported the development of a centralised visitor app that integrates ferry schedules, event calendars, emergency alerts, and booking platforms. At the institutional level, policy measures will prioritise the use of technology for licensing, inspections, and data

collection, reducing inefficiencies and enabling transparency. Technology adoption will also improve marketing intelligence and enhance visitor satisfaction by ensuring seamless and accessible information at every stage of the travel experience.

Priority Actions:

7.8.1. Launch a centralised visitor application and portal integrating ferry schedules, event calendars, emergency alerts, and booking platforms.
7.8.2. Digitise licensing, inspections, and compliance monitoring for operators, improving transparency and reducing processing times.
7.8.3. Smart tourism infrastructure (Wi-Fi at attractions, QR-coded interpretive signage, e-ticketing for sites) to enhance visitor experience.
7.8.4. Create a national tourism data dashboard for real-time monitoring of arrivals, mobility patterns, and site use, feeding into policy decisions.
7.8.5. Support digital adoption among MSMEs through training, grants, and partnerships with online booking platforms.

7.9. Labour Market and Human Resource Development

Concerns were raised about shortages of skilled labour in hospitality, marine services, and event management, as well as gaps in customer service quality. Stakeholders emphasised the need for systematic workforce planning, linked to training at local institutions. Policy commitments will embed tourism workforce development into national education and skills frameworks, expand partnerships with H. Lavity Stoutt Community College, and incentivise private sector investment in training. Programmes will target both entry-level skills and leadership development, ensuring that Virgin Islanders are equipped to take up opportunities across the value chain. Workforce development initiatives shall be aligned with national tourism quality standards to ensure consistent delivery of high-quality service across the sector.

Priority Actions:

7.9.1. Embed tourism workforce planning into the national skills framework, identifying priority occupations and future demand projections.
7.9.2. Partner with H. Lavity Stoutt Community College and regional institutions to expand vocational programmes in hospitality, marine services, culinary arts, and events management.
7.9.3. Create a National Customer Service Certification, mandatory for frontline staff in licensed businesses.
7.9.4. Incentivise private sector investment in training through fiscal credits and recognition programmes.
7.9.5. Develop a labour mobility strategy, enabling Virgin Islanders to gain international experience while attracting skilled professionals for gaps.

7.10. Public–Private Partnerships and Destination Management Councils

The consultations strongly supported the establishment of a Destination Management Council as a high-level coordinating body with thematic subcommittees. Stakeholders stressed that the Council must not be consultative only, but must also be empowered to prioritise, recommend, and monitor action across tourism, environment, trade, infrastructure, and disaster management. Policy measures will be legislated by the Council and institutionalised roundtable mechanisms to ensure transparency and sector-wide buy-in. This will formalise collaboration between government, industry, and community representatives, creating a unified platform for decision-making.

Priority Actions:

7.10.1. Legislate the Destination Management Council (DMC) into the Tourism Act as a statutory coordinating body with authority to advise Cabinet on priorities, policies, and monitoring.
7.10.2. Establish thematic subcommittees (e.g., marine, cruise, culture, environment, Sister Islands) under the DMC, ensuring sector-wide representation.
7.10.3. Formalise joint investment mechanisms (PPP frameworks) for infrastructure such as marinas, airports, and visitor facilities.
7.10.4. Ensure transparent appointment processes for DMC membership and publish annual reports on its decisions and outcomes.
7.10.5. Adopt consensus-based planning models, requiring consultation with the DMC before major tourism-related projects are approved.

7.11. Investment and Pioneer Status Reform

Tourism remains the largest driver of economic activity in the Virgin Islands, and continued growth requires an investment regime that is both competitive and aligned with the Territory's development priorities. The current pioneer status and investment incentive frameworks were designed in an earlier era, and while they have facilitated investment in traditional tourism infrastructure, they have not kept pace with the sector's evolving needs.

Stakeholders across the industry, including small and medium enterprises, community representatives, and international partners, have consistently emphasised the need to modernise and rebalance incentive regimes. Reforms must ensure that fiscal concessions not only attract large-scale investment but also foster inclusive growth, product diversification, environmental sustainability, and resilience. At the same time, the Government must guarantee transparency and accountability, ensuring that concessions deliver measurable benefits to the Virgin Islands' economy and people.

The National Tourism Policy, therefore, commits to a comprehensive review of the investment and pioneer status regimes. This includes revising eligibility criteria, introducing new categories for green and innovative tourism investment, tying concessions to performance-based outcomes, and strengthening oversight mechanisms. Reforms will also prioritise the participation of MSMEs,

youth, and women entrepreneurs, while incentivising innovation in emerging niches such as culinary, wellness, and cultural tourism.

The following framework consolidates the Priority Actions for reforming investment and pioneer status regimes under the National Tourism Policy. It recognises that incentives must be modernised to support inclusive growth, product diversification, environmental sustainability, transport improvements, and institutional transparency. While the commitments are grouped here for ease of reference, they are anchored within the relevant Policy Pillars.

1. Inclusive Growth & Income Distribution (Pillar 1)

- Review pioneer status criteria to allow MSMEs, community enterprises, and locally owned businesses to access targeted incentives for community tourism, cultural industries, and agritourism.
- Expand concession frameworks to include youth and women-owned businesses, ensuring equitable access to investment support.
- Tie concessions to domestic value retention requirements, including local employment quotas, supplier linkages, and community benefit agreements.

2. Product & Niche Market Development (Pillar 4)

- Modernise legislation to provide pioneer incentives for emerging niches such as wellness, culinary, adventure, and cultural tourism.
- Tie pioneer status approval to innovation and diversification, including projects focused on heritage restoration, eco-lodging, digital platforms, or green event management.
- Time-bound, performance-based concessions, ensuring that fiscal benefits are contingent on delivery of agreed outputs, such as festivals delivered or heritage trails developed.

3. Biodiversity & Resource Conservation (Pillar 5)

- Introduce a green pioneer status for investors meeting sustainability thresholds in renewable energy, water conservation, waste minimisation, and single-use plastic elimination.
- Require environmental certification (e.g., Green Globe, EarthCheck) as a precondition for continued concessions, monitored through annual compliance reviews.
- End blanket concessions for developments that create significant environmental risk, ensuring incentives promote biodiversity protection and sustainable practices.

4. Access & Transport Services (Pillar 6)

- Provide pioneer status concessions for sustainable transport investment, including electric taxis, hybrid tour buses, and low-emission ferries.
- Prioritise concessionary regimes for critical inter-island transport infrastructure, such as ferry terminals, airstrips, and integrated ticketing technologies, preferably under public–private partnership models.

5. Institutional Capacity (Pillar 8)

- Publish annual investment incentive reports, disclosing beneficiaries, concession values, and measurable sectoral outcomes.
- Harmonise tourism pioneer status regimes with those in related sectors (culture, creative industries, transport, environment) to ensure consistency and alignment with the National Sustainable Development Plan (NSDP 2036).

The reform of investment and pioneer status regimes is cross-cutting, touching multiple policy pillars. It strengthens the Virgin Islands' competitiveness while ensuring that fiscal incentives support inclusivity, diversification, sustainability, and accountability.

By modernising the investment framework, the Virgin Islands will be better positioned to attract quality investors, stimulate local entrepreneurship, protect its environmental assets, and deliver fair and transparent benefits to communities across the Territory.

7.12. Public Awareness and Sensitisation

Several consultations highlighted a disconnect between tourism policy and public perception of tourism's importance. Many residents view the sector as external to their daily lives, despite its role as the primary driver of the economy. Policy direction will therefore emphasise public education campaigns that highlight tourism's benefits, encourage community participation, and foster a culture of hospitality and pride. Schools, community groups, and media outlets will be engaged to strengthen the narrative that tourism is a shared national responsibility.

Priority Actions:

7.12.1. Implement a Tourism Education Campaign targeting schools, communities, and the private sector to promote awareness of tourism's role in national development.
7.12.2. Integrate hospitality and cultural pride training into national service programmes and youth initiatives.
7.12.3. Community tourism awareness workshops across all districts, ensuring grassroots involvement in shaping visitor experiences.
7.12.4. Introduce visitor etiquette campaigns for residents, visitors, and operators to reinforce environmental care, safety, and service standards.
7.12.5. Support annual Tourism Awareness Month, showcasing achievements, challenges, and opportunities in the sector.

7.13. Legislative Infrastructure

Stakeholders repeatedly stressed the need for modern legislation to support standards, licensing, and quality assurance. Comparative regional models were employed as benchmarks, where new

acts have created certification committees, licensing regimes, and tourism levies. Policy commitments will include drafting and passing updated legislation for accommodation standards, tour operator licensing, site quotas, and environmental management. This legislative reform will provide the backbone for effective destination management, ensuring accountability and consistency across the sector.

Priority Actions:

7.13.1. Draft and enact a comprehensive Tourism Act, consolidating regulations on standards, licensing, training, site management, and enforcement powers.
7.13.2. Modernise licensing systems for accommodations, taxis, ferries, and tour operators, linking renewal to compliance with quality and sustainability standards.
7.13.3. Legislate site quotas, carrying capacities, and conservation obligations for high-traffic sites.
7.13.4. Establish certification requirements for grading, eco-certification, and accessibility compliance.
7.13.5. Align national tourism legislation with regional frameworks to ensure harmonisation and competitiveness.

Closing Statement for the Pillar

Implementation of destination management controls shall be coordinated through the Destination Management Council in accordance with the Governance and Operating Model set out in Pillar 8.

By strengthening research systems, embracing technology, investing in human resources, and institutionalising partnerships through a Destination Management Council, the Virgin Islands will establish a robust framework for destination governance. These measures will transform the way the Territory manages its tourism assets, ensuring that policies are data-driven, inclusive, and legally grounded. This approach aligns with OECS regional priorities and advances NSDP outcomes on efficiency, competitiveness, and sustainable governance, positioning the Virgin Islands as a well-managed, world-class destination.

8. Institutional Capacity

Tourism stakeholders across the Virgin Islands emphasised that effective governance, coordination, and institutional strength are prerequisites for delivering on the aspirations of the sector. The consultations revealed that while the Territory benefits from a strong private sector presence and a globally recognised brand, weaknesses in institutional arrangements, capacity gaps within government agencies, and fragmented inter-agency collaboration continue to constrain progress. This pillar recognises that the ability to implement policies, enforce regulations, and coordinate action across ministries and sectors is as important as the policy content itself. It aligns with the OECS policy framework on institutional capacity and supports NSDP outcomes in governance effectiveness, public administration efficiency, and strengthened partnerships.

While stakeholder consultations were a critical component of policy development, they were complemented by data analysis, market research, and review of regional and international best practices to ensure that the Policy reflect both stakeholder perspectives and empirical evidence. Consultation inputs were systematically validated against available data and analytical findings to strengthen the Policy's credibility and strategic coherence.

Tourism Governance and Institutional Roles

Clear governance arrangements are essential to ensuring that tourism policy is implemented in a coordinated, efficient, and accountable manner. The institutional framework for the tourism sector defines the roles, responsibilities, and relationships between key entities to support coherent decision-making and delivery. By clarifying institutional mandates and strengthening coordination mechanisms, the Government ensures that tourism development is guided by a unified strategic direction, avoids duplication of functions, and enhances the overall effectiveness and responsiveness of the sector.

The effective implementation of this Policy requires clear delineation of roles and responsibilities, and coordination mechanisms across tourism institutions. The Ministry of Tourism, Culture and Sustainable Development (MTCSD) shall serve as the lead policy authority, responsible for strategic direction, policy development, regulation, inter-agency coordination, and monitoring of sector performance. The BVI Tourist Board (BVITB) shall be responsible for destination marketing, brand management, visitor promotion, and market intelligence, and shall operate within the strategic framework established by the Ministry. The Destination Management Council (DMC) shall function as a coordination and advisory body, supporting the implementation of destination management measures, facilitating stakeholder engagement, and advising on operational issues affecting the tourism sector.

Any entity established to support events, festivals, or cultural programming shall operate within the national tourism governance framework, with clearly defined roles that complement, rather than duplicate, the functions of existing institutions. All institutions shall operate within a coordinated governance structure, supported by formal mechanisms for collaboration, information sharing, and joint planning.

In the absence of a specific strategy or plan, decision-making shall be guided directly by the principles and policy position established in this document.

Institutional Interface and Coordination Mechanisms

Coordination among tourism institutions is essential to ensuring that policy direction is translated into coherent, efficient action. This Policy establishes the mechanisms through which key entities interface, collaborate, and align their activities, enabling a whole-of-government approach to tourism development and management. By formalising coordination processes and information-

sharing systems, the Government strengthens accountability, improves operational efficiency, and ensures that all institutions work collectively toward shared strategic objectives.

The interface between the Ministry, the BVI Tourist Board, and other tourism-related entities shall be governed by clearly defined protocols, including:

- Strategic alignment of all operational activities with Ministry-led policy direction
- Regular coordination meetings and joint planning processes
- Defined reporting lines and performance accountability framework
- Information-sharing mechanisms supported by digital systems and data governance protocols.

Events Governance

Events, festivals, and cultural programming play a significant role in enhancing destination appeal, driving visitor demand, and supporting year-round tourism activity. Establishing a governance framework to coordinate and manage events is a strategic approach that is institutionally aligned, operationally efficient, and coherent. By integrating events within the broader tourism governance structure, the Government ensures that planning, promotion, and delivery are aligned with national priorities, avoid duplication of functions, and maximise economic and cultural value for the Territory. National oversight of events, festivals, and related activities shall be coordinated within the existing tourism governance framework

Any proposed Event Board or equivalent entity shall have a clearly defined mandate, aligned with the national tourism strategy, and shall operate in coordination with the Ministry and the BVITB to avoid institutional overlap and ensure efficient delivery.

Tourism Governance and Operating Model

To eliminate fragmentation and clarify accountability, the Virgin Islands shall adopt a defined tourism governance structure that sets clear roles, decision authority, and funding responsibilities.

Roles and Responsibilities

Governance:

- **MTCSD**: Responsible for tourism policy, product development, standards, certification, destination management, data, Environment and Tourism Improvement Levy (ETIL)-funded product programmes
- **Destination Management Council (Governance/statutory):**

Operational:

- Tourism Development Department: Cross-agency delivery oversight, site quota governance, cruise dispersal, enforcement coordination, and island committees
- BVITB: Marketing, brand, sales, promotions, hosting, marketing intelligence
- Department of Culture
- BVI Port Authority: Gateways and port operations, data feeds, cruise scheduling coordination in tandem with the Ministry responsible for tourism.
- National Parks Trust: Protected sites, heritage assets, site management, and visitor permits where delegated
- Festival and Events Board: Professional events pipeline and cultural programming
- Central Statistics Office: TSA compilation with the MTCSD tourism unit
- Film Commission

Decision Authority

- Site quotas, timed entry systems, and event caps shall be established through regulations under the Tourism Act and coordinated by the Destination Management Council
- ETIL-funded tourism product development expenditure shall be administered by MTCSD, with annual public reporting
- Cruise scheduling and dispersal agreements shall be coordinated under the Destination Management Council.

Performance Accountability

Implementation of the Tourism Governance and Operating Model shall be supported by the Digital Tourism and Data Governance Roadmap. Tourism governance performance shall include:

- Quarterly delivery dashboards
- Annual Cabinet tourism performance reporting
- Public reporting of high-level indicators
- A mid-term review in 2031
- A final evaluation in 2036

8.4. Strengthening National Tourism Agencies and Governance Reform

Stakeholders called for clearer definitions of roles and responsibilities among the Ministry of Tourism, the Tourist Board, and related statutory agencies. Duplication of functions and gaps in oversight were seen as undermining effectiveness. Policy measures will streamline mandates,

enhance technical capacity within the Ministry, and establish dedicated units for research, product development, and standards enforcement. Strengthening national tourism agencies will ensure that the Government has the institutional weight to lead, regulate, and coordinate the sector effectively.

The implementation of this Policy will coincide with a wider reform of governance and operations in the Virgin Islands' tourism sector. This transition is intended to strengthen institutional clarity, reduce mandate duplication, and ensure that each body is positioned to deliver effectively on its core functions. By redefining roles and responsibilities across the Ministry of Tourism, Culture and Sustainable Development (MTCSD), the BVI Tourist Board (BVITB), the Festival and Events Board, and the Film Commission, the sector will move toward a model that balances strategic oversight, operational delivery, and market responsiveness.

The first step in this process is the transfer of BVITB staff into the MTCSD, where the Ministry will assume direct responsibility for product development, training, certification, and the enforcement of standards across accommodations, service providers, retail operators, and tourism practitioners. This reform places accountability for service quality and tourism standards within the Ministry, ensuring that policy priorities are directly linked to day-to-day oversight and sector improvement.

In parallel, the BVITB will be streamlined to focus on its comparative advantage in destination marketing and hosting functions. Its role will be to promote the Virgin Islands globally, manage brand identity, and serve as a coordination point for hosting visitors, media, and international delegations. This narrower mandate will enhance efficiency while allowing the Board to deepen its expertise in marketing and public relations.

The Virgin Islands Festival and Fairs Committee will be reconstituted into the Virgin Islands Festival and Events Board, with a dedicated mandate to manage national festivals and events. This will ensure that cultural celebrations, carnivals, and community events are supported by a permanent executive structure, with transparent funding, professionalised event management, and long-term planning that integrates festivals into the broader tourism offering.

Similarly, the Film Commission will be established as an independent body operating in parallel to the BVITB. This institutional autonomy will give it the flexibility and authority to attract film productions, incentivise creative projects, and promote the Virgin Islands as a hub for film and visual artistic expression. By developing a specialised focus, the Commission can leverage international partnerships, support local creatives, and contribute to diversifying the economy through film tourism.

Taken together, these reforms will provide the MTCSD with a clear leadership role in setting policy, developing tourism products, and raising service standards, while empowering semi-autonomous entities to focus on marketing, events, and creative industries. The new governance framework will establish a more coherent, collaborative, and accountable system, capable of advancing the Policy's strategic goals and positioning the Virgin Islands as a modern, competitive, and culturally vibrant destination.

Priority Actions:

8.4.1. Government will implement a structured transition process to clarify institutional roles, avoid duplication, and strengthen delivery capacity across the tourism sector. To ensure continuity and effectiveness, the following steps will be undertaken:

8.4.2. To guide the transition, the Government will develop a Transition Roadmap, which will include milestones, budget estimates and training needs. The Transition Roadmap will outline timelines, staffing reallocations, legal reforms, and stakeholder communication strategies. Progress will be reviewed quarterly, with updates shared publicly to maintain accountability and transparency.

8.4.3. The transfer of BVITB staff into the Ministry of Tourism, Culture and Sustainable Development (MTCSD) will be completed in phases, beginning with training, certification, and product development units. Clear job descriptions, reporting lines, and performance frameworks will be issued to align staff with their new mandate.

8.4.4. The Virgin Islands Tourist Board will be restructured to focus exclusively on destination marketing and hosting functions. Legislation and governance instruments will be amended to narrow its remit, and resources will be reallocated to strengthen global promotion, media relations, and visitor hosting services.

8.4.5. The Virgin Islands Festival and Fairs Committee (VIFFC) will be reconstituted into the Virgin Islands Festival and Events Board (VIFEB) through legislative reform. This new statutory body will be empowered with a permanent executive structure, transparent budgeting processes, and operational autonomy to plan, manage, and promote national festivals and events.

8.4.6. The Film Commission will be established as an independent statutory entity, operating parallel to the BVITB. Enabling legislation will be drafted to define its mandate, including authority to attract film productions, administer incentive schemes, and support local filmmakers. Administrative support, start-up financing, and technical expertise will be provided to ensure early success and sustainability.

8.4.7. The MTCSD will retain oversight of policy, product development, standards, and certification, integrating these functions into its core operations. The Ministry will also establish a monitoring and evaluation framework to track compliance across accommodations, service providers, and tourism practitioners, ensuring that service quality meets international standards.

8.4.8. Establish inter-agency MOUs or Service Level Agreements between agencies that MTCSD will oversee.

8.4.9. Provide dedicated budgetary allocations and staffing for these units to ensure continuity and technical capacity.

8.4.10. Professionalise governance of statutory bodies by introducing competency-based board appointments and publishing codes of conduct in keeping with the protocols and policy on Statutory Bodies.

8.4.11. Implement performance monitoring frameworks for statutory boards and agencies, requiring annual reporting on outputs and impact.

8.5. Adding Value to the Tourism Function at the Regional Level

Consultations underscored the importance of deeper engagement with regional tourism institutions, particularly the OECS, CARICOM, and the Caribbean Tourism Organisation. Stakeholders stressed that regional partnerships provide access to technical expertise, joint marketing opportunities, and collective bargaining power with international carriers and investors. Policy direction will institutionalise Virgin Islands' participation in regional working groups, harmonise national standards with OECS frameworks, and invest in capacity to contribute to regional research and knowledge exchange. This will ensure that the Virgin Islands both benefit from and contribute to collective Caribbean tourism resilience.

Priority Actions:

8.5.1. Institutionalise active participation in OECS, CARICOM, and CTO tourism committees, ensuring Virgin Islands representation in regional decision-making.
8.5.2. Harmonise tourism standards and certification frameworks with OECS policies to facilitate multi-destination marketing and recognition.
8.5.3. Joint regional marketing campaigns, co-branded product showcases, and shared participation in international trade fairs.
8.5.4. Pursue regional joint procurement agreements (e.g., for sustainability certification systems, training, and IT platforms) to reduce costs.
8.5.5. Provide secondments and staff exchanges with regional organisations to strengthen professional networks and capacity.

8.6. Public Agency Partnership Arrangements

The need for stronger inter-agency collaboration was a recurrent theme, particularly in areas where tourism intersects with environment, trade, immigration, customs, disaster management, and culture. Stakeholders cited challenges with siloed decision-making and slow response times in cross-cutting issues. Policy measures will establish structured partnership arrangements across agencies, supported by memoranda of understanding, inter-ministerial committees, and joint training programmes. This collaborative approach will reduce duplication, speed up delivery, and ensure that tourism is integrated into wider government planning.

Priority Actions:

8.6.1. Formalise inter-ministerial committees (Tourism, Environment, Health, Immigration, Customs, Ports, Trade) to coordinate cross-cutting issues.
8.6.2. Establish memoranda of understanding (MOUs) between agencies to clarify roles in tourism-related functions such as site management, emergency response, and licensing.
8.6.3. Strengthen inter-agency coordination (Ports, Customs, Immigration, Police) to streamline cruise passenger flows and improve visitor satisfaction.
8.6.4. Create a whole-of-government service charter for tourism, ensuring consistency across border, health, and infrastructure agencies.
8.6.5. Embed joint training programmes for frontline officers across agencies (immigration, customs, police, health inspectors) to align with tourism service standards.

8.6.6. Integrate tourism performance metrics into public service appraisals where relevant (e.g., processing times, customer feedback).

8.7. Regional Partnerships

Stakeholders expressed strong support for leveraging partnerships beyond the sub-region, including with international organisations such as UNDP, UNWTO, and conservation NGOs. These partnerships were seen as essential for financing climate adaptation projects, strengthening research, and showcasing the Virgin Islands' best practices on the global stage. Policy direction will prioritise strategic alliances that align with national priorities, focusing on technical cooperation, concessional financing, and co-branding opportunities. By pursuing targeted partnerships, the Virgin Islands will amplify its global profile while gaining resources to advance domestic policy objectives.

Priority Actions:

8.7.1. Pursue strategic partnerships with international organisations (UNWTO, UNDP, ECLAC, CDB) to mobilise technical and financial support for sustainable tourism projects.
8.7.2. Expand bilateral agreements with neighbouring territories (USVI, Puerto Rico, OECS) for ferry/air access, joint promotions, and crisis response.
8.7.3. Mobilise international climate and biodiversity financing to support tourism adaptation and conservation initiatives.
8.7.4. Establish formal partnerships with NGOs and academic institutions to pilot innovation in marine tourism, heritage management, and community-based tourism.
8.7.5. Leverage diaspora networks for investment promotion, destination marketing, and skills transfer initiatives.

8.8. Health Sector and Tourism

The health sector plays a vital role in the success of tourism in the Virgin Islands. Tourism can only thrive where visitors are assured of reliable, accessible, and effective health services, while residents remain confident that their own needs are not compromised. The quality of medical care, emergency response, and overall resilience of the health system directly influences the Territory's reputation as a safe and secure destination. Stakeholders, both local and international, consistently emphasise that the level of service and competency expected in the Virgin Islands is high and must meet international standards.

