4

VOICES & VISION OF THE PEOPLE

Photo Source: U.S. Virgin Islands Department of Tourism

VOLUME 4

VOICES & VISION OF THE PEOPLE

OUTREACH & ENGAGEMENT

- Website and Social Media 92
- Outreach and Promotion 93
- Public Engagement 93

COMMON DENOMINATORS & DISTINGUISHING CHARACTERISTICS

- Community Survey Findings 97
- The Expat Factor 116
- Interview Themes 124

OUTREACH & ENGAGEMENT

Vision 2040 is a community-driven economic development plan rooted in the long-term aspirations and outlook of U.S. Virgin Islands residents and those throughout the diaspora. The planning process included extensive outreach and engagement efforts to ensure that that Vision 2040 reflects the ideas, priorities, and concerns of a broad cross-section of the U.S. Virgin Islands community.

Meaningful participation by the community during the planning process was considered essential to building trust among participants and stakeholders. This trust and understanding led to community support and buy-in, helping to reinforce that the final strategy would include ideas that had been vetted by community actors, and lead to an actionable economic development strategic plan.

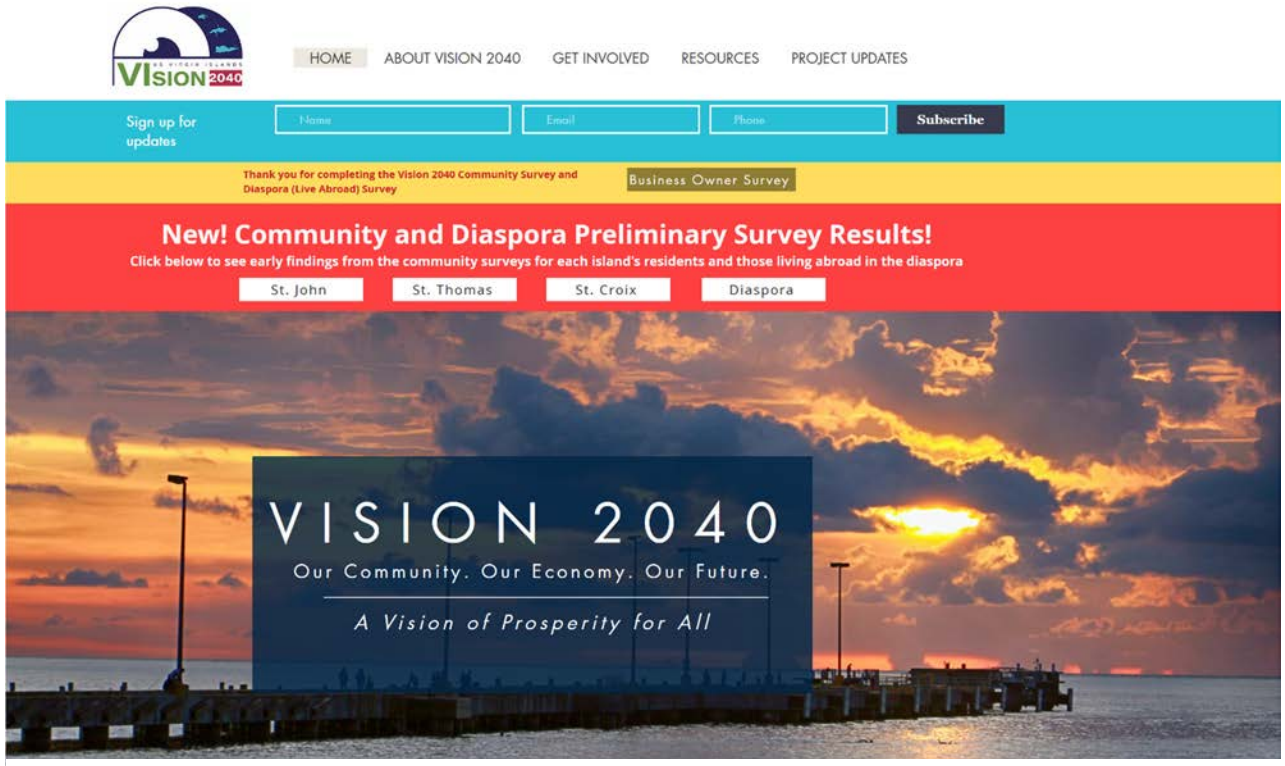
The planning process is essential to build trust among participants and stakeholders. This trust and understanding helps build community support.

The planning process was conducted during the Covid-19 pandemic, which required utilizing an extensive array of virtual engagement techniques including video conference meetings, online surveys, social media and website engagement, virtual open houses, and other techniques.

Website and Social Media

A dedicated website (www.USVI2040.com) was developed as a one-stop information and engagement portal. The website featured a calendar of upcoming events, background information on the process, links to online surveys, a comment form to send questions and comments directly to the project team, and a resources page with meeting materials, project documents, links, and other related project resources for download.

The Vision 2040 process also included a robust social media presence, including a dedicated Facebook page that was used to provide regular updates on the project, promote opportunities for public engagement, and live stream public meetings. A Vision 2040 YouTube channel was also created to make recordings of public meetings and engagement events available for repeat viewing.



The Vision 2040 Website Homepage

COMMUNITY ENGAGEMENT PRINCIPLES

The community engagement process was carried out based on the following principles.

- ✓ **Inclusive.** All residents, including traditionally marginalized and hard to reach populations, are aware of the planning process, know how to provide input, and can provide input.
- ✓ **Transparent.** The process is transparent, and activities and scope of the Project Team are known to all.
- ✓ **Meaningful.** Community members have an opportunity early on to shape the focus and direction of the plan.
- ✓ **Accountable.** Community members can see and ensure that their input was considered as part of the planning process and was incorporated as necessary into the draft plan.
- ✓ **Accessible.** That the plan is shared and communicated in such a way that is easily understandable by all residents.

Two video commercials were created as part of the Vision 2040 plan to encourage participation in public engagement events and activities.

Outreach and Promotion

The Vision 2040 process included a wide-reaching outreach and promotion campaign to raise awareness of the plan and gain input from a large and diversified group of residents and stakeholders. Promotional activities included the following:

- **Two Video Commercials**
- **180 Promotional Radio Spots**
- **6 Radio Interviews**
- **Radio & Television Broadcast of Public Meetings**
- **Electronic Board Advertising**
- **Print Newspaper Advertisements**
- **Influencer Promotion of Vision 2040**
- **Social Media Page and Engagement**
- **Dedicated Vision 2040 Website**
- **Vision 2040 Subscriber List E-mail Blasts**
- **Five (5) Published News Articles**

Public Engagement

A total of eleven (11) engagement events were held throughout the research process along with three (3) community surveys.

PUBLIC KICKOFF MEETING: This meeting featured a presentation by the project team providing an overview of the Vision 2040 process and details on how community members could provide input throughout the process.

VIRTUAL OPEN HOUSES (3): A virtual open house was held for each individual island. Each virtual open house was web-based on the project website and featured an interactive experience for participants who could provide input via eight "stations" or activities. The stations included:

VOICES OF THE PEOPLE

BY THE NUMBERS

3,116 Total Survey Responses

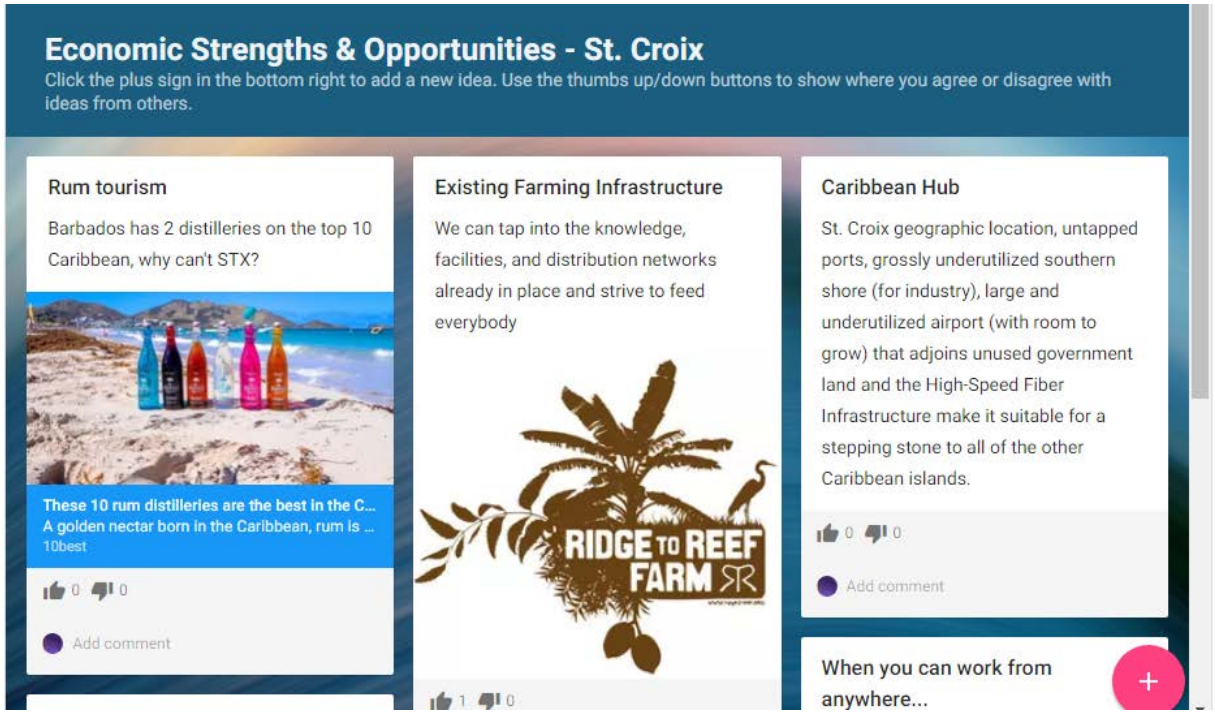
- **1,117** St. Croix Community survey
- **602** St. Thomas Community survey
- **203** St. John Community survey
- **706** Diaspora (Live Abroad) survey
- **488** Business Owner survey

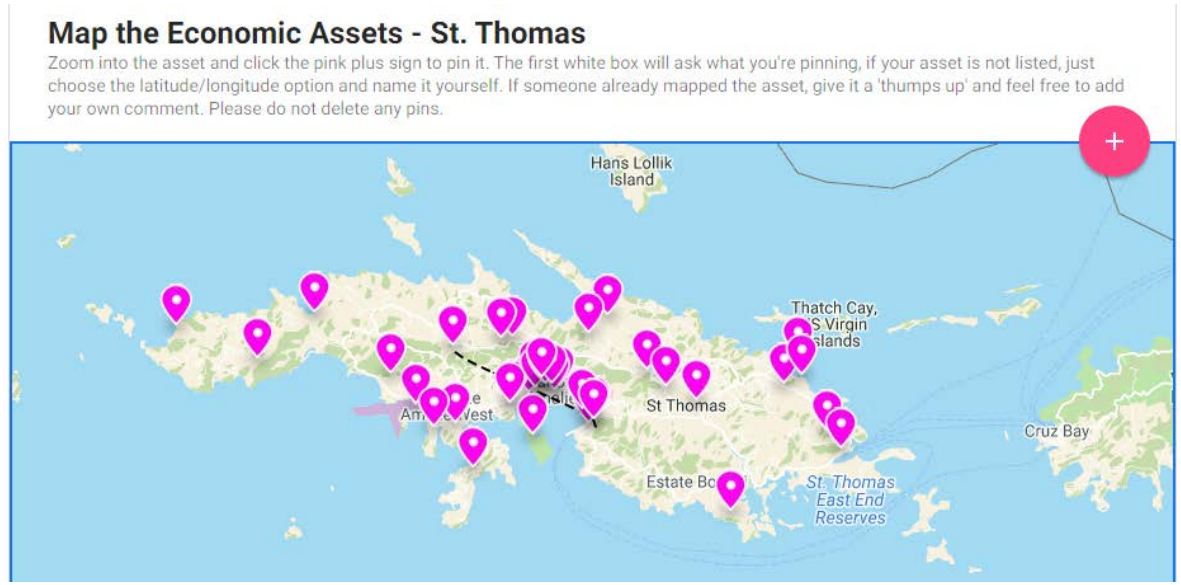
4,360 Total Website Users

570 Website Subscribers

60+ Stakeholder Interviews

1. **Research Briefing:** A brief overview of key economic research findings.
2. **From the Future:** Participants were asked to write a hypothetical message from the future outlining what they hope the U.S. Virgin Islands will be like in twenty years.
3. **Post-it! Strengths and Opportunities:** A virtual bulletin board where participants added notes about what they believe are the key positive things the Territory has going for it and what it can capitalize on in the future for success.
4. **Post-it! Challenges and Weaknesses:** Similar to the previous station, this exercise invited participants to help identify critical issues that must be addressed for economic success over the next two decades.
5. **Map-It! Economic Assets:** This station offered a chance for participants to drop a pin on a map to identify key economic assets on their island.
6. **Map-It! Economic Weaknesses:** This station offered a chance for participants to drop a pin on a map to identify key economic assets on their island.
7. **Governor for a Day:** In this participatory exercise, participants were able to score and rank various economic development priorities.
8. **Open Thinking:** As a final station, this provided a chance to collect any additional thoughts, comments, and ideas from participants.





