

PART V STRATEGY AND ACTION PLANS

22. IMPROVE AIR AND SEA ACCESS

All other things being equal, a traveller normally wants to minimise total elapsed travel time. Hence the primary objective of an access strategy is to minimise the portal to portal access time for a traveller while ensuring a satisfactory level of service at an affordable cost. Air access, despite its decline, continues to be the dominant transport mode to/from Dominica and even more so for international visitors to the country.

22.1 AIR ACCESS STRATEGY

As outlined in the Access Strategy Study, the main components of the air access strategy are to:

- Recognise and work more closely with nearer regional hubs;
- Cultivate and work with 2nd and 3rd tier regional carriers, i.e. the regionally domiciled carriers that do not fly jet aircraft, with the 3rd tier carriers flying aircraft with less than 35 seats;
- Make optimal use of the island's two airports;
- Provide easy and convenient in-transit facilities at these regional hubs;
- Select and implement cost-effective distribution systems appropriate to small islands and small airlines; and
- Promote more efficient connections to the international services at the main regional hubs serving Dominica.

Recognise and Work More Closely with Nearer Regional Hubs

Dominica should work with all the regional airports that have international operations giving preference to those in closer proximity to the island which offer good levels of international service. Therefore it is proposed that Dominica consciously recognises the nearer regional hubs, (i.e. those other than San Juan and St. Thomas) as its own international airports similar to the recognition given to Boston Airport by the tourism communities in the Upper North East States of the United States or that Saba and St. Eustatius and, increasingly, Anguilla give to St. Maarten. This means that Dominica should work closely with the managements of these hubs and their related tourism authorities in joint marketing and passenger facilitation programmes to increase international service to the hubs. This strategy is consistent with the recently defined tourism policy of the OECS.

The Access Strategy Study recommends that Dominica recognises the following hubs as its own international airports:

- St. Maarten, Barbados, Antigua, Guadeloupe and work with Hewanorra, St. Lucia to develop its potential by promoting connecting service to Dominica.
- San Juan (SJU) is an important hub for the Eastern Caribbean and Dominica. SJU has the largest number of flights and the widest reach to US market and Central America.
- US mainland flights to Dominica over San Juan tend to be the lowest price options.
- There are daily flights by LIAT and Seabourne Airlines to Dominica that connect to a limited number of the available flights at SJU.
- LIAT also provides connectivity SJU-DOM over its hub at Antigua (ANU).
- JetBlue is now the major carrier to SJU and is expanding; JetBlue flies regional jets to some Eastern Caribbean countries but does not believe such service is profitable to Dominica.
- Cape Air is the current JetBlue code share partner at SJU, but their equipment appears inappropriate for Dominica service.

- Both ATRs and Dash -8-300s have severe baggage capacity constraints – further exacerbated by the distance between SJU and DOM.

Cultivate and Work with 2nd and 3rd Tier Regional Carriers

- 2nd and 3rd tier regional airlines have to be wooed to provide direct service to Dominica from/to selected groups of international flights at the regional hubs. The source markets of interest to Dominica will determine the selection of these groupings. In addition to LIAT, some of these regional airlines include Air Caraibes, Air Antilles, Air BVI, Winair, Cape Air, Air Sunshine, and SVGAir. Given that a number of these airlines are not domiciled in the regional airport hubs or Dominica, there must be early agreement by Dominica and the host governments of the regional hubs that where necessary, domicile will not be a constraint to the provision of air service between the hubs and Dominica.
- Antigua and Barbados, being LIAT hubs with strong service from the United Kingdom, can be used to provide access to the regional, UK/Europe and Canadian markets. Should intra-regional services be encouraged to start at Hewanorra, St. Lucia, this provides yet another opportunity to access the UK/Europe market and the Atlanta catchment area in the USA.
- St. Maarten has strong service from Eastern United States, France, Holland and to a lesser extent Canada and Central America. It is also much nearer to Dominica than San Juan and St. Thomas. It could be considered a preferred regional hub for Dominica.
- Guadeloupe, the closest regional hub to Dominica, has excellent daily service from the two international Paris airports and therefore has the potential to be an important regional hub for service to/from Continental Europe.

Dominica must therefore seek to:

- Immediately develop nearer hubs such as SXM, BGI, ANU and PTP
- Establish regional connections at Hewanorra UVF, which would move it from being a strategic hub to a potential international hub
- Simultaneously maximize alternative (direct) SJU solutions.
- Improve air connectivity with Guadeloupe/Martinique.

Provide Easy and Convenient In-Transit Facilities

Dominica's international hubs must afford connecting passengers:

- In-transit facilities that easily accommodates interline connections.
- Easy and speedy Immigration, Customs and Security checks.
- Adequate, comfortable and clean facilities – seating, washroom, shops, restaurants.
- Easy access to up-to-date flight information.
- Friendly, well-trained and knowledgeable staff.

Select and Implement Cost-Effective Distribution Systems

A cost-effective distribution system for the 2nd and 3rd tier Eastern Caribbean airlines/sea ferries supplying critical connectivity is needed to:

- Provide potential visitors with easy booking access to Dominica
- Offer wide global reach in regional and international markets.
- Improve the contribution of airlines/ferries to the growth of tourism.
- Enhance the airlines or ferries own long term viability.

Promote more Efficient Connections to International Flight Banks at the main Regional Hubs

- Work jointly with the international airlines and the intra-regional connecting airlines to ensure smooth inter-airline systems.
- Work jointly with the management of the selected regional hubs and the tourism authorities of those countries to attract more international service to the hubs.
- Work with selected 2nd and 3rd tier airlines to provide at minimum daily service connecting key international services to Dominica.

Air Access as at April 2013

The DDA has already started implementing the Air Access strategy with heartening early results:

- Both Seaborne and LIAT now provide direct daily service SJU-DOM v.v. leading to an increase in seats by 7,300 annually.
- LIAT has now added SXM-DOM daily once again leading to an increase of seats on that sector.
- The timings of these flights have led to significant increase in cities in both the US and UK that have same day connectivity to Dominica.
- The DDA has started working closely with the management of Princess Juliana International Airport (PJIAE), St. Maarten to attract more airlines to PJIAE and to improve the quality of connectivity at that airport.
- Air Antilles has committed to providing PTP-DCF (Canefield) later in 2013, providing same day connections with international flights from Europe.