Consultations highlighted ongoing challenges with the availability and distribution of health professionals, particularly on the Sister Islands. Concerns were raised about gaps in access to primary care, limited capacity to respond to emergencies, and the absence of medical specialists to support complex needs. These gaps not only affect the well-being of residents but also erode visitors' confidence, especially during mass-casualty events, natural hazards, or health-related

crises. Ensuring a responsive health system is therefore integral to visitor safety and resilience, a core guiding principle of this Policy.

The Policy therefore commits to close collaboration between the Ministry of Health, the Ministry of Tourism, Culture and Sustainable Development, and the private sector to align service delivery with tourism needs. This will include upgrading medical facilities on Tortola and the Sister Islands, ensuring adequate emergency medical evacuation protocols, expanding telemedicine and diagnostic services, and strengthening human resource planning to address shortages in key medical professions.

By prioritising health as an enabler of tourism, the Virgin Islands will not only secure visitor confidence but also strengthen community well-being, making tourism more sustainable, resilient, and inclusive across all islands.

8.9. Visitor Safety and Resilience

The Virgin Islands affirms its responsibility to ensure the safety, security, and well-being of every visitor throughout their journey—from the moment they choose the Virgin Islands as a destination to their safe return home.

This principle recognises that visitor confidence and satisfaction depend on the Territory's capacity to deliver seamless and reliable services at all stages of the travel cycle. Accordingly, Government and industry stakeholders shall work together to:

8.9.1. Strengthen Emergency Preparedness and Response – Integrate disaster risk reduction, hazard management, and emergency health protocols into tourism planning and operations.
8.9.2. Safeguard Visitors During Disruptive Events – Ensure readiness for hurricanes, mass casualty events, geological hazards such as tsunamis and earthquakes, pandemics, or other emergencies that may affect the visitor experience.
8.9.3. Enhance Health and Support Systems – Maintain resilient health, medical evacuation, and crisis support services to meet international standards of care and safety.
8.9.4. Maintain Continuity of Operations – Establish contingency arrangements at airports, seaports, accommodations, and key attractions to minimise disruption and ensure orderly response during crises.
8.9.5. Ensure Transparent Communication – Provide accurate, timely, and accessible information to visitors through coordinated channels before, during, and after hazard events.
8.9.6. Build Capacity through Training – Equip tourism workers, hospitality providers, emergency responders, and community actors with the knowledge and skills necessary to support visitors during crises.

This guiding principle positions the Virgin Islands as a destination that not only delivers exceptional experiences in times of normalcy but also demonstrates resilience and care in times of disruption, ensuring visitor trust, loyalty, and long-term competitiveness.

8.10. Financing and Resource Mobilisation

Implementing the National Tourism Policy will require significant investment in infrastructure, environmental management, product development, and institutional reform. While the modernisation of the investment regime and the pioneer status reforms provide a foundation, the success of the Policy depends on a clear strategy to mobilise the financial resources needed to execute its priorities.

Government is committed to adopting a multi-channel financing approach that blends public funds, private capital, and regional and international resources. Domestic budget allocations will be prioritised for core regulatory and institutional functions, while public–private partnerships (PPPs) will be encouraged for large-scale infrastructure such as ferry terminals, airport expansion, and urban waterfront redevelopment. These PPPs will be structured to balance investor returns with public benefits, ensuring transparency and accountability in concession agreements.

In addition, the Policy will leverage green and blue financing mechanisms to support sustainability and resilience objectives. This includes accessing global climate funds, biodiversity offsets, carbon credits, and sustainability bonds to finance projects such as reef restoration, renewable energy adoption in hotels and marinas, and coastal resilience measures. The Government will also explore opportunities to use a portion of the Environmental and Tourism Levy as a co-financing instrument to attract matching contributions from regional and international partners.

Regional financing will be sought through institutions such as the Caribbean Development Bank (CDB), the Organisation of Eastern Caribbean States (OECS) pooled tourism funds, and CARICOM's regional development initiatives. International partnerships with the UN system, the World Bank, and bilateral donors will also be pursued to provide technical assistance, blended finance, and concessional loans for strategic projects.

At the national level, the Policy encourages domestic and diaspora investment and impact financing, creating pathways for Virgin Islanders to contribute capital to tourism enterprises, cultural projects, and sustainable infrastructure.

Finally, resource mobilisation will be integrated into the monitoring and reporting framework. Annual reports will include a financing dashboard that tracks funds mobilised by source (public, private, regional, international), sector (infrastructure, environment, culture, human resources), and delivery mechanism (PPP, levy, grant, loan). This transparency will build confidence among stakeholders, strengthen accountability, and ensure that financing flows are aligned with the Policy's strategic priorities.

Priority Actions:

8.10.1. Strengthen the financing framework to mobilise the diverse resources required to fund projects, programmes, and institutional reforms. Recognising that tourism development demands sustained investment in infrastructure, human capital, innovation, and

sustainability, Government will pursue a mix of public, private, and blended financing mechanisms to achieve long-term financial resilience.

8.10.2. Expand access to concessional and green financing, working with multilateral institutions, climate funds, and regional partners. These facilities will be used to finance climate resilience infrastructure, renewable energy projects in tourism facilities, and ecosystem restoration efforts that enhance the Territory's sustainability credentials.

8.10.3. To attract private capital, the Government will develop a Public-Private Partnership (PPP) Framework for Tourism Infrastructure, providing clear guidelines for risk sharing, investment protection, and performance monitoring. This framework will be designed to support the financing of ports, marinas, cultural and heritage sites, and other tourism-related amenities.

8.10.4. Work with the private sector and civil society to establish a Tourism Investment Promotion Mechanism, which will include the development of a portfolio of bankable projects for investors. These projects will align with the Policy's strategic pillars, particularly in product diversification, environmental protection, and community tourism development.

8.10.5. To ensure transparency and accountability, all financing and investment activities will be subject to robust monitoring, reporting, and evaluation procedures, including annual financial statements and periodic reviews of funding outcomes.

8.11. Fees, Taxes, and Simplification for Growth

While revenue generation remains a vital policy objective, consultations with the marine and yachting sector highlighted that the current fee and charge framework is overly complex, fragmented, and burdensome. Stakeholders described a system in which multiple agencies—including Customs, the Shipping Registry, Immigration, Labour, and the Ministry of Finance—impose separate fees and requirements, creating overlapping layers of bureaucracy. Inconsistent application of rules and lack of transparency in how fees are calculated further undermine investor confidence and frustrate operators. Delays in work permits and vessel licensing, coupled with unclear regulatory guidance, were cited as factors that make the Virgin Islands less competitive compared to other jurisdictions.

The marine sector argued that this approach places too much emphasis on extracting revenue piecemeal rather than fostering growth through simplicity and efficiency. Stakeholders advocated for a one-stop-shop system that consolidates licensing, permits, and payments into a single, transparent platform. They noted that simplifying processes would reduce costs, free up time for business innovation, and send a clear signal to investors that the Territory is serious about ease of doing business. At the same time, streamlining does not mean reducing revenues; instead, it allows the Government to collect taxes and fees more efficiently while encouraging greater compliance and participation from operators.

The National Tourism Policy, therefore, commits to a review of all tourism-related fees and taxes with a view to simplification, fairness, and competitiveness. This review will benchmark the Virgin Islands against regional peers, identify opportunities to consolidate or standardise charges,

and ensure that the fiscal burden is not driving businesses into informality. The objective will be to design a system that maximises revenue while minimising red tape, thereby strengthening both the Government's fiscal position and the private sector's capacity to grow.

By addressing the inefficiencies of the current system, the Policy positions the Virgin Islands to harness opportunities for growth in marine and tourism services. A transparent, predictable, and business-friendly fee and tax regime will make the Territory more competitive, improve compliance, and create an enabling environment that benefits both Government and industry.

Priority Actions:

8.11.1. To enhance competitiveness, improve ease of doing business, and encourage sectoral growth, the Government will undertake a comprehensive review of all tourism-related fees, taxes, and administrative procedures. This review will assess both the structure and implementation of charges across the marine, hospitality, and services sectors, with the goal of eliminating duplication, reducing bureaucracy, and ensuring fairness and transparency in revenue collection.

8.11.2. As a first step, the Government will establish an Inter-Agency Tourism Fiscal Review Committee, comprising representatives from the Ministry of Finance, the Ministry of Tourism, Culture and Sustainable Development (MTCSD), the BVI Ports Authority, the Shipping Registry, and key private sector stakeholders. The Committee will identify areas of overlap, streamline payment systems, and propose mechanisms to simplify procedures, including consolidating permits, licenses, and fee payments into a single digital interface or one-stop-shop system.

8.11.3. Informed by this review, the Government will rationalise the fee and tax structure to ensure that it is proportionate, predictable, and regionally competitive. Benchmarking will be conducted against peer jurisdictions within the OECS and the wider Caribbean to ensure that the Virgin Islands maintains its attractiveness for investment while safeguarding public revenues. Simplified fee schedules and transparent guidance will be published to improve compliance and clarity for operators.

8.11.4. The reform will also include a digital integration of payment and licensing processes, linking Customs, Immigration, Maritime, and Tourism databases to allow operators to complete transactions electronically. This will reduce administrative delays, minimise opportunities for error, and enhance the Government's capacity for data collection and enforcement.

8.11.5. Finally, the policy commits to a communication and transition plan to ensure that all operators, especially small and medium enterprises, are informed and supported during the transition to the simplified system. Training and help-desk support will be provided to ease adoption and maintain high compliance rates.

Through these measures, the Virgin Islands will move toward a streamlined, efficient, and equitable system that encourages entrepreneurship, improves compliance, and enhances competitiveness—ensuring that revenue generation and business growth proceed hand in hand.

8.12. Revenue Generation and Equity in Taxation

Tourism is a significant contributor to the Virgin Islands' economy, yet the current tax system does not fully capture the value generated across all segments. Stakeholders and the Government alike have underscored the need for a more equitable and efficient approach to ensure the public sector receives adequate returns on reinvested funds for infrastructure, services, and environmental protection. Two areas in particular—marine accommodations and cruise passengers—have been identified as critical to reform.

First, the concept of a "bed" must be treated equally, whether it is located on land or at sea. Hotels, villas, and guesthouses currently contribute to public revenues through occupancy taxes, while charter vessels—despite hosting thousands of visitors each year—do not fall under the same framework. This creates a structural imbalance and forfeits revenue potential from one of the Territory's most important subsectors. To address this inequity, the Government may progressively extend occupancy taxation to the marine sector, applying charges to berths on charter vessels in a manner that is transparent, enforceable, and consistent with practices in other destinations. The introduction of such a measure will ensure that all accommodation providers contribute fairly to the maintenance of services and amenities on which their guests depend.

Second, the current exclusion of cruise passengers from the Environment and Tourism Improvement Levy (ETIL) has been widely regarded as inequitable. Cruise visitors generate significant impacts on infrastructure, the environment, and local services, yet are exempt from contributing to the fund specifically designed to mitigate these pressures. As part of upcoming berthing agreement negotiations, the Government will redress this imbalance by including cruise passengers within the scope of the ETIL. This will harmonise contributions across all visitor segments and provide dedicated resources for environmental management, destination upgrades, and community tourism development.

Through these reforms, the Policy ensures that revenue generation is maximised and grounded in the principles of equity and sustainability. By treating land- and marine-based accommodations on the same footing, and by requiring cruise visitors to contribute to the Territory's environmental and tourism development levy, the Virgin Islands will strengthen its fiscal position and reinvest in the resilience, competitiveness, and long-term success of its tourism economy.

8.12.1. Government will introduce a Marine Accommodation Occupancy Framework that extends the principle of the "bed tax" to charter vessels and live-aboard yachts. A phased implementation approach will be adopted, beginning with larger fleets and bareboat operators before extending to smaller vessels. To ensure compliance, the framework will be linked to existing licensing and permitting systems managed by the Ports and Maritime Authorities, supported by clear reporting requirements and digital submission portals.

8.12.2. In parallel, the Government will amend the application of the Environment and Tourism Improvement Levy (ETIL) to include cruise passengers. This measure will be embedded in negotiations for new cruise berthing agreements, ensuring that cruise lines contribute fairly to the maintenance and enhancement of the Territory's infrastructure, environmental assets, and tourism services. Proceeds will be earmarked transparently for environmental

protection, site management, and community tourism initiatives, thereby demonstrating clear reinvestment of funds.

8.12.3. Supporting actions will include the drafting of enabling legislation and regulations, stakeholder consultations with marine operators and cruise partners to ensure phased implementation and fairness, and the creation of a compliance and monitoring mechanism within the Ministry of Finance and the Ministry of Tourism, Culture and Sustainable Development. Public communications will accompany the reforms to explain their purpose, benefits, and use of proceeds, thereby ensuring industry understanding and visitor acceptance.

Through these actions, the Virgin Islands will embed equity in its fiscal regime, maximise revenues from its largest sectors, and reinvest resources to strengthen sustainability, competitiveness, and resilience.

8.13. Redirecting ETIL Resources for Product Development

The Environmental and Tourism Improvement Levy (ETIL) was created to provide dedicated resources for enhancing tourism products and protecting the environment. At present, these resources are allocated to the BVI Tourist Board. However, under the reformed governance structure, responsibility for product development will rest with the Ministry of Tourism, Culture and Sustainable Development (MTCSD). To ensure alignment of functions with financing, ETIL resources earmarked for product development must therefore be redirected to the Ministry.

This realignment will require legislative amendments to the Environmental and Tourism Improvement Levy's Act and related statutory instruments, explicitly designating the Ministry as the recipient and administrator of product development funds. The amendments will guarantee that resources are ring-fenced and deployed exclusively for the purposes specified in the Act—namely, the development and maintenance of tourism infrastructure, the preservation of natural and cultural sites, and the upgrading of visitor services.

To operationalise this framework, the Ministry will be subject to strict accounting and reporting rules, ensuring transparency in the allocation and use of revenues. Annual reports will be submitted to Cabinet, with expenditure linked to clearly defined projects, measurable outcomes, and the Policy's strategic pillars.

By redirecting ETIL resources to MTCSD, Government will strengthen the Ministry's ability to deliver on its mandate for product development, reduce institutional overlap, and ensure that tourism levies are applied directly to the improvement of visitor experiences and environmental stewardship. This reform will reinforce accountability, create coherence between funding and function, and maximise the developmental impact of the ETIL.

Priority Actions

8.13.1. The Environmental and Tourism Improvement Levy (ETIL) resources earmarked for product development will be redirected from the BVI Tourist Board (BVITB) to the Ministry of Tourism, Culture and Sustainable Development (MTCSD), which will hold responsibility for tourism product development, standards, and certification.

8.13.2. An operational framework will be established within the MTCSD to support robust governance, accounting, and audit procedures. The Fund will operate as a distinct financial mechanism under the Ministry, with disbursement procedures tied to approved tourism development projects that directly advance the Policy's strategic pillars.

8.13.3. To strengthen transparency and accountability, the Ministry will publish annual expenditure reports, clearly identifying the projects supported, the outcomes achieved, and how these investments align with the ETIL's statutory purpose. Monitoring and evaluation protocols will be embedded into operation, supported by performance indicators and oversight from the Ministry of Finance.

8.13.4. The realignment of ETIL resources will enable the Ministry to deliver tangible improvements to tourism infrastructure, service standards, and environmental management, ensuring that revenues collected from visitors are reinvested efficiently in projects that enhance the overall quality and sustainability of the Virgin Islands' tourism product.

Closing Statement for the Pillar

By investing in stronger national tourism agencies, engaging more actively in regional tourism frameworks, building structured public agency partnerships, and leveraging international alliances, the Virgin Islands will significantly enhance its institutional capacity. This will ensure that policies are not only well-designed but also effectively implemented, monitored, and enforced. The Territory's ability to manage its tourism sector professionally, transparently, and accountably will advance NSDP outcomes in good governance and efficiency, while aligning with the OECS regional vision for institutional strengthening. This positions the Virgin Islands to deliver on its tourism policy commitments in a coordinated, credible, and resilient manner.

Tourism Governance and Implementation

Effective implementation of the Tourism Policy requires a coordinated governance framework across government institutions, the private sector, and community stakeholders. The Ministry responsible for Tourism will provide overall policy leadership and strategic direction for the sector. The BVI Tourist Board and Film Commission will lead destination marketing, visitor experience and support management, and tourism product development initiatives. The Ministry of Finance and the Ministry of Financial Services, Economic Development and Digital Transformation will support investment facilitation, fiscal policy alignment, and tourism-related infrastructure development, with MTCSD monitoring investment deployment over time.

Private sector partners, including hospitality operators, tour providers, and transportation services, will play a central role in product innovation and service delivery improvements. Local communities will contribute through cultural tourism development, heritage preservation, and community-based tourism initiatives.

This governance framework supports coordinated decision-making, performance monitoring, and accountability across the tourism ecosystem. All tourism-related strategies, plans, and investment decisions shall align with the policy directions established in this document. Where inconsistencies arise, the Policy shall take precedence unless otherwise determined by Cabinet.

The transition from the current tourism framework to the policy direction established herein shall be managed in a phased and coordinated manner, ensuring continuity of operations while progressively aligning systems, institutions, and practices.

9. Costs and Benefits of Policy Implementation

The successful implementation of the National Tourism Policy will require significant investment across infrastructure, governance, human capital, and environmental protection. These costs are not only financial but also include social and ecological considerations that must be carefully balanced. At the same time, the benefits of reform—if strategically planned and effectively managed—are expected to far outweigh the costs, delivering stronger competitiveness, sustainable livelihoods, and enhanced visitor experiences for the Virgin Islands.

The cost–benefit analysis (CBA) will provide a structured way to weigh the resource requirements of policy actions against their anticipated returns. By examining both the direct and indirect effects of proposed investments, CBA will enable decision-makers to prioritise interventions that will yield the highest value for the economy, the environment, and the people of the Virgin Islands. It also highlights trade-offs, ensuring transparency in policy choices and accountability in resource allocation.

Priority areas for analysis include improvements to air and sea access, regulation of marine tourism, management of cruise flows, development of cultural and heritage attractions, investment in workforce training, and diversification of the tourism product. Equally important are measures to strengthen environmental protection and climate resilience, alongside reforms to the legislative and governance framework. These areas reflect the integrated nature of the tourism sector, where investments in infrastructure, services, and environmental management collectively underpin the Territory’s competitiveness.

9.4. Redirecting ETIL Resources for Product Development

A detailed outline of costs and benefits under each priority area is provided in Appendix V: Cost–Benefit Analysis (CBA) Matrix on page 156. This appendix consolidates the evidence base needed to guide decision-making, offering a clear view of where policy investments will deliver the greatest economic, social, and environmental impact. Together, the narrative and appendix ensure that the Policy is both visionary and grounded in the practical realities of implementation.

Priority Actions:

9.4.1. Institutionalise a Cost-Benefit Analysis (CBA) framework to assess the financial, social, and environmental implications of all major tourism initiatives. This approach will enable decision-makers to prioritise investments based on value for money, sustainability, and long-term developmental impact, while ensuring transparency in the use of public resources.

9.4.2. Development standardised CBA guidelines and templates for tourism-related projects. These tools will be used across ministries, statutory bodies, and public-private partnerships to evaluate project proposals, including airport and seaport expansions, marine tourism infrastructure, heritage restoration, workforce training, and environmental protection initiatives.

9.4.3. A dedicated Tourism Investment Evaluation Committee will be established to review CBAs and recommend project prioritisation. (A phased and cost-band implementation roadmap is provided in Appendix IX). This Committee will assess both direct and indirect impacts, including employment generation, visitor spending, community benefits, and environmental risks. It will also ensure that CBAs consider gender inclusion, youth engagement, and geographic equity across the Sister Islands.

9.4.4. Invest in training and data systems that enable the regular collection of key tourism performance indicators. This will allow for the ongoing refinement of cost and benefit projections and facilitate adaptive management as market conditions evolve.

9.4.5. Develop and maintain a comprehensive Policy Risk Register. The Register will catalogue strategic, operational, financial, legal, and reputational risks associated with Policy implementation, assign named risk owners, quantify likelihood and impact, specify mitigation actions, and record the residual risk rating. The Register will be reviewed semi-annually by the DMC and reported annually to Cabinet alongside the Implementation Report (see Appendix XIII: Policy Risk Register on page 175).

9.4.6. Introduce a Public Reporting Framework to publish summary findings of CBAs for major projects, promoting transparency and accountability. This will allow both citizens and investors to understand how public funds are being allocated and what benefits are being realised for the Territory.

9.4.7. Conduct Fiscal Risk Assessment for PPP and Major Capital Proposals. Prior to commitment of public funds or guarantees for major tourism investment under public-private partnership models (including port upgrades, Prospect Reef redevelopment, marina infrastructure, and runway feasibility works), conduct a fiscal risk assessment addressing:

- Contingent liability exposure against the Medium-Term Fiscal Framework
- value-for-money comparison with public procurement alternatives

- private sector capacity and risk allocation
- Medium-Term Fiscal Framework alignment.

9.5. Coordinate with the Central Statistics Office and other agencies to integrate tourism CBA findings into the Tourism Satellite Account (TSA) and national economic reports. This will strengthen the link between tourism investment, fiscal planning, and broader economic growth strategies.

Through these actions, Government will ensure that tourism investments deliver measurable and equitable benefits, that costs are effectively managed, and that policy implementation contributes to a resilient, inclusive, and financially sustainable tourism sector.

While this chapter outlines the principles guiding investment evaluation and Cost-Benefit Analysis, a phased and cost-banded implementation roadmap is provided in Appendix IX: Costed Implementation Plan and Financing Strategy. Appendix IX translated strategic priorities into sequenced investment phases and funding pathways aligned with fiscal sustainability principles.

9.5. Implementation Framework and Supporting Instruments

The implementation of this Policy shall be supported by a series of detailed strategy and action plan documents, which will operationalise the policy directions set out herein

Priority Actions:

9.5.1. Tourism Development Strategy
9.5.2. Destination Management Plan
9.5.3. Air Service Development Strategy
9.5.4. Tourism Infrastructure and Investment Plan

These instruments may define specific targets, timelines, programmes, and implementation mechanisms, consistent with the policy framework established in this document.

Tourism Policy Financing Strategy

Implementing the Tourism Policy will require a combination of public investment, private-sector participation, and strategic partnerships. Public financing will support enabling investments, including tourism infrastructure, destination management systems, regulatory reforms, and strategic marketing initiatives. Private sector investment will drive the development of accommodation, tourism, and transportation services, as well as enhancements to the visitor experience.

Strategic partnerships with regional and international development partners will support sustainability initiatives, digital transformation, and tourism capacity building.

A high-level costed implementation plan and financial strategy is presented in Appendix IX, outlining suggestions for projected investment requirements, financing sources, and priority investments over the policy period.

Tourism Policy Financing Framework

The implementation of this Policy requires a clear, credible, and sustainable financing approach that aligns strategic priorities with available resources. By adopting a structured, multi-source financing approach, the Government ensures that tourism initiatives are adequately resourced, aligned with national fiscal planning, and delivered in a coordinated and accountable manner.

The implementation of this Policy will be supported by a structured and transparent financing framework to ensure fiscal sustainability, accountability, and effective delivery of priority interventions. A multi-source financing approach will be adopted, including:

- Annual budgetary allocations aligned with Policy priorities
- Revenues generated through the Environmental and Tourism Improvement Levy (ETIL)
- Public-private partnerships (PPPs) for infrastructure and service delivery
- External financing, including grants and concessional funding where appropriate
- Cost-recovery mechanisms and user-based fees where applicable

All financing arrangements shall be integrated into the Medium-Term Fiscal Plan and Budget document, and shall be subject to existing public finance management regulations and oversight mechanisms.

Institutional Funding and Resource Planning

Effective institutional arrangements require not only clearly defined roles, but also adequate and sustainable resourcing to support their functions. Linking institutional development to resource availability and budget processes, the Government strengthens accountability, prevents unfunded mandates, and ensures that new and existing entities are equipped to deliver on their responsibilities in a coordinated and sustainable manner.

The establishment and operation of tourism-related institutions, including departments, boards, and coordination mechanisms, shall be supported by clearly defined funding and resource plans. These will include:

- Staffing requirements and organisation structures
- Operational expenditure (OPEX) requirements
- Capital expenditure (CAPEX) requirements where applicable
- Phase implementation aligned with fiscal capacity and priority sequencing

No new institutional structure shall be established without a defined funding source and approved through the national budget and public investment processes.