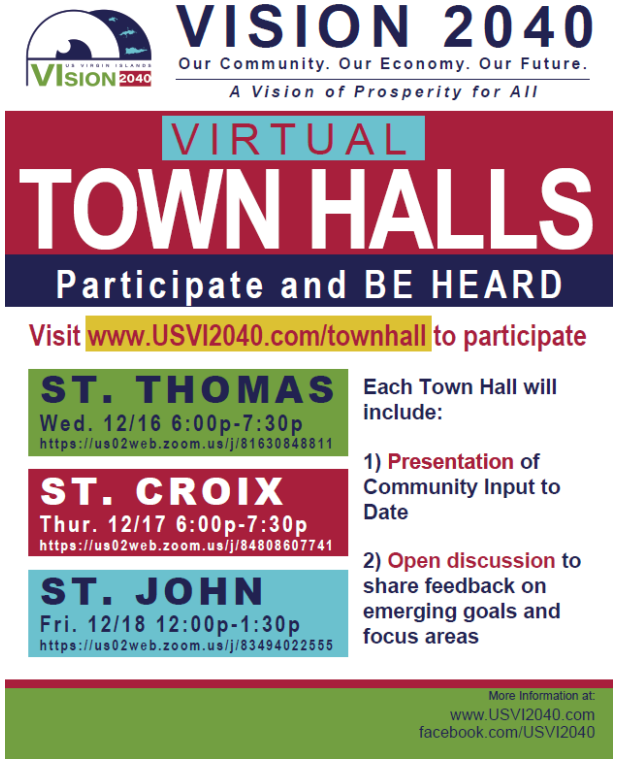
Examples of two stations part of the Virtual Open House for each island.

PUBLIC FORUM EVENT

A territory-wide virtual public forum meeting was held on November 23, 2020 to collect public input around economic strengths, challenges, and opportunities for the U.S. Virgin Islands. The meeting was held via Zoom and broadcast throughout the territory on WTJX and Government Access Channel as well as livestreamed on Facebook via multiple Facebook pages, including Government Access Channel, Vision 2040, USVIEDA, WTJX, and Government House. It was also broadcast on radio stations throughout the U.S. Virgin Islands. A telephone hotline was set up to allow those without internet access the ability to call into the meeting to provide comments.

The Vision 2040 Public Forum was widely available through multiple channels and provided an opportunity for all residents to come together to help shape a vision for the future economy.

ISLAND TOWN HALLS



In December 2020, three virtual town hall meetings were held for each of the Islands, recognizing the unique assets, challenges, and opportunities facing each. A presentation of each island's community survey results was made, followed by open discussion during which participants were invited to share ideas about goals and strategies specific to their island.

A Community Town Hall for each island allowed residents to focus on locally important issues and opportunities, recognizing the unique assets, challenges, and culture of each island.

RESIDENT SURVEYS

A total of three (3) resident surveys were conducted throughout the Vision 2040 process. An online community survey was created for each island to collect input on priorities, ideas, key issues and concerns, potential strategies and plan directions, and other thoughts on the future of the U.S. Virgin Islands economy. The survey details and results are included in the following section.

Resident Survey Question Example

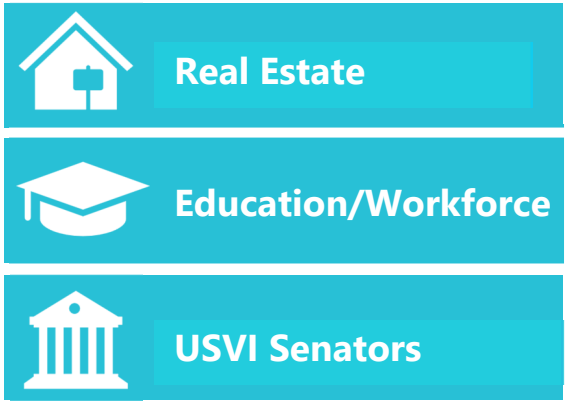
Stakeholder Engagement

In addition to the extensive public engagement activities, economic development and other relevant and expert stakeholders were consulted as part of the planning process. Stakeholder engagement for Vision 2040 included 60 one-on-one interviews, three focus group sessions, and five working group meetings around specific industry sectors. As previously discussed, the process was also overseen by a task force of government, business, economic development, and other representatives and stakeholders.

STAKEHOLDER INTERVIEWS: Interviews were held with a wide variety of stakeholders to represent a range of perspectives, industries, population segments, backgrounds, and expertise. Among the key stakeholder interview categories were the following:

- Economic Development Officials
- Site selection professionals
- Government Officials and Agency Heads
- Education and Workforce
- Finance and Financial Services
- Community Groups/Non-Profit Organizations
- Business Owners and Leaders
- Utilities and Infrastructure
- Service Industry
- Technology and Communications
- Energy
- Agriculture
- Manufacturing
- Health Care
- Marine Businesses

FOCUS GROUPS: Three (3) focus groups were held for the following topics/groups:



WORKING GROUP MEETINGS: Five (5) working group meetings were also held to discuss specific industry sectors, including the following:

Diaspora Engagement (Expats)

The Vision 2040 process included input from former USVI residents living abroad to better understand why they left. Most reasons given included education and job opportunities, military service, and for medical care, along with relocations following losses from severe hurricanes.

DIASPORA (LIVE ABROAD) SURVEY: A diaspora survey was also created to collect valuable insights from U.S. Virgin Islanders currently living abroad, whether temporarily, having just moved, or having left years ago. The diaspora survey focused on the reasons that many U.S. Virgin Islanders leave the Territory, as well as what could be done to draw those living abroad to return. The diaspora survey is discussed further in this chapter.

DIASPORA TOWN HALLS: Two virtual town halls were held for U.S. Virgin Islanders living outside of the Territory during the first week of December 2020. Participants in the town halls shared their personal experiences and discussed reasons for leaving as well as challenges and barriers to potentially returning to the Territory.

Common Denominators & Distinguishing Characteristics

Community Survey Findings

SURVEY RESPONDENTS

The community survey was completed by residents of St. Croix, St. Thomas, and St. John. In total, 1,921 surveys were completed with 58% from St. Croix, 31% from St. Thomas, and 11% from St. John.

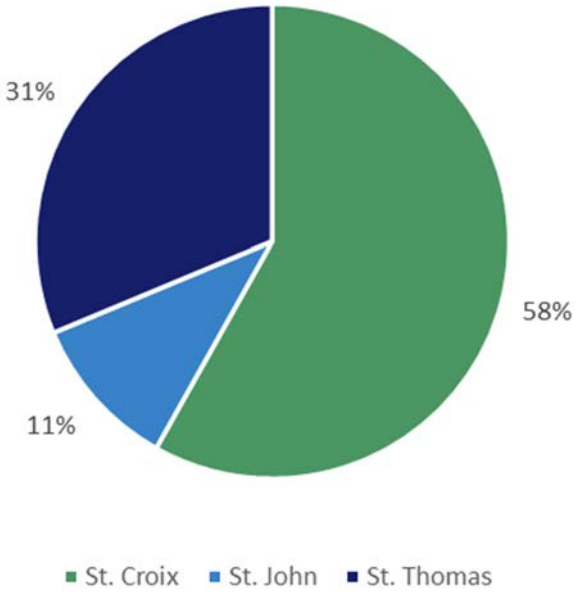
The age of respondents varied, with 22% aged 40-49, 21% aged 50-50, 17% aged 30-39, 17% aged 60-69, 15% under age 30, and 7% aged 70 and up.

Fifty-four percent (54%) of respondents were born and raised in the USVI, whereas 46% were not. When asked what brought them here, top reasons include because of a family decision (23%), job opportunity (22%), vacationed and decided to stay (18%), or a place to retire (15%).

Most have lived in the Territory for at least 10 years. Thirty-nine (39%) have lived in the U.S. Virgin Islands more than 10 years, 57% their entire lives, and 4% less than 10 years. A majority of respondents own their home (67%) versus rent (33%).

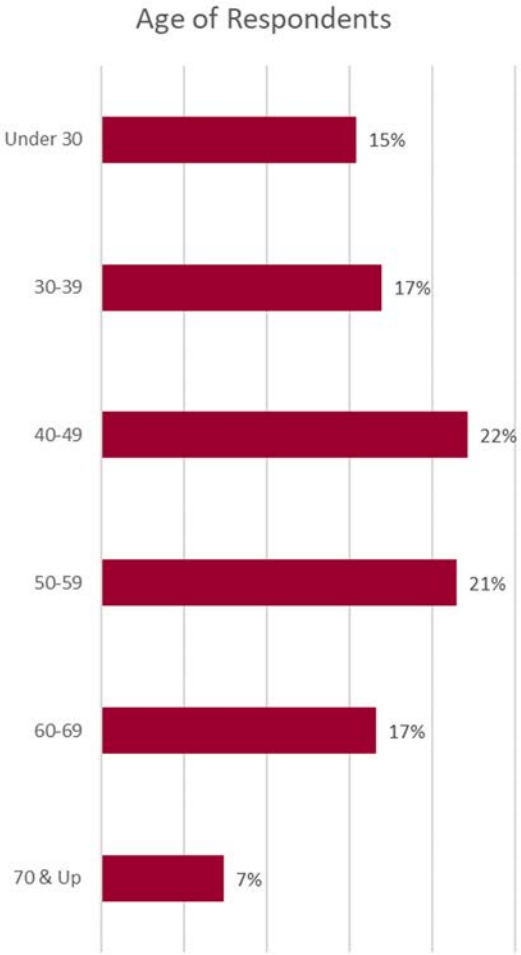
A majority of respondents are employed (72%) whereas 16% are retired and 4% are unemployed. 8% were in another situation such as being a student or in transition.

RESPONSES BY ISLAND



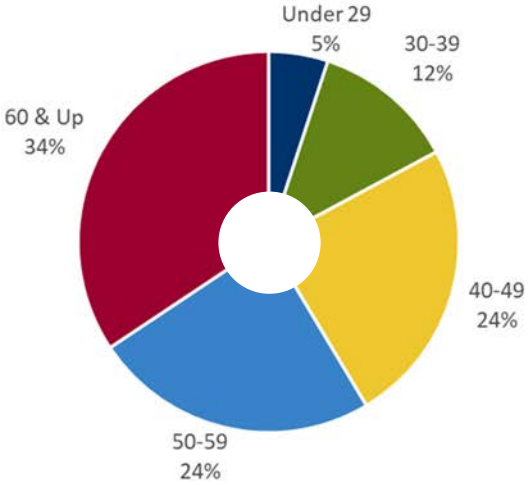
- 54% of respondents were born and raised in the USVI.
- 39% have lived on the Islands more than 10 years; 57% their entire lives.
- The USVI is the primary residence of 80% of respondents.