22.2 SEA ACCESS STRATEGY

Given the growing importance of sea access to Dominica's economy, it is imperative that the country maintains and expands regular, sustainable sea access to/from Dominica and in particular with the French West Indies, on a regular basis at affordable rates.

This requires the government and the DHTA to continue to liaise closely with the existing ferry operator, while at the same time encouraging new ferry operations on selected routes to expand travel opportunities for regionally domiciled persons and to facilitate multi-destination tourism.

In addition the Government through DDA must continue to encourage year-round cruise ship and yachting visitors but with the proviso that the long-term integrity of the country's core eco-tourism product will be maintained.

Implementation of this strategy will require the Government to:

- Give priority to the upgrade of the ferry terminal at Roseau.
- Improve customer service at the ferry service
- Conduct joint marketing programmes with the ferry operators to promote multi-destination tourism.
- Continue to upgrade and improve the operations of the Roseau Cruise Ship Terminal both as regards the handling of cruise ship calls and the landside management of taxi/tour buses and street vendors.
- Explore the possibilities of a new Cruise Terminal and Cruise Village at Canefield (Donkey Beach) which would permit Roseau to cater to smaller vessels and Woodbridge Bay to concentrate on the handling of commercial traffic only; and

- Enhance/upgrade the attractiveness of the Cabrits docking facility, particularly for smaller 'boutique' cruise vessels and any new ferry operations.

22.3 RECOMMENDED ACTIONS

- Urgent formal approval of the Access Strategy by the Government of Dominica.
- Appoint a senior person in the DDA to drive the Access Strategy.
- Close collaboration by the Discover Dominica Authority (DDA), Dominica Air & Sea Port Authority (DASPA), their respective governing ministries and the Dominica Hotel and Tourism Association (DHTA).
- Major upgrade of access information on the DDA website such that a visitor can more easily know how to get from his/her gateway airport to their place of accommodation in Dominica. This revision should be from the perspective of a visitor, including one domiciled in the region, who has Dominica as one of a number of travel options.

23. INCREASE RESOURCES FOR DESTINATION MARKETING

23.1 STRATEGIC APPROACH

Dominica's overall destination marketing strategy must be based on seven fundamental factors.

The **first** is that Dominica has limited resources to undertake general marketing campaigns. Consequently, in the short/medium term, the strategy should be to concentrate resources on fewer markets, targeted promotions within these markets, and minimize overheads and other administrative costs.

The **second** is that Dominica must reinforce its position in the market as an exclusive high quality destination but differentiated from competitors through its offering of a unique holiday/vacation experience in a natural environment, and its distinct cultural heritage. However, it must be emphasized that this will not be achieved by marketing alone. The product must reflect a 5* experience which means increased investment in all aspects of the tourism product – accommodation, infrastructure, amenities, standards, heritage etc.

The **third** is that Dominica must allocate greater resources and effort to e-marketing. During the past decade, the internet has brought about a pronounced shift in how people purchase travel and tourism products. It has been estimated that the global number of users of the internet has grown from 16 million in 1995, through 361 million in 2000 to reach about 2.0 billion in 2011.

The internet has had a major impact on tourism and travel, with the development of huge numbers of websites and applications including reservation systems, online travel agents and tour operators and interactive product review sites. Social networking sites, such as Facebook and LinkedIn, have developed as marketplaces with an increasing array of tourism and travel products being promoted through these networks.

The implication is that in today's international business environment it is no longer sufficient for Dominica to simply have a website. Dominica – both the DDA and product providers – must be more proactive in e-marketing.

The **fourth** factor is that destination marketing must be market research-driven. A key characteristic of successful tourism destinations is the emphasis that they place on understanding the customer and how to meet their needs. Significant resources are spent on knowing the customer and what their requirements and perceptions are of the destination post- and pre-visit. Similarly, knowing the market distribution channels – how best to reach the customer, understanding the trade channels – tour operator, travel agents, etc – and, especially today, understanding the web-based technologies can be used only to communicate with customers, but also to provide market research information is essential.

A **fifth** factor is 'leveraging' the DDA's promotional budget by engaging in joint advertising campaigns with market intermediaries (traditional and on-line tour operators, airlines, etc) as well as with organisations such as DHTA to get wider market exposure than otherwise possible.

The **sixth** factor is to capitalise on the market knowledge and marketing skills within the Dominican tourism sector. A key initiative would be to engage with the Dominican ground tour operator sector to spearhead the development of non-traditional and niche markets.

The **seventh** factor is that Dominica is an off-line destination. The implications of this is that there needs to be a high standard of air and sea connectivity as described in Ch. 22.

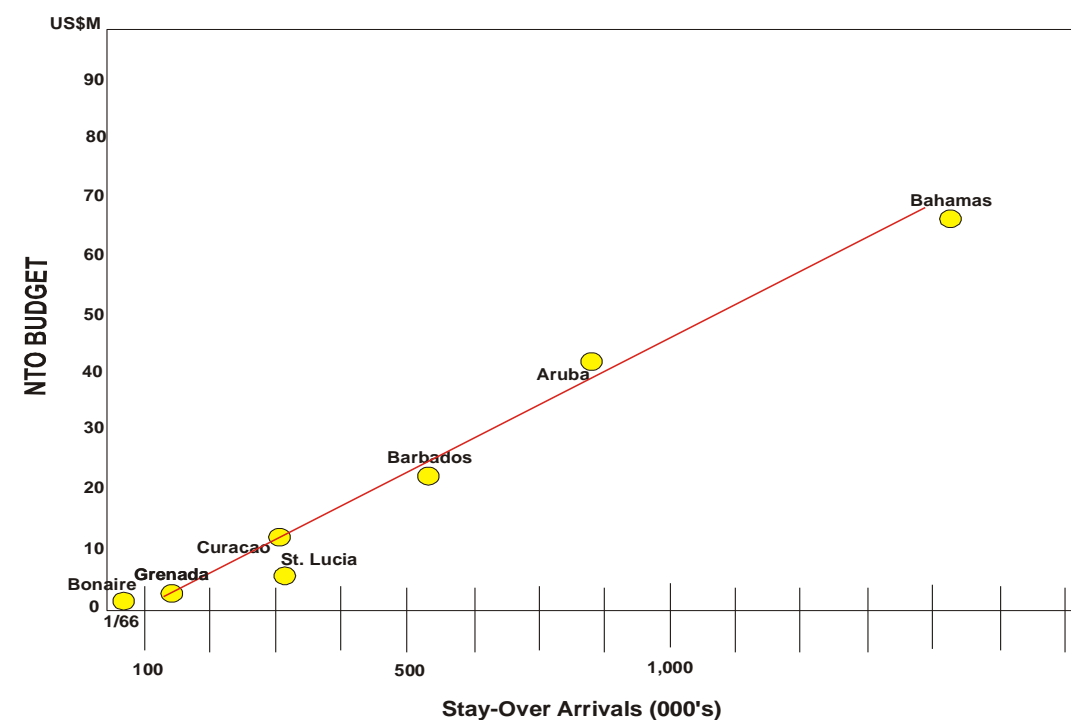
23.2 INCREASED DESTINATION MARKETING RESOURCES