Phased Implementation and Fiscal Prioritisation

The successful delivery of this Policy requires a disciplined approach to sequencing and prioritisation, ensuring interventions are implemented in a realistic, financially sustainable manner. The adoption of a phased and prioritised approach ensures that investments are directed toward the most impactful and feasible initiatives, maximising value for money while maintaining fiscal stability and supporting long-term development objectives.

The implementation of the Policy and priorities shall be based on available financial resources, strategic importance, and readiness for execution. Priority shall be given to interventions that demonstrate strong economic returns, support value retention, enhance infrastructure capacity, and align with national development objectives. Major investments will be subject to cost-benefit analysis and options appraisal to ensure value for money and fiscal sustainability.

10. Legislative Implications and Path Forward

The Virgin Islands currently lacks a comprehensive Tourism Act, leaving the sector without a clear, consolidated legal foundation. This absence means there is no statutory authority to set and enforce site-level carrying capacities or quotas at sensitive locations such as beaches, parks, and heritage sites. Likewise, there is no unified framework for licensing and grading tourism operators and attractions beyond maritime vessel licensing, nor are there requirements for the training and certification of guides, dive leaders, and cultural heritage interpreters.

Environmental performance standards are not embedded in tourism licensing, leaving compliance to general environmental and maritime laws rather than a sector-specific regime. Equally absent are provisions requiring tourism operators to submit data to inform decision- and evidence-based policy-making. Finally, there is no statutory basis for establishing and funding Destination Management Councils with defined powers and duties, leaving multi-agency coordination fragmented. The net effect is a situation where ambitious policy commitments outpace the legal toolkit, increasing the risk that Government's strategic objectives remain aspirational rather than enforceable.

To close these gaps, Government must fast-track a Tourism Act. This legislation will consolidate governance and regulation under a single statutory instrument. It will create a statutory Destination Management Council, define the Ministry's regulatory powers, and clarify functional interfaces with various stakeholders to manage aspects of the industry and avoid overlap. The Act will introduce a unified licensing and quality assurance regime requiring mandatory registration of all tourism businesses and attractions, national grading standards, and guide/operator certification requirements, with recognition of maritime certifications where applicable. It will also provide explicit powers to set site quotas, visitor-use limits, and event caps at sensitive locations, backed by offences and penalties for non-compliance.

Environmental compliance will be embedded into tourism licensing, with eco-standards covering waste, water, and energy efficiency, as well as MARPOL-consistent waste handling for cruise and anchorage operations. Data and transparency provisions will require operators to submit regular reports, enable publication of compliance and performance dashboards, and mandate cooperation with the compilation of tourism-related statistics. Financing and enforcement mechanisms will establish licensing fees and rationalise the Tourism Improvement levy structure with earmarked funding for destination management and product development. Proposed mechanisms will define inspection powers, penalties, administrative sanctions, and appeal mechanisms. Finally, the Bill will coordinate existing maritime and finance instruments, cross-referencing the Commercial Recreational Vessels Licensing Act and the Cruising and Home Port Permit Act, ensuring alignment of vessel and charter regulation with onshore tourism licensing and quality standards.

The investment regime, as currently embedded in the Planning Act, further demonstrates the need for reform. Development Agreements presently provide for duty exemptions and preferential access to work permits, yet there is no statutory obligation for investors to report on employment, training, local procurement, or capital expenditure. This has meant that Virgin Islanders and Belongers are not guaranteed participation in the workforce or supply chains, even where investors benefit from concessions. Unlike other jurisdictions, there are no mandatory localisation plans, quarterly declarations of local hires, or certified Bills of Quantities to verify the actual value of investments. There are no sanctions for under-performance and no routine verification by independent auditors or quantity surveyors.

The Tourism Act will therefore establish a monitoring and reporting framework for Development Agreements. Beneficiaries will be required to submit quarterly performance reports covering Virgin Islander/Belonger employment, training and certification, capital expenditure verified through certified Bill of Quantities (BoQs), and local procurement, including agriculture, fisheries, and cultural linkages. These reports will be subject to audit by the Ministry of Tourism or a designated regulator, which will have the power to request supporting evidence and conduct site inspections. Concessions such as duty exemptions and work-permit facilitation will be conditional upon compliance, with the Government empowered to suspend or claw back benefits in cases of verified under-performance. Projects above a defined threshold will be required to prepare Local Employment and Skills Plans, including localisation targets, apprenticeships, and pathways into management roles for Virgin Islanders and Belongers. Transparency will be enhanced through an Annual Investment Performance Report that publishes aggregated data on employment, local spending, and verified investments, balancing accountability with commercial confidentiality.

In parallel, the Act will introduce a mandatory tourism statistics regime to ensure evidence-based management of the sector. All licensed tourism businesses and attractions—including accommodations, marinas, charter companies, tour operators, cultural and heritage sites, and qualifying restaurants and transport providers—will be required to submit data through a centralised online portal. Sanctions will apply for late or non-submission, while compliance will be a condition for eligibility to receive incentives, grants, or marketing support. Strong data-protection provisions will ensure privacy and confidentiality, with published outputs limited to aggregated dashboards and Cabinet or Parliamentary reports.

The Environmental and Tourism Improvement Levy (ETIL) was created to provide dedicated resources for the enhancement of tourism products and environmental protection. At present, these resources are allocated to the BVI Tourist Board. However, under the reformed governance structure, responsibility for product development will rest with the Ministry of Tourism, Culture and Sustainable Development (MTCSD). To ensure alignment of functions with financing, ETIL resources earmarked for product development must therefore be redirected to the Ministry.

This realignment will require legislative amendments to the related statutory instruments, explicitly designating the Ministry as the recipient and administrator of product development funds. The amendments will guarantee that resources are ring-fenced and deployed exclusively for the purposes specified in the Act—namely, the development and maintenance of tourism infrastructure, the preservation of natural and cultural sites, and the upgrading of visitor services.

By redirecting ETIL resources to MTCSD, Government will strengthen the Ministry's ability to deliver on its mandate for product development, reduce institutional overlap, and ensure that tourism levies are applied directly to the improvement of visitor experiences and environmental stewardship. This reform will reinforce accountability, create coherence between funding and function, and maximise the developmental impact of the ETIL.

Together, these reforms will provide the Virgin Islands with the comprehensive legislative framework it needs. By consolidating fragmented responsibilities, embedding mandatory licensing, certification, capacity management, and environmental compliance, and by introducing robust monitoring of investment and tourism statistics, the Tourism Act will transform policy ambition into enforceable action. It will align the Territory with best practices in the region and ensure that tourism development delivers measurable and transparent benefits to Virgin Islanders and Belongers while safeguarding the long-term sustainability of the sector.

Key implementation risks and mitigation measures are identified and monitored through the Policy Risk Register contained in Appendix XIII. The Policy Risk Register shall be actively used as a decision-support tool. All major tourism policy decisions and investments shall include a formal risk assessment covering fiscal, environmental, operational, and reputational risks, with mitigation measures defined prior to approval.

Priority Actions:

10.4. Undertake a comprehensive programme of legislative reform that consolidates and updates existing laws to reflect the evolving scope of the industry, regional obligations, and the policy's strategic priorities.

10.5. Draft and enact a Virgin Islands Tourism Act, which will serve as the principal legal instrument governing the sector. This legislation will codify provisions for destination management, quality assurance, licensing, training and certification, data reporting, environmental compliance, and enforcement mechanisms. It will also clarify the functional relationships among the Ministry of Tourism, Culture and Sustainable Development (MTCSD), the BVI Tourist Board, the Festival and Events Board, and the Film Commission—eliminating overlap and strengthening coordination.

10.6. Government will also review and amend related sectoral laws and regulations, including the Planning Act, the Hotel and Restaurant (Taxation) Ordinance, the Environmental and Tourism Improvement Levy, and the Commercial Recreational Vessel legislation, to ensure consistency with the new tourism framework. These amendments will establish clear linkages between tourism licensing and environmental, labour, and safety standards, ensuring that all operations adhere to sustainable and inclusive development principles.

10.7. To support transparency and evidence-based policymaking, the new legislation will include provisions for mandatory tourism statistics reporting by operators, the formal establishment of a Destination Management Council, and the creation of mechanisms for public participation and stakeholder consultation in tourism governance.

10.8. Finally, the Government will introduce a phased legislative timetable, governed by the following sequenced Legal Reform Roadmap. Each stage includes a lead agency, stakeholder consultation window, and target enactment date.

Stage	Instrument	Lead Agency	Consultation Window	Target Enactment
1	Tourism Act	MTCSD/ AG	To be determined in the implementation plan	To be determined in the implementation plan
2	Licensing & Certification Regulations	MTCSD	To be determined in the implementation plan	To be determined in the implementation plan
3	Carrying Capacity & Quota Regulation	MTCSD/ NPT	To be determined in the implementation plan	To be determined in the implementation plan
4	Mandatory Statistical Reporting Regulation	MTCSD/ CSO	To be determined in the implementation plan	To be determined in the implementation plan
5	Environmental & Sustainability Standards Regulations	MTCSD/ DoE	To be determined in the implementation plan	To be determined in the implementation plan
6	Planning Act Amendment (investment/ pioneer reform)	MTCSD/ Planning	To be determined in the implementation plan	To be determined in the implementation plan
7	Hotel & Restaurant Taxation Ordinance amendment	MoF/ MFCSD	To be determined in the implementation plan	To be determined in the implementation plan
8	ETIL legislative amendment (redirect to MTCSD)	MTCSD/ MoF/ HoA	To be determined in the implementation plan	To be determined in the implementation plan
9	Commercial Recreation Vessels Licensing alignment	MTCSD/ BVIPA	To be determined in the implementation plan	To be determined in the implementation plan

Stage	Instrument	Lead Agency	Consultation Window	Target Enactment
10	Events & Festival Safety Regulations	MTCSD/ VIFEB	To be determined in the implementation plan	To be determined in the implementation plan

The Planning Act amendment will embed the investment facilitation and compliance requirements. The Development Agreement reporting becomes enforceable, and eligibility for incentives is conditional on compliance with reporting requirements.

Alignment with NSDP 2036 and OECS Common Tourism Policy objectives will be confirmed by MTCSD at each stage prior to tabling.

Through these actions, the Virgin Islands will move toward a unified and modern legal framework that gives full effect to the Policy's goals of inclusivity, competitiveness, and sustainability—transforming tourism from a collection of activities into a fully regulated, coordinated, and strategically managed sector.

To move from policy commitment to implementation, five enabling actions must be completed within the first year of adoption:

1. Publication of the baseline dashboard, finalising all MRF provisional indicators. Baseline publication shall be supported by a Tourism Baseline Data compilation consolidating official sources, definitions, and methods for arrivals, accommodation stock, charter proxies, employment, visitor yield, and priority environmental indicators.
2. Establishment of the Tourism Statistical and Research Unit within MTCSD
3. Introduction of the Tourism Act to the House of Assembly
4. Publication of the Stakeholder Engagement Plan and activation of the online transparency portal
5. Activation of the Policy Risk Register and convening of the Investment Evaluation Committee.

These five actions constitute the critical path for translating the strategic ambition of this Policy into measurable outcomes for the people of the Virgin Islands.

Delegated Regulation Framework

The Tourism Act shall provide enabling authority for the promulgation of delegated regulations necessary to operationalise policy commitments. These may include:

- **Licensing and Certification Regulations**
  Standards, eligibility criteria, renewal procedures, and enforcement mechanisms for tourism operators.
- **Carrying Capacity and Quota Regulations**

Site-level visitor caps, timed entry systems, cruise volume controls, and marine mooring limits.

- **Environmental and Sustainability Standards Regulations**
  Waste management requirements, environmental compliance thresholds, renewable energy standards for tourism facilities, and climate resilience provisions.
- **Mandatory Statistical Reporting Regulation**
  Data submission obligations, confidentiality safeguards, reporting schedules, and penalties for non-compliance. The regulation will include: confidentiality safeguards, data governance protocol requirements, penalties and appeals process, and publication rules for aggregated indicators
- **Events and Festival Safety Regulations**
  Event permitting thresholds, attendance caps, and safety compliance standards.
- **Inspection and Enforcement Regulations**
  Powers of authorised officers, penalty schedules, appeals procedures, and compliance audits.

Regulations shall be promulgated in phases aligned with the Implementation Roadmap (Appendix IX) and the Digital Tourism and Data Governance Roadmap.

10.5. Modernisation of Tourism Legislation for Investment Enablement

A modern and responsive legislative framework is essential to enabling sustainable tourism investment, supporting innovation, and ensuring that the sector remains competitive within a rapidly evolving global environment. This section establishes the approach to updating and strengthening tourism-related legislation to provide clarity, predictability, and efficiency for investors and operators. Aligning legislative reform with national development priorities and fiscal frameworks, the Government ensures that investment is directed toward high-value, sustainable outcomes, while reducing administrative barriers and improving the overall ease of doing business in the tourism sector.

A comprehensive modernisation of tourism-related legislation will be undertaken to create an enabling environment for sustainable investment, innovation, and sector growth. All legislative reforms shall be aligned with the National Sustainable Development Plan, the Medium-Term Fiscal Plan, and the Tourism Growth and Yield Model, ensuring that investment supports long-term economic value and sustainability.

10.5.1. Establish a clear and transparent framework for tourism investment approvals, including defined timelines, requirements, and decision-making processes
10.5.2. Introduce targeted investment incentives aligned with national priorities, including accommodation development, sustainable infrastructure, and high-value tourism products
10.5.3. Support public-private partnerships (PPPs), including risk-sharing mechanisms, contingent liability management, and investment safeguards

10.5.4. Implement streamlined licensing, permitting, and regulatory processes through digital systems and coordinated institutional oversight

Performance Monitoring and Reporting Framework

The implementation of this Policy shall be governed by a structured Monitoring and Reporting Framework to ensure accountability, transparency, and evidence-based decision-making. Performance monitoring shall be anchored in a defined set of Key Performance Indicators (KPIs), baselines, and outcome targets aligned with the Strategic Goals of this Policy. These indicators shall measure economic performance, environmental sustainability, visitor experience, and equitable distribution of tourism benefits across the Virgin Islands.

Tourism data systems shall support decision-making across demand management, carrying capacity enforcement, investment planning and quality assurance.

The detailed indicator framework, including definitions, baselines, methodologies, and reporting responsibilities, is set out in Appendix VI: Delivery-Based Monitoring and Reporting Framework.

Reporting Requirements

All Ministries, Departments, Statutory Bodies, and relevant tourism stakeholders shall be required to collect, submit, and report data in accordance with the Monitoring and Reporting Framework.

The Ministry of Tourism, Culture and Sustainable Development shall be responsible for consolidating and publishing tourism performance reports. Reporting shall include:

- Quarterly performance updates for internal monitoring and corrective action
- Annual Tourism Performance Reports submitted to Cabinet and the House of Assembly
- Periodic public reporting, including dashboard updates and summary reports

Performance Management and Accountability

Performance against policy objectives and strategic goals shall be reviewed regularly to assess progress, identify implementation gaps, and inform corrective actions. Where performance is below expected levels, the Ministry shall initiate targeted policy, regulatory, or operational adjustments to ensure alignment with national priorities.

All tourism-related agencies shall be held accountable for delivery against assigned responsibilities, and performance outcomes shall inform planning, budgeting, and resource allocation decisions.

Integration with National Systems

The Monitoring and Reporting Framework shall be aligned with the National Sustainable Development Plan (NSDP), the Medium-Term Sustainable Development Strategy (MTSDS), the Medium-Term Fiscal Plan (MTFP), and national performance management systems to ensure coherence across Government.

Tourism performance data shall be used to support fiscal planning, investment prioritisation, and national development reporting.

Policy Conclusion and Final Position

This Policy establishes a clear and binding framework for the development, management, and governance of the tourism sector in the Virgin Islands over the period 2026–2036. It moves the Territory from fragmented, volume-driven tourism development to a structured, high-value, and sustainable model grounded in economic performance, environmental stewardship, and equitable participation.

The Policy defines the Government's position on tourism development and sets out the principles, institutional arrangements, and economic framework that shall guide all tourism-related decisions. It provides a coherent basis for legislation, investment, regulation, and sector coordination, ensuring that tourism contributes meaningfully to national development priorities.

Implementation of this Policy shall be supported by enforceable legislation, including the Tourism Act, and a clearly defined governance structure led by the Ministry of Tourism, Culture and Sustainable Development and supported by the Destination Management Council and other relevant agencies. All entities operating in the tourism sector shall comply with the provisions of this Policy.

Performance and delivery shall be governed through a structured Monitoring and Reporting Framework, with clearly defined indicators, reporting obligations, and accountability mechanisms. Tourism performance shall be assessed continuously and reported to Cabinet and the House of Assembly, ensuring transparency, oversight, and adaptive policy management.

All major tourism-related decisions, investments, and interventions shall be subject to rigorous appraisal, including cost-benefit analysis, options assessment, and alignment with the Medium-Term Sustainable Development Strategy and Medium-Term Fiscal Plan. This ensures that tourism development remains fiscally responsible, evidence-based, and consistent with national priorities.

This Policy is not an operational plan, but a governing instrument. It establishes the direction within which all strategies, programmes, and investments must operate. Where conflicts arise, this Policy shall take precedence.

Through this framework, the Virgin Islands positions itself to deliver a tourism sector that is competitive, resilient, and sustainable, while ensuring that the benefits of tourism are retained within the economy and shared across communities and generations.

Appendix I: Situational Analysis, Current Tourism Market and Key Stakeholder Roles

This Appendix provides the analytical foundation for the Policy, including tourism statistics, market trends, and sector performance indicators. The data presented are drawn from national sources, regional institutions, and international benchmarks and are intended to support evidence-based decision-making and policy implementation.

Tourism continues to serve as a pillar of economic growth and fiscal stability in the Virgin Islands. Though recent official GDP data are limited, available regional and domestic estimates suggest that tourism contributes approximately 30 to 40 percent of national GDP, when direct and indirect effects are considered. This includes accommodation, transportation, food services, yachting, excursion, construction and associated supply chains that support jobs and income across the territory.

Using 2021 as a baseline year for GDP contribution provides a practical starting point for modelling, as it captures conditions during a period of significant global and local economic shocks. This ensures that the policy framework accounts for the sector's performance under stress and strengthens future resilience modelling. Within this context, policy modelling links visitation-arrival targets, length of stay, and average spend per visitor to measurable impacts on GDP, employment, and government revenue. This analytical approach supports evidence-based decision-making and enables forecasting the fiscal and social benefits of the intervention.

The tourism policy further recognises the evolving visitor profile, rising sustainability expectations, and growing competition across the region. By considering resilience, green growth, and high-value tourism as guiding principles, the Virgin Islands aims to secure a tourism industry that is economically productive, socially inclusive, and environmentally sustainable. In justifying the need for including the economic context, the following should be considered:

- The need to position tourism as a measurable driver of GDP
- The need to support fiscal modelling for medium-term policy scenarios
- The need to align with regional benchmarks (Jamaica, Cayman Islands, Barbados, etc) where GDP contribution is similarly 30 – 40%
- The need to introduce resilience and sustainability as guiding policy anchors
- The need to prepare the groundwork for the Tourism Satellite Account (TSA) framework.

The Virgin Islands enters the 2026–2036 period with clear competitive strengths and equally clear constraints. As the "Sailing Capital of the World," the Territory's sheltered waters, charter fleet, and network of marinas anchor a marine-led economy that also sustains land-based hospitality, culinary, culture, and retail. Visitor arrivals over the last decade reflect expansion, severe disruption (2017 hurricanes and the 2020–2021 pandemic), and a resilient rebound supported by cruise and yachting, alongside a slower but steady recovery in overnight capacity. This rebound now meets hard limits: pressure on iconic sites (e.g., The Baths), uneven port performance, access bottlenecks, and service-quality gaps—particularly on Sister Islands—requiring differentiated growth strategies and capacity management.

The policy response is therefore grounded in segmentation and place-based delivery: boutique/heritage experiences with strong visitor management on Virgin Gorda; eco-culinary, low-volume models on Anegada; event-driven, high-volume days on Jost Van Dyke with stronger safety and environmental controls; and a balanced gateway role for Tortola, linking cruise, urban culture, and overnight stays. Cross-cutting enablers include better data (mandatory statistics), carrying-capacity tools, streamlined fees and licensing, health-system readiness, and financing mechanisms that link revenue to product development and environmental stewardship.

Delivery depends on coordinated institutions. The Ministry of Tourism, Culture and Sustainable Development leads on product development, standards, and certification; the BVI Tourist Board focuses on destination marketing and hosting; the Festival and Events Board professionalises national events; the National Parks Trust safeguards natural and heritage assets; and the Ports Authority manages gateways. Private sector bodies (hotel, marine, and creative industries), education partners (HLSCC), and frontline agencies (Immigration, Customs, Shipping Registry) complete the ecosystem. Detailed evidence, data tables, and island-specific diagnostics supporting this summary are provided in

Appendix I: Situational Analysis, Current Tourism Market *on page 110*.

At present, the only sector-specific instrument focused on tourism management is the Tourist Board Ordinance, which establishes the British Virgin Islands Tourist Board but does not create a modern, end-to-end regulatory regime for destinations, sites, operators, or service standards. Cruise operations are overseen primarily through the BVI Ports Authority Act and Regulations, which empower the Authority to manage ports and maritime traffic—but not to set destination carrying capacities, license tourism businesses ashore, or certify guides and attractions. Marine charter and small commercial vessels are governed through the Commercial Recreational Vessels Licensing Act, 1992 (as amended 2025) and the Cruising and Home Port Permit Act, 2021, alongside maritime codes and licensing requirements issued by the Shipping & Maritime Authority; these instruments primarily regulate vessels, permits, and fees rather than tourism quality, market conduct, training/certification of operators, or site management on land.

Tourism-related investments are presently facilitated under the Planning Act through Development Agreements that confer negotiated benefits (e.g., duty exemptions; facilitation of entry/work permits) in exchange for the delivery of defined projects. While this approach expedites large and strategic projects, the regime lacks a statutory monitoring framework to verify the delivery of public-interest commitments, particularly regarding local employment, skills transfer, and the actual investment value. There is no legal requirement for investors to report periodically on the number of Virgin Islanders/Belongers employed, nor to submit Bills of Quantities (BoQs) and certified financial statements to substantiate capital expenditure. This gap limits the Government's ability to assess whether incentives yield their intended socio-economic returns.

Limitations in the Institutional Arrangements for the Tourism Sector

The current legal framework governing tourism in the Virgin Islands is fragmented and inadequate to meet the needs of a modern, diversified sector. At present, there is no statutory basis for destination management, such as Destination Management Councils, multi-agency coordination, or mandatory submissions of research and tourism statistics. Visitor-use planning is not legislated, which limits the Government's ability to regulate growth, enforce carrying capacities, or ensure integrated oversight of critical tourism assets.

Similarly, the Virgin Islands lacks legal tools for capacity management and site quotas. While port operations are addressed under ports legislation, there are no statutory mechanisms to limit visitation at beaches, national parks, heritage sites, or cruise-adjacent precincts. This absence risks overuse of sensitive areas and undermines environmental and visitor experience standards.

Another significant deficiency is the absence of a sector-wide licensing, grading, and quality assurance regime. Outside of vessel safety and maritime codes, there is no civil licensing framework for tours, guides, cultural attractions, or events on land. Correspondingly, there are no statutory requirements for training and certification of tour guides, dive leaders, snorkel supervisors, or heritage interpreters—positions that directly affect visitor safety and the integrity of the Virgin Islands' cultural and natural assets.

Environmental compliance is indirect, being addressed only through general environmental and maritime laws. There is no integrated tourism compliance framework to establish eco-standards, waste and water benchmarks, or sustainability obligations tied to tourism licenses. This gap is significant in an economy where natural resources are the foundation of competitiveness.

These omissions arise because tourism management responsibilities are dispersed across multiple agencies: the Ports Authority (cruise terminals), Shipping & Maritime Authority (vessel certification), and the Ministry of Finance (charter fees and recreational vessel licensing). Without a dedicated Tourism Act to consolidate functions, the system remains fragmented and is unable to enforce quality, capacity, training, and compliance in a coordinated manner.