AGE OF RESPONDENTS



RESPONDENTS BY AGE & ISLAND

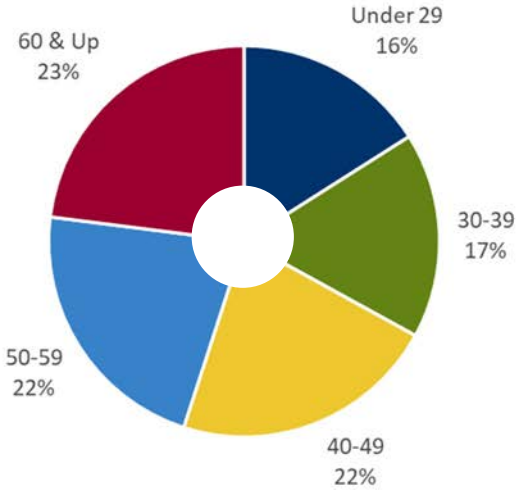
ST. THOMAS



ST. THOMAS RESPONSES

- 602 TOTAL RESPONSES
- 63% WERE BORN & RAISED IN THE USVI
- 60% HAVE LIVED IN ST. THOMAS THEIR WHOLE LIFE, 37% MORE THAN 10 YEARS

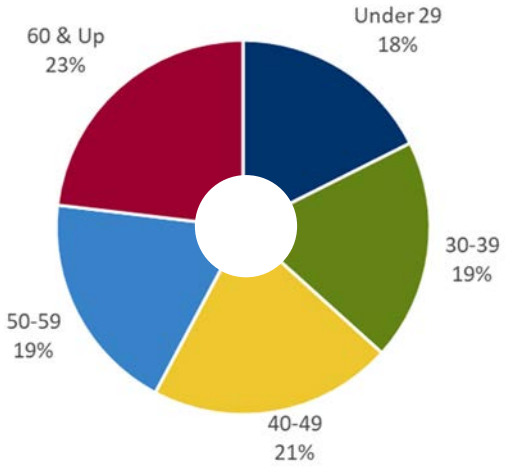
ST. CROIX



ST. CROIX RESPONSES

- 1,117 TOTAL RESPONSES
- 52% WERE BORN & RAISED IN THE USVI
- 54% HAVE LIVED IN ST. CROIX THEIR WHOLE LIFE, 41% MORE THAN 10 YEARS

ST. JOHN



ST. JOHN RESPONSES

- 203 TOTAL RESPONSES
- 66% WERE BORN & RAISED IN THE USVI
- 59% HAVE LIVED IN ST. JOHN THEIR WHOLE LIFE, 33% MORE THAN 10 YEARS

COMMUNITY SENTIMENT

Generally, people feel positive about the future, with over 80% feeling opportunities will present themselves, feeling more fortunate than others, or believing conditions will improve in the Territory.

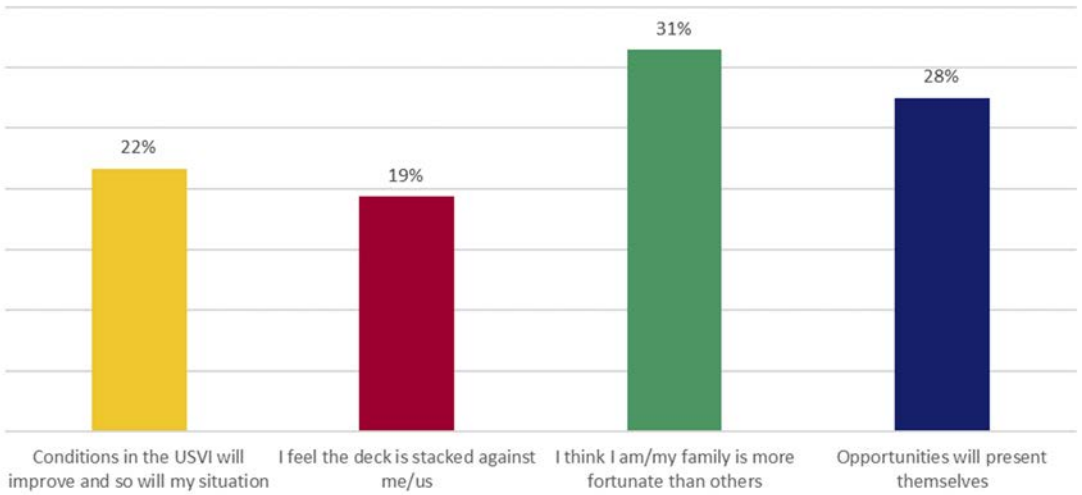
Positive sentiment is similar among each island, but differs depending on one's age. Those under 40 years of age are slightly less optimistic (74%) than those aged 40 and up (83%). Those aged 60 and up are even more optimistic with people feeling they are better off than others, that opportunities will present themselves, and conditions will improve (89%).

Those working in the public sector are only slightly less optimistic (80%) than private sector with employees (82%). Self-employed workers are the most optimistic (89%).

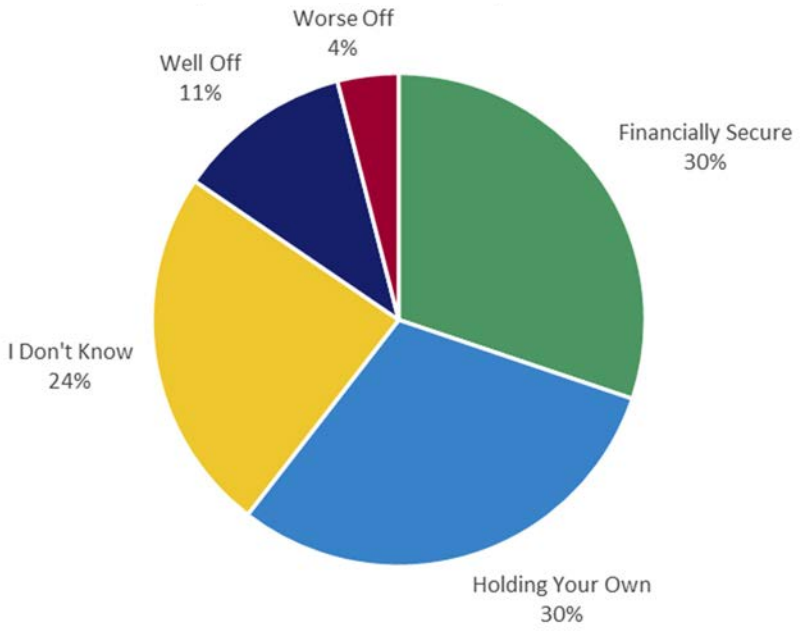
Renters feel like the "deck is stacked against us" (29%) more often than homeowners (14%). This could be due to the uncertainty and temporary nature of renting, as renters typically spend more of their income on housing, and affordable housing is a major cause of concern among respondents.

- Residents age 60+ are the most optimistic age group
- Homeowners are more optimistic than renters
- Self-employed workers are more optimistic than all other workers

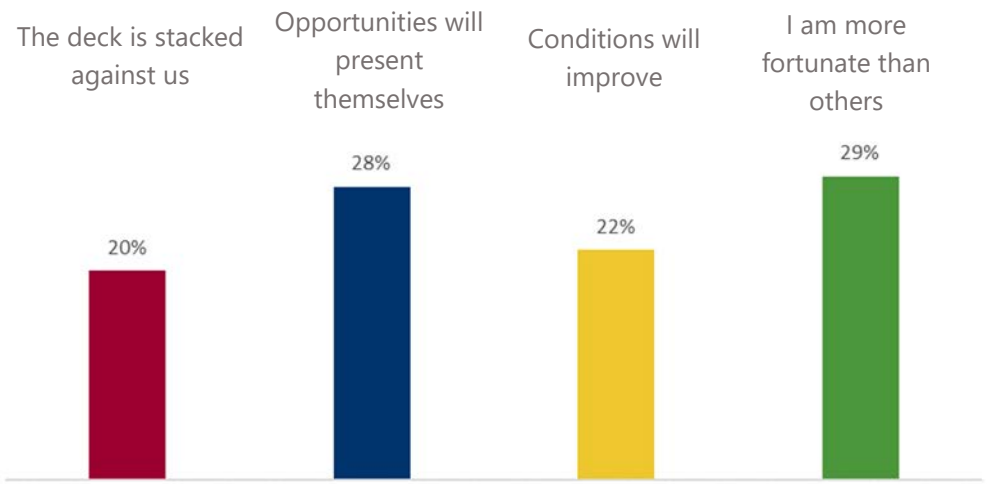
WHICH STATEMENT IS CLOSEST TO YOUR POINT OF VIEW?



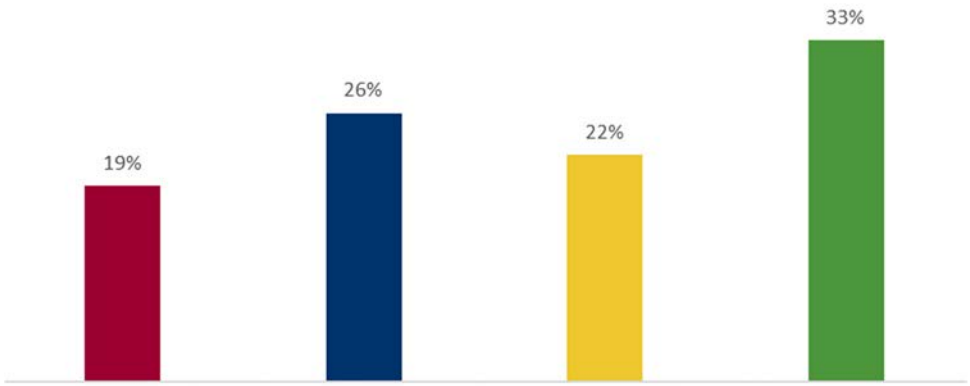
IN 20 YEARS, DO YOU THINK YOU WILL BE...



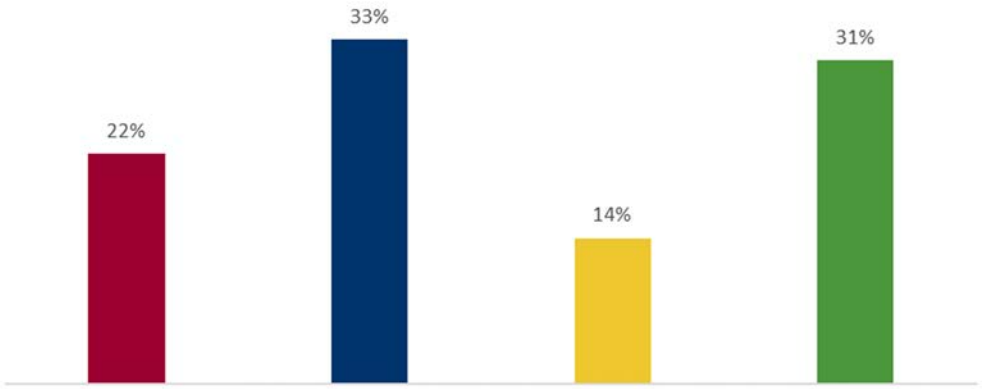
St. Thomas Responses



St. Croix Responses



St. John Responses



CURRENT CONDITIONS

While people feel generally positive about their personal outlook, they feel less positive about the current conditions in the Territory. We asked respondents to rank conditions on the island using the choices of "Poor," "Fair," "Good," or "Excellent." To understand overall conditions, we translated these into numerical values 1 (poor) through 4 (excellent). The least favorably ranked conditions include:

- Infrastructure (Electricity-price/reliability) (1.1)
- Ability to address social problems (manage substance abuse, mental health needs, etc.) (1.2)
- Housing Affordability/Cost (1.3)
- Infrastructure (Transportation: roads, sidewalks, air access, bridges, ports, ferry, etc.) (1.4)

There was no condition ranked over a 2.1 (slightly better than "fair" condition). The least negatively ranked conditions include:

- Quality of Life (recreation, culture, access to nutritious food, liberty, enjoyment, etc.) (2.1)
- Residents' outlook/attitude/pride (2.0)
- Acceptance of change and diversity (new residents, ideas, experiences, races, etc.) (1.9)
- Commercial and office property (abundance and attractiveness) (1.9)

Conditions were ranked similarly between age groups, people who have a more negative or positive outlook, or people considering leaving the Territory.

Conditions we asked citizens to rate.

(1=Poor, 2=Fair, 3=Good, 4=Excellent)

2.1	Quality of Life (recreation, culture, access to nutritious food, liberty, enjoyment, etc.)
2.0	Residents' outlook/attitude/pride
1.9	Acceptance of change and diversity (new residents, ideas, experiences, races, etc.)
1.8	Commercial and office property (abundance and attractiveness)
1.8	Infrastructure (high-speed internet)
1.8	Local regulations, taxes
1.8	Presence of young, educated adults
1.8	Housing quality
1.7	Amenities (retail, professional services, etc.)
1.7	Support for small business
1.7	Workforce (skilled, trained, meet workplace demands)
1.6	Schools and quality of education
1.6	Infrastructure (water and sewer)
1.6	Employment opportunities/jobs
1.5	Removal of trash and lack of debris
1.5	Services for the elderly
1.5	Healthcare needs/services
1.5	Housing availability
1.5	Government service and responsiveness
1.4	Crime Rate (personal and property safety—Excellent is safest)
1.4	Infrastructure (transportation: roads, sidewalks, air access, bridges, ports, ferry, etc.)
1.3	Housing affordability/cost
1.2	Ability to address social problems (manage substance abuse, mental health needs, etc.)
1.1	Infrastructure (electricity-price/reliability)

Citizens have major issues with most conditions in the Territory. When asked to rank conditions either "Poor," "Fair," Good," or "Excellent," no issue received a higher score than "Fair."