To achieve the targeted increase in tourist arrivals, increased resources will have to be directed to destination marketing. Although it is recognised that there is no direct relationship between the number of stay-over arrivals and the size of an NTO budget in any one year, Figure 23.1 suggests that the high numbers of tourist arrivals are associated with high NTO budgets. The implication is clear; if Dominica wants to increase stay-over arrivals to a higher level, a commensurate increase in financial resources must be available to the DDA.

What size marketing budget does the DDA need to achieve the stated targets? One way of approaching this issue is to see what competing destinations are spending. Although a useful indicator, this approach had a number of drawbacks, the obvious one being the assumption that other destinations know what they're doing and spend their money effectively. The second drawback with this approach is that it doesn't take into account the stage of development in a market. The third drawback is that this approach doesn't take into consideration the extent of supportive promotion from other intermediaries in the market (airlines, tour operators particularly).

Nonetheless, as shown in Ch. 17, the norm for Caribbean destinations is a budget representing between 2% and 3% of total visitor spending. On this basis, the DDA's budget will have to be increased to between EC\$8.5 and EC\$12.5 million under the medium growth Scenario B by 2022 in terms of constant 2012 money values, and between EC\$10.5 and EC\$16 million under Scenario C.

Figure 23.1: NTO Budgets and Stay-Over Arrivals, 2009



23.3 INCREASED RESOURCES TO E-MARKETING

The creative use of technology is crucial to the development of tourism to Dominica. The internet provides the technology platform for Dominica to establish itself in the market on an equal footing with its competitors at comparatively modest costs.

Adequate resources must be allocated for this activity – not only for the development and management of the web site, but equally important, for the skills to manage, maintain and further develop the site.

23.4 STRENGTHEN DOMINICA'S GROUND TOUR OPERATORS

The promotional activities of the Dominican ground tour operators should be strengthened and supported. Dominica's ground tour operators can spearhead the development of:

- Different segments of the market – FIT, group travel etc.
- Niche product markets – MICE, weddings, hiking etc.
- Non-traditional markets – France, German-speaking, Scandinavia, Netherlands.

The sector should be encouraged to establish web-sites, confidential tariffs, provide 'meet-and-greet' services, make overseas promotional trips etc. The cost of these promotional trips (air fares, expenses) could be initially supported by the DDA in the context of a promotional programme specifying targeted results etc. With the strengthening of the ground tour operator sector within a time frame of 3 to 4 years, support could be reduced.

23.5 IMPROVE TOURISM RESEARCH AND STATISTICS METHODS

One of the key characteristics of successful tourism destinations is the emphasis that they place on understanding the customer and how to meet their needs. Significant resources are spent on knowing the customer and what their requirements are and what their perceptions are of the destination post and pre visit. Similarly, knowing the market distribution channels – how best to reach the customer, understanding the trade channels – tour operator, travel agents etc. – and especially today, understanding how the Internet technologies can provide research information to collect market information is essential.

The following is recommended:

➤ **Revise Visitor Exit Survey Questionnaire**

The Visitor Exit Survey Questionnaire should be revised to:

- Reconsider the continual inclusion of some questions which have marginal value e.g. 'would you recommend Dominica to a friend for a holiday?'
- Capture information in relation to visitor's motivations in considering Dominica as a vacation destination.
- Collect more accurate information on visitor expenditures.
- Capture information on how the visitor arranges trip e.g. extent to which a visitor uses the internet to source information, book flights and accommodation vis-à-vis the travel agent/tour operator.

The survey should be conducted during three periods of the year to capture the peak, shoulder and off-peak seasons.

➤ **Yachting Survey**

A survey should be undertaken among yachts' people to Dominica to determine their profiles and requirements as a first step in developing a product to attract this segment of the market. (A comprehensive questionnaire has already been prepared by the DDA).

➤ **Accommodation Survey**

Establish an accommodation survey to collect information on guests' country of residence, length of stay, room occupancy rates, etc. in the various hotels, guesthouses, villas and cottages. This is crucial as there is no information currently available on the utilisation of the tourism plant.

➤ **Website**

The website can be used to collect market research data and analytics to provide Dominica with important information with which to develop and monitor marketing campaigns.

➤ **Cruise Survey**

A similar survey to the "Departing Passenger" Survey should be undertaken annually among cruise visitors. The standard CTO Cruise Survey questionnaire (as used in Barbados) should be customised to meet Dominica's specific needs. However, two surveys should be undertaken – one to target small cruise ships and the other for the larger ships in order to establish the characteristics of both market segments.

➤ **Survey among Tour Operators in Guadeloupe and Martinique**

Survey to determine the most effective ways to promote excursions and short stays (1-4 nights) of residents and holidaymakers in Guadeloupe and Martinique should be undertaken.

➤ **Immigration Departure Cards**

The Immigration E/D card could be adapted to capture additional information on visitors' characteristics and perceptions of their visit.