The investment regime also exposes serious governance gaps. Development Agreements—administered under the Planning Act—grant investors wide-ranging incentives, including duty exemptions and preferential access to work permits. However, there is no statutory obligation to monitor compliance with employment, training, procurement, or capital-investment commitments. As a result, Virgin Islanders and Belongers are not guaranteed fair participation in the workforce or the supply chain, despite the benefits conferred to developers. Unlike other jurisdictions, there are no mandatory localisation plans, quarterly declarations of local hires, or certified bills of quantities to verify the true value of investments.

The Tourism Investment Facilitation and Compliance Strategy could include: an investor pipeline (what gets prioritised, what does not, fast-track criteria tied to measurable public benefits); a standard Development Agreement; monitoring; a sanctions regime (under-performance consequences); and annual investment performance reporting (aggregated).

Transparency and accountability mechanisms are similarly absent. There are no sanctions for under-performance of Development Agreements, no standard reporting or publication of compliance data, and no routine verification by independent engineers or auditors. This undermines both public confidence and the Government's ability to ensure that investment incentives deliver tangible national benefits.

Tourism statistics also remain under-reported. There is no legal requirement for operators to submit visitor and business data, which severely hampers evidence-based decision-making, the development of tourism statistics, and the timely preparation of dashboards and policy indicators. Critical information—such as arrivals by category, length of stay, workforce data, and service quality indicators—are left incomplete, limiting the Government’s capacity to plan and respond effectively.

Cross-agency coordination is weak. Information on incentives, permits, exemptions, and licenses is siloed across various departments, including Planning, Finance, Labour/Immigration, Ports/Maritime, and the Ministry of Tourism. This results in inefficiencies, duplication, and missed opportunities to align fiscal, labour, environmental, and tourism objectives within a single coherent system.

The Sailing Capital of the World

The Virgin Islands' status as the "Sailing Capital of the World" is one of its most distinct competitive advantages across the region and globally. Its sheltered waters, line-of-sight navigation, and over 60 islands and cays make it ideal for novice and experienced sailors alike. Widely recognised as the premier destination for Marine tourism, the Virgin Islands is also known as the "Yachting Capital of the Caribbean." This reputation is grounded in the robust charter boat industry from companies such as The Moorings, Dream Yacht Charter, Navigare, and TMM complemented by a range of crewed and bareboat services. Activities within marine-based tourism include sailing, chartering, boat rentals, marinas, regattas, and various marine services, all of which contribute to the territory's Gross Domestic Product (GDP). The Moorings alone accounts for over 300 vessels and has helped position the Virgin Islands as a premiere destination for luxury catamaran and monohull charters.

Additionally, the marine tourism industry is a key driver behind overnight visitors staying on yachts rather than traditional hotels, with the Territory accounting for over 4,000 berths and mooring options at private marinas and public harbours. Water-based tourism accounts for a significant share of visitor arrivals, and many land-based businesses, from restaurants to provisioning companies, rely heavily on this clientele.

In line with its brand, the Virgin Islands' unique geographical features and natural beauty make it a sailing destination; the islands offer ideal sailing conditions and the distinct advantage of "line-of-sight sailing," which makes navigation easy. Furthermore, major international events like the BVI Spring Regatta draw many participants, generating direct spending and demonstrating the strength within the sailing community.

However, increased pressure on the marine environment, congestion in anchorages, and the need for standardised service quality remain pressing issues. Strategic marine spatial planning and investment in supporting infrastructure will help sustain this competitive edge. Infrastructure limitations are also a concern, as existing harbours and marinas struggle to accommodate increasing demand, requiring more sophisticated facilities. Environmental concerns continue to surface, including the lack of waste-management solutions for yachts and insufficient pump-out facilities for sewage, leading to discharge into the sea and contributing to environmental degradation.

The Tourism Landscape: Pre-Hurricanes, Post-Disasters, and Post-Pandemic Recovery

Tourism has long been the economic lifeblood of the Virgin Islands, supporting a significant portion of employment across the Territory. Prior to 2017, the Virgin Islands enjoyed robust growth and an enviable reputation as a premier Caribbean destination for yachting, nature-based experiences, and luxury travel. The Territory welcomed a balanced mix of cruise ship passengers and overnight guests, with strong arrivals from the United States, the United Kingdom, and regional markets.

Between 2013 and 2025, tourist arrivals reveal a pattern of expansion, disruption, and gradual recovery. From 2013 to 2015, arrivals averaged around 750,000–900,000 visitors annually, followed by a peak in 2016 with over 1.1 million arrivals, driven largely by cruise passengers. However, the upward trajectory was abruptly interrupted in 2017 when Hurricanes Irma and Maria struck, causing widespread damage to hotels, marinas, ports, restaurants, and cultural landmarks. Arrivals declined sharply, reaching a low of just 134,000 in 2021 amid the compounded shocks of natural disasters and the global COVID-19 pandemic.

As borders reopened and global travel restrictions eased, the Virgin Islands began its path to recovery. By 2022, arrivals were rising steadily, surpassing the one million mark again by 2024. The year 2025 recorded 1,202,008 visitors, which is the highest number of arrivals for the Virgin Islands. This data underscores a critical reality: while the tourism sector remains highly vulnerable to external shocks, particularly natural disasters and global crises, it also demonstrated remarkable resilience, with cruise tourism playing a key role in driving post-crisis recovery.

See Table 1 below.

Table 1: Type of Tourist by Year ('000)

YEAR	CRUISE SHIP	OVERNIGHT	DAY TRIPPERS	TOTAL
2013	367	366	8	**742**
2014	361	386	8	**755**
2015	516	393	13	**922**
2016	699	408	18	**1,124**
2017	410	336	12	**757**
2018	201	192	16	**409**
2019	575	302	17	**895**
2020	219	83	3	**305**
2021	70	59	4	**134**
2022	344	174	7	**524**
2023	720	262	13	**995**
2024	768	305	18	**1,092**
2025	875	303	24	**1,202**

Source: Central Statistics Office

The recovery trajectory has been deeply mixed with the rebuilding of accommodation capacity across the islands. Before Hurricanes Irma and Maria in 2017, hotel establishments and room capacity in the Virgin Islands had been steadily increasing, reaching a peak in 2016 with 57 establishments and 1,421 rooms. The devastation led to an unprecedented collapse. By 2018, only 14 hotels remained operational, with 344 rooms available, which accounted for less than one-third of the pre-hurricane capacity. This contraction reflects the severe infrastructural damage and

prolonged closures faced by major properties, particularly in Road Town, Cane Garden Bay, Virgin Gorda, and Jost Van Dyke.

In the years that followed, gradual rebuilding and reinvestment have driven a steady recovery in hotel infrastructure. Although total capacity has yet to fully recover to pre-hurricane levels, the trend since 2019 indicates consistent progress. Tortola and Virgin Gorda, both primary tourism hubs, have led this resurgence, benefiting from focused reconstruction efforts and renewed investment. Anegada and Jost Van Dyke, though smaller in scale, have experienced more modest recoveries, reflecting their niche markets and resource constraints. Across the Territory, this slow but steady resurgence highlights both the challenges and achievements of rebuilding a tourism industry within a small island context where physical vulnerability and fiscal limitations can delay full restoration.

This dichotomy of tourism policy planning and impacts of adverse weather events on this industry is further illustrated in the following (See Table 2 below).

Table 2: Hotel Room Capacity of the BVI

	Hotel Room Capacity of the British Virgin Islands											
	TOTAL BVI		Tortola		Virgin Gorda		Anegada		Jost VanDyke		Other Virgin Islands	
Year	No of Establishments	No of Rooms	No of Establishments	No of Rooms	No of Establishments	No of Rooms	No of Establishments	No of Rooms	No of Establishments	No of Rooms	No of Establishments	No of Rooms
2013	53	1,332	24	715	10	388	5	69	6	33	8	127
2014	55	1,381	25	757	10	388	5	69	6	33	9	134
2015	56	1,413	26	771	10	406	5	69	6	33	9	134
2016	57	1,421	25	766	11	411	5	69	6	33	10	142
2017	58	1,373	25	764	11	391	3	43	6	33	13	142
2018	14	344	7	208	6	130	0	0	1	6	0	0
2019	25	638	13	355	8	258	0	0	3	17	1	8
2020	51	1,080	24	524	12	389	2	21	6	39	7	107
2021	56	1,203	24	526	13	436	4	64	6	39	9	138
2022	58	1,348	25	612	14	495	4	64	6	39	9	138
2023	59	1,400	25	612	14	495	4	64	6	39	10	190
2024	60	1,435	26	647	14	495	4	64	6	39	10	190
2025	60	1,437	26	649	14	495	4	64	6	39	10	190

Source: Central Statistics Office

Apart from designated “hotel” properties in the Virgin Islands, the local communities participate and support the tourism offering by investing in smaller properties such as Guest houses, Villas and Apartments; including Airbnb’s to augment and fill accommodation gaps for the tourism sector (Table 3).

Complementing the formal hotel sector, the Virgin Islands' guesthouse and apartment industry has emerged as a vital pillar of accommodation supply. The evolution of guest house and apartment capacity in the Virgin Islands from 2013 to 2025 presents a rich narrative of expansion, contraction, recovery, and stabilization; a cycle emblematic of small-island economies navigating

both opportunity and vulnerability. The data presented underscore the sector's underlying resilience and the pivotal role of policy in sustaining its recovery.

Table 3: Guest Houses Capacity for the Virgin Islands

	Guest Houses Capacity for the Virgin Islands											
	TOTAL BVI		Tortola		Virgin Gorda		Anegada		Jost VanDyke		Other Virgin Islands	
Year	No. of G.Hs/Apts	No. of Rooms	No. of G.Hs/Apts	No. of Rooms	No. of G.Hs/Apts	No. of Rooms	No. of G.Hs/Apts	No. of Rooms	No. of G.Hs/Apts	No. of Rooms	No. of G.Hs/Apts	No. of Rooms
2013	144	553	68	290	56	191	6	22	4	19	10	31
2014	150	572	70	296	60	204	6	22	4	19	10	31
2015	166	635	79	334	66	225	7	26	4	19	10	31
2016	149	570	81	338	45	149	8	32	5	20	10	31
2017	110	408	54	216	45	149	3	15	5	20	3	8
2018	68	248	33	136	34	107	1	5	0	-	0	-
2019	226	748	160	532	34	107	2	10	21	73	9	26
2020	244	824	161	535	41	145	2	10	21	73	19	61
2021	332	1,155	161	535	117	430	13	54	21	73	20	63
2022	334	1,161	163	542	117	430	13	54	21	73	20	62
2023	334	1,161	163	542	117	430	13	54	21	73	20	62
2024	334	1,161	163	542	117	430	13	54	21	73	20	62
2025	334	1,161	163	542	117	430	13	54	21	73	20	62

Source: Central Statistics Office. **Note:** G. Hs = Guest Houses. Apts.= Apartments

Expansion and Confidence Building (2013–2015)

Between 2013 and 2015, the Virgin Islands experienced a strong period of tourism-driven expansion. The number of guest houses and apartments grew from 144 to 166, while room capacity rose from 553 to 635; a 15% increase. Tortola and Virgin Gorda anchored this growth, with Tortola expanding from 68 to 79 establishments and Virgin Gorda from 56 to 66.

This early expansion period reflected rising investor confidence and a strategic pivot toward smaller, boutique-style accommodations that cater to independent travellers and niche markets. From an economic standpoint, this diversification reduced reliance on large resorts and aligned with broader Caribbean trends emphasising authenticity and local experience.

Policy insight: Government incentives for small accommodation development and streamlined licensing procedures likely supported some growth. However, the gains also set the stage for vulnerability, as rapid expansion occurred without fully embedding resilience into the infrastructure base.

Contraction and Systemic Shock (2016–2018)

The years 2016 to 2018 mark a severe **negative supply shock**, with total establishments dropping from **149 to 68** and room capacity from **570 to 248**. Tortola's numbers fell by more than half, and smaller islands like Anegada and Jost Van Dyke nearly disappeared from the market.

The contraction corresponds directly to the **impact of Hurricanes Irma and Maria in 2017**, which devastated the tourism sector. This event highlights the structural fragility of the Virgin Islands' economy: heavy concentration in tourism, limited diversification, and infrastructure vulnerability.

The collapse represents not a demand shortage but a **physical destruction of productive capacity** — a hallmark of disaster-induced supply shocks in small open economies. The near-total shutdown of small-island operations also illustrates the uneven distribution of resilience; larger establishments recovered faster due to better access to insurance and credit.

The crisis exposes the urgent need for institutional mechanisms that enhance **disaster resilience**, including stricter building codes, universal insurance coverage, and coordinated post-disaster financial support.

Recovery and Structural Realignment (2019–2021)

The rebound from 2019 to 2021 is remarkable. Total establishments surged from **226 to 332**, and rooms from **748 to 1,155**, surpassing pre-hurricane levels within three years. Tortola and Virgin Gorda led the recovery, collectively providing nearly 80% of total rooms. Smaller islands like Jost Van Dyke and Anegada also re-emerged, though at more modest levels.

This recovery phase suggests both **adaptive capacity and structural realignment**. The rapid expansion in 2019 likely reflects reconstruction investment, insurance settlements, and an entrepreneurial wave of new entrants. Virgin Gorda's leap to **117 establishments and 430 rooms by 2021** illustrates consolidation into more resilient, mid-scale operations, while Jost Van Dyke's revival demonstrates how community-based tourism can rebound quickly once infrastructure returns.

The Virgin Islands transformed disaster recovery into a **capital-deepening process**, improving average accommodation quality and infrastructure resilience. The rebound illustrates the region's ability to convert post-crisis reconstruction into long-term structural gain.

Recovery funds should be institutionalised to ensure equitable support across islands and business sizes. Moreover, partnerships between the public sector, insurers, and development agencies can accelerate the transition from emergency relief to productive investment.

Further, the rapid increase recorded from 2019 onward is because of a combination of factors such as:

1.) Operational and structural changes at the micro-business levels where larger hotel establishments (such as Long Bay, Lambert Beach Hotel, Nanny Cay, among others) entered the market with Villa offerings, separate and apart from their main hotel operation. This increased both the number of establishments and the available rooms in this category.

2.) Improved coverage for these establishments revealed more accurate, increased numbers. This expansion of coverage is a result of leveraging online platforms for some of these establishments, as more came online and increased cooperation in reporting by the establishments themselves.

3.) Actual increased capital investments entering the market, resulting in the construction of additional capacity.

Stabilisation and Maturity (2022–2025)

From 2022 onward, the data indicate a **stabilisation plateau**. Capacity holds steady at **334 establishments and 1,161 rooms** through 2025. This equilibrium suggests that the post-recovery phase has matured: investment flows have normalised, and the sector is now constrained less by supply and more by demand dynamics and environmental considerations.

The Virgin Islands' tourism market appears to have reached its natural carrying capacity under current infrastructure and demand conditions. Marginal expansion could lead to diminishing returns unless accompanied by product differentiation or higher value-added services.

Policy insight:

- **Shift focus from expansion to competitiveness.** Investment should prioritise quality upgrades, energy efficiency, and service innovation rather than raw capacity growth.
- **Implement sustainable zoning.** Overdevelopment risks environmental degradation, which could erode the islands' tourism appeal.
- **Digital transformation.** Supporting small operators in digital marketing, online booking systems, and brand positioning will sustain occupancy rates and enhance market reach.

The evolution of the guest house and apartment sector offers several important lessons. First, it underscores the fragility of small-island tourism infrastructure in the face of natural disasters. Second, it highlights the capacity of local entrepreneurs and communities to adapt and rebuild. Third, it signals a shift in market maturity, from expansion driven by physical growth to development grounded in quality, sustainability and inclusivity.

Recommendations for Long-Term Competitiveness

1. **Institutionalise Climate and Disaster Resilience:**

a. Enforce hurricane-resilient construction standards.
b. Expand access to insurance via pooled risk mechanisms (e.g., CCRIF).
c. Establish a dedicated tourism recovery fund for rapid reactivation post-disaster.

2. **Support Inclusive Growth and Island Diversification:**
    a. Provide concessional financing and technical support for micro-guest houses in smaller islands.
    b. Encourage local supply linkages — food, crafts, maintenance — to deepen domestic economic benefits.
    c. Promote Anegada and Jost Van Dyke as distinct eco- and cultural-tourism destinations.

3. **Enhance Market Positioning and Quality:**
    a. Transition from "more rooms" to "better experiences."
    b. Develop sustainability certifications for small accommodations.
    c. Foster partnerships with digital platforms to boost visibility and global reach.

4. **Data-Driven Planning and Governance:**
    a. Continuously update and publish accommodation statistics.
    b. Integrate environmental and tourism data for smarter spatial planning.
    c. Strengthen coordination between the Central Statistics Office, tourism agencies, and local governments.

Strategic Outlook

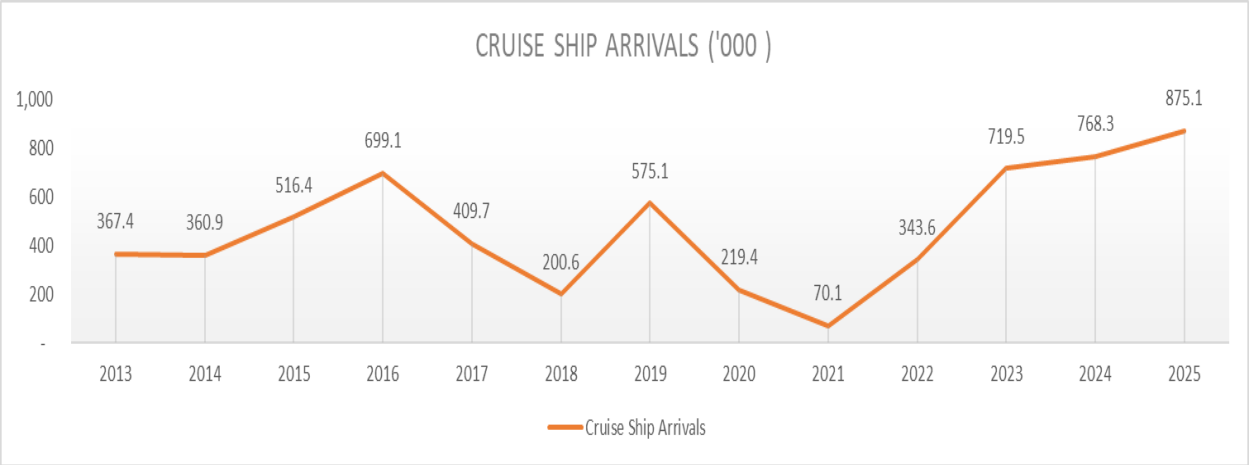
The data confirm a **resilient, but capacity-bound, tourism sector**. The Virgin Islands' guest house and apartment industry has moved from reconstruction-driven expansion to a phase of **mature stability**. Future growth will depend less on new construction and more on **innovation, sustainability, and productivity gains**.

By embedding resilience, promoting inclusive entrepreneurship, and strengthening institutional capacity, the Virgin Islands can transform its tourism model from one that **recovers from shocks** to one that **withstands and adapts to them** — ensuring that tourism remains a sustainable pillar of national development.

Cruise Tourism: A Major Economic Driver

Cruise tourism plays a pivotal role in the Virgin Islands' economy. The Cyril B. Romney Tortola Pier Park, developed in 2015, significantly elevated the Territory's cruise product, attracting major international cruise lines and enabling the berthing of larger vessels.

Figure 3: Number of Cruise Passenger Arrivals (2013 - 2025).



Source: Central Statistics Office. Note: 2025 (Jan.-Aug.)

At its peak in 2016, the Virgin Islands welcomed over 700,000 cruise passengers, with day visitors contributing to retail, transportation, food, and beach excursions (Figure 3 above). Although this number plummeted after 2017 and again in 2020 due to the pandemic, recent seasons have shown a steady rebound with renewed interest from Royal Caribbean, Norwegian, and Disney Cruise Line.

Despite its economic significance, cruise tourism presents several challenges, including crowd management, uneven spending patterns, and environmental pressure. Enhancing the value of the cruise experience, increasing linkages to local businesses, and improving guest flow throughout Tortola and beyond are strategic priorities.

Overnight Guests: Villas, Resorts, and Boutique Accommodations

Overnight tourism remains a high-value segment. The Virgin Islands is known for its intimate, low-density accommodation stock, ranging from luxury resorts and eco-retreats to private villas and bed-and-breakfasts. Since 2017, many properties have rebuilt stronger and more sustainable facilities, offering upgraded services and amenities.

Key developments include:

- The reopening of Rosewood Little Dix Bay in 2020, a flagship for luxury tourism.
- The expansion of Scrub Island, Oil Nut Bay, and other resort communities.
- The growth of vacation rentals and Airbnb listings, driven by changing traveller preferences.

Despite this, access remains a barrier to growth in overnight stays. The Virgin Islands' limited airlift, compounded by reliance on ferry transfers and intra-regional connections, places the Territory at a competitive disadvantage. Efforts to improve connectivity, streamline entry protocols, and enhance the arrival experience are essential to growing this segment.

Figure 4: Number of Overnight Visitors (2013 - 2025).



Source: Central Statistics Office.

The chart shows the trend in overnight tourist arrivals (in thousands) from 2013 to 2025. Arrivals were relatively stable between 2013 and 2016, peaking at around 408,000 in 2016. However, numbers declined sharply in 2017 and 2018, due to the devastation of hurricanes Irma and Maria, falling to just 192,000, before partially recovering in 2019.

The most dramatic decline occurred in 2020 and 2021, when arrivals dropped to 83,000 and 59,000, respectively, reflecting the global impact of the COVID-19 pandemic on travel. From 2022 onward, overnight arrivals show steady recovery, climbing back to 305,000 in 2024, though still below pre-2016 levels.

For 2025 (January–August), arrivals reached 233,000, indicating that the year could close with totals comparable to or slightly below 2024 if the trend continues.

A further breakdown of Tourist Arrivals by port () could further illustrate the impact of overnight stays.

Table 4: Tourist Arrivals by Port of Entry

	TOURIST ARRIVALS BY PORT (Nr.)							
YEAR	BEEF ISLAND	WEST END	ROAD TOWN	VIRGIN GORDA AIR	VIRGIN GORDA SEA	ANEGADA	JOST VAN DYKE	TOTAL
2013	77,321	107,230	73,079	10,068	49,323	663	56,801	374,485
2014	71,969	108,665	84,110	11,811	58,923	609	58,406	394,493
2015	77,803	113,276	78,305	10,896	63,837	374	61,314	405,805
2016	83,949	123,437	78,199	9,768	62,655	1,295	65,972	425,275
2017	64,340	108,017	76,209	6,115	37,185	1,516	53,908	347,290
2018	60,002	36,556	61,214	974	12,966	1,143	35,565	208,420
2019	76,413	69,425	75,870	2,995	30,299	1,431	63,424	319,857
2020	19,250	24,046	18,434	1,343	9,231	288	13,330	85,922
2021	35,689	7,377	20,559					63,625
2022	66,705	41,701	56,835	2,572	2,436	544	10,063	180,856
2023	77,375	63,457	59,019	4,722	30,280		40,524	275,377
2024	107,075	73,228	58,060	3,946	35,449		45,691	323,449
2025	93,080	52,238	39,093	3,609	25,976		35,799	249,795

(Source: Central Statistics Office. Note: Table excludes Cruise Tourism)

Tourism in the Territory has shown fluctuating trends over the years, with peak arrivals in 2016 totalling 425,275. However, significant declines were observed in 2018 (Hurricanes Irma and Maria in 2017) and, particularly, in 2020 due to the COVID-19 pandemic, impacting the overall tourist influx. Recovery began in 2021, with 2025 (January-August) recording 249,795 arrivals, suggesting a promising trajectory for the year-end total.

Different ports contribute diversely to this recovery. Beef Island's strong and consistent performance sees it nearing or exceeding previous high numbers, while other ports like West End show a declining trend, indicating a need for strategic attention. Virgin Gorda Air maintains steady numbers, while Virgin Gorda Sea, Road Town, Anegada, and Jost Van Dyke show varying levels of recovery, with Jost Van Dyke requiring more targeted strategies due to slower growth.

The partial data from 2025 highlights the ongoing importance of strategic planning for tourism management. The focus should be on enhancing growth in underperforming ports like West End and Jost Van Dyke through targeted strategies and infrastructure improvements. Capitalising on the strength of high-performing ports like Beef Island is crucial for sustaining growth. Forecasting year-end totals and comparing them against pre-pandemic numbers will provide insights into the effectiveness of current strategies and inform adjustments for optimised balanced tourism across all ports.