PERCEPTIONS TODAY

Since current conditions are so poorly ranked within the Territory, what do citizens feel like other Caribbean islands are doing well? We asked respondents to choose from 15 options what other communities in the Caribbean are doing better. The top responses include:

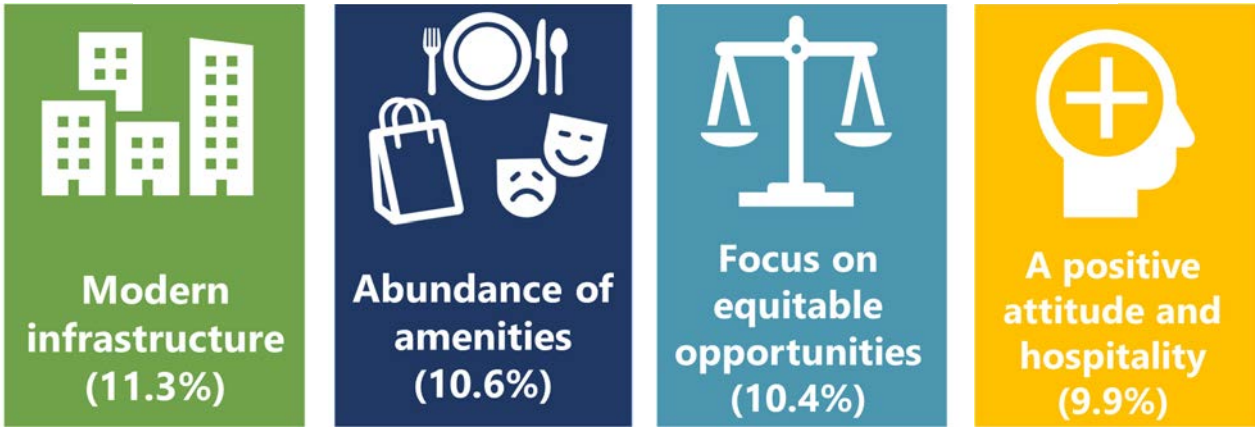
- Modern infrastructure (11.3%)
- Abundance of amenities (10.6%)
- Focus on equitable opportunities (10.4%)
- A positive attitude and hospitality (9.9%)

When asked to give three words to describe the Territory, we got a number of both positive and negative responses. While people believe the Territory is beautiful, with a laid-back culture and beautiful beaches, there are also significant challenges to living on the islands. Respondents cited the cost of living, crime, and issues with the government.

It is clear that people love where they live, but the challenges make it extremely difficult to make life prosperous. Respondents are looking for leadership, opportunity, and investment in USVI.

WHAT ARE OTHER CARIBBEAN PLACES DOING BETTER?

TOP RESPONSES (OF 15 OPTIONS)



WHAT WORDS WOULD YOU USE TO DESCRIBE LIFE IN THE TERRITORY?

PERCEPTIONS ACROSS THE ISLANDS

ST. THOMAS

ST. CROIX

ST. JOHN

CONDITIONS SCORED LOWEST ON EACH ISLAND (1= LOWEST RANKED)

1. Infrastructure
2. Social Problems
3. Housing Affordability
4. Crime Rate
5. Removal of Trash
6. Government Service and Responsiveness

1. Infrastructure (cost of electricity)
2. Social Problems
3. Crime Rate
4. Infrastructure (transportation)
5. Housing Affordability
6. Healthcare

1. Housing Affordability
2. Infrastructure (cost of electricity)
3. Social Problems
4. Housing Availability
5. Government Services and Responsiveness
6. Healthcare

LEAVING THE TERRITORY

The survey included two questions about leaving the Territory. First, "Why do you think people leave?" The top response is that they desire a better quality of life (34%). This is followed by health or medical reasons (21%), a job opportunity (21%), or to seek a lower cost of living (16%).

The second question sought to identify why residents might need to leave in the future. Medical (33%) and career reasons (32%) are the most cited reasons followed by family reasons (16%) and other reasons (15%). Other reasons include the cost of living, other economic reasons, and reaching retirement age.

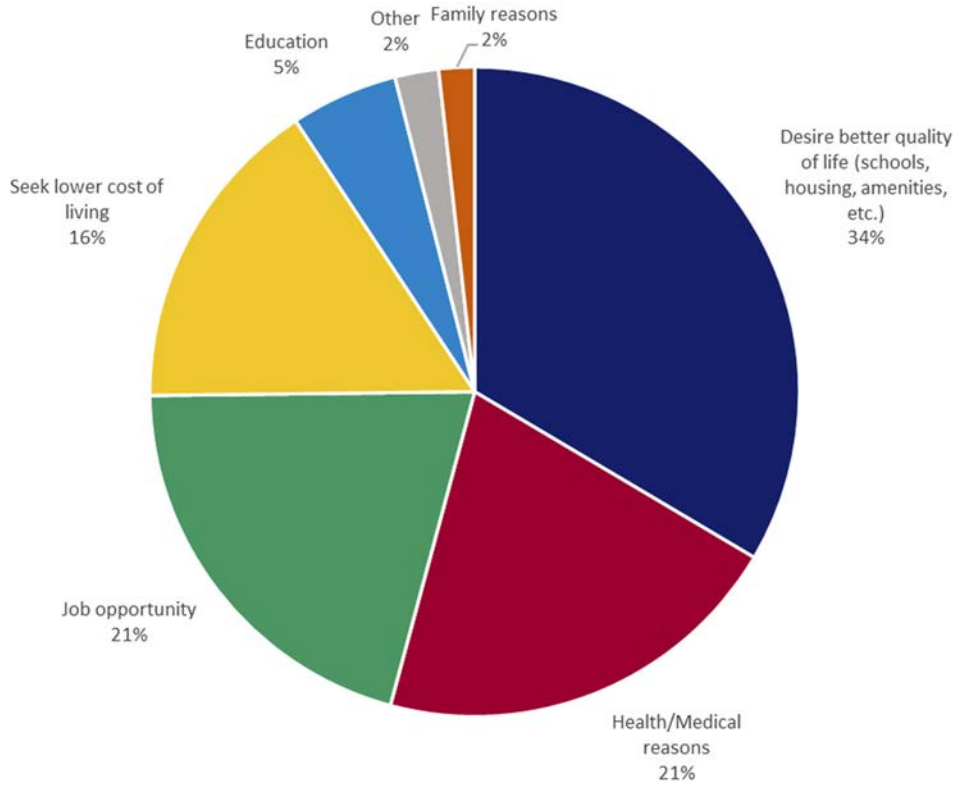
8 out of 10 residents expect to live in the USVI 20 years from now.

For those that expect to leave, medical or health reasons (33%) and career or professional reasons (32%) top the list.

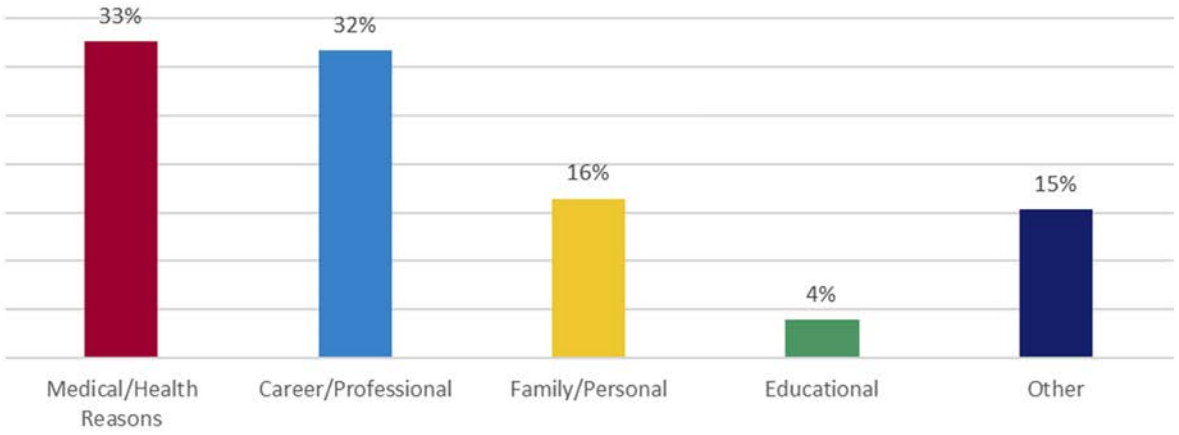
While younger residents feel they will move for career and professional reasons, older individuals select health and medical reasons. Many older individuals plan to move to the U.S. mainland for better healthcare services upon retirement, while the younger generation may leave seeking job opportunities.

The most commonly cited reason for moving for renters would be career or professional (35%) followed by family or personal reasons (23%) and

WHY DO YOU THINK PEOPLE LEAVE THE US VIRGIN ISLANDS?



FOR THOSE THAT THINK THEY MIGHT HAVE TO LEAVE: WHY?



medical and health reasons (19%). For homeowners, medical and health reasons top the list (52%) followed by other reasons (16%) and career or professional reasons (16%).

MAJOR CONCERNS

The word cloud to the right illustrates themes that appeared when residents were asked to list what they think the USVI needs most. Residents most often cite the need for a government that invests in and cares about its people, improved infrastructure, more educational opportunities, quality health care, opportunities for youth and more job opportunities overall, affordable housing, and a lower cost of living.

Residents who indicated they regretted their move to the Territory, they would first change governmental leadership. There is a feeling that the government does not care about its residents, is stealing from its people, and overall lacks leadership. Medical care, educational systems, infrastructure, and more modern technology are also mentioned by these residents that require improvement.

Citizens are looking for leadership that invests in the community via better education, infrastructure, jobs, and healthcare.

For those who have a negative outlook on their move to the Territory, respondents would first change the leadership on the island. Many respondents cite better government and leadership who are serious about helping its residents is needed. Affordable housing and utilities, activities for youth, more jobs that allow for career growth, and infrastructure improvements top the list.

WHAT ONE THING WOULD YOU SAY THE US VIRGIN ISLANDS NEEDS MOST?

FUTURE DEVELOPMENT

Respondents of each island were asked to identify what kind of development they would like to see by region. Top types of development are listed by island and by region below.

St. Croix

Within the entire island, the top types of development desired include retail/commercial (31%), residential (29%), health & social services (27%), and hotel (26%). By region top responses include:

1. **Christiansted |** Retail (55%) & Health & Social Services (43%)
2. **East End |** Residential (44%) & Hotel (39%)
3. **Frederiksted |** Retail (68%), Hotel (55%), Health & Social Services (54%) & Residential (50%)
4. **Northside Central |** Residential (44%)
5. **Southside Central (Container Port) |** Industrial (60%)
6. **Southside E |** Residential (37%)
7. **Southside W (Centerline Rd - M. Evans Highway) |** Retail (41%)

As USVI leadership works to implement strategies and direct investment to each island, or develop visions for each region of each island, these responses should be used to inform what redevelopment and new development happens and where it should be located.

Top Types of Development Wanted by Island:

St. Croix | retail/commercial (31%), residential (29%), health & social services (27%), and hotel (26%)

St. Thomas | residential (36%), health & social services (24%), hotel (22%), and retail (22%)

St. John | residential (28%), health & social services (25%), retail (23%), and hotel (16%). A small number surveyed selected "No Development", of which 30% specified that they did not wish to see hotels.