➤ **Data base of Travel Trade Information**

For each niche market there is a need to identify the relevant associations, media channels, organisations etc.

➤ **Additional Cross Tabulations of E/D Information**

From the E/D cards, market profiles could be developed providing information on purpose of visit, intended length of stay, accommodation type, mode of transport etc.

24. IMPROVE, EXPAND AND DIVERSIFY THE PRODUCT

The Tourism Structure Plan, as outlined in Ch 20, recommended a number of projects, sites and attractions which have the potential for further developing and enhancing the Dominica tourism product. These are described in more detail in the following sections (with some inevitable repetition).

24.1 MARINA AND RELATED FACILITIES

Project Context

Conveniently located in the middle of the chain of eastern Caribbean islands, Dominica is an ideal stopping point for sailing vessels cruising the Caribbean. It is strategically situated between two large French yachting centres, Guadeloupe (at a distance of 16 nautical miles) and Martinique (27 nautical miles) making it an attractive destination for French charter vessels in particular. The most popular anchorage is at Prince Rupert Bay, Portsmouth, which can often have over 100 yachts at one time.

Currently, there are no marina or boat repair facilities, and only limited chandlery and provisioning services (with yachters denied use of the fuel pump at the new fishing jetty). Lack of these facilities and services is seriously impacting on the development of Portsmouth as a major yachting centre in the Eastern Caribbean to rival English Harbour in Antigua or Rodney Bay in St. Lucia.



Content

Marinas and ancillary facilities are most often developed as part of mixed ventures, such as hotels or resort communities which largely depend upon tourism demand rather than yachtsmen to be successful. In recent years, a number of such projects have been considered for Dominica but, for various reasons, have not gone ahead.

As part of its recommendations for the Cabrits and Portsmouth Development Area, the 2005 TMP included provision for a 100-berth marina together with associated marina/condominium development. The recommended site encompasses approximately 500 acres of Government owned land stretching from the coast at the Cabrits peninsula, of which

some 80 acres were identified for the development of the marina, hotel and complementary facilities.

Other envisaged components included

- A boutique hotel resort on the western ridge of the Park (50-80 rooms);
- a waterfront resort (200 apartments/town houses) to include apartments and villas;
- a golf/sports village (100 to 150 villas, apartments/town houses) to include sports academies, health and fitness programmes, tennis instruction, nature tours and other learning activities;
- an auditorium for cultural performances/pageants/sound & light shows, etc.; and
- public beach facilities (pool, cabanas, tennis courts, children's play, BBQ pits, etc.).

Subsequently, a Trinidad-based company (Crews Inn Group) has carried out preliminary studies for a marina, hotel and complementary facilities. This project appears to be stalled, whether temporarily or permanently, is not clear.

In the meantime, it has been announced that a *Cabrits Marina* is proposed by Government on a 100-acre site comprising a marina with up to 200 slips, haul-out yard, restaurants, bars, shops, offices, condominiums, hillside villas and a 40-bedroom hotel extension. Whether or not this will form part of the Cabrits Hotel & Spa (68 rooms and suites), which is presently being constructed, is unclear.

24.2 ENHANCEMENT OF THE URBAN ENVIRONMENT

24.2.1 Roseau

Project Context

The majority of the island's buildings of architectural and historic importance are located within the city of Roseau. The historic district of Roseau, encompassing the old 'French Quarter' and the Old Market, with its array of heritage buildings in an easily walkable area, gives 'character' to Roseau. The old 'French Quarter' is of particular significance, with its irregular street pattern, cobbled pavements and unique buildings. It has been the subject of many proposals for preservation and restoration. Although a number of buildings have been maintained, for the most part the historic district has experienced neglect over the years. The use of the cobble-stoned Old Market as a vendor's square is detrimental to the historic character and architecture of the resource, while the waterfront - both ocean and river frontage - is an underdeveloped asset. Visits to the Dominica Museum (on the Roseau Bayfront) and to the restored Old Mill at Canefield can also be part of this experience.

Content

The recommended development concept comprises the following main elements:

Roseau Historic District

- Formal establishment of a historic district in order to protect, restore and promote Roseau's cultural and architectural heritage;
- Implementation of the draft building control guidelines and the incentive package for property owners and developers of land in the district that have been submitted for consideration of Government;

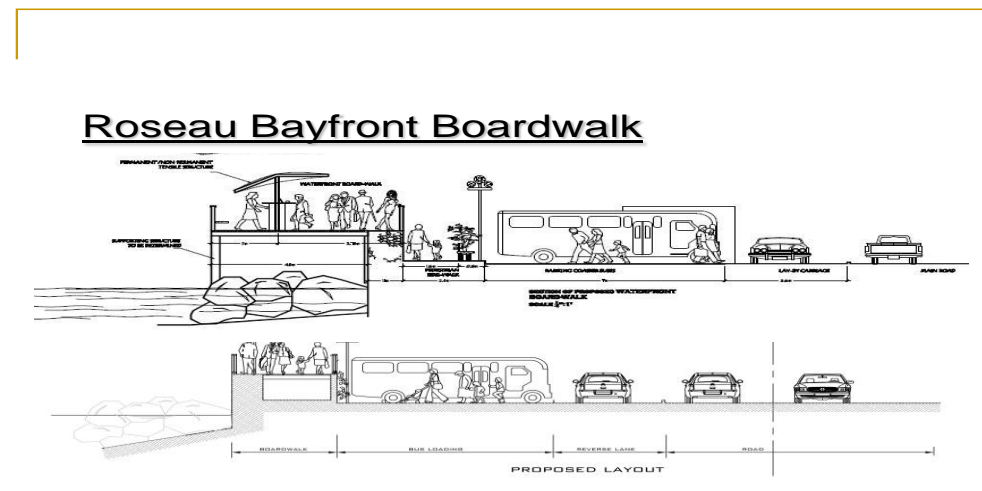
- Designation of heritage trails, with appropriate signage and detailed route maps/brochures;
- Repair of pavements, gutters and roads as part of a wider Roads Reinstatement Rehabilitation project for the entire urban area;
- Declaration of a pedestrian-only and no parking zone between the hours of 7.00am and 17.00pm each day.