The Individuality of Sister Islands

The National Tourism Policy acknowledges that, while the Virgin Islands are promoted as a single destination, each of the Sister Islands has unique characteristics, opportunities, and challenges that must be reflected in the design and implementation of tourism policy. Recognising this

individuality ensures that development is equitable, relevant, and rooted in each island's cultural, environmental, and economic context.

Virgin Gorda, with its iconic landscapes and boutique hospitality sector, requires policies that safeguard fragile ecosystems such as The Baths while enhancing high quality and heritage experiences. Anegada, as the low-lying coral island, demands specialised attention to climate resilience, renewable energy, and community-based tourism that integrates fisheries, culinary experiences, and environmental stewardship. Jost Van Dyke, celebrated for its vibrant music and event culture, benefits from policies that strengthen event management capacity, visitor safety, and small business participation. Tortola, as the commercial and administrative centre, requires continued investment in cruise tourism management, air and sea access, and urban renewal that enhances visitor experience.

The Policy therefore commits to tailoring goals and implementation mechanisms to reflect these distinctive identities. Resource allocations, regulatory frameworks, and development programmes will not be applied uniformly but will be adapted to each island's profile, carrying capacities, and aspirations as expressed during community consultations. In practice, this will include:

- Dedicated community tourism funds and capacity-building programmes targeted to each Sister Island.
- Differentiated product development priorities, recognising the comparative advantages of each island.
- Transportation and access strategies designed to improve inter-island connectivity and ensure equitable visitor flows.
- Stronger roles for Sister Island representatives within the Destination Management Council, ensuring that voices from Anegada, Virgin Gorda, Jost Van Dyke, and the wider districts are embedded in decision-making.

By tailoring policy delivery to the individuality of each Sister Island, the Virgin Islands strengthens its overall competitiveness while safeguarding cultural authenticity and ensuring that the benefits of tourism are fairly shared across the Territory.

The Virgin Islands are not defined by a single tourism identity, but rather by a tapestry of island-specific experiences that together form a world-class destination. Each major island, Tortola, Virgin Gorda, Anegada, and Jost Van Dyke has cultivated its own tourism niche, shaped by geography, infrastructure, local culture, and investment patterns. The surrounding offshore cays and private islands add further dimension, providing exclusive escapes and marine adventures that distinguish the BVI from regional competitors.

Tortola

Tortola remains the commercial and administrative heart of the Virgin Islands, with tourism offerings that cater to a diverse cross-section of visitors. As the main cruise port, Tortola welcomes hundreds of thousands of cruise passengers annually through the Cyril B. Romney Tortola Pier Park, a modern facility that combines retail, cultural exhibits, and tour coordination.

Beyond cruise tourism, Tortola offers:

- Iconic beaches like Cane Garden Bay, Smuggler's Cove, Brewer's Bay, Long Bay, Beef Island and Josiah's Bay.
- Land-based heritage attractions, including the Callwood Rum Distillery, J.R. O'Neal Botanic Gardens, and Mount Healthy Windmill.
- Culinary experiences ranging from local roadside eateries to fine dining establishments.
- Adventure activities such as hiking in Sage Mountain National Park and surfing at Apple Bay.

Tortola is also the logistical centre for inter-island ferry transfers, business travellers, and regional air traffic, with the Terrance B. Lettsome International Airport serving as the main aviation gateway. However, growing urban congestion, cruise ship crowding, and strained infrastructure underscore the need for strategic urban planning, beautification, and enhanced visitor flow management.

Virgin Gorda

Virgin Gorda is synonymous with upscale tranquillity. Known for its natural beauty and refined appeal, the island hosts some of the Territory's most prestigious properties and lifestyle experiences. Tourism here centres around:

- The Baths National Park, the BVI's most iconic natural attraction.
- Luxury resort communities such as:
- Rosewood Little Dix Bay, reopened in 2020 after extensive renovations.
- Oil Nut Bay, a self-contained, high-end development offering luxury villas, a marina village, fine dining, and curated wellness and adventure activities.
- Bitter End Yacht Club, rebuilt after Hurricane Irma with a renewed focus on sustainability, yachting culture, and luxury hospitality.
- Saba Rock, a stylish boutique resort and restaurant perched on a tiny cay in North Sound, popular among sailors and excursionists for its scenic setting and upscale atmosphere.

Virgin Gorda excels in attracting high-net-worth individuals, family travellers, and wellness seekers. The island's combination of refined luxury, minimal commercial clutter, and access to pristine marine areas positions it as the BVI's flagship destination for low-density, high-value tourism.

However, connectivity remains a hurdle. Virgin Gorda lacks direct international flights and depends on ferry access or private air charters from Tortola and St. Thomas. Enhancing access while preserving the island's character is a key policy consideration.

Jost Van Dyke

Jost Van Dyke is famed for its authentic, beach-party charm. Though small in size, the island punches above its weight in tourism impact. Highlights include:

- Legendary establishments such as Foxy's Bar and Soggy Dollar Bar, which draw visitors from across the globe, especially during New Year's Eve and holiday weekends.
- White Bay considered one of the Caribbean's top beaches, where beach bars line the shore and the "Painkiller" cocktail reigns supreme.
- Local music, culinary traditions, and casual, friendly service that give Jost its enduring charm.

Jost Van Dyke's tourism economy is heavily boat-based. Most visitors arrive by private yacht, day charters, or ferries, spending the day on the beach before returning to Tortola or St. Thomas. With limited overnight accommodations, the island thrives on volume, but this model presents sustainability concerns. Waste management, carrying capacity, and visitor impact on marine life and beach quality require urgent attention as tourism numbers rise.

Anegada

Anegada's tourism identity is uniquely defined by its geography and remoteness. As the only coral island in the volcanic Virgin Islands chain, Anegada offers long flat vistas, salt ponds, flamingo colonies, and an extensive barrier reef system. Its low elevation and sparse development make it ideal for niche tourism, such as:

- Kite surfing, snorkelling, birdwatching, and eco-tours.
- The Anegada Lobster Festival is held annually each November, drawing thousands of food lovers from across the Caribbean and the U.S. Virgin Islands for a weekend of local cuisine, music, and cultural celebration.
- Boutique inns and locally owned restaurants that offer fresh seafood, beachfront hospitality, and personalised service.

Access to Anegada is limited to ferries, yachts, and small aircraft, helping the island retain its sense of seclusion and authenticity. However, this also limits scalability. As interest in culinary and nature-based tourism grows, Anegada has the potential to develop as the BVI's premier slow-travel destination—provided that environmental preservation and waste management are prioritised.

Offshore Cays and Private Islands

The BVI's smaller islands and private resorts offer bespoke, secluded experiences often integrated into sailing and charter itineraries. Several notable developments include:

- Peter Island Resort & Spa, which recently reopened after extensive rebuilding following Hurricane Irma. This iconic property is once again welcoming discerning guests seeking wellness, beach seclusion, and five-star service in a private-island setting.
- Norman Island, often linked to pirate lore and "Treasure Island" mythology, is a favourite for snorkelers and sailors. Its underwater attractions like the Caves and The Indians are among the best in the Caribbean.
- Cooper Island Beach Club, a solar-powered boutique eco-resort featuring a microbrewery, rum bar, and sustainable design, attracting both overnight guests and visiting yachts.
- Guana Island and Scrub Island also cater to the high-end market, offering luxurious seclusion with access to nature reserves, hiking trails, and private beaches.

These offshore islands enhance the overall BVI experience by offering multi-day itineraries and "hop-on-hop-off" adventures for charter guests. Their offerings underscore the Territory's leadership in yacht tourism and small-island hospitality.

Culture, Heritage, and Culinary Tourism

Culture, heritage, and cuisine are inseparable from the Virgin Islands' identity and emerged strongly in the consultations as critical pillars for a distinct and competitive tourism product. Stakeholders consistently emphasised that cultural tourism is more than entertainment—it is both an economic driver and a means of safeguarding identity for future generations. The Virgin Islands possesses a rich blend of historical traditions, culinary practices, festivals, and artistic expression, these assets remain underutilised and insufficiently integrated into the tourism offering.

Food is a powerful connector between residents and visitors, and that the Territory's culinary identity requires clearer definition, branding, and consistent visibility. Traditional dishes are not always available, creating missed opportunities for authenticity. A story shared during consultations illustrated this gap, where visitors were unable to find a signature dish despite its promotion, resulting in disappointment and reputational harm. Farm-to-table initiatives linking restaurants with local farmers and fishers, the revival of the national culinary team to showcase BVI cuisine internationally, and policies to reduce reliance on imported foods while promoting authentic Virgin Islands dishes are priority.

The preservation and promotion of the Virgin Islands' historical and cultural identity is of paramount importance. Community voices underscored the importance of restoring and interpreting heritage sites, many of which are privately owned and underfunded, as well as embedding cultural storytelling into visitor experiences. There is a lack of a dedicated institution for heritage site management and the need for a Heritage and Museum Development Fund to restore landmarks and expand museums. Concerns about cultural dilution, internal divisions, and the lack of pride in promoting Virgin Islands artists and traditions further highlighted the urgency of government-backed programmes to safeguard cultural ownership. Stronger year-round cultural programming should not be limited to August Emancipation or November Lobster Festival, to spread economic benefits and sustain community participation. Festivals must prioritise local

artists, musicians, and performers, with funding mechanisms to ensure fair compensation. The creative industries—music, craft, design, and storytelling—can be engines of entrepreneurship and national branding that must be supported through grants, technical assistance, and visibility platforms.

The integration of cultural and culinary education into school curricula, youth involvement in heritage projects, and mentorship programmes linking young Virgin Islanders to cultural entrepreneurs and artisans instil cultural pride and continuity. The policy supports interventions intended to prevent cultural erosion, instil pride, and inspire youth to see cultural industries as viable career pathways. There is a clear consensus: cultural, heritage, and culinary tourism are underdeveloped but hold immense potential to diversify the Virgin Islands' product mix, strengthen economic inclusivity, and assert a distinct identity in an increasingly competitive global market. The National Tourism Policy, therefore, elevates these areas to central importance, recognising culture not as an adjunct but as a foundation of sustainable tourism development.

Emerging Trends and Strategic Opportunities

The BVI's tourism market is evolving. Trends such as digital nomadism, wellness and eco-tourism, experiential travel, and sustainability are gaining traction. Visitors increasingly seek personalised, immersive experiences that connect them with nature, culture, and community.

Opportunities include:

- Developing agritourism experiences and farm-to-table dining.
- Building capacity in heritage site management and storytelling.
- Supporting community-based tourism in underserved areas.
- Diversifying event tourism beyond peak seasons.
- Creating youth engagement programs to pass on cultural knowledge and tourism skills.

Key Stakeholders' Roles

Tourism in the Virgin Islands is underpinned by a network of government institutions, statutory bodies, industry associations, and community stakeholders who together influence the quality, reach, and sustainability of the visitor experience. As tourism becomes more dynamic and complex, these supporting structures must evolve to meet emerging demands in coordination, infrastructure, workforce development, and service delivery.

The Ministry of Tourism, Culture and Sustainable Development

The establishment of the Ministry of Tourism, Culture and Sustainable Development in 2023 marked a significant step in institutionalising tourism governance in the Territory. For the first

time, tourism was elevated to the ministerial level, providing a focused mandate to guide policy development, inter-agency coordination, and long-term sector planning.

The Ministry's key responsibilities include:

- Setting strategic direction for tourism development and alignment with national priorities;
- Facilitating cross-sector collaboration with infrastructure, education, and environmental agencies;
- Leading stakeholder consultations, performance monitoring, and research;
- Integrating tourism more meaningfully with cultural expression and sustainable development goals.

The Ministry plays a vital role in ensuring that tourism policy, planning, and implementation are coherent, inclusive, and forward-looking.

The BVI Tourist Board (BVITB)

As the Territory's national destination marketing organisation, the BVI Tourist Board (BVITB) leads efforts to promote the Virgin Islands in key source markets while supporting local tourism development.

BVITB's core functions include:

- Destination branding and international marketing;
- Public relations and engagement in the U.S., UK, Canada, and regional markets;
- Organising flagship events like BVI Food Fete and Anegada Lobster Festival;
- Providing business development support to tourism entrepreneurs and communities;
- Operating Visitor Information Centres and maintaining direct engagement with the hospitality industry.

The BVITB has been central to rebuilding the Virgin Islands' tourism visibility post-Hurricanes Irma and Maria and during post-COVID recovery. Going forward, the Board is expected to deepen its use of data, digital marketing, and stakeholder engagement to remain competitive in a fast-changing global market.

BVI Ports Authority (BVIPA)

The BVI Ports Authority (BVIPA) is a statutory body with a central role in the operation and management of the Territory's Sea ports, including the facilitation of cruise and ferry passengers—a cornerstone of the BVI's tourism sector.

Key tourism-related responsibilities of the BVIPA include:

- Managing the Cyril B. Romney Tortola Pier Park in partnership with developers and stakeholders;

- Facilitating berthing and logistical support for cruise ships and day-tour vessels;
- Overseeing ferry terminals at Road Town, West End, Virgin Gorda, and Anegada;
- Coordinating with Immigration and Customs to streamline visitor entry and exit processes;
- Ensuring maritime safety, port security, and cleanliness at visitor-facing marine infrastructure.

The BVIPA has contributed significantly to increasing cruise visitor volumes since the development of the Pier Park in 2015 and is a critical player in future strategies to enhance the cruise product, improve port aesthetics, and integrate seaport experiences more deeply into community tourism.

Table 5: Summary of Cruise Ship visits of Virgin Islands

Summary of Cruise-ship Visits to the Virgin Islands

MONTHS	NUMBER OF CALLS MADE AT VARIOUS PORTS/ANCHORAGES							TOTAL CALLS
	CRUISE-PIER	ROAD TOWN JETTY	PORT PURCELL	ROAD HARBOUR	JOST VAN DYKE	VIRGIN GORDA	Other Anchorages	
1997	102	10	56	6	56	103	14	347
1998	97	12	68	24	49	108	54	412
1999	129	12	70	22	66	137	29	465
2000	166	9	43	7	68	174	50	517
2001	190	1	29	12	80	130	18	460
2002	133	0	10	2	57	100	17	319
2003	219	1	15	25	84	144	45	533
2004	267	1	5	56	123	140	50	642
2005	235	2	2	62	98	147	66	612
2006	216	3	1	25	79	109	63	496
2007	287	8	4	47	74	117	79	616
2008	251	2	1	41	69	114	32	510
2009	251	0	0	42	82	116	48	539
2010	227	0	0	41	68	101	27	464
2011	203	7	0	52	96	135	67	560
2012	172	0	0	16	66	94	49	397
2013	164	3	0	12	66	93	46	384
2014	117	0	1	55	27	57	12	269
2015	86	0	0	112	63	96	55	412
2016	236	0	0	14	74	83	55	462
2017	-	-	-	-	-	-	-	-
2018	0	0	0	0	0	0	0	0
2019	0	0	0	0	0	0	0	0
2020	0	0	0	0	0	0	0	0
2021	0	0	0	0	0	0	0	0
2022	0	0	0	0	0	0	0	0
2023	225	0	0	6	50	31	60	372

Source: Central Statistics office and BVI Ports Authority

National Parks Trust of the Virgin Islands

The National Parks Trust of the Virgin Islands plays a central role in safeguarding the Territory's natural and cultural heritage, which forms the foundation of the tourism product. Established under statute, the Trust is responsible for managing a system of protected areas that includes iconic sites such as The Baths National Park, Sage Mountain, historical ruins and coastal ecosystems. Its work ensures that the ecological integrity and cultural significance of these areas are preserved for the benefit of residents and visitors alike.

The Trust's key responsibilities include:

- Managing and conserving terrestrial and marine parks, heritage sites, and critical ecosystems that underpin the tourism experience;
- Implementing conservation programmes for biodiversity, coral reef restoration, and habitat management;
- Overseeing visitor facilities within protected areas, ensuring they meet safety, environmental, and service standards;
- Supporting education and awareness initiatives to foster stewardship among residents, schools, and tourism operators;
- Collaborating with the Ministry of Tourism, Culture and Sustainable Development and other agencies to align protected-area management with national tourism and sustainable development goals.

The National Parks Trust is a cornerstone institution for the Virgin Islands' tourism sector. Its effective stewardship ensures that natural and cultural sites are protected, visitor experiences are enhanced, and the Territory maintains its global reputation as a premier destination rooted in environmental sustainability and heritage preservation.

British Virgin Islands Hotel and Tourism Association (BVIYHTA)

The BVI Hotel and Tourism Association (BVIYHTA) serves as the collective voice of tourism businesses across the Territory. Its membership includes hotels, villas, restaurants, tour operators, and service providers, and it is instrumental in representing the private sector in national tourism discussions.

BVIYHTA contributes through:

- Advocacy on industry standards, taxation, and regulatory issues;
- Workforce development and service quality training;
- Participation in tourism planning consultations;
- Facilitating information-sharing and joint promotion among members.

The association's input is essential to aligning public policy with on-the-ground realities and enabling small and medium enterprises to thrive within a resilient tourism economy.

BVI Marine Association

The BVI Marine Association represents a key pillar of the Virgin Islands' tourism identity and economy, yachting and marine-based tourism. This includes stakeholders in yacht chartering, sailing, marina operations, boat maintenance, water sports, and environmental stewardship.

The Association is engaged in:

- Advocacy for marine infrastructure investment and policy reform;
- Environmental conservation and reef protection campaigns;
- Workforce training for marine technicians, captains, and service professionals;
- Partnerships to strengthen the sailing capital brand through events and standards.

Given the Territory's competitive positioning in global sailing tourism, the Marine Association's leadership and collaboration with government agencies are vital to maintaining safety, environmental sustainability, and service excellence in the marine tourism space. The following table shows accumulation of recreational equipment for this industry.

Table 6: Charter industry companies and vessels

Number of charter companies and charter boats/yachts based in the Virgin Islands		
Year	No. of Companies	No. of Boats
2013	25	1,308
2014	25	1,308
2015	25	1,320
2016	25	1,332
2017	25	1,332
2018	19	404
2019	19	417
2020	19	430
2021	19	443
2022	19	456
2023	19	469
2024	19	482
2025	19	495

Source: Central Statistics Office

Observe the steep drop in the number of boats in 2018 following the 2017 devastating hurricanes. The number of boats have not returned to pre-hurricane levels as well as a minor drop in number of companies, this leaves room for further investment in this area.

Other Key Supporting Stakeholders

- **Immigration, Customs, and the Virgin Islands Shipping Registry**: These agencies play critical roles in border management and vessel regulation, directly impacting the visitor experience at sea and on arrival.
- **Trade Department & Department of Labour**: Ensure that businesses are properly licensed and that the tourism workforce meets standards of safety, productivity, and fairness.
- **H. Lavity Stoutt Community College (HLSCC) and other educational institutions**: These bodies have a role in developing future tourism leaders and skilled workers through hospitality and entrepreneurship programs.
- **Department of Culture & Community-Based Organizations**: These stakeholders support the preservation and promotion of Virgin Islands culture, ensuring that tourism also uplifts identity, pride, and heritage.

Appendix II: Alignment of National Tourism Policy Pillars with NSDP Outcomes

1. Sustainable Development of Tourism

- **NSDP Linkages:**
  - *National Outcome #6 – Diversified Economy and Globally Competitive Industries*
  - *National Outcome #7 – Green and Blue Economy*
  - *National Outcome #16 – Environmental Sustainability*
- Tourism will act as a driver of diversification by developing blue, cultural, and eco-tourism niches, integrating sustainability principles, and balancing economic growth with environmental stewardship.

2. Inclusive Growth and Community Empowerment

- **NSDP Linkages:**
  - *National Outcome #2 – Adaptive and Shock Responsive Social Protection Systems*
  - *National Outcome #3 – An Educated and Highly Skilled Population*
  - *National Outcome #5 – An Enabling Business Environment*
- Tourism development will create equitable opportunities for youth, women, MSMEs, and Sister Islands communities through training, entrepreneurship support, and integration into value chains.

3. Competitiveness and Market Diversification

- **NSDP Linkages:**
  - *National Outcome #4 – Fiscal Strength and Sustainability*
  - *National Outcome #8 – Smart Nation/Digital Economy*
  - *National Outcome #11 – Transportation and Logistics*
- Investments in airport and seaport upgrades, digital platforms, and destination branding will enhance global competitiveness and facilitate diversification of source markets.

4. Cultural Integrity and Heritage Protection

- **NSDP Linkages:**
  - *National Outcome #9 – Sustainable Energy and Water*
  - *National Outcome #16 – Environmental Sustainability*
  - *National Outcome #17 – Hazard Risk Reduction and Adaptation to Climate Change*
- Tourism will be positioned as a vehicle to safeguard Virgin Islands' identity through heritage tourism, festivals, and integration of arts, culture, and culinary traditions.

5. Climate Resilience and Environmental Stewardship

- **NSDP Linkages:**
  - *National Outcome #17 – Hazard Risk Reduction and Adaptation to Climate Change*
  - *National Outcome #16 – Environmental Sustainability*

- Consistent with the **OECS Climate Action Plan for Tourism**, this goal embeds disaster preparedness, low-carbon transitions, coral reef restoration, and beach/coastal management into the tourism framework.

6. Institutional Strengthening and Governance

- **NSDP Linkages:**
  - *National Outcome #12 – Peace, Justice for All, Safety and Security*
  - *National Outcome #13 – Efficiency and Effectiveness of Government*
  - *National Outcome #14 – Constitutional Advancement*
- Legislative reforms (e.g., licensing, standards, site quotas) and institutional mechanisms (e.g., Destination Management Council) will ensure coherent governance, transparency, and accountability in tourism.

Appendix III: Sister Island Priorities Mapped to Policy Pillars

This appendix ensures that the National Tourism Policy is not applied uniformly but instead reflects the distinct character of Virgin Gorda, Anegada, Jost Van Dyke, and Tortola. Each island's priorities align with the eight policy pillars, ensuring tailored delivery that strengthens both local ownership and national competitiveness.

Anegada: Evidence-Based Findings and Priority Actions

1) Access & Transport

Stakeholders called for daily, reliable ferry and air services, better coordination between ferries and flights, and stronger inter-island links (notably with Virgin Gorda). Irregular schedules are undermining resident mobility and the visitor experience.

Priority Actions:

- Negotiate and publish a guaranteed daily ferry timetable with performance clauses; align ferry arrivals/departures with flight schedules via a single public schedule.
- Pilot an inter-island connector (Anegada–Virgin Gorda) during peak periods, with quarterly performance reviews tied to reliability and load-factor targets.
- Introduce through-ticketing (air and ferry) and real-time information to reduce missed connections and improve the visitor journey.

2) Port of Entry, Cleanliness & First Impressions

Participants described poor dock conditions—insufficient amenities, seating, waste management, and signage—and asked for dedicated personnel to manage cleanliness and order.

Priority Actions:

- Fund an Anegada Port Welcome Upgrade: shade, seating, restrooms, clear wayfinding, accessible pathways; establish a site manager & cleaning crew with KPIs published quarterly.
- Implement waste and recycling stations with vendor compliance rules and a rapid-response protocol for cruise/peak days.

3) Health Services & Visitor Safety

Stakeholders flagged emergency response limits, medicine stockouts, and clinic conditions as critical risks that affect residents and visitors alike.

Priority Actions:

- Upgrade the Anegada Clinic (triage, stabilization room, essential medicines), formalise medevac protocols, and run joint drills with tourism operators.

- Establish a health supplies SLA with monthly stock audits and publish a visitor safety readiness scorecard.

4) Land Titling, Financing & Local Investment

Residents stressed that the lack of land titles blocks access to finance and prevents locals from investing, creating an uneven playing field compared to foreign investors.

Priority Actions:

- Launch an Anegada Land Regularisation Programme (survey, titling, deeds) prioritising ancestral parcels; pair with a Local Tourism Enterprise Credit Window (guarantees/low-interest loans).
- Require Community Benefit Plans for any large external investment; preference scoring for local equity participation.

5) Community-Led Development Model

There is strong resistance to large, foreign-owned resorts; stakeholders prefer small-scale, locally led tourism as Anegada's core identity.