St. Croix

FUTURE DEVELOPMENT

St. Thomas

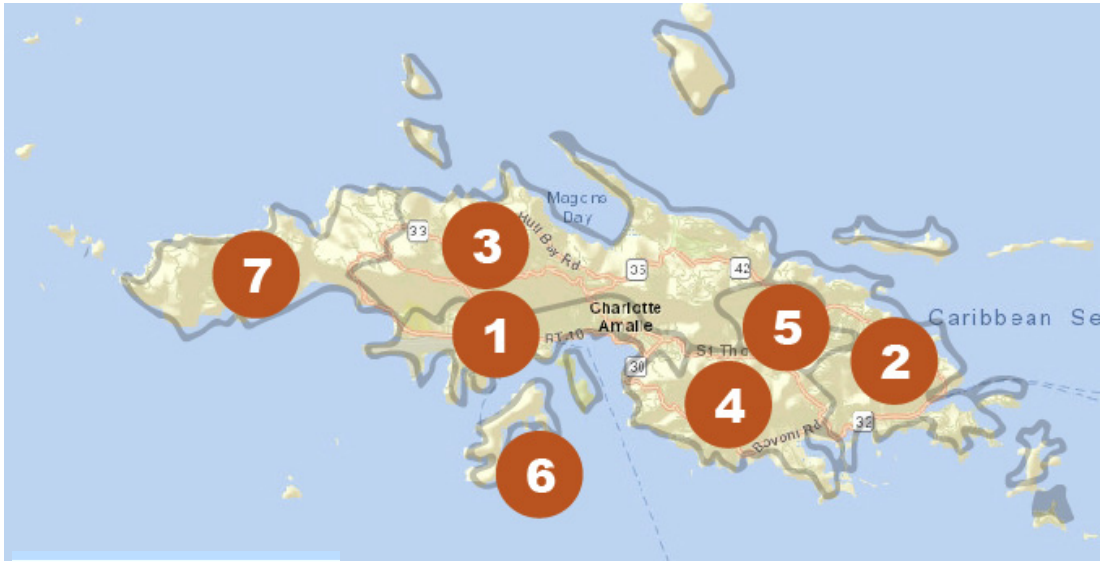
Within the entire island, the top types of development desired include residential (36%), health & social services (24%), hotel (22%), and retail (22%). By region top responses include:

1. **Charlotte Amalie** | Retail (50%) & Health & Social Services (43%)
2. **East End/Red Hook** | Residential (44%) & Retail (44%)
3. **Northside** | Residential (59%)
4. **Southside** | Residential (43%)
5. **Tutu** | Residential (42%) & Health & Social Services (38%)
6. **Water Island** | Hotel (46%) & Residential (37%)
7. **West End** | Residential (55%) & Health & Social Services (34%)

St. John

Within the entire island, the top types of development desired include residential (28%), health & social services (25%), retail (23%), and hotel (16%). By region top responses include:

1. **Central** | Health & Social Services (45%) & Residential (38%)
2. **Coral Bay** | Retail (47%) & Health & Social Services (47%)
3. **Cruz Bay** | Retail (43%) & Health & Social Services (44%)
4. **East End** | Residential (41%)
5. **North Central** | Residential (32%)



St. Thomas

St. John

JOBS OF THE FUTURE

Jobs that Fit

When respondents were asked to choose what types of jobs would be the best fit for the Territory, agricultural (13.8%), health and social services (10.4%), education (8.7%), and arts & culture jobs (8.7%) ranked highest. Conservation jobs are a top choice for those over the age of 70. Accommodation & hospitality are a top choice for those under 20 and those 40-49. **The top five ranked types of jobs desired are traditionally among the lowest paying sectors of the economy.**

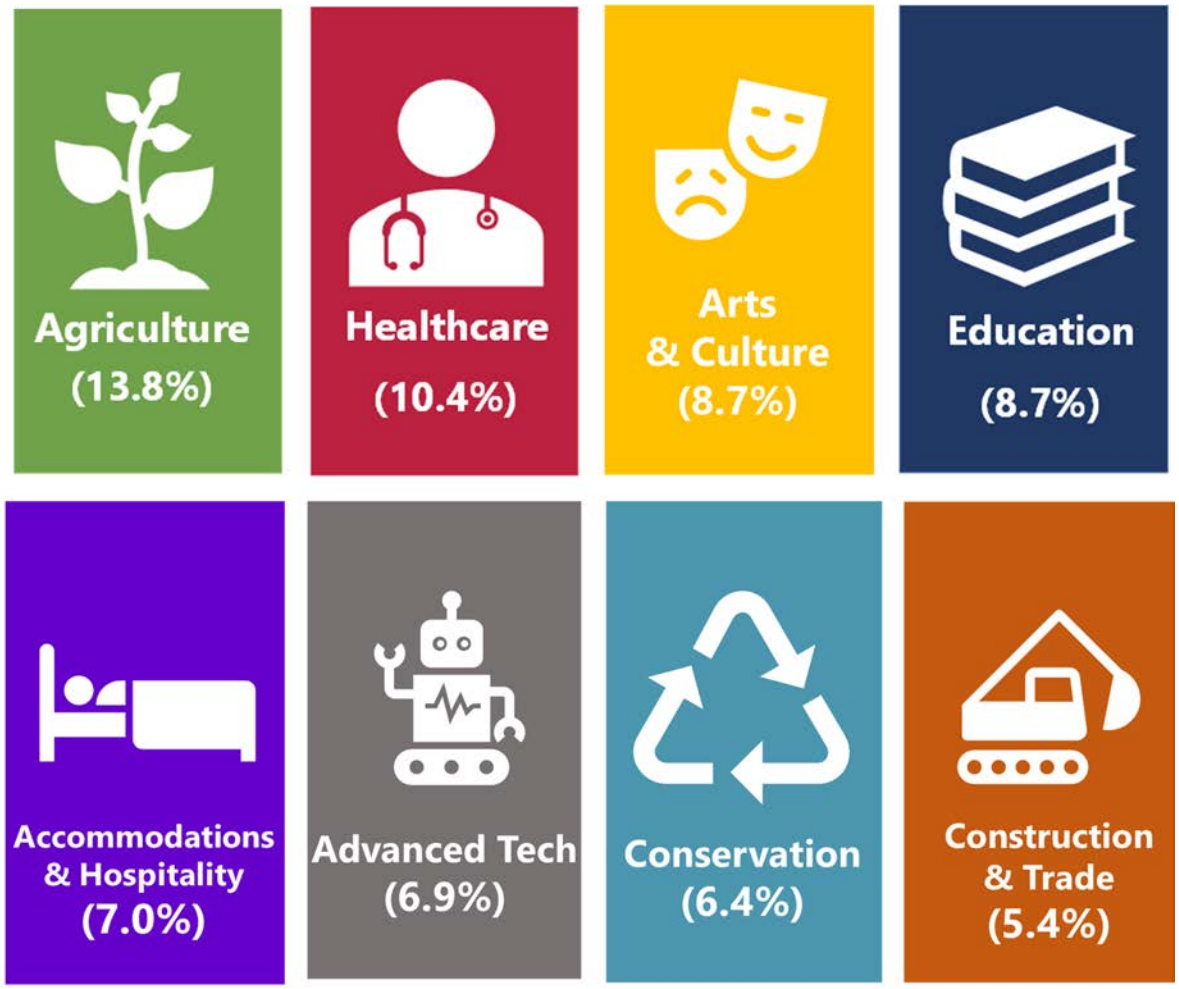
Interestingly, the top choice for those under 20 was advanced/technology-based manufacturing, which are among the highest paying jobs in America today.

USVI residents under age 20 were the only age group to select advanced/technology-based manufacturing as the type of job they want to see most/have the best fit for their island. These are typically the highest paying jobs.

Those who have moved to the island value conservation jobs more than those who are born and raised (8.7% versus 4.0%). Those who are born and raised on the island value advanced/ technology-based manufacturing jobs more than those who have moved to the island (8.1% versus 5.1%). Otherwise, they both value agricultural, health and social services, education, and arts & culture jobs similarly.

WHAT TYPES OF JOBS/SERVICES DO YOU WANT TO SEE MORE OF AND THINK ARE THE BEST FITS FOR YOUR ISLAND?

TOP RESPONSES (OF 22 OPTIONS)



JOBS OF THE FUTURE BY ISLAND (RESIDENT OPINION)

Public Forum Event

The November 2020 public forum event provided residents an opportunity to share input on strengths, assets, weaknesses, challenges, and opportunities for the future of the U.S. Virgin Islands economy. Participants identified a wide range of issues and priorities that helped shape the goals and strategies for the Vision 2040 plan. The input received during this virtual participatory meeting is shown below.

STRENGTHS & ASSETS

WHAT IS UNIQUE ABOUT THE USVI? HOW CAN WE TAP INTO THAT TO CREATE MORE JOBS?

- Broadband internet
- Free trade zone area on St. Croix
- Near shore offshore location
- Rich culture
- Food/culinary arts
- Beautiful beaches/beauty and great weather
- Entrepreneurial minded
- Diversity of workforce and loyal workforce
- Agricultural tourism
- Environment: Clean air and water
- Views and quiet parks
- Family-owned and run small businesses
- Enormous diaspora population
- Ecotourism
- Energy resources and jobs
- Advantageous tax regime
- People deeply love and are willing to promote USVI
- Major resorts
- University of Virgin Islands and aquaponics

WEAKNESSES & CHALLENGES

WHAT IS PREVENTING ECONOMIC GROWTH?

- (Lack of) services for homeless and mentally ill (job training, services, support, wellbeing)
- Cost and reliability of energy
- No recycling/reuse activity or facilities
- High cost of living including high cost of food/groceries
- Being out of the customs zone
- Lack of adequate healthcare facilities
- Lack of diversification
- Losing youth
- Internet reliability issues
- Supply chain issues/barriers
- Security and crime prevention
- Disconnection from CARICOM
- US control of trade zone
- Off-island online purchases (rather than local)
- Lack of opportunities for middle class growth
- Lack of programs to encourage innovation/entrepreneurship (among youth)
- Lack of housing/high cost of housing

OPPORTUNITIES

WHERE DO YOU SEE FUTURE BUSINESS OPPORTUNITIES FOR THE USVI?

- Export fresh drinkable water
- Access to capital for farmers to grow agriculture industry
- Job training for inmates
- South shore trade zone
- High value manufacturing industry
- Financial businesses
- Technology/E-commerce
- Renewable energy
- Make spaces for small local craftspeople/manufacturers
- Urban agriculture
- Cultural heritage
- Culinary/Dining
- Recycling plastics and paper products
- Ecological services and research
- Marine industry/dry dock facility
- Healthcare and wellness destination/tourism
- Retirement/Assisted Living facilities
- Children's museums
- Heritage tourism
- Construction trades (job training)
- Business side of storm recovery

Virtual Open House Input

The virtual web-based open houses collected community input for each island separately on economic strengths and opportunities, the economic assets of each island, weaknesses and challenges, and economic development priorities for the future. Residents of St. Croix and St. Thomas chose to participate in these open houses, those from St. John did not.

ECONOMIC STRENGTHS AND OPPORTUNITIES: A wide variety of strengths and opportunities were identified by open house participants, ranging from broad feedback to ideas for specific sites and properties. Overall, the key theme that emerged from responses was to better utilize each island's existing assets. Participants identified many assets in the Territory that are currently underutilized, but offer opportunities for economic revitalization and growth for the future. These assets include historic neighborhoods, infrastructure including broadband and telecommunications, tourism assets, and others. Select responses from participants are shown to the right.

MAPPING ECONOMIC ASSETS: Participants identified on a map the assets they believe to be the most significant for economic growth. The identified assets are shown on the maps on the following pages with select assets highlighted.

ST. CROIX STRENGTHS & OPPORTUNITIES

- **Rum Tourism:** add distilleries on St. Croix
- Existing **Farming Infrastructure**: tap into the knowledge, facilities and distribution networks already in place
- Untapped **ports**
- Underutilized **southern shore**
- Opportunity to better utilize **airport** that is adjacent to potential development areas
- High speed **fiber infrastructure**
- Great opportunity for **remote workers** to live
- **Telecommunications** infrastructure and connectivity
- Opportunity for **collaboration** on business ventures for schools and communities
- Strength as a **global location**, **holistic environment**, and open **ports** for commerce.

ST. THOMAS STRENGTHS & OPPORTUNITIES

- **Sugar Bay Resort** and the opportunity to renovate and use for hotel training program
- Revitalization of **Historic Neighborhoods**, including in Charlotte Amalie (Savanne and Frenchtown) and others.
- Expand **banking, financial, and legal** options to entire Caribbean
- **Modernize and expand tourism** both on islands and on the water

"Utilize the potential and resources of the University of the Virgin Islands along with the private sector, such as Coral World, and eco-tourism to establish the USVI as a world class marine research destination."