Plaza at Old Public Market Square

- Removal of all existing vendors and their stalls;
- Establish new venues for vendors on site of Old Ruins and/or adjacent buildings;
- Establish cafe and provide additional seating and shade; and
- Use of the stand for 'street' performances.

Roseau Bayfront

- Construction of a removable Boardwalk along the sea wall;
- Erect a permanent/non-permanent shelter on the platform of the berth for the dispatch of organized & private tours.
- Eliminate parking on sea side of street;
- Re-locate all vendors from along the bayfront and adjacent roads and alleys roads to new arcades and other buildings; and
- Implement approved plan for a new promenade alongside the Roseau River, including greater capacity for pedestrians and cyclists; a traffic-free environment; and creation of enhanced diversity and interest through provision of pavilions, kiosks, piers, treatments, and international public sculpture.



Roseau Bayfront Boardwalk (from *Roseau Revitalization Strategy* Part I, (P. Honychurch/Physical Planning Department)

Transportation

- Construction of a multi-storey car park building at Windsor Stadium for use by the general public; and
- Provision of new bus terminals on the city outskirts.

24.2.2 Portsmouth

Project Context

With the growing concentration of new tourism-related developments in the north of the island (particularly at Cabrits), Portsmouth will take on a new role as a tourist centre and service provider. Although a busy town, enlivened by the Ross University Medical campus, the buildings, streets, etc. are generally for the most part in poor condition, which detracts from the town's overall ambience and makes it less attractive for visitors. While this has been improved by the recent removal of old ship wrecks that formerly lined the shore, much more needs to be done to enhance the urban environment.

Proposals for the physical planning and development of Portsmouth are contained in a comprehensive report prepared by the Portsmouth Citizen's Planning Commission. These proposals have been discussed at a well-attended meeting with tourism stakeholders from the Portsmouth and surrounding area.

Content

The recommended development concept comprises the following main elements:

- A by-pass from Glanvillia to Cabrits;
- Designation of a new Indian River Preserve (which, inter alia, will safeguard the river from pollution arising from uncontrolled development);
- the enhancement of Borough Square;
- extension and repair of Old Town Pier for use by yacht dinghies and other small craft;
- construction of a coastal boardwalk from the Borough Square to Cabrits; and
- development of a Creole Village at Lagon.

24.3 TOURISM FACILITIES

Additional tourism facilities - mainly accommodation – will be provided in new projects (either under construction or planned). Hotel/resort developments currently under construction include

- Cabrits Hotel & Spa (58 rooms and suites) being constructed with financing from the Government of Morocco. The details of the management and operation of the hotel have not yet been announced;
- Atlantique View Resort & Spa, Anse de Mai, (40 rooms). As a member of the Ascend Collection (Choice Hotels) group, this development will be Dominica's first "branded" hotel property;
- Petit Coulibri Resort (near Soufriere): 20 Rooms;
- Kwani Eco Lodge (Castle Bruce): 12 rooms; and
- Sunrise Farms (Castle Bruce): 10 cottages.

The total investment value represented by these five developments is reported to be in excess of EC\$50 million. None is located in the Roseau area.

Planned (or contemplated) developments not yet under construction include

- Woodford Hill Resort which will comprise a total of 112 accommodation units (32 cottages; 16 townhouses; and 64 villas) with 329 rooms plus central facilities including bars; restaurants; wellness spa; and beach club; and

- Cabrits Marina: On the 100-acre site, the Government proposes a marina village of up to 200 slips, haul-out yard, restaurants, bars, shops, offices, condominiums, hillside villas and a 40-bedroom hotel extension.
- Another project (comprising some 75 villas plus hotel) located in the vicinity of Springfield Plantation is understood to be under active consideration, while Government has commissioned designs for a 120-room hotel on a site owned by the Public Works Corporation at Goodwill Road, Roseau. In their present form, plans submitted by the developers for this (and another hotel to be constructed across the Roseau River) are likely to be rejected by the Physical Planning Division..

24.4 VISITOR ATTRACTIONS

24.4.1 Nature Sites

Project Context

Some 206,000 visitors were recorded at the main nature sites during 2011, the great majority of whom were foreign. This compares with 232,000 in 2005. Together, Trafalgar Falls (87,730 visitors) and Emerald Pool (55,975 visitors) accounted for approximately 70 percent of the total number of visitors in 2011, with the highest levels of visitation occurring in the period December to April.

The site improvement component of the ETDP funded the rehabilitation of the different sites. The works included improvements to access routes, boardwalks, safety railings, reconstruction of shelters and reception centres. Key issues include the continuing need for maintenance of pathways and steps, interpretation material which is old or not done to international standards, lack of other things to do, and, at the least-visited sites, inadequate visitor facilities which remain closed except by special advance arrangements for groups, and inadequate car parking facilities.

Capacity issues only arise on cruise ship days when numbers visiting Trafalgar Falls and Emerald Pool can be of the order of 1,700 and 1,500 visitors, respectively. To address this issue, Government has declared Trafalgar Falls to be a "premium site" which (on cruise days) is reserved until 12.00 am for those passengers on pre-booked tours sold aboard ship.

In addition, in order to enhance the visitor experience while at the same time preserving the integrity of the resource sites, there is need for improved access and increased carrying capacity at Trafalgar Falls and Emerald Pool.