Priority Actions:

- Codify an Anegada Small-Scale Development Code (caps on footprint/height/keys), streamlined approvals for community enterprises, and no-displacement safeguards.
- Create an Anegada Community Tourism Fund for micro-grants to family-run businesses and co-ops.

6) Environmental Stewardship & Clean Seas

Residents warned of reef and beach degradation and called for conservation partnerships, regulation, and public education.

Priority Actions:

- Expand MPA management & reef restoration, install pump-out facilities, set eco-mooring fields, and enforce beach cleanliness standards with visible compliance tags.
- Roll out a "Keep Anegada Pristine" campaign (operators, schools, visitors) and tie business licensing to environmental compliance.

7) Culture, Heritage & Events (incl. Lobster Fest)

Stakeholders see potential in heritage tourism (e.g., graveyards), but noted missing basics (e.g., fencing, signage). They want more events beyond Lobster Fest—and for Lobster Fest to be locally managed and rebranded to showcase broader cuisine.

Priority Actions:

- Fund a Heritage Basics Package (fencing, interpretive signage, trails) with local guides trained as storytellers.
- Transfer Lobster Fest planning to a local committee (with BVITB support), broaden the culinary theme, and add shoulder-season mini-festivals.

8) Fair and Consistent Enforcement

Residents cited selective enforcement—some businesses comply while others breach rules without consequence—undermining trust.

Priority Actions:

- Create a single enforcement protocol across agencies with uniform penalties, spot checks, and a public compliance dashboard; add a confidential complaints channel.

9) Equity for Anegada (Equality vs. Equity)

The community asked for a policy that recognises Anegada's unique context and delivers equitable outcomes, not just generic "equal" treatment.

Priority Actions:

- Embed equity-based allocations (funding, grants, transport subsidies) with Anegada-specific targets for MSME participation, training places, and infrastructure spend, reported annually.

Virgin Gorda – The Valley: Evidence-Based Findings and Priority Actions

1) Infrastructure, Congestion and Parking (Gateway & Sites)

Stakeholders flagged drainage failures near the marina, overcrowding at the ferry terminal, and site-level parking gaps at The Baths and Gorda Peak; Savannah Bay lacks basic visitor amenities (restrooms, trolleys). A multi-level parking facility near St. Thomas Bay was proposed to ease congestion. The Premier acknowledged the system-wide parking deficit and suggested studies, pedestrianisation and accessibility upgrades, with a dedicated tourism infrastructure entity to build and maintain facilities (parking, bathrooms, lifeguards).

Priority Actions:

- Commission a Virgin Gorda Gateway & Sites Plan (ferry precinct, Savannah Bay, Gorda Peak) covering drainage upgrades, universal access, wayfinding and multi-level parking at St. Thomas Bay; assign delivery to the tourism infrastructure entity with quarterly KPIs.
- Install basic amenities at Savannah Bay (restrooms, shaded seating, trolley solution) and a visitor-safety checklist for high-use sites.

2) Transport Services & Taxi Licensing

Visitors are being stranded due to a shortage of taxi drivers; licenses appear on hold in VG, though issued in Tortola. The Premier supported a data-driven approach to the visitor-to-taxi ratio and committed to raising the matter with the relevant Ministry.

Priority Actions:

- Implement a Taxi Supply Model tied to seasonality and visitor flows (license issuance guided by ratios and service standards) and publish service reliability dashboards.

3) Visitor Management at The Baths (Capacity & Pricing)

Stakeholders warned of overcrowding and degraded experience for overnight guests due to cruise surges. Community members argued that fees at The Baths are under-priced ($3) versus value; cruise lines capture margins while local revenue remains minimal. Cabinet had reviewed a fee increase to $20; Premier affirmed the importance of improving first impressions at gateways and integrating culture into the experience. A cultural villages concept was proposed to disperse visitors and spending (including The Valley) while avoiding "cruise-only" segregation.

Priority Actions:

- Adopt a Sustainable Visitor Management Policy for The Baths: daily caps, timed entries, differential pricing, and off-peak incentives, aligned to NPTVI conservation rules.
- Establish a Cultural Village – The Valley pilot (permanent vendor booths, restrooms, live culture, crafts) accessible to all visitors, not cruise-exclusive.

4) Festivals, Heritage and Branding

Concerns about Virgin Gorda Easter Festival planning/marketing and the economic impact of relocation; calls for earlier fixed dates, larger budget, and a permanent executive structure under an amended Festival and Fairs Act. Enforcement of the Preservation of Names and Places Act (2001) was urged to safeguard cultural identity.

Priority Actions:

- Fix Easter Festival dates 12 months in advance; increase seed funding; constitute a permanent festival executive and marketing calendar.
- Activate/enforce the Preservation of Names and Places Act to protect toponyms and strengthen authentic destination branding.

5) Institutional Presence and Support

Stakeholders highlighted insufficient BVITB presence on VG and loss of a sub-office post-hurricane; plans to re-establish were noted.

Priority Actions:

- Reopen a Virgin Gorda Tourism Sub-Office (information, product development, events liaison) with a published service charter and local advisory committee.

6) Level Playing Field for Local Charter Operators

Strong concerns about foreign-based vessels operating commercially in BVI waters without permits or fair contribution; call for stricter enforcement of port-to-port rules and licensing to protect BVI operators.

Priority Actions:

- Establish a Marine Commercial Compliance Unit (with Ports/Maritime) to enforce port-to-port rules, licenses and fees; quarterly enforcement bulletins published.

7) Reinstatement of Gun Creek Port of Entry

Unanimous support to reactivate and staff Gun Creek as a full port of entry, essential for regattas and to relieve Spanish Town; repeated in closing remarks on the case for reopening, with history of functionality and benefits to communities like Leverick Bay.

Priority Actions:

- Reopen Gun Creek with Customs/Immigration, establish event-season surge staffing, and integrate with e-entry forms to streamline nautical arrivals.

8) Customer Service at Borders

Inconsistent/unwelcoming front-line services at entry points; need for customer-service training and accountability.

Priority Actions:

- Roll out border service standards and mandatory training for Ports, Customs, Immigration at VG entry points with mystery shopper audits and public scorecards.

9) Utilities and Roads – Smarter Civil Works

Recurring waterline failures/roadworks disrupt operations; call for HDPE piping and smarter utility corridors (including above-ground conduits) to avoid repeated excavations.

Priority Actions:

- Adopt a No-Dig Utility Corridor standard (HDPE, shared conduits) for North Sound, sequencing works to event calendars to reduce disruption.

10) Human Resources and Professionalisation

Need to **professionalise the workforce** across roles to attract skilled professionals and elevate standards.

Priority Actions:

- Launch a VG Talent Pathways programme tied to certification ladders, management internships, and employer pledges to local advancement.

11) Entrepreneur Support & Product Rules

Call for a fully functioning Small Business Bureau, concessional finance and a review of outdated restrictions (e.g., jet-ski policy) to enable responsible innovation.

Priority Actions:

- Operationalise the Tourism MSME Window (grants/guarantees) and conduct a risk-based review of activity restrictions with clear safety/environmental protocols.

12) Environmental Protection – Mangroves, Seagrass, Sensitive Sites

Caution against unchecked development harming mangroves/seagrass in North Sound; overuse at The Baths risks irreversible damage—urge visitor flow regulation and alternative routes/attractions.

Priority Actions:

- Enforce no-net-loss of mangroves/seagrass (offsets, setbacks), expand eco-moorings, and implement carrying capacity limits with timed entries at The Baths, consistent with NPTVI's mandate.

13) Events and Accommodation for Nautical Tourism

Major regattas expose shortage of crew accommodations; strategic infrastructure investment is needed to retain high-value nautical events.

Priority Actions:

- Facilitate event-linked lodging solutions (temporarily permitted modular units/charters, homestay schemes) and a Regatta Readiness Plan with transport/berthing coordination.

14) Mobility & Parking System (North Sound)

Stakeholders proposed a centralised landing with scheduled shuttles to reduce congestion and improve experience across the North Sound precinct.

Government response (North Sound):

- Establish a North Sound Mobility System (central jetty, scheduled land/sea shuttles, integrated ticketing) and managed parking zones linked to event days.

Jost Van Dyke: Evidence-Based Findings and Government Responses

1) Overcrowding, Visitor Management & Infrastructure at White Bay

Stakeholders emphasised severe overcrowding at White Bay during cruise ship days, creating environmental stress, safety risks, and diminished visitor experience. Concerns included insufficient restrooms, waste disposal, and parking, alongside unregulated anchoring of visiting vessels.

Priority Actions:

- Implement a White Bay Carrying Capacity Plan, with daily visitor thresholds, anchoring regulations, and staggered cruise passenger dispersal to alternative sites.
- Fund basic visitor infrastructure (restrooms, shaded seating, waste and recycling stations) and tie compliance responsibilities to local vendors/operators.
- Introduce a JVD Beach Management Unit with responsibility for crowd control, environmental monitoring, and safety services (lifeguards, signage, hazard protocols).

2) Festivals, Events & Cultural Identity

JVD stakeholders highlighted the Old Year's Night festival as a global draw but noted weak crowd management, limited infrastructure, and lack of formal planning support. They called for better integration of local vendors, musicians, and artisans into the visitor economy.

Government response (JVD):

- Establish a dedicated Event-Management Subcommittee under the Destination Management Council to oversee Old Year's Night and peak cultural events, with operational budgets and safety protocols.
- Support local participation by formalising vendor licensing for events, ensuring fair pricing and designated spaces for food, crafts, and music.
- Develop an annual cultural calendar to extend economic benefits beyond Old Year's Night, including smaller music and food festivals.

3) Transport & Access

Stakeholders reported ferry delays, inconsistent schedules, and inadequate docking facilities, limiting the flow of visitors and residents alike. Congestion at peak arrival times compounds issues during events and cruise ship calls.

Government response (JVD):

- Upgrade Great Harbour ferry dock with better passenger handling facilities, lighting, and signage.

- Negotiate with ferry operators for a minimum service guarantee, with subsidies tied to on-time performance and frequency.
- Create a peak-event transport plan, including additional ferry runs and shuttle services, coordinated with Old Year's Night and cruise schedules.

4) Environmental Stewardship & Clean Seas

Concerns were raised about litter, anchoring damage, and waste management during high-volume days, especially when combined with limited enforcement capacity. Stakeholders warned that the island's fragile reefs and beaches are being put at risk.

Priority Actions:

- Designate eco-mooring zones at White Bay and Great Harbour, with strict anchoring bans in sensitive areas.
- Deploy event-day environmental inspectors supported by local NGOs, tasked with monitoring reef and beach conditions.
- Introduce a "Clean Jost Van Dyke" programme combining business licensing conditions, public education, and visitor-awareness campaigns, with annual reporting on compliance.

5) Health, Safety & Emergency Services

Stakeholders highlighted the limited capacity of health and emergency response on the island to handle large crowds or crisis events (e.g., mass casualty scenarios). Specific mention was made of the need for first-aid facilities, trained personnel, and medevac protocols during peak events.

Priority Actions:

- Establish an Event Health & Safety Protocol for JVD, including first-aid posts, emergency evacuation routes, and coordination with BVI Health Services.
- Train and certify event safety volunteers (crowd control, first aid, fire safety) drawn from the local community.
- Require festival and event organisers to fund contingency health and safety measures as part of event licensing.

6) Equity, Local Business Participation & Training

Stakeholders expressed frustration that benefits from high visitor volumes do not always flow equitably to local vendors. Many lack access to financing or training opportunities that would allow them to expand or formalise their operations.

Priority Actions:

- Launch a Community Vendor Development Programme offering micro-grants, training in event logistics, food safety, and customer service.
- Guarantee local vendor quotas in contracts for cruise excursions and event services.

- Provide tailored business planning workshops through HLSCC for JVD entrepreneurs, linked to access to credit facilities.

Appendix IV: Issues, Policy Objective and Priority Action Matrix

Issue	Corresponding Policy Objectives	Priority Action
Issue 1: Policy and Governance Gaps	**PO 1: Strengthening governance and coordination across tourism institutions** **PO 7: Using robust data and monitoring systems to guide evidence-based decision-making** **PO 6: Ensuring equitable distribution of tourism benefits (related to investment framework).**	
1. i. Lack of a National Tourism Policy governing and providing direction to the sector	PO 1: Strengthening governance and coordination across tourism institutions PO 7: Using robust data and monitoring systems to guide evidence-based decision-making	7.8.1. Draft and enact a comprehensive Tourism Act, consolidating regulations on standards, licensing, training, site management, and enforcement powers. 10.2. Draft and enact a Virgin Islands Tourism Act, which will serve as the principal legal instrument governing the sector.
1. ii. Inconsistent strategic direction	PO 1: Strengthening governance and coordination across tourism institutions	7.5.1. Legislate the Destination Management Council (DMC) as a statutory coordinating body with authority to advise Cabinet on priorities, policies, and monitoring. 8.1.1. Clarify and streamline mandates of the Ministry of Tourism, the Tourist Board, and new statutory bodies to eliminate duplication and strengthen oversight.
1. iii. Fragmented governance and coordination	PO 1: Strengthening governance and coordination across tourism institutions	7.5.1. Legislate the Destination Management Council (DMC) as a statutory coordinating body with authority to advise Cabinet on priorities, policies, and monitoring. 7.5.2. Establish thematic subcommittees (e.g., marine, cruise, culture, environment, Sister Islands) under the DMC. 8.3.1**.** Formalise inter-ministerial committees (Tourism, Environment, Health, Immigration, Customs, Ports, Trade) to coordinate cross-cutting issues.

Issue	Corresponding Policy Objectives	Priority Action
		8.1.6. The MTCSD will retain oversight of policy, product development, standards, and certification, integrating these functions into its core operations. 8.1.2. The transfer of BVITB staff into the Ministry of Tourism, Culture and Sustainable Development (MTCSD) will be completed in phases, beginning with training, certification, and product development units.
1.iv. Outdated legislative framework	PO 1: Strengthening governance and coordination across tourism institutions	7.8.1. Draft and enact a comprehensive Tourism Act, consolidating regulations on standards, licensing, training, site management, and enforcement powers. 10.2. Draft and enact a Virgin Islands Tourism Act.
1.v. Slow pace of implementation (e.g. increasing fees)	PO 1: Strengthening governance and coordination across tourism institutions	8.8.1. Undertake a comprehensive review of all tourism-related fees, taxes, and administrative procedures. 1.4.3. Institutionalise cross-ministry investment teams (tourism, infrastructure, trade, planning) to coordinate approvals for major tourism projects. 7.3.2. Digitise licensing, inspections, and compliance monitoring for operators, improving transparency and reducing processing times.
1.vi. Excessive bureaucracy and delays	PO 1: Strengthening governance and coordination across tourism institutions	7.3.2. Digitise licensing, inspections, and compliance monitoring for operators, improving transparency and reducing processing times. 1.4.3. Institutionalise cross-ministry investment teams (tourism, infrastructure, trade, planning) to coordinate approvals for major tourism projects. 8.8.2. Propose mechanisms for simplifying procedures, including the consolidation of permits, licenses, and fee payments into a single digital interface or one-stop-shop system.
1.vii. Lack of policy integration	PO 1: Strengthening governance and	8.3.1. Formalise inter-ministerial committees (Tourism, Environment, Health, Immigration,

Issue	Corresponding Policy Objectives	Priority Action
	coordination across tourism institutions	Customs, Ports, Trade) to coordinate cross-cutting issues. 8.1.6. The MTCSD will retain oversight of policy, product development, standards, and certification, integrating these functions into its core operations.
1.viii. Need for a comprehensive investment framework	PO 6: Ensuring equitable distribution of tourism benefits to local communities, small businesses, and sister islands.	7.6 (Pillar 8). Review pioneer status criteria to allow MSMEs, community enterprises, and locally owned businesses to access targeted incentives for community tourism, cultural industries, and agritourism. 8.7.3. Government will develop a Public-Private Partnership (PPP) Framework for Tourism Infrastructure.
Issue 2: Regulatory and Standardisation Issues	**PO 1: Strengthening governance and coordination across tourism institutions.** **PO 5: Building a skilled, services-oriented local workforce through education and training.**	
2. i. Lack of enforceable quality standards	PO 1: Strengthening governance and coordination across tourism institutions. PO 5: Building a skilled, services-oriented local workforce through education and training.	4.8.1. Implement a destination-wide accommodation grading and star-rating system, harmonised with OECS standards and enforced by law. 7.8.2. Modernise licensing systems for accommodations, taxis, ferries, and tour operators, linking renewal to compliance with quality and sustainability standards. 7.4.3. Create a National Customer Service Certification, mandatory for frontline staff in licensed businesses.
2. ii. Unregulated accommodations	PO 1: Strengthening governance and coordination across tourism institutions	4.8.2. Establish grading criteria for non-traditional accommodations (villas, Airbnb, charter yachts), ensuring quality, safety, and service consistency. 8.9.1. Introduce a Marine Accommodation Occupancy Framework that extends the principle of the “bed tax” to charter vessels and live-aboard yachts.

Issue	Corresponding Policy Objectives	Priority Action
2. iii. Inconsistent fees and rules	PO 1: Strengthening governance and coordination across tourism institutions	8.8.1. Undertake a comprehensive review of all tourism-related fees, taxes, and administrative procedures. 8.8.3. Rationalise the fee and tax structure to ensure that it is proportionate, predictable, and regionally competitive.
2.iv. Lack of safety oversight	PO 1: Strengthening governance and coordination across tourism institutions	6.2.5. Require service reliability and safety performance standards for all licensed ferry operators, with public reporting on delays and compliance. 6.3.3. License reforms for taxis and tour operators, requiring customer service, safety, and accessibility certification. 7.2.2. Require property-level emergency plans (evacuation/shelter, medical triage, communications) as a licensing condition, with annual drills.
2.v. Unregulated transport	PO 1: Strengthening governance and coordination across tourism institutions	6.3.3. License reforms for taxis and tour operators, requiring customer service, safety, and accessibility certification. 7.8.2. Modernise licensing systems for accommodations, taxis, ferries, and tour operators.
Issue 3: Infrastructure and Access Constraints	**PO 4: Expanding infrastructure and access (air, sea, and inter-island transport) to improve visitor experiences.** **PO 3: Diversifying the tourism product (relevant to site infrastructure and medical tourism).**	
3. i. Limited air and sea Access	PO 4: Expanding infrastructure and access (air, sea, and inter-island transport) to improve visitor experiences.	**6.1.1.** Negotiate direct international air services from priority markets. **6.1.2.** Complete the airport runway extension and terminal upgrades. **6.2.1.** Modernise ferry terminals (Road Town, Virgin Gorda, Anegada, Jost Van Dyke) with upgraded safety, customs, immigration, and passenger amenities.

Issue	Corresponding Policy Objectives	Priority Action
3. ii. Inadequate accommodation capacity	PO 4: Expanding infrastructure and access (air, sea, and inter-island transport) to improve visitor experiences.	**4.5.5.** Develop innovative accommodation solutions for peak events, including temporary modular lodging, cruise ship berths, and certified homestay schemes.
3. iii. Poor conditions at ports of entry	PO 4: Expanding infrastructure and access (air, sea, and inter-island transport) to improve visitor experiences.	6.2.1. Modernise ferry terminals (Road Town, Virgin Gorda, Anegada, Jost Van Dyke) with upgraded safety, customs, immigration, and passenger amenities. 6.3.1. Implement integrated transport hubs at key entry points.
3.iv. Deficiencies in core infrastructure	PO 4: Expanding infrastructure and access (air, sea, and inter-island transport) to improve visitor experiences.	7.1.1. Upgrade visitor infrastructure and amenities to ensure that facilities such as restrooms, signage, transport hubs, and shaded areas can accommodate the passenger volumes of cruise ships. 8.7.3. Government will develop a Public-Private Partnership (PPP) Framework for Tourism Infrastructure.
3.v. Under-resourced health care	PO 3: Diversifying the tourism product (relevant to site infrastructure and medical tourism). PO 4: Expanding infrastructure and access (air, sea, and inter-island transport) to improve visitor experiences.	4.6.1. Conduct a National Medical and Academic Tourism Feasibility Study. 8.5 (Context). Commit to upgrading medical facilities on Tortola and the Sister Islands
3.vi. Lack of site infrastructure and maintenance	PO 3: Diversifying the tourism product (relevant to site infrastructure and medical tourism).	4.1.1. Allocate dedicated funding and staff to restore and interpret historic sites... integrating them into heritage trails. 4.5.2. Upgrade and certify sports facilities to meet regional and international standards.
Issue 4: Environmental and	**PO 2: Embedding environmental sustainability and climate resilience into all tourism development.**	

Issue	Corresponding Policy Objectives	Priority Action
Sustainability Threats	**PO 7: Using robust data and monitoring systems (relevant to capacity limits).**	
4. i. Capacity exceeded at key sites	PO 2: Embedding environmental sustainability and climate resilience into all tourism development. PO 7: Using robust data and monitoring systems (relevant to capacity limits).	2.1.1. Institute a Visitor Use Management Plan (VUMP) for high-traffic bays and channels, setting daily berth/anchorage limits and time-of-day rotations to prevent overcrowding. 2.3.1. Set site-specific daily visitor quotas and timed entry/reservation systems for sensitive sites (e.g., The Baths). 7.1.5. Adopt a cruise carrying capacity and dispersal policy. 7.8.3. Legislate site quotas, carrying capacities, and conservation obligations for high-traffic sites
4. ii. Marine pollution and waste Management	PO 2: Embedding environmental sustainability and climate resilience into all tourism development.	5.2.1. Implement a mandatory waste management plan requirement for all licensed tourism properties and attractions. 2.6.2. Designate no-discharge zones and require pump-out stations at strategic marinas. 5.2.4. Enforce cruise ship waste offloading protocols with independent inspections.
4. iii. Threats to marine ecosystems	PO 2: Embedding environmental sustainability and climate resilience into all tourism development.	2.2.1. Scale a Territory-wide coral nursery network with standardised out-planting protocols and annual restoration targets for priority reefs. 2.5.3. Expand and re-zone the MPA network based on science (no-take cores, recreation zones). 2.1.7. Introduce anchoring exclusion zones over sensitive habitats (seagrass/coral).
4.iv. Coastal degradation	PO 2: Embedding environmental sustainability and climate resilience into all tourism development.	2.3.2. Complete coastal erosion management plans (dune restoration, mangrove replanting) before any new coastal tourism approvals. 3.1.4. Prioritise nature-based solutions—mangrove restoration, dune rebuilding, coral and seagrass rehabilitation.