Photo Source: Flickr user Than You (20,5 millions+) views

Photo Source: ridge2reef

Photo Source: Tripadvisor

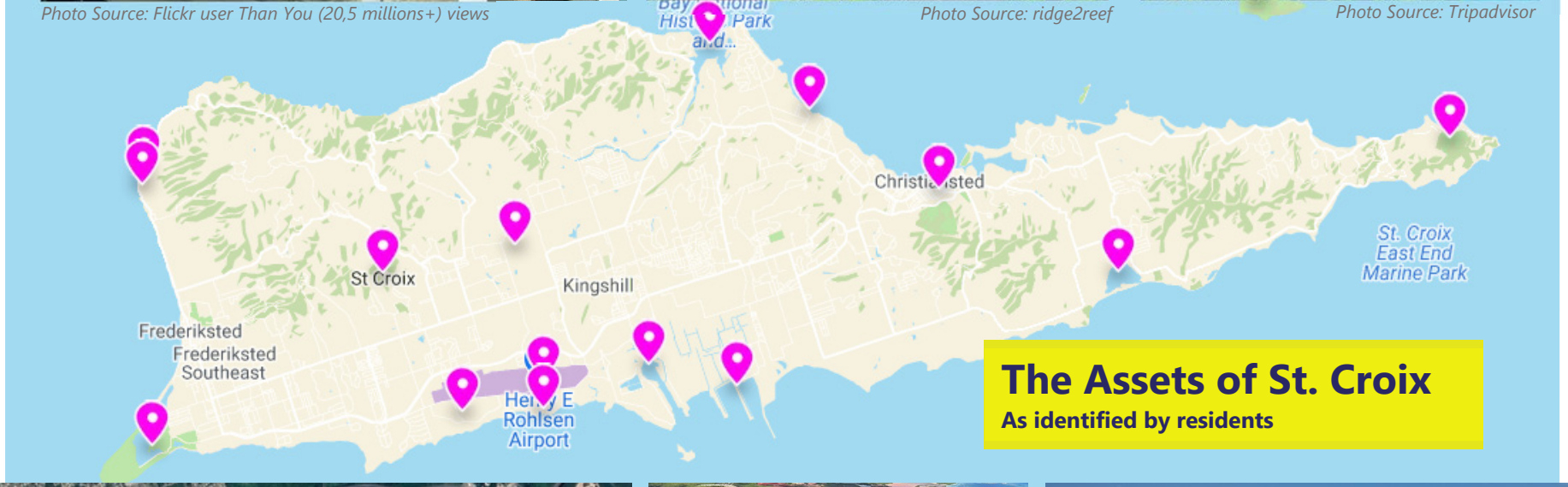


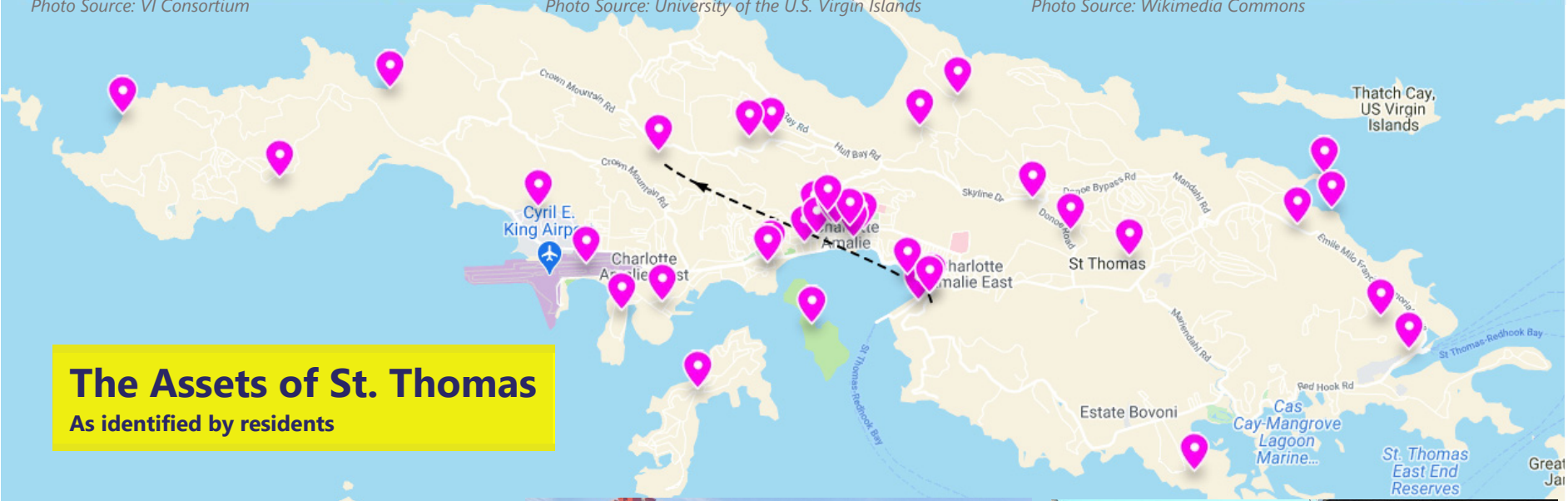
Photo Source: Google Earth

Photo Source: U.S. Virgin Islands Port Authority

Photo Source: VI Consortium

Photo Source: University of the U.S. Virgin Islands

Photo Source: Wikimedia Commons



The Assets of St. Thomas

As identified by residents

Photo Source: University of the U.S. Virgin Islands

Photo Source: St. Thomas Source

Photo Source: 10best.com

ECONOMIC CHALLENGES AND WEAKNESSES:

Participants also shared their perceptions of the economic challenges and weaknesses facing each island.

St. Croix: In St. Croix, these challenges and weaknesses focused largely on infrastructure. The condition of the island's infrastructure was identified as a critical challenge, including roads, bridges, and government and school buildings and facilities. Participants identified the U.S. Virgin Islands Water and Power Authority (WAPA) as a major challenge/weakness due to the high cost and unreliability of electric service.

The USVI Water and Power Authority (WAPA), St. Croix, USVI. *Photo Source: VI Consortium*

St. Thomas: The St. Thomas virtual open house also identified electric service from WAPA as a critical challenge. Other infrastructure challenges identified included road and waste management. Participants also identified challenges with government, including a need to improve the efficiency of government services by modernizing agencies, U.S. Virgin Islands tax refunds and tax incentives.

PRIORITIES:

Participants were asked to rank hypothetical economic development initiatives to help identify community priorities. The results of the exercise are shown in the box below.

Note that no residents on St. John provided input in the virtual Open House section of the website.

Priorities: Which Initiatives Ranked Highest?

ST. THOMAS

HIGHEST PRIORITIES

- Recruiting new businesses to diversify the Territory's economy
- Improving entrepreneurship and job training and support to develop new homegrown businesses in the Territory

High Priorities

- Programs to support agri-businesses and a more robust agriculture industry
- Crime prevention initiative
- Build modern healthcare facilities

Moderate Priorities

- Provide high speed internet service for every resident and business
- New marketing and other initiatives to expand the tourism industry

ST. CROIX

HIGHEST PRIORITIES

- Provide high speed internet service for every resident and business
- Crime prevention initiative
- Build modern healthcare facilities

High Priorities

- Recruiting new businesses to diversify the Territory's economy
- Improving entrepreneurship and job training and support to develop new homegrown businesses in the Territory

Moderate Priorities

- Programs to support agri-businesses and a more robust agriculture industry
- New marketing and other initiatives to expand the tourism industry

Community Town Halls

The community Town Halls collected feedback from each island; some common themes emerged for the six focus areas as indicated below.

INFRASTRUCTURE

- Go green and embrace renewable energy including solar
- Modernize infrastructure but maintain unique sense of place and heritage
- Improve the quality of road systems throughout the Territory
- Provide safe pedestrian infrastructure, including sidewalks
- Provide reliable and cost-effective electricity urgently

BUSINESS CLIMATE

- Improve transparency with government and with WAPA
- Improve Telecommunications (internet) to support businesses of the future
- Modernize Government operations using technology and the internet
- Improve Business interactions with government agencies, including faster processing of applications and reliable timelines

EDUCATION & WORKFORCE

- Change curriculum throughout the educational system to be geared toward jobs of the future
- Better engage K-12 students through new programs and internships
- Become more of a global educational system
- Build on the strengths of the University of the Virgin Islands
- Focus on tech jobs and trades for which there aren't enough workers

TECHNOLOGY

- Integrate new technology tools across industries
- Explore and monitor emerging technologies of the future such as cryptocurrency for opportunity
- Provide more technology training and certification opportunities for residents
- Provide access to technology for residents that don't have access through libraries and community centers

DIVERSIFY ECONOMY

- Reduce dependency on tourism industry, particularly cruise tourism
- Build resiliency to economic uncertainties caused by hurricanes and Covid-19 impacts
- Diversify tourism industry including medical, sports, cultural/heritage, and conventions
- Grow other areas of the economy, including agriculture and manufacturing

QUALIFY OF LIFE/PLACE

- Improve public spaces, including signage, sidewalks, lighting, and green spaces
- Consider extremely high cost of living, including for necessities such as food and housing
- Address crime, which is a critical issue that currently gives the Territory a "bad name"
- Think differently about waste management on the islands and how this relates to economic development

The Expat Factor

What is the opinion of the diaspora regarding the future of the Territory? Why did they leave, and would they consider moving back?

Survey Findings

SURVEY RESPONDENTS

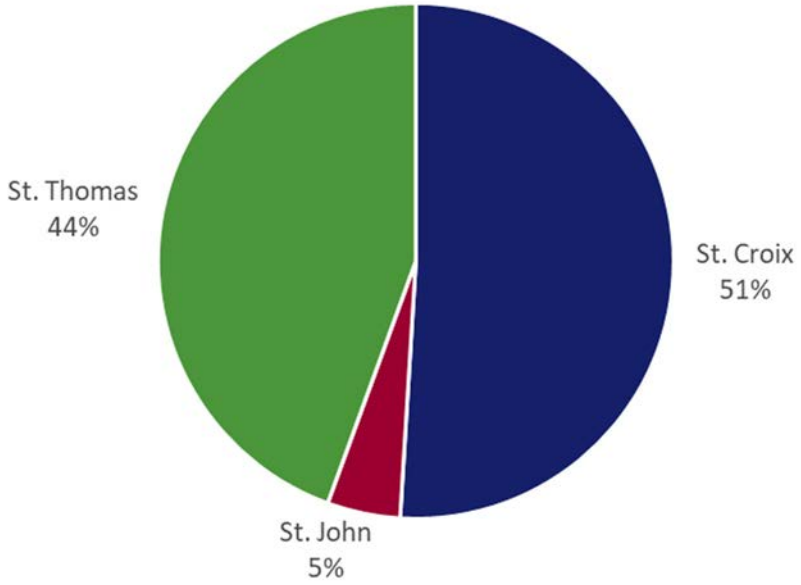
With 706 people responding, 78% still have family in the Territory and 22% do not. Approximately 51% have closest ties to St. Croix, 44% to St. Thomas, and 4% to St. John. There was only one response from Water Island. A total of 95% live in the Unites States and the most inhabited states include (in order) Florida, Georgia, Maryland, Texas, and Virginia.

Most of the diaspora visit at least once every few years, but typically more often.

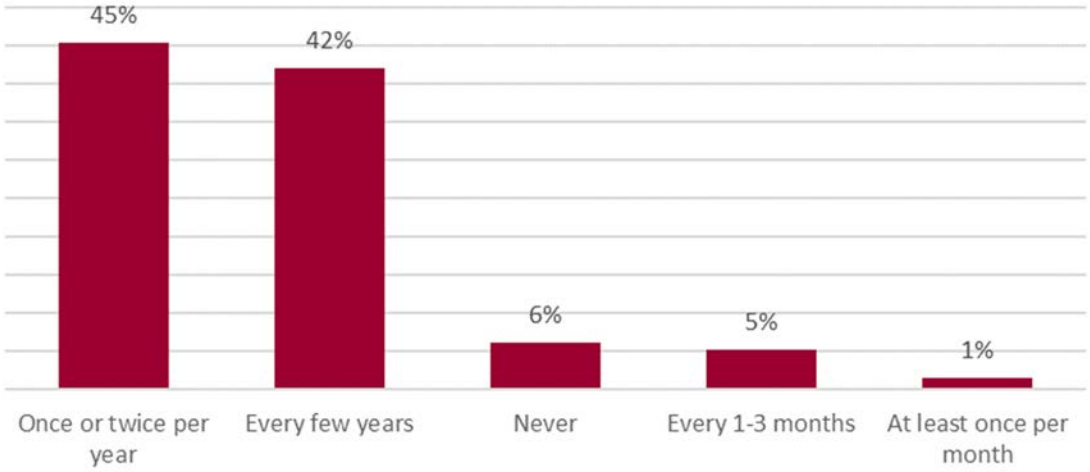
Most of the diaspora visit once or twice per year (45%) or every few years (42%). Of these, 39% are under the age of 40, 28% are between the ages 40-49, and 20% between 50-59. A total of 40% have been gone 11-25 years, 29% have been gone more than 25 years, 21% have been gone 5-10 years and 9% have been gone less than 5 years.

The results also found that 36% of respondents have a bachelor's degree, 32% have a master's degree or PhD, 21% have some college, 5% have a trade or certification, and 4% have a high school diploma.

TO WHAT ISLAND DO YOU HAVE THE CLOSEST TIES?



HOW OFTEN DO YOU VISIT THE US VIRGIN ISLANDS?



MOVING AWAY

A total of 37% of respondents have been gone from the Territory 11-25 years, 28% have been gone more than 25 years, 21% have been gone 5-10 years, and 14% left less than 5 years ago.