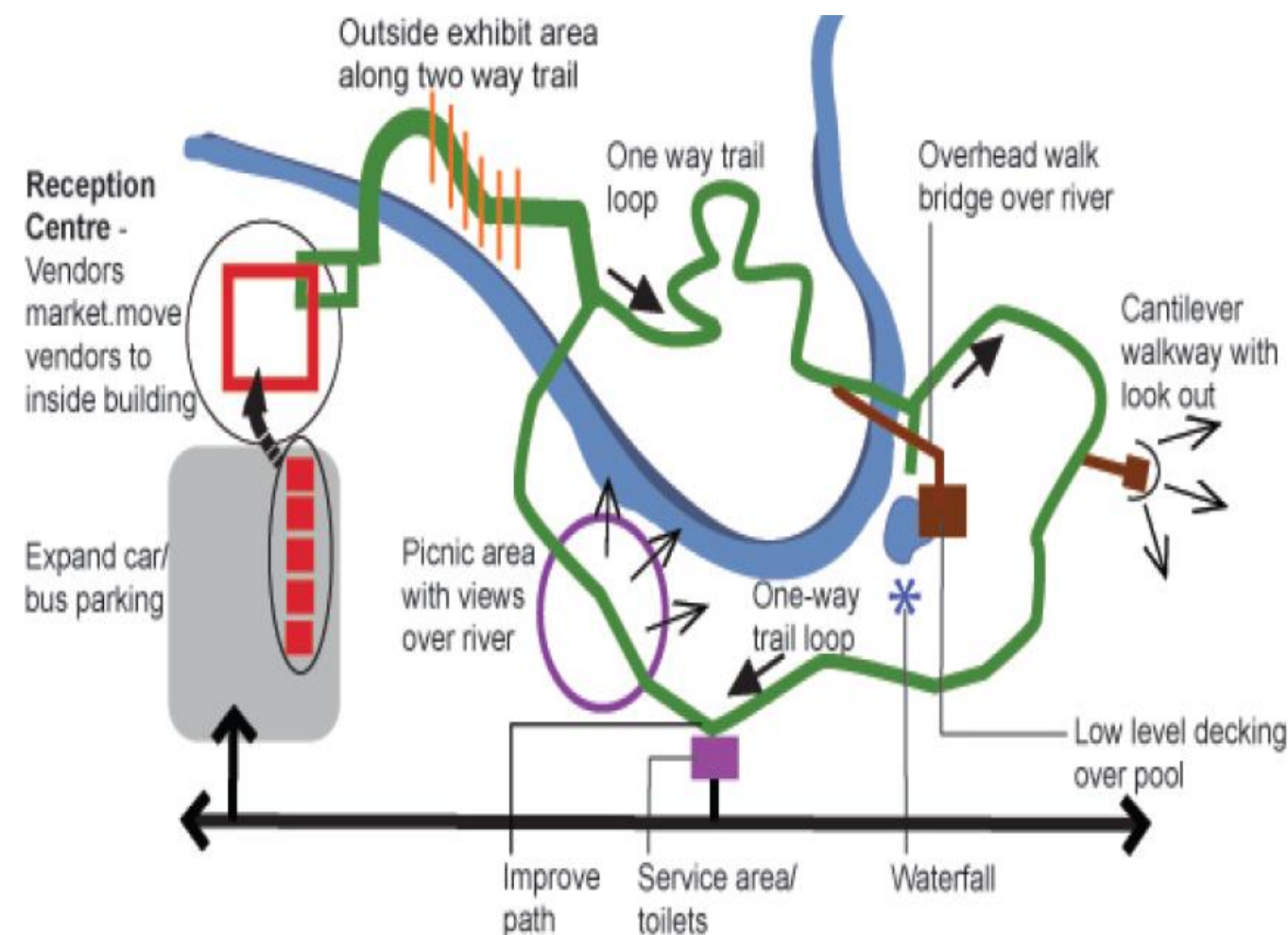
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The main proposals are:

(i) Trafalgar Falls

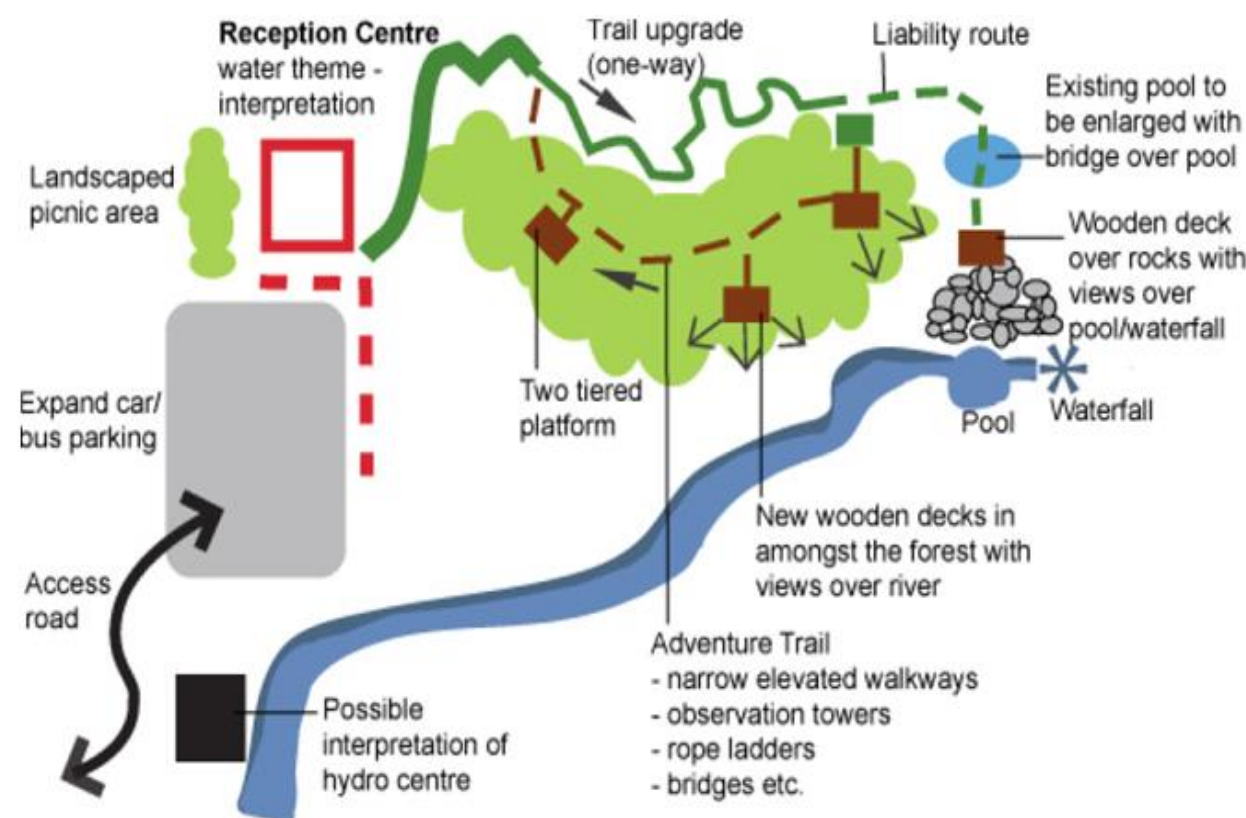
- Expand car/bus parking area;
- Landscaped picnic area;
- Interpretation centre with water theme upgrade;
- Enlarge wooden deck two storey with views over pool/waterfall;
- New wooden decks in amongst the forest with views over river;
- Adventure Trail with narrow elevated walkways, observation tours, rope; ladders, bridges, etc.; and
- Enlargement of existing pool(s).