Issue	Corresponding Policy Objectives	Priority Action
4.v. Underutilisation of levy funds	PO 2: Embedding environmental sustainability and climate resilience into all tourism development.	2.1.2. Reinvest marine use fees (cruising, moorings, park permits) into conservation and enforcement capacity. 8.10.1. The Environmental and Tourism Improvement Levy (ETIL) resources earmarked for product development will be redirected from the BVI Tourist Board (BVITB) to the Ministry of Tourism, Culture and Sustainable Development (MTCSD).
Issue 5: Workforce and Human Capital Challenges	**PO 5: Building a skilled, services-oriented local workforce through education and training.**	
5. i. Dependence on expatriate labour across the tourism sector	PO 5: Building a skilled, services-oriented local workforce through education and training.	7.4.1. Embed tourism workforce planning into the national skills framework, identifying priority occupations and future demand projections. 7.4.5. Develop a labour mobility strategy, enabling Virgin Islanders to gain international experience while attracting skilled professionals for gaps.
5. ii. Lack of training and career pathways in tourism	PO 5: Building a skilled, services-oriented local workforce through education and training.	7.4.2. Partner with H. Lavity Stoutt Community College and regional institutions to expand vocational programmes in hospitality, marine services, culinary arts, and events management. 1.3.3. Expand apprenticeships and internships within the accommodations, cruise, and marine sectors to create career pathways for young people. 1.3.8. Introduce retention strategies such as return-service scholarships, local career progression frameworks, and incentives for businesses to invest in the professional growth of young Virgin Islanders.
5.iii. Inconsistent service quality	PO 5: Building a skilled, services-oriented local workforce through education and training.	7.4.3. Create a National Customer Service Certification, mandatory for frontline staff in licensed businesses. 1.4.1. Embed tourism service standards across all frontline ministries (Immigration, Customs,

Issue	Corresponding Policy Objectives	Priority Action
		Ports, Postal, Health), ensuring visitors experience consistent quality.
5.iv. Need for cultural knowledge	PO 5: Building a skilled, services-oriented local workforce through education and training.	4.1.2. Institutionalise cultural storytelling by training and certifying guides, artists, and performers in heritage interpretation. 1.3.6. Reintroduce patriotic and cultural education in schools (national heroes, pledge, festivals).
Issue 6: Data and Economic Planning Deficiencies	**PO 7: Using robust data and monitoring systems to guide evidence-based decision-making**	
6. i. Lack of comprehensive visitor data	PO 7: Using robust data and monitoring systems to guide evidence-based decision-making	7.2.2. Establish Tourism Statistical and Research capacity within the Ministry of Tourism. 7.2.4. Mandatory reporting requirements for accommodations, marinas, and tour operators, supported by digital submission systems. 10.4. The new legislation will include provisions for mandatory tourism statistics reporting by operators.
6. ii. Absence of economic measurement tools for measuring tourism benefits and impacts	PO 7: Using robust data and monitoring systems to guide evidence-based decision-making	7.2.3. Implement a Tourism Satellite Account (TSA) to accurately measure tourism's contribution to GDP, employment, and foreign exchange earnings.
6. iii. Absence data sharing protocols in the public and private sectors	PO 7: Using robust data and monitoring systems to guide evidence-based decision-making	7.2.6. Formalise data-sharing agreements with Customs, Immigration, Ports, and airlines/ferry operators to support integrated statistics.
Issue 7: Product and Diversification Issues	**PO 3: Diversifying the tourism product beyond marine-based activities to include culture, heritage, culinary, sports, eco-tourism, and medical tourism.** **PO 6: Ensuring equitable distribution of tourism benefits to local communities, small businesses, and sister islands.**	

Issue	Corresponding Policy Objectives	Priority Action
7. i. Over-reliance on marine/beach Tourism	PO 3: Diversifying the tourism product beyond marine-based activities to include culture, heritage, culinary, sports, eco-tourism, and medical tourism.	4.2.1. Develop a National Culinary Programme that brands and promotes Virgin Islands cuisine. 4.5.1. Establish a National Events and Sports Calendar. 4.6.1. Conduct a National Medical and Academic Tourism Feasibility Study.
7. ii. Underutilised cultural and heritage assets	PO 3: Diversifying the tourism product beyond marine-based activities to include culture, heritage, culinary, sports, eco-tourism, and medical tourism.	4.1.1. Allocate dedicated funding and staff to restore and interpret historic sites. 1.1.2. Integrate community-based tours (e.g., East End/Long Look heritage, Jost Van Dyke cultural sites) into national cruise and overnight visitor itineraries. 4.7.1. Submit nomination dossiers for potential UNESCO World Heritage listings.
7.iii. Lack of consistency and authentic culinary identity	PO 3: Diversifying the tourism product beyond marine-based activities to include culture, heritage, culinary, sports, eco-tourism, and medical tourism.	4.2.1. Develop a National Culinary Programme that brands and promotes Virgin Islands cuisine. 4.2.5. Incentivise farm-to-table integration through procurement contracts, tax credits, and promotion of agritourism experiences.
7.iv. Insufficient sports and events infrastructure	PO 3: Diversifying the tourism product beyond marine-based activities to include culture, heritage, culinary, sports, eco-tourism, and medical tourism.	4.5.1. Establish a National Events and Sports Calendar. 4.5.2. Upgrade and certify sports facilities to meet regional and international standards.
7.v. Inequitable distribution of benefits across Sister Islands	PO 6: Ensuring equitable distribution of tourism benefits to local communities, small businesses, and sister islands.	2.1.4. Develop multi-island itineraries that deliberately route visitors to Sister Islands (Virgin Gorda, Anegada, Jost Van Dyke). 4.5.2. Decentralise investments [in sports facilities] to Virgin Gorda, Anegada, and Jost Van Dyke.

Issue	Corresponding Policy Objectives	Priority Action
		7.1.8. Establish certified excursion packages that actively direct passengers to Virgin Gorda, Jost Van Dyke, and Anegada.
7.vi. Need for stronger national identity and branding	PO 3: Diversifying the tourism product beyond marine-based activities to include culture, heritage, culinary, sports, eco-tourism, and medical tourism.	4.8.6**.** Establish a national certification scheme for eco- and cultural-tourism products. 4.3.4. Integrate sports, music, and maritime events into the national branding strategy.
Issue 8: Equity and Local Economic Participation	**PO 6: Ensuring equitable distribution of tourism benefits to local communities, small businesses, and sister islands.**	
8. i. Barriers to local investment	PO 6: Ensuring equitable distribution of tourism benefits to local communities, small businesses, and sister islands.	1.2.1. Enact a Tourism MSME Incentive Policy, granting preferential access to concessions, fiscal incentives, and technical support for local entrepreneurs. 7.6 (Pillar 8 context). Review pioneer status criteria to allow MSMEs, community enterprises, and locally owned businesses to access targeted incentives.
8. ii. Competitive challenges for local entrepreneurs against foreign-owned operations	PO 6: Ensuring equitable distribution of tourism benefits to local communities, small businesses, and sister islands.	7.6 (Pillar 8). Tie concessions to domestic value retention requirements, including local employment quotas, supplier linkages, and community benefit agreements. 1.4.4. Adopt a "local first" procurement framework for hotels, cruise ships, and festivals.
8. iii. Limited "Trickle-down" benefits to local communities	PO 6: Ensuring equitable distribution of tourism benefits to local communities, small businesses, and sister islands	**1.1.3.** Implement revenue-sharing models so that park fees, cruise head taxes, and event revenues are channelled into district-based improvements. **7.1.5.** Strengthen community integration in cruise tourism by guaranteeing vendor participation for artisans, food vendors, and performers. **8.9.1.** Government will introduce a Marine Accommodation Occupancy Framework that

Issue	Corresponding Policy Objectives	Priority Action
		extends the principle of the "bed tax" to charter vessels and live-aboard yachts.

The remaining Priority Actions fit primarily under the following broad thematic categories and their corresponding Policy Objectives.

Policy Objective	Relevant Priority Action Sections in Sources
PO 1: Strengthening governance and coordination across tourism institutions.	7.1 (Cruise Tourism), 7.5 (PPP/DMC), 7.6 (Investment Reform), 7.7 (Public Awareness), 7.8 (Legislative); 8.1 (Agency Strengthening), 8.2 (Regional Value), 8.3 (Public Agency Partnerships), 8.4 (Regional), 8.5 (Health), 8.6 (Safety), 8.7 (Financing), 8.8 (Fees/Taxes), 8.9 (Revenue/Equity), 8.10 (ETIL Redirect), 10.0 (Legislative Implications).
PO 2: Embedding environmental sustainability and climate resilience into all tourism development.	2.2 (Coral Reef Restoration), 2.3 (Beach Use Planning), 2.4 (EIAs), 2.5 (MPAs), 2.6 (Marinas), 2.7 (Awareness); 3.1 (Adaptation/Mitigation), 3.2 (Energy), 3.3 (Carbon Neutral), 3.4 (Sargassum); 5.1 (Biodiversity), 5.2 (Waste), 5.3 (Circular), 5.4 (Plastics), 5.5 (Resource Efficiency).
PO 3: Diversifying the tourism product beyond marine-based activities.	4.1 (Cultural Heritage), 4.2 (Culinary), 4.3 (Events), 4.4 (Entertainment), 4.5 (Sports), 4.6 (Medical/Academic), 4.7 (Heritage Recognition), 4.9 (Emerging Trends), 4.10 (Market Development).
PO 4: Expanding infrastructure and access	6.1 (Air Access), 6.2 (Ferry Services), 6.3 (Transport Integration), 6.4 (Sustainable Transport).
PO 5: Building a skilled, services-oriented local workforce.	1.3 (Youth Engagement), 7.4 (Labour Market), 2.7 (Blue Tourism Awareness).
PO 6: Ensuring equitable distribution of tourism benefits.	1.1 (Community Tourism), 1.2 (MSME/Entrepreneurship), 1.3 (Youth Engagement), 1.4 (Value Chain Linkages).
PO 7: Using robust data and monitoring systems to guide evidence-based decision-making.	7.2 (Research/Statistics), 7.3 (Use of Technology), 9.0 (CBA Framework).

Appendix V: Cost–Benefit Analysis (CBA) Matrix

Priority Area	Costs	Benefits
Air Access and Airport Expansion	Extending the airport runway; environmental impacts; significant capital investment	Ability to attract direct long-haul flights; higher overnight stays; increased visitor spending; stronger competitiveness vs. regional peers
Ferry and Seaport Infrastructure	Rebuilding West End ferry terminal; upgrading Road Town and sister island docks	Improved visitor first impressions; faster inter-island access; stronger sister-island economies; more reliable cruise and yachting support
Yachting and Marine Tourism Regulation	Installing sewage pump-out facilities; expanding moorings; establishing new enforcement systems	Reduced marine pollution; preservation of reefs; enhanced visitor experience; safeguarding the "Sailing Capital" brand
Cruise Tourism Management	Developing beach management plans; installing safety infrastructure; implementing crowd dispersal systems	Improved carrying capacity at beaches; higher per-passenger spending; reduced environmental degradation; stronger community acceptance
Culture and Heritage Tourism Development	Restoration of museums and heritage sites; funding for community programming	Diversification beyond marine tourism; year-round visitor appeal; stronger identity branding; empowerment of local artists, performers, and SMEs
Workforce Training and Service Quality	Establishing a national training institution at HLSCC; implementing mandatory customer service certification	Higher visitor satisfaction; increased repeat visitation; stronger global reputation; greater local employment opportunities
Tourism Product Diversification	Developing sports tourism facilities; investing in culinary and farm-to-table initiatives; building eco-tourism trails	Reduced reliance on yachting; increased resilience to external shocks; expanded revenue streams; attraction of new visitor segments
Environmental Protection and Climate Resilience	Expanding marine protected areas; reforestation; erosion control; waste management systems	Preservation of beaches, reefs, and landscapes; sustained destination attractiveness; reduced recovery costs from hurricanes and climate impacts
Regulatory and Governance Reform	Drafting and passing modern tourism legislation; strengthening the Tourist Board mandate; establishing a Destination Management Council	Improved policy coherence; reduced bureaucracy; faster investment approvals; more consistent visitor experience; stronger investor confidence

Appendix VI: Delivery-Based Monitoring & Reporting Framework

1. Purpose and Function

This Framework establishes the system for measuring, reporting, and managing performance under the National Tourism Policy (2026–2036). It defines the indicators, baselines, targets, reporting obligations, and accountability mechanisms required to ensure effective policy implementation.

This Framework is binding on all Ministries, Departments, Statutory Bodies, and relevant tourism stakeholders involved in the delivery of the Policy.

2. Structure of the Framework

The Framework is organised around:

- Strategic Goals of the Policy
- Key Performance Indicators (KPIs)
- Baselines and Target Ranges
- Data Sources and Reporting Entities
- Reporting Frequency and Outputs

Each KPI is linked directly to a Strategic Goal and shall be used to assess performance, inform decision-making, and guide resource allocation.

3. Indicator Classification

Indicators shall be grouped into the following categories:

- **Economic Performance Indicators**
  (e.g. Tourism Direct GDP, visitor yield, value retention)
- **Environmental Sustainability Indicators**
  (e.g. reef health, site capacity utilisation)
- **Visitor Experience Indicators**
  (e.g. satisfaction scores, service quality metrics)
- **Equity and Inclusion Indicators**
  (e.g. MSME participation, local employment)

Each indicator shall have a clearly defined methodology, data source, and responsible reporting entity.

4. Data Integration and TSA Alignment

All economic indicators within this Framework shall be derived from or aligned with the Tourism Satellite Account (TSA) and supporting data systems.TSA outputs shall provide the official basis for measuring tourism's contribution to GDP, value added, and economic impact.

All data used in this Framework shall be collected through approved digital systems and shall be subject to validation and quality assurance procedures.

5. Reporting Obligations

All responsible entities shall be required to collect and submit data in accordance with defined reporting standards and timelines.

Reporting shall include:

- **Quarterly Internal Performance Updates**
  For monitoring progress and identifying implementation issues
- **Annual Tourism Performance Report**
  Submitted to Cabinet and the House of Assembly
- **Public Reporting Outputs**
  Including dashboards and summary performance reports

Failure to meet reporting obligations shall trigger compliance review and corrective action.

6. Institutional Responsibilities

- The **Ministry of Tourism, Culture and Sustainable Development** shall coordinate overall performance monitoring and reporting
- The **Central Statistics Office** shall validate economic data, including TSA outputs
- The **BVI Tourist Board and other agencies** shall report on assigned indicators
- All relevant entities shall be accountable for data accuracy and timely submission

7. Performance Management and Corrective Action

Performance against KPIs shall be reviewed continuously.

Where performance deviates from expected outcomes:

- Corrective actions shall be initiated
- Policy or regulatory adjustments may be applied

- Resource allocation may be revised

Performance results shall directly inform planning, budgeting, and investment decisions.

8. Integration with National Systems

This Framework shall be aligned with:

- The National Sustainable Development Plan (NSDP 2036)
- The Medium-Term Fiscal Framework
- National performance management systems

Tourism performance data shall be used to support national reporting, fiscal planning, and cross-sector coordination.

9. Transparency and Accountability

Performance results shall be published in accordance with Government transparency standards.

All methodologies, assumptions, and data limitations shall be documented to ensure credibility and reproducibility.

Indicators for Development in the National Tourism Strategic Plan

The successful implementation of this Policy will ultimately depend on the ability of Government and its partners to measure progress through robust, relevant, and regularly updated indicators. While this Policy sets the strategic direction, the detailed metrics to track delivery will be developed under the forthcoming National Tourism Strategic Plan. These indicators will ensure that future planning is evidence-based, transparent, and responsive to changes in the operating environment.

A first category of indicators will focus on visitor volumes and patterns. This will include traditional metrics such as total visitor arrivals—disaggregated into overnight, cruise, and day-tripper segments—along with average length of stay. More detailed measures will also be required to monitor cruise ship calls and daily passenger volumes by port of entry. Where feasible, the Strategic Plan will incorporate site-specific carrying capacity indicators for popular locations such as The Baths and Cane Garden Bay, recognising that establishing such baselines may itself be part of the implementation process.

A second set of indicators will examine infrastructure and access. These will include air access capacity, measured through runway utilisation, direct routes, and available seat capacity; ferry operations, assessed by frequency, reliability, and passenger throughput; and inter-island travel times and costs, which are critical to the competitiveness of sister island economies. Quality

indicators for ports of entry—such as immigration wait times, visitor satisfaction with facilities, and first impressions—will be monitored to ensure that access gateways meet international standards.

A third category will address workforce and service quality. Indicators here will include the number of workers employed in hospitality, marine, and related services; the levels of training and certification attained in areas such as customer service, culinary arts, and marine operations; and the development of a national service quality index, informed by visitor surveys and complaint/commendation data.

Given the Virgin Islands' reliance on natural and cultural assets, environmental and sustainability indicators will be central to monitoring progress. These will include reef health indices, waste and sewage management performance (including the number and compliance rates of pump-out facilities), and beach quality and safety measures such as cleanliness audits and lifeguard coverage. Indicators will also track the use of the Environmental and Tourism Levy, ensuring transparency in how funds are allocated and the measurable impact of projects financed.

The Strategic Plan will also focus on inclusivity and equity within the sector. Metrics will capture the share of tourism businesses owned by Virgin Islanders compared to foreign investors, the geographic distribution of tourism revenue across Tortola, Virgin Gorda, Anegada, and Jost Van Dyke, and the participation rates of SMEs, women, and youth entrepreneurs in tourism-related enterprises.

Finally, a core group of indicators will address governance and institutional performance. These will include the number of policies or regulations enacted to promote sustainable tourism (such as those on marine protection, carrying capacity, and waste management); the functionality and effectiveness of the Destination Management Council or equivalent coordinating body; and stakeholder satisfaction with the Government's coordination, responsiveness, and delivery in the sector.

Together, these categories of indicators will create a comprehensive monitoring framework that links directly to the outcomes and priorities set by this Policy. Their systematic development and implementation in the Strategic Plan will provide the Virgin Islands with the evidence needed to make timely adjustments, ensure accountability, and track the sector's contribution to sustainable national development.

Appendix VII: Stakeholder Participation

Consultation demographics are presented for transparency and inclusivity reporting purposes and are not intended to serve as primary inputs into policy design or strategic decision-making.

A total of 336 participants took part across the three main consultation formats (Figure 5), with a gender split overall of 183 females (54%) and 153 males (46%) (Figure 6).

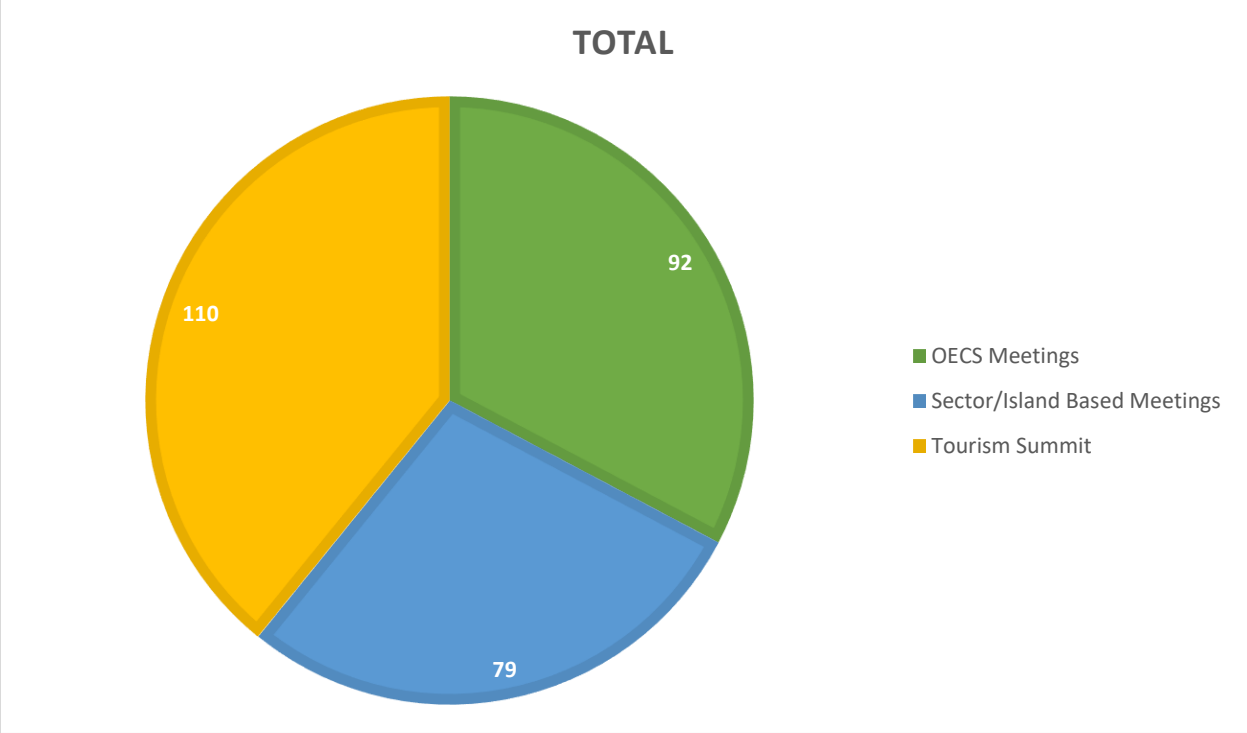


Figure 5: Total number and percentage of participants at consultative meetings.

Consultative Rounds	Number of Participants
OECS Meetings	92
Tourism Summit	110
Sector/Island Consultations	134
Grand Total	**336**

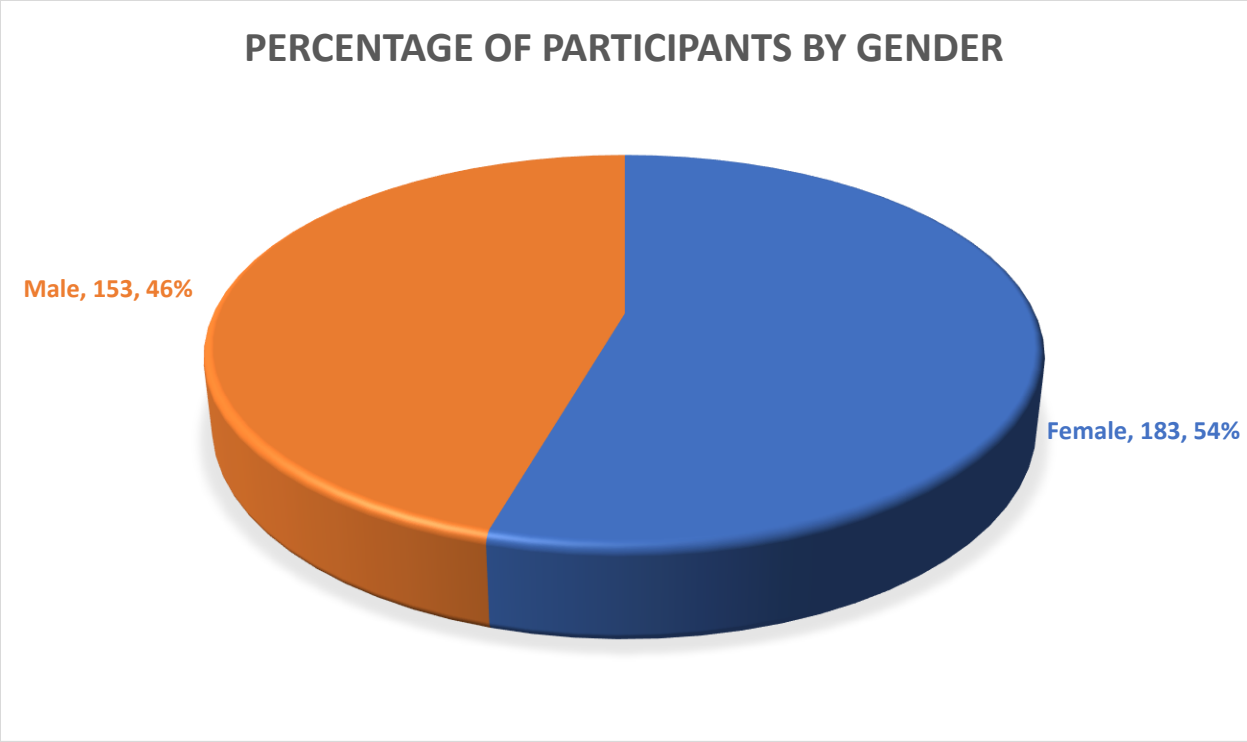


Figure 6: Gender distribution of stakeholders contributing to the development of the policy.

The Ministry of Tourism, Culture and Sustainable Development hosted consultations in partnership with the OECS (16 meetings) during January 2024 and held sub-sector and island-wide 22 meetings throughout the Territory between March – June 2025. A two-day Tourism Summit was held in January of 2025. Extensive meeting notes and minutes were kept of each consultative meeting, which forms the basis for the recommendations made throughout the policy. All policy recommendations generated through the consultative process cannot be included in the policy; however, they will inform a *National Strategic Tourism Plan*, which will be developed to support implementation and resource mobilisation.

The OECS Meetings (92 participants) were split as 40 females (43.5%) and 52 males (56.5%). Male participation exceeded female participation at the OECS meetings, showing male-leaning representation. The Tourism Summit (110 participants) was split into 68 females (61.8%) and 42 males (38.2%). Women were the majority, highlighting strong female engagement in this high-profile, cross-sector event. Sector/Island Consultations (134 participants) were split into 75 females (56.0%) and 59 males (44.0%). Female participation again exceeded that of males, reflecting broad-based community and business engagement with significant input from women.

Women were overall more engaged, particularly in the Summit and community-level consultations, which suggests that policy design benefitted from a strong representation of female voices at both grassroots and strategic levels. Men were more prominent in the OECS-focused sessions, where intergovernmental, technical, and regulatory issues were central, indicating a gendered dimension in policy/technical forums versus community consultations. This diversity of

participation strengthens the legitimacy of the National Tourism Policy, ensuring that both male and female perspectives were integrated across international, national, and local consultations.

Looking specifically to the Sector and Island-Based meetings which took place between March – June 2025 (Figure 7), the consultations revealed a broad spectrum of participation across the different sectors of the tourism ecosystem, demonstrating that the National Tourism Policy has been shaped by diverse and representative voices.