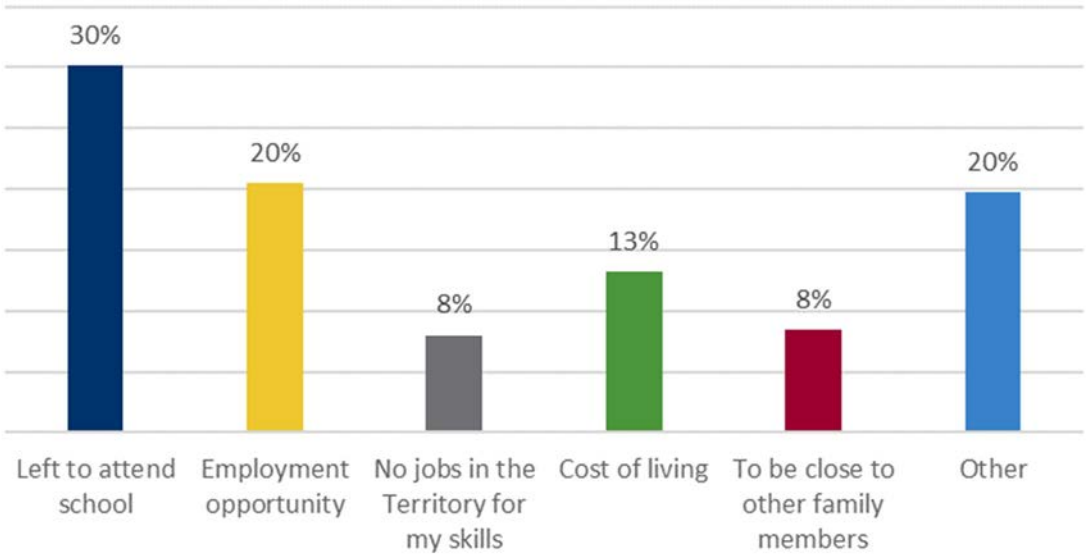
The results indicate that 30% of people left to attend school, 20% for an employment opportunity, 13% because of the cost of living, 8% to be closer to family, 8% because there were no jobs given their skills, and 20% for another reason (namely medical, a hurricane, or military).

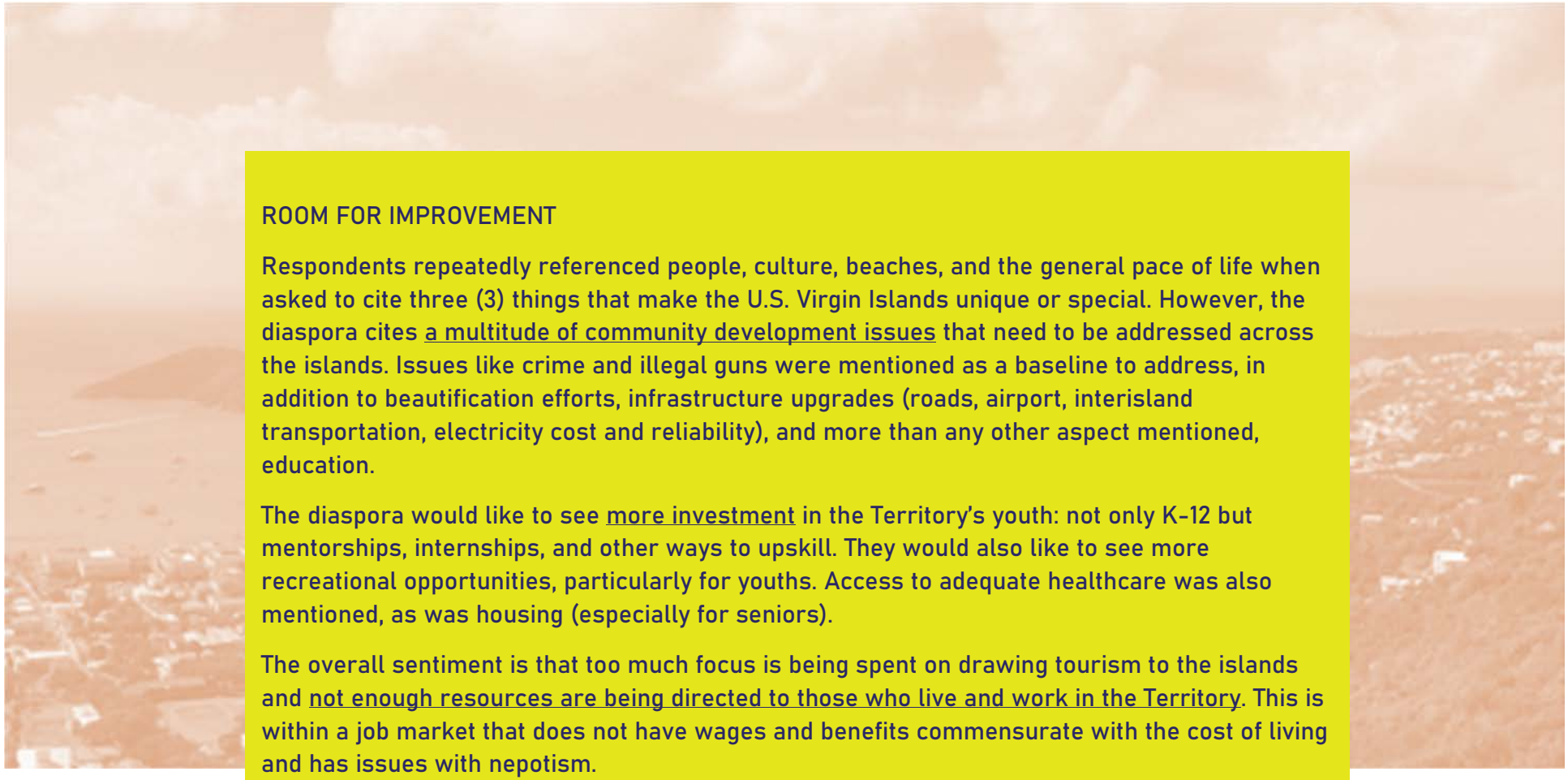
Respondents who felt there were no jobs for their skills were asked to identify those skills. There were a wide variety of skills including management, technician, accounting, technology, information, computer/ programing, and healthcare.

The major reasons why people have moved away have changed over time. The cost of living is increasingly cited as a reason people move away; 21% who moved away less than 5 years ago cite this as a reason compared to just 6% who have been away more than 25 years. Leaving for school is another reason that has changed over the years; whereas those who have been away more than 25 years cite this as the biggest reason for leaving the islands (43%), just 15% of those who have been away less than 5 years cite this reason.

Reasons for leaving are largely consistent between the islands, with leaving to attend school, employment opportunity, and other reasons (hurricanes and military) topping the list.

WHY DID YOU LEAVE THE US VIRGIN ISLANDS?





ROOM FOR IMPROVEMENT

Respondents repeatedly referenced people, culture, beaches, and the general pace of life when asked to cite three (3) things that make the U.S. Virgin Islands unique or special. However, the diaspora cites a multitude of community development issues that need to be addressed across the islands. Issues like crime and illegal guns were mentioned as a baseline to address, in addition to beautification efforts, infrastructure upgrades (roads, airport, interisland transportation, electricity cost and reliability), and more than any other aspect mentioned, education.

The diaspora would like to see more investment in the Territory's youth: not only K-12 but mentorships, internships, and other ways to upskill. They would also like to see more recreational opportunities, particularly for youths. Access to adequate healthcare was also mentioned, as was housing (especially for seniors).

The overall sentiment is that too much focus is being spent on drawing tourism to the islands and not enough resources are being directed to those who live and work in the Territory. This is within a job market that does not have wages and benefits commensurate with the cost of living and has issues with nepotism.

Several respondents mentioned corrupt governmental practices as an issue of concern.

Many mentioned the difficulty of getting a job without knowing the "right" person. To many of the diaspora it seems the government does not care, as seen through a lack of public investment.

MOVING BACK

The survey results found that 54% of people would consider moving back to the Territory, 17% would not, and 29% might consider. To return "home", 39% would need a job opportunity, 22% would need to retire, 17% would need to keep their current job and work remotely, and 23% provided an "other" reason. "Other" responses are summarized in the box at bottom right. Of those who would consider moving back to the Territory:

- **Their time away does not impact their interest to potentially move back.** The results show that 37% of those who have been off the islands 11-25 years, 28% of those off the islands over 25 years, 22% who have been off the islands 5-10 years, and 13% of those who have been off the islands less than 5 years.
- **They vary in age.** The results show that 26% of people who want to move back are aged 40-49, 21% are aged 50-59, 18% are aged 30-39, 15% are aged 20-29, and 14% are aged 60-69.
- **Most do not own a business.** The results show that 70% of those interested in moving back do not own a business, but 30% do.
- **They are educated.** Approximately 37% have a bachelor's degree, 32% have a master's degree or PhD, 20% have at least some college.
- **A majority are tied to St. Croix.** Approximately 54% have closest ties to St. Croix, 41% have closest ties to St. Thomas, 5% to St. John.
- **Most are working.** A total of 93% are working
- **Most have family still on the islands.** A total of 81% have family in the Territory.

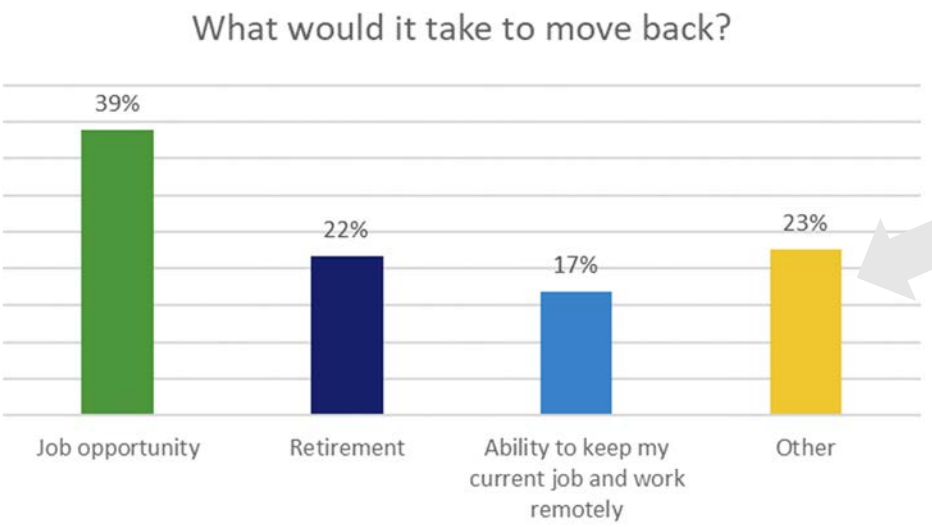
WOULD YOU CONSIDER MOVING BACK?

8 out of 10

people would consider moving back

(responded yes or maybe)

WHAT WOULD IT TAKE TO MOVE BACK?



Top responses from the "other" category include affordable housing, better healthcare, lower cost of living, additional job opportunities, and less crime.

BUSINESS OWNERS OF THE DIASPORA

A total of 28% of all respondents operate a business, with 85% starting this business after moving from USVI. In this segment it was important to understand whether there is potential in having them move back to the Territory, and would be necessary to do so. As a result, further analysis was conducted.

Business Owners Who Would Consider Moving Back

Ninety percent (90%) of people who started a business off-island would consider moving back. Those that own a business and would consider operating a business in the U.S. Virgin Islands:

- **They are younger and more educated.** Thirty-five (35%) are less than 40 years old, and another 35% are aged 40-49. 39% have a master's degree and another 34% have a bachelor's degree.
- **They have been gone a while, but that does not preclude their interest.** Forty-one percent 41% have been gone from the islands 11-25 years, 24% have been gone more than 25 years, 23% have been gone 5-10 years, and 11% less than 5 years.
- **Job and remote working opportunities will be necessary, among other community development improvements.** In order to move back, 33% would need a job (or business) opportunity, 23% would need to be able to keep their current job and work remotely, 17% would need to reach retirement age, and 27% cite another reason including affordable housing, better government support and business opportunities, and infrastructure improvements (electricity, internet, roads, etc.).