Implementation of some of these measures will require acquisition of more land which is presently in private ownership.



(ii) Emerald Pool

- Expand car/bus parking area;
- Reception Centre – vendors' market: move vendors inside the building;
- Outside exhibit area along two-way trail;
- One way trail loop
- Low level decking over pool;
- landscaped picnic area with views over river; and
- cantilevered walkway with look out towards Atlantic Coast.



24.4.2 Botanic Gardens

Project Context

In a city noticeably lacking greenery and open green spaces, the Roseau Botanic Gardens (RBG) is a major local amenity which is also visited by cruise and other visitors. Covering an area of approximately 40 acres, the Gardens are home to over 50 types of indigenous plants and imported trees as well as the Sisserou Parrot, as well as a number of buildings (including a school), a cricket pitch and an agricultural research station. However, having lost a large number and variety of plants following Hurricane David (1979) that were not replaced, the RBG as presently arranged look more like a municipal park rather than a botanical garden *per se*. Even then, it lacks the amenities, such as children's playground, tennis or basketball courts, normally found in such a park. The Gardens (which have been the subject of a number of recent consultancies regarding their future use and development) do not showcase Dominica's biodiversity in terms of range of exotic plants, trees, etc.

Content

The recommended development concept to convert the existing Botanic Gardens into a multiple-use amenity park comprises the following main elements:

- Fenced children's playground with slides, paddling pools, climbing frames, tree houses, sand pit, all on a soft ground covered with bark chippings;
- Adventure trail (for older children);
- Tennis and basketball courts;
- Enhancement of existing Aviary;
- Water feature;
- Gazebo (for weddings, etc.);
- Amerindian Garden;
- Orchid House;
- Medicinal Garden;
- Restroom facilities.

and implementation of the 2006 Master Plan's other recommendations for traffic management, including diversion of the existing through road and limitation of admission to pedestrians and cyclists, with exceptions only for disabled and emergency vehicles.

24.4.3 BioPark

Project Context

One of the major 'flagship' projects included in the Tourism Master Plan is the development of a *BioPark* in the Pond Casse area which would showcase Dominica's flora and fauna. It would offer an interactive experience with nature. This could be similar to the highly successful INBio Park in Heredia, Costa Rica, that is part museum, part educational centre, and part nature park.

The BioPark concept would capitalise on Dominica's major strength – its nature resource – significantly enhancing the island's image in this segment of the market. Because of its rainforest, range of plants, etc., Dominica is one of the few islands in the Caribbean that could develop an authentic BioPark. The BioPark would also strengthen the cruise product. It would be a major attraction that would allow cruise passengers to sample the island's nature/eco-tourism product and encourage them to come back for a longer stay. Its location in the Pond Casse vicinity would be convenient for cruise passengers disembarking at any of the island's three cruise berths (Roseau, Woodbridge or Cabrits), or a new facility at Donkey Beach, with road access made easier by the rehabilitation of the West Coast and Melville Hall to Canefield highways. Additionally, the BioPark would not just increase Dominica's capacity to handle greater numbers; it would also relieve pressure on Trafalgar Falls, Emerald Pool and Roseau city itself.

Content

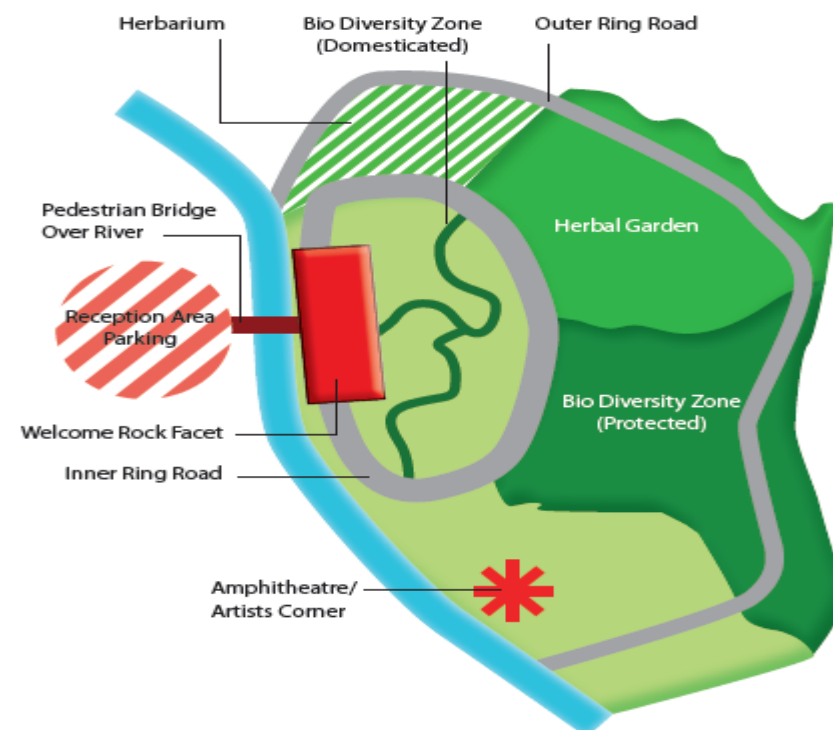
As outlined in the Plan, the development concept for the BioPark, which would require a site of about 10 acres (4 hectares), would include:

- interpretative room – video presentation on what the BioPark contains;
- exhibition areas with interlinking pathways to showcase Dominica's, rainforest, plants, bird life, etc;
- restaurants and retail outlets;
- meeting rooms; and parking.