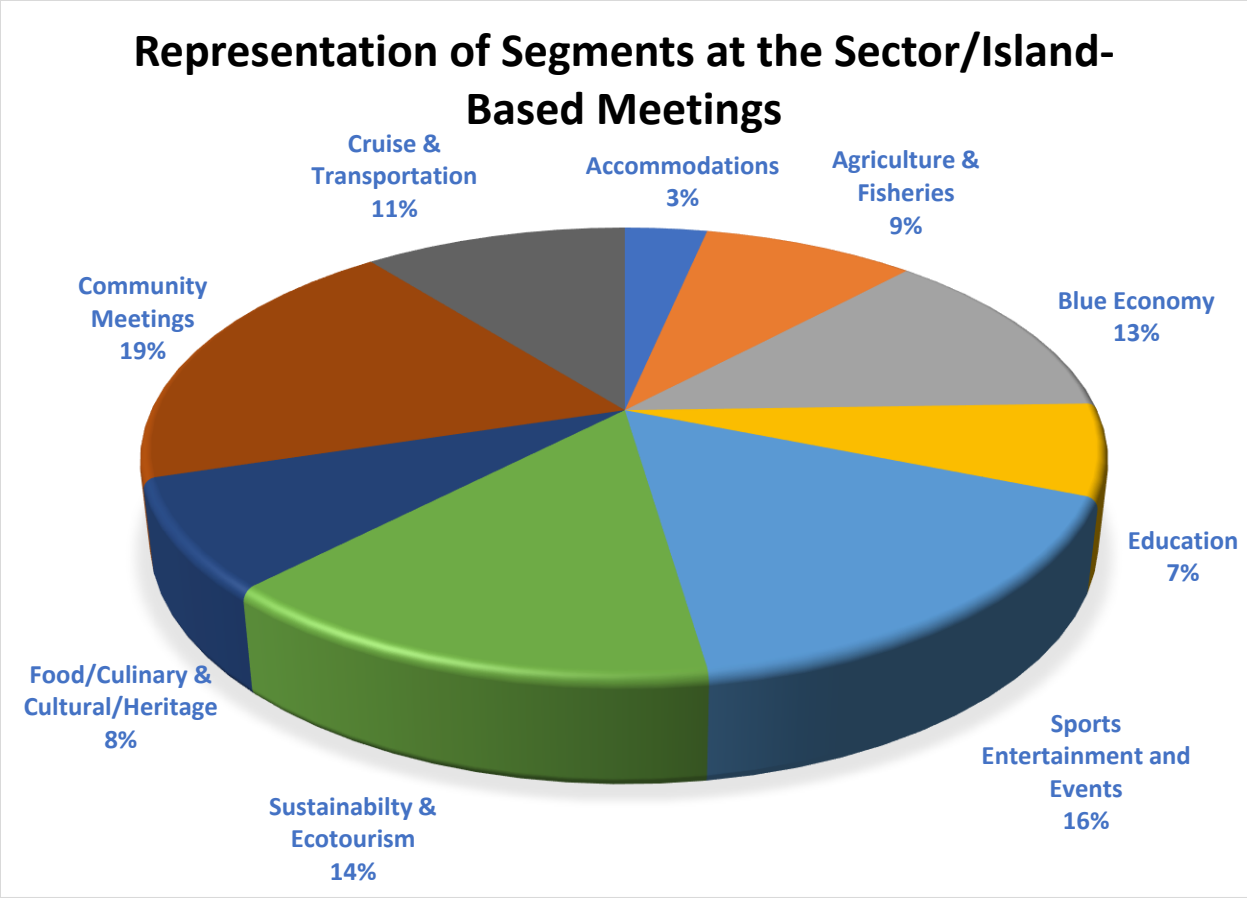


Figure 7: Distribution of sector and community-based participants (March – June 2025).

Community meetings accounted for the largest share of participants, with 29 individuals or just over 19 percent of the total, underscoring the importance of grassroots engagement and the strong presence of sister island communities in the process. Close behind were stakeholders from sports, entertainment, and events (16.6 percent), highlighting the critical role that festivals and cultural programming play in both visitor experiences and the wider tourism economy.

Equally significant was the participation of sustainability and ecotourism representatives (14.6 percent), reflecting the growing recognition of environmental stewardship and nature-based tourism as pillars of competitiveness. The blue economy sector (12.6 percent) was also well

represented, consistent with the Virgin Islands' identity as a leading yachting and marine tourism destination. Cruise and transportation stakeholders (10.6 percent) contributed actively, bringing forward perspectives on access, mobility, and the management of passenger flows.

Traditional economic linkages were also visible. Agriculture and fisheries stakeholders (8.6 percent) participated in meaningful numbers, stressing the importance of farm-to-table connections and fisheries in strengthening the tourism supply chain. Similarly, food, culinary, and cultural heritage representatives (7.9 percent) emphasised the role of cuisine and heritage assets in branding the Territory as an authentic Caribbean destination. The education sector (6.6 percent) brought forward ideas for integrating tourism awareness and workforce preparation into school curricula and training pathways. Finally, accommodation providers (3.3 percent), though the smallest group by number, provided highly influential contributions, drawing on their central role in visitor stays and service quality.

Taken together, this distribution shows that tourism policy in the Virgin Islands has not been shaped by accommodation and cruise operators alone, but by a wide ecosystem of stakeholders spanning environment, culture, transport, education, agriculture, and community development. The balance between traditional sectors such as accommodations, cruise, and agriculture and emerging areas such as ecotourism, the blue economy, and sports and events reflect the diversification and resilience priorities that underpin the new Policy.

Appendix VIII: Carrying Capacity and Visitor Management Framework

Scope

This framework establishes operational guidance for managing visitor volumes, infrastructure pressure, and environmental sensitivity across high-traffic tourism zones. It applies to:

- Major beaches and national parks (including the Baths, Cane Garden Bay, White Bay, and other high-use sites)
- Cruise hubs and roads (Road Town, Pier Park and associated road networks)
- Marine protected areas and mooring fields
- Peak-event destinations (including Jost Van Dyke festival periods and regatta events)

Cruise tourism shall be managed in alignment with the Territory's value-based tourism model, ensuring that passenger volumes, spending patterns, and visitor flows support overall economic and destination quality objectives.

The baseline and threshold data will be set out in the implementation plan

Site Baseline and Threshold Template

For each designated high-traffic site, a Site Capacity Profile shall be established using the following structure:

Indicator	**Requirement**
Daily Maximum Visitor (cap)	Defined based on infrastructure and environmental thresholds
Hourly Cap (if applicable)	Maximum visitors per hour during peak periods
Infrastructure Capacity	Toilets, waste systems, parking, emergency access, lifeguards
Environmental Sensitivity Rating	Low/ Moderate/ High / Critical
Amber Trigger	80% of daily capacity reached
Red Trigger	95% of daily capacity reached
Enforcement Mechanism	Tickets, timed entry permits, vessel limits, or access control

Visitor Management Tools

The following tools may be deployed individually or in combination:

- Timed entry permits for high-sensitivity sites
- Quotas per cruise ship call day
- Mooring limits in marine zones
- Shuttle systems and controlled parking zones
- Event attendance caps

- Visitor behaviour code with enforceable penalties
- Dynamic pricing mechanism (subject to policy approval)

The selection of tools shall be evidence-based and site-specific.

Governance and Enforcement

Carrying capacity thresholds and enforcement mechanisms shall be established through regulations under the Tourism Act.

The Destination Management Council shall recommend site thresholds and monitor compliance. Designated site managers and authorised officers shall enforce quotas, ticketing systems, and permit requirements.

Inspection powers, penalties, and appeals processes shall be governed by statutory provisions.

Thresholds shall be reviewed every three years or earlier where environmental or infrastructure conditions materially change.

Appendix IX: Costed Implementation Plan and Financing Strategy

This appendix provides a high-level phased implementation roadmap to support structured investment sequencing and fiscal discipline. It complements the Cost-Benefit Analysis framework and Investment Evaluation Committee (IEC) process outlined in the main body of the Policy.

The following table provides indicative cost bands, funding sources, and responsible agencies for priority Phase 1 actions. All cost bands are subject to formal Cost-Benefit Analysis and Investment Evaluation Committee review prior to budget appropriation.

Priority Action	Indicative Cost Band	Primary Funding Source	Lead Agency
Tourism Act (drafting & enactment)	To be determined in the implementation plan	National Budget	MTCSD/ AG
DMC establishment (setup & first year operation)	To be determined in the implementation plan	National Budget/ ETIL	MTCSD
Tourism Statistics & Research Unit	To be determined in the implementation plan	National Budget	MTCSD/ CSO
TSA methodology & first publication	To be determined in the implementation plan	National Budget/ donor	MTCSD/ CSO
Digital cruising permit & mooring reservation system	To be determined in the implementation plan	PPP/ETIL	MTCSD/ BVIPA
Island-specific carrying capacity studies	To be determined in the implementation plan	National Budget/ donor	MTCSD/ NPT
MSME Tourism Finance Window (seed fund)	To be determined in the implementation plan	PPP/ CDB/ donor	MTCSD/ MoF
Stakeholder Engagement Plan & transparency portal	To be determined in the implementation plan	National Budget	MTCSD
Policy Risk Register development	To be determined in the implementation plan	National Budget	MTCSD/ DMC
Workforce certification framework (phase 1)	To be determined in the implementation plan	National Budget/ ETIL	MTCSD/ HLSCC

Total indicative Phase 1 envelope: 1.35 – 3.93 (2026-2027). Full multi-year costing to be confirmed following CBA and TAS establishment.

Implementation Phasing

Phase 1: Foundation (2026-2028)

Focus:

- Enactment of the Tourism Act
- Establishment of the Destination Management Council
- Implementation of Digital Tourism and Data Systems
- Fee simplification and compliance strengthening
- ETIL governance reform and ring-fencing
- Immediate site management and visitor flow controls

Objective:

- To establish legal authority, data integrity, and governance clarity

Phase 2: Expansion and Integration (2029-2031)

Focus:

- Infrastructure upgrade at gateways and high-traffic sites
- Cruise dispersal infrastructure
- Marine waste and mooring management systems
- Workforce certification and standards expansion
- Strengthened local procurement integration

Objective:

- To scale capacity within defined carrying limits while improving yield and value retention.

Phase 3: Optimisation and Resilience (2032- 2036)

Focus:

- Climate resilience retrofits
- Ecosystems restoration and environmental management
- Advances digital performance systems
- High-yield product diversification
- Mature destination management systems

Objective:

- To consolidate a resilient, high-value tourism model

Costing Bands and Action Matrix

Cost bands are subject to a formal Cost-Benefit Analysis prior to approval.

Financing Source Mapping

To ensure sustainable implementation, funding shall be structured across diversified sources:

1. **ETIL Ring-Fence Expenditure**
   Allocation to product development, environmental management, and site capacity enforcement.
2. **Public-Private Partnership Pipeline**
   Applied to:
   a. Ports and gateway upgrades
   b. Marina and marine infrastructure
   c. Heritage asset restoration
   d. Select tourism facilities
3. **Climate and Concessional Financing**
   Applied to:
   a. Coastal resilience projects
   b. Renewable energy integration
   c. Ecosystem restoration
   d. Marine waste systems
4. **Cruise Revenue Reinvestment**
   Structured agreements to support:
   a. Cruise dispersal infrastructure
   b. Vendor development
   c. Site capacity management

All financing arrangements shall align with the Tourism Growth and Yield Model and the Medium-Term Fiscal Framework. All major financing arrangements involving public guarantees, revenue-sharing agreements, or equity participation under public-private partnership models shall be subject to a Fiscal Risk Assessment prior to Cabinet approval. The assessment shall:

1. Quantify contingent liability exposure against the Medium-Term Fiscal Framework
2. Confirm value for money relationships to public procurement alternatives
3. Establish a cap on cumulative PPP contingent liabilities as a percentage of recurrent revenue
4. require publication of summary terms in the Public Reporting Framework,

The Investment Evaluation Committee (IEC) shall review all PPP proposals with a capital value exceeding $1 million before submission to the Cabinet.

Appendix X: Stakeholder Engagement Plan (2026-2036)

To sustain and support the ***Implementation – Staged Stakeholder Engagement*** outlined on page 19, a plan will be devised within six months after the formal adoption of the policy. The purpose of the plan is to formalise ongoing stakeholder participation during Policy implementation, ensuring legitimacy, transparency, and adaptive management. Below are the principal elements of the plan.

Lead Agency: MTCSD | Target Publication: to be determined in the implementation plan

1. Stakeholder Mapping and Roles Matrix

Stakeholder Group	**Role During Implementation**	**Engagement Mechanism**
Cabinet/HoA	Oversight, budget approval, legislative action	Annual Cabinet report, biennial HoA presentation
MTCSD	Policy leadership, regulatory oversight, sector coordination, reporting	All mechanism
DMC	Operational coordination, destination management advisory	Quarterly DMC meetings
BVITB	Marketing execution and delivery, brand management, and visitor data and intelligence	Quarterly sector briefings
BVIPA/Ports	Infrastructure, access, data sharing	Quarterly briefings
MENRCC/National Parks Trust (NPT)	Environmental management, reef monitoring	Quarterly briefings
Private sector (large operators)	Investment, data submission, compliance	Annual forum, licensing process
MSMEs	Product delivery, local procurement	MSMEs Finance Window engagement, quarterly forums
Sister Islands communities	Place-based delivery, equity monitoring	Biennial Sister Islands dialogues
Youth	Workforce pipeline, future policy inputs	Annual youth tourism forum
Civil society/ NGOs	Environmental monitoring, equity advocacy	Annual public progress forum
Diaspora	Investment, marketing, cultural programming	Annual diaspora engagement event
Charter Yacht Society	Industry advocacy, operational input, policy feedback, sector coordination (charter and crewed vessels	Annual sector consultation, quarterly marine briefings, participation in DMC consultation

2. Engagement Schedule
    a. Quarterly: Sector briefings (MTCSD + DMC + key agencies)

b. Annual: Public Progress Forum (open to all stakeholders), Annual Tourism Performance Report publication
c. Biennial: Sister Island Dialogues, Stakeholder satisfaction survey
d. As required: Grievance and feedback responses (14 – day response standard)

3. Online Transparency Portal
   A dedicated public portal shall be established to provide:
   - Real-time implementation progress dashboard
   - Procurement opportunities and funding calls
   - Annual ETIL expenditure reports
   - TSA and tourism statistics publications
   - Policy documents and Cabinet reports (in accessible formats)
4. Grievance and Feedback Mechanism
   a. Submission channels: online portal, emails, physical drop-box at MTCSD and Sister Islands government offices
   b. Response standard: acknowledgement within 5 business days, substantive response within 14 business days
   c. Escalation: unresolved grievance escalated to DMC within 30 days
   d. Annual summary of grievance received, resolved, and pending published in Annual Implementation Report

ETIL Governance and Transparency

The Environmental and Tourism Improvement Levy (ETIL) shall be managed as a dedicated mechanism to support tourism development, environmental management, and destination enhancement.

The Government shall ensure transparency and accountability in the allocation and use of ETIL revenue through:

- Annual public reporting of ETIL collections and expenditure
- Clear linkage between EITL-funded projects and tourism policy priorities
- Defined allocation principles supporting infrastructure, environmental protection, and product development
- Integration of ETIL planning with the Medium-Term Fiscal Plan and Public Reporting Framework

ETIL resources shall be allocated in a manner that maximises long-term sector value, sustainability, and public benefit.

Appendix XI: Options Appraisal Framework for Flagship Interventions

Purpose: to ensure that all major public investments and policy commitments are subject to structured, transparent options analysis before resource allocation.

Lead Agency: MTCSD/ Investment Evaluation Committee | Target Publication: to be determined in the implementation plan

Flagship Interventions Subject to Appraisal

1. Tourism Act (legislative design options)
2. TSA establishment (methodology and institutional options)
3. DMS creation (statutory model options)
4. Runway/ airport upgrade feasibility (scope and funding options)
5. Aviation Impact and Demand Assessment
    a. Scenario demand modelling, by market segment
    b. Route feasibility analysis (hub realism)
    c. Airport facilitation requirements (processing, security, etc)
    d. Ground transport and hotel capacity interactions
    e. Fiscal and environmental impact summary
6. Prospect Reef redevelopment (development model options)
7. Sister Island ferry subsidisation (subsidy model options)
8. MPA expansion (boundary and governance options)
9. Digital permitting system (build vs. buy vs. partner options)
10. ETIL redirections (legislative options)
11. Workforce certification framework (delivery model options)
12. UNESCO nomination programme (site selection options)

Standard Appraisal Template (for each intervention)

Element	Content
Do-Nothing Baseline	Current situation, projected costs of inaction over 5 years
Option A	Description, indicative cost range, expected benefits, risks, and feasibility rating
Option B	Description, indicative cost range, expected benefits, risk, and feasibility rating
Multi-Criteria Score	Impact (0-5), cost-effectiveness (0-5), feasibility (0-5), equity (0-5), time to deliver (0-5)
Recommended Option	Preferred option with rationale and key risk mitigations
Publication	Summary tabled with Cabinet submission, published in Public Reporting Framework

Appraisal Calendar: Aligned with the annual budget cycle and legislative time (Appendix IX)

Airlift Evaluation Consideration

- Route demand thresholds
- Load factor sustainability
- Hub connectivity efficiency
- Cost of incentives vs economic return
- Infrastructure requirements vs projected demand

Events Infrastructure Development (Tortola)

- Conference and convention facilities
- Multi-purpose sports and events complexes
- Integrated accommodation and venue clusters

Operational Feasibility Criteria (Marine Sector)

- Ease of implementation by marina operators
- Compliance burden on operators and users
- Cost of enforcement vs expected benefit
- Compatibility with existing systems and infrastructure
- Impact on sector competitiveness

Appendix XII: Equity Impact Assessment (EqIA) Framework

Purpose: to assess and mitigate distributional impacts of flagship Policy measures on vulnerable groups, Sister Islands communities, and the informal tourism sector.

Lead Agency: MTCSD/ Social Development | Target Publication: to be determined in the implementation plan

1. Scope – Measures Subject to EqIA
    a. MSME finance windows, vendor zone policies, pioneer status reform, community tourism funds
    b. Marine fee structures and mooring quota impacts on small operators
    c. Carrying Capacity limits and their income effects on site-dependent vendors
    d. Licensing and certification requirements and their compliance costs for informal operators
2. Methodology
    a. Quantitative: income modelling by demographic group, employment projections disaggregated by islands, gender, age, and formal/informal status
    b. Qualitative: focus groups with affected communities on Sister Islands, MSME surveys
    c. Comparison: pre/post policy scenario modelling

Baseline Indicators (to be determined in the implementation plan)

Indicator	**Disaggregation**	**Source**
Share of tourism income by household decile	By island and income group	CSO/ TSA
Informal sector employment in tourism (% of total)	By island, gender, and age	CSO Labour Force Survey
MSME density in tourism by island	By island and sub-sector	MTCSD/ BVI Finance registry
Female-owned tourism enterprises (% of total	By island	MTCSD registry
Youth employment rate in tourism	By island	CSO/ MTCSD

3. Mitigation and Compensation Matrix
   For each identified negative distributional impact, a specific mitigation or compensation measure shall be designed, budgeted, and incorporated into the relevant implementation plan before policy activation.

Appendix XIII: Policy Risk Register

Purpose: to systematically identify, assess, and monitor risks to successful Policy Implementation

Lead Agency: MTCSD/ DMC | Review Cadence: Semi-annual by DMS, annual report to Cabinet | Target Publication: to be determined in the implementation plan

Risk ID	Risk Category	Risk Description	Likelihood (H/M/L)	Impact (H/M/L)	Risk Owner	Mitigation Action	Residual Risk
R01	Strategic	Delayed enactment of the Tourism Act	M	H	MTCSD/ AG	Early drafting, HoA engagement, Legal Reform Roadmap	M
R02	Strategic	DMC establishment delayed by institutional resistance	M	H	MTCSD	Transition Roadmap, Cabinet mandate, stakeholder briefings	L-M
R03	Operational	TSA data non-compliance by tourism operators	M	H	MTCSD/ CSO	Sanctions in Act, incentive linkages, and a compliance portal	L-M
R04	Operational	Carrying capacity enforcement capacity insufficient	M	M	MTCSD/ NPT/ BVIPA	Phased rollout, capacity building plan, oversight	L
R05	Financial	ETIL revenues fall short of Phase 1 implementation budget	L-M	H	MOF/ MTCSD	Diversified financing pipeline, donor engagement, CDB relationship	L
R06	Financial	PPP contingent liabilities exceed fiscal framework limits	L	H	MOF	Fiscal Risk Assessment required before each PPP commitment	L
R07	Environmental	Major hurricane or climate event disrupts Phase 1 delivery	M	M	MTCSD/ MOF/ DM	Business Continuity Plan, CCRIF coverage, contingency reserve	L
R08	Environmental	Sargassum event severely impacts visitor season	M	M	MTCSD/ DoE	National sargassum response framework, MSME support window	L
R09	Legal	Legislation delays beyond Legal Reform Roadmap timeline	M	H	AG/ MTCSD	Dedicated legislative counsel, quarterly HoA liaison, Roadmap monitoring	M

R10	Reputational	Community opposition to new concessions or quota limits	L	M	MTCSD/ DMC	Stakeholder Engagement Plan (Appendix X), EqIA (Appendix XII) grievance mechanism	L
R11	Reputational	Perceptions of inequitable benefit distribution	L-M	M	MTCSD/ DMC	Equity Impact Assessments, disaggregated MRF reporting, and transparency portal	L
R12	Institutional	High staff turnover in MTCSD and DMC during transition	M	M	MTCSD HR	Competitive remuneration, succession planning, knowledge management protocols	L-M

Appendix XIV: M&E Methodology and Baseline Data Dictionary

Purpose: to provide a transparent, documented methodology for all KPI's in Appendix VI and to standardise the data dictionary for consistent measurement and reporting across agencies.

Lead Agency: MTCSD/ CSO | Target Publication: to be determined in the implementation plan

1. Data Sources by KPI Category

KPI Category	Primary Data Source	Secondary Source	Collection Frequency
Governance & Oversight	MTCSD administrative records	Cabinet Office	Annual
Legislative & Regulation	HoA records, MTCSD compliance database	AG Chambers	Annual
Institutional Arrangements	MTCSD HR and organisational records	DMS secretariat	Biennial
Financinag & Investment	MOF/ ETIL accounts, project registry	Donor reports	Annual
Programme Implementation	MTCSD delivery dashboard, agency reports	DMC traffic-light system	Quarterly
Stakeholder Engagement	Consultation records, survey instruments	DMC secretariat	Annual
Monitoring & Data Systems	TSA publication record, dashboard uptime	CSO	Annual
Visitor Yield	TSA, Visitor Expenditure Survey	BVITB	Annual
Reef Health Index	National Parks Trust monitoring stations	Regional NGO data	Annual
MSME Performance	BVI Finance registry, MTCSD licensing data	CSO	Annual

2. Data Quality Standards
    a. All primary data shall be validated by the responsible agency before submission to MTCSD
    b. TSA data subject to independent statistical review before publication

c. Discrepancies between agency data sources resolved through DMC Data Sub - Committee
d. Published data accompanied by confidence ratings (High/ Medium/ Provisional)

3. Baseline Finalisation Plan
    a. All baselines in Appendix VI shall be formally established and published to be determined in the implementation plan as part of the first Tourism Performance Dashboard
    b. Baseline methodology for each indicator documented in the Baseline Data Dictionary

4. Independent Mid-Term Evaluation (2031)
    a. Scope: assessment of Policy implementation progress against all MRF KPIs, review of pillar level outcomes, stakeholder perception survey, recommendation for 2031-2036 phase
    b. Independence requirements, evaluation team with no direct involvement in Policy implementation, terms of reference approved by Cabinet
    c. Budget: to be determined in the implementation plan (ring-fenced in MTCSD M&E budget from 2026 onward)
    d. Procurement timeline: to be determined in the implementation plan
    e. Dissemination: full report published on transparency portal, summary presented to HoA, Cabinet response document published within 90 days

5. M&E Budget Ring-Fence
   Not less that 1% of the annual MTCSD programme budget shall be ring-fenced for M&E activities, including: data collection, dashboard maintenance, annual reporting, mid-term and end-term evaluation