Business Owners Who Would Not Consider Moving Back

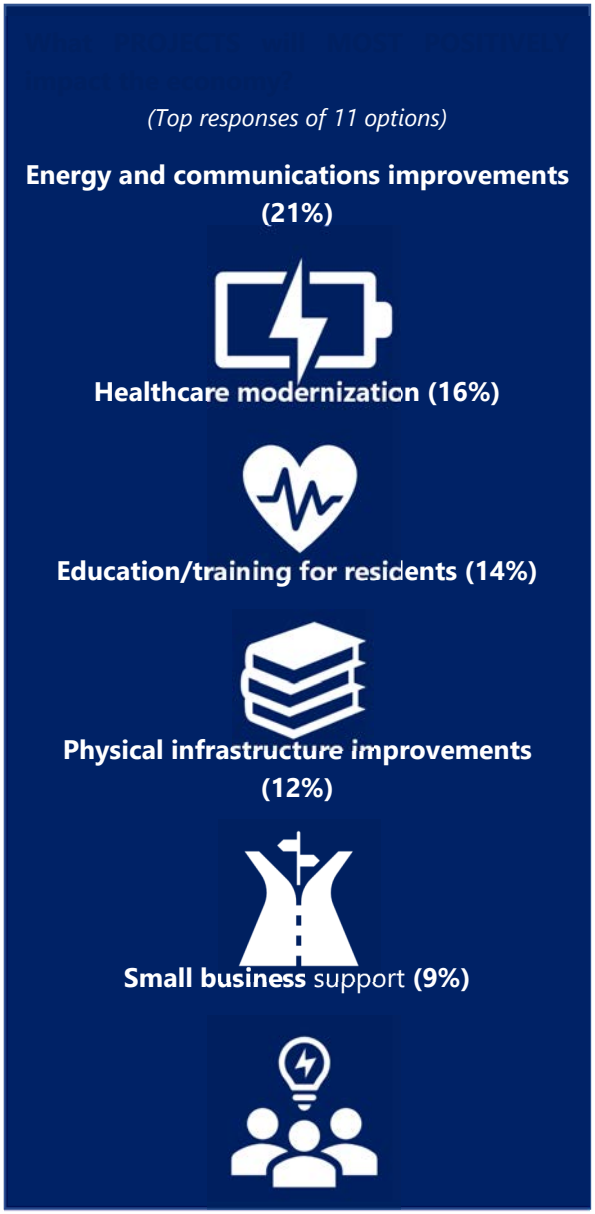
For those that own a business but would not consider operating a business in the U.S. Virgin Islands:

- **Cost of living and crime are main reasons for not moving back.** Thirty-seven percent (37%) tout the high cost of living in the Territory as a reason why moving back is not a possibility; 22% cite crime.
- **They would need to reach retirement before moving back.** Thirty-six (36%) would need to reach retirement age to be in a place to move back. We can infer that the business they operate would not be easily moved to the Territory. This could be due to labor, infrastructure, customer base, etc.
- **They visit family slightly less frequently than those who would consider operating a business.** Sixty-four (64%) only visit once or twice per year and 18% every few years. For those who would consider operating a business, 47% visit once or twice a year and 39% visit every few years.
- **Like those who would consider moving back, community improvements are paramount.** Those who would not consider moving or operating a subsidiary in the Territory believe the top economic development priorities are to 1) build modern healthcare facilities, 2) build a modern and resilient energy system to provide reliable and less expensive electricity, and 3) create a crime prevention initiative.
- **They believe internal investments will bring the greatest impacts.** The projects they feel would have the greatest economic impact include energy and communications improvements, healthcare modernization, and education and training for residents. (Note: these are the same top three types of projects for those who would consider operating a business or subsidiary from USVI).

HIGHLY EDUCATED

It would be advantageous to draw those back to the Territory who have a high level of education because they have a higher earning potential and are more likely to start a business. Here we examine the portion of the diaspora that has a bachelor's degree or higher. Overall, 55% of this population would consider moving back, 16% would not, and 30% might consider it.

- **Many would need a job opportunity.** Thirty-seven percent (37%) would need a job opportunity, 20% would need to retire, and 17% would need to be able to work remotely. Twenty-five percent (25%) provided other reasons including affordable housing, better healthcare, lower cost of living, decrease in crime, improved infrastructure, and more local business opportunities.
- **A variety of jobs are needed.** For jobs needed among those with a bachelor's degree or higher, respondents cite several different occupations including Information Technology, Computer Programming and Data Science, Accounting, Advertising/ Marketing, and Human Resources.
- **Key to improving the economy is investment.** Respondents feel projects around energy and communications, healthcare modernization, education and training for residents, and physical infrastructure improvements will have a positive impact on the economy.



FUTURE DEVELOPMENT

The diaspora envisions a future that is clean, safe, and friendly. While the external vision of the Territories is a romantic one of paradise with beautiful beaches, easy living, and natural beauty, it is clear the diaspora sees another reality. While they do appreciate these aspects of the Territory, they also see the crime, lack of investment, and high cost of living as impediments to future development.

Economic Priorities for Impact

For projects that have the most economic impact, ranked highest were those that improve energy and communications, modernized healthcare, train and educate residents, improve physical infrastructure, and provide small business support.

It is clear the diaspora is interested in investment into community systems throughout the Territory. The economic priorities ranked highest included 1) building a modern and resilient energy system to provide reliable and less expensive electricity, 2) creating a crime prevention initiative, and 3) building modern healthcare facilities.

Those who visit regularly feel projects around energy and communications, healthcare modernization, education and training for residents, and physical infrastructure improvements will bring the most positive impact to the economy.

The diaspora believes the best jobs for economic opportunity are in the following sectors: Agriculture, Arts & Culture, Technology-based Manufacturing, Health and Social Services, and Accommodation & Hospitality.

CRITICAL ANALYSIS

Among the most striking phrases from the ex-pats engaged in the early stages of Vision 2040 were two words, "It's home." They stuck out not because they came from the current residents of the Territory. Rather, they came from the diaspora, people who grew up in the U.S. Virgin Islands but moved away, mostly to the mainland U.S.

Through town hall meetings, one-on-one interviews, and a specialized diaspora survey that drew more than 700 respondents, U.S. Virgin Islanders who left 10, 20, or even 30 years ago consistently referred to the islands as "home."

An overwhelming majority of the diaspora say that under the right conditions, they would consider returning "home" to live and work.

This represents future investment and economic activity. Viewed in this way, former residents can be considered for targeted marketing and recruitment.

Over the next 20 years former residents could be one of the keys to future prosperity and help stem the population loss and declining economic base.

For the most part the respondents were representative, based on population: 55% whose closest ties were to St. Croix, 44% to St. Thomas, and 4% to St. John. The overwhelming majority—95%—currently live in the United States, with the largest contingents in Florida, Georgia, Texas, and the Washington, D.C. area. (There are large numbers of USVI ex-pats in and around New York City but they were not among the top respondents to the survey).

Among those who left two decades ago or more, the pursuit of higher education was cited as the biggest reason – what might be called a "pull" factor. Those who left more recently cited a "push" factor – the hurricanes, affordability, and the lack of suitable employment opportunities, among others.

Nearly two-thirds of these former residents left the territory more than a decade ago. This makes their continued allegiance to the USVI—and their reference to it as "home"—quite remarkable.

Sharp differences emerged among those who left and the reasons they cite for doing so. Among those who left two decades ago or more, the pursuit of higher education was cited as the biggest reason—what might be called a "pull" factor." Those who left more recently cited a "push" factor—the hurricanes, affordability, and the lack of suitable employment opportunities, among others.

Here are a handful of the key takeaways from the diaspora engagement:

- **More than 80% of the surveyed diaspora would consider moving back.** That is an unusually high statistic; however, there are strong caveats to that sentiment. And it should be noted that respondents were self-selecting: i.e., the former residents with the greatest attachment to the U.S. Virgin Islands were the ones most likely to participate in the survey in the first place.

- **Among those who would consider a return, there are significant obstacles to overcome.** Nearly 40% would need an employment opportunity; or, for those who own their own enterprises, the ability to transfer it or operate it from the U.S. Virgin Islands. But beyond professional concerns, there were the predictable quality of life issues:

    - Cost and reliability of energy
    - Healthcare
    - Education
    - Infrastructure
    - Crime
    - Overall cost of living
    - Perceived corruption and nepotism in the Territorial government.

EXPAT SUMMARY

Expats cite a multitude of community development issues that need to be addressed across the Islands.

Basic issues like crime and illegal guns were mentioned as a baseline to address, in addition to beautification efforts, infrastructure upgrades (roads, airport, interisland transportation, power) and more than any other aspect mentioned, education.

The diaspora would like to see more investment in the youth: not only K-12 but mentorships, internships, and other ways to upskill. In addition, they want to see additional recreational opportunities, particularly for the youth. Access to adequate healthcare was also mentioned, as was housing (especially for seniors).

The overall sentiment is that too much focus is being spent on drawing tourism to the U.S. Virgin Islands and not enough resources are being directed to those who live and work on the Islands.

There are also strong views concerning a job market that does not have wages and benefits commensurate with the cost of living. Further, a large segment of the diaspora has issues with what they view as nepotism and several mentioned corrupt governmental practices. Many mentioned the difficulty of getting a job without knowing the "right" person.

Finally, to many of the diaspora it seems the government does not care, as seen through a lack of public investment, and this is creating, in their opinion, a negative sense of community pride and lack of confidence.

Photo Source: U.S. Virgin Islands Department of Tourism

Interview Themes

Stakeholder engagement for Vision 2040 included 60 one-on-one interviews, three focus group sessions, and five working group meetings around specific industry sectors. The following is a summary of themes resulting from these discussions.

Photo Source: U.S. Virgin Islands Department of Tourism

Strengths & Assets

- **Quality of place & life** – There are many attributes of the Territory and its people that will attract new residents and businesses.
- **Post-secondary education** – UVI is training the workforce of the future with programs in process technology, hospitality, green technology, a new school of agriculture, marine science, data science, and is working to create a medical school, as well as expanding its successful Research & Technology Park.
- **Broadband infrastructure** – There is a very robust telecom system serving the Territory with additional improvement in the works. Any future economy will require this and the U.S. Virgin Islands can capitalize on it in multiple ways.
- **Alternative energy** – Multiple forms of alternative energy are possible including solar, wind, wave, tidal, biomass, waste-to-energy and others that will reduce the Territory's reliance on oil and propane, reducing the energy component of the cost of doing business.
- **Location** – The Territory is well-located for small-scale shipping, logistics, and nearshoring uses, with exemption from the Jones Act an added benefit. Additional port capacity would be necessary to capitalize on expanding opportunities for larger scale transshipments.
- **St. Croix South Shore Trade Zone** – This newly created trade zone is the largest area in the USVI available for industrial and commercial development.

Weaknesses, Issues, and Challenges

- **Lack of economic diversification** – The Territory is too dependent on tourism and government as the sources of most employment. A long-term, structural change in the economy is necessary.
- **Costs** – The costs of living and doing business will continue to discourage people and businesses from moving to the USVI. Electric costs are a particular concern.
- **Fiscal situation** – The Territorial Government, GERS and WAPA will continue to negatively impact the economy until made financially stable.
- **Business climate** – Government bureaucracy, regulations and procedures impede business creation and operations. Navigating the business licensing and permitting system is difficult and expensive. Elements of the tax code such as the gross receipts tax and excise tax hurt businesses

and make the USVI unattractive as a business location.

- **Labor force** – In an already small workforce (see Volume 3), the brain drain of young and educated Virgin Islanders is causing an adult workforce lacking skills needed by many types of businesses.
- **Lack of an image** – Many people outside the Territory have limited knowledge of the U.S. Virgin Islands; in particular, why someone might want to live or have a business in the Territory.
- **Short-term thinking** – The Territory, especially government, has historically been too reliant on short-term fixes rather than long-.erm solutions, which is an impediment to major, but necessary structural transformation.
- **Quality of place** – In particular, inadequate medical services, infrastructure, and housing opportunities.
- **Climate change** – How will the Territory cope with and adapt to more hurricanes, rising sea level, increasing temperature, and other impacts of climate change?

Opportunities

- **Economic diversification** – Many possible types of businesses that can succeed in the Territory were identified and can be created or recruited.
- **Competitiveness** – Improve and promote the USVI "product" so that it is considered a good location for business in ways comparable to or better than those used by Barbados, Trinidad, and Puerto Rico.
- **Education** – Focus the USVI K-12 educational system to prepare youth for a lifetime of economic independence and prosperity.
- **World-class R&D Center** – Position the Territory as a world-class research and development center of excellence for emerging technologies and businesses related to Vision 2040 target sectors and others identified in the future.
- **Incentives** – Improve the USVI's incentive system to assure incentives are a strategic investment of mutual benefit to the business and Territory. Ensure that incentives are equally available to offshore businesses being recruited and homegrown businesses.
- **Retrieving the diaspora** – Aggressively work to encourage and incentivize the return of U.S. Virgin Islanders living abroad to live, establish businesses, and bring their knowledge and skill sets to the U.S. Virgin Islands economy.

Photo Source: U.S. Virgin Islands Department of Tourism

This page intentionally left blank.