An outline plan of how the BioPark might look is shown in Figure 24.1 below.

The original proposed location for the BioPark was in the Layou River Valley for which initial feasibility studies were subsequently prepared.* However, following recent flooding and continuing sand mining in this area, it became necessary to look at alternative sites, of which Pond Casse was chosen as the most suitable. The project should now be pursued energetically as having the potential to become a major new attraction not only for Dominica, but for the entire eastern Caribbean.

Figure 24.1: BioPark



24.4.4 Beaches

Project Context

For the most part lacking the traditional white sand beaches associated with the Caribbean, Dominica is not promoted by DDA or tour operators as a beach destination. This undersells the island which does in fact have several outstanding and unspoilt beaches. It is significant that many (but not all) investors are choosing beach locations for their new developments.

The majority of Dominica's beaches are located around the north-western and north-eastern coasts. In contrast, there are no suitable places to swim near Roseau. The nearest suitable beaches are Mero and Scott's Head which are both more than 20 minutes from the city centre. The formerly-popular Donkey Beach at Canefield is now little used (partly because of pollution) and has a neglected appearance, while the beach at Woodbridge Bay has docks on its shoreline and boats on its waters, rendering it somewhat hazardous for swimmers and snorkelers. Botanical Beach (Victoria Street), Champagne Beach and Rock-A-Way are considered to be too rocky. As a result, local people often prefer bathing in rivers.

Content

The main proposal is to provide suitable sea-bathing facilities for residents of, and visitors to, Roseau within a reasonable distance of the city. This could be achieved through enhancement the beach facilities at one of the following beaches:

- Botanical Beach, Victoria Street (for city residents as well as visitors);
- Champagne Beach (for residents and visitors of the area south of Roseau).

The required improvements are:

- Botanical Beach: access (via the library grounds), parking, breakwater, rock pool; more sand; toilet /changing facilities; shade trees.
- Champagne Beach: Access and other facilities have already been greatly enhanced under the EU project, but the "beach" is covered by stones and rocks which makes getting in and out of the sea very difficult for swimmers. There is need for a protected sandy portion that will not be washed away and additional car parking space.

24.4.5 Culture and Heritage

Project Context

Dominica has much to offer in the way of, culture and heritage. It has the only dedicated Carib (Kalinago) territory in the Caribbean, while both the Roseau Historic District (see Section 24.2.1 above), Fort Shirley (within the Cabrits National Park), the well-preserved 18th century Bois Cotlette Plantation in Soufriere (which now offers tours to visitors) and the 'Massa Quarters' of the old Geneva Estate at Grand Bay are significant heritage sites. In addition, there are several important maroon sites and numerous events and festivals (including Carnival and World Creole Festival) which promote local culture and heritage.

Whilst these are interesting attractions for regional and other foreign visitors who happen to on island at the time, apart from Fort Shirley and some of the major festivals, they have not in themselves been a reason for such persons to visit Dominica. They need more enrichment and development.

Measures to enhance the Roseau Historic District have already been outlined in Section 24.2.1 above while Fort Shirley has received considerable assistance under the EU- funded Ecotourism Development Programme (ETDP) the main building has been restored and there is on-going work (now financed largely from admission fees) on restoration of other buildings. Also, at Bois Cotlette, a project involving the estate's 50 acre plot and its 18th century masonry buildings and ruins, is being implemented by its current owners.

Excluding the above on-going projects, the following have been identified as priority culture and heritage projects: *Kalinago Barana Autê*; and Geneva Heritage Park/Art & Crafts Centre at Grand Bay.

* Williams, A and Lugal, A; *Layou Bio Park Concept Plan, Economic & Financial Feasibility*, 2010

(i) Kalinago Barana Autê**Content**

The Carib cultural village (Kalinago Barana Autê) was opened in 2006. It offers visitors cultural group performances, demonstration of Kalinago crafts, the local architecture, an interpretation centre along with local catering for individuals and groups. This is a multi-faceted project offering natural attractions, including well designed trails, views of the Atlantic coastline and a waterfall. However, from its inception the KBA has been operating at a loss, with visitor numbers some 6,300 per annum (comprising 1,300 nationals and 5,000 non-nationals) representing less than one-sixth of the projected 37,500 visitors. Recommended financial input and staffing have not been realized. Since the injection of \$85,000 by the CDB for the first year of operations, the KBA has not been in receipt of any significant financial contribution from or through Government.

A recent report* identified problems with management, product development, maintenance and marketing, and recommended, *inter alia*, that marketing activities should not be given priority over product development and enhancement since this could create a negative effect on visitation. The report's findings and recommendations were discussed at a subsequent meeting held at the KBA in October 2012 at which the main issues/constraints confronting the KBA were identified as the lack of financial resources; the need for administrative staff; and the need for the Kalinago Community to embrace the KBA more fully (and move away from further complaints that the KBA's location was not in accord with the community's original proposal). Amongst others, it was decided that the Government/Ministry of Tourism would oversee the development of the KBA for 3-5 years or up to the point of it being financially and economically viable before handing over total control to the Kalinago Development Committee.

Estimated Cost

The cost of essential capital works is estimated at EC\$110,000, including provision for

- Parking Area Improvement;
- Relocation of Septic Tank and soakaway;
- Enhancement of Pool at the base of the Waterfall;
- Rebuilding of Gazebos (2);
- Expansion of Kitchen Facility/Bar Restaurant;
- Upgrading of Herbal Garden and Identification of Plants;
- Costuming;
- Signage; and
- Office and Computer Equipment, including Desktop Computers (3), Laptop (1) Telephone System, Office Furnishing Equipment for Additional Staff, Camera, Projector, and Television.

The size of the proposed annual subvention from Government has yet to be decided.

In addition, the Ministry of Tourism and Ministry of Carib Affairs agreed to present a joint submission to Cabinet, and the Kalinago Council to approach non-governmental donor /funding agencies in favour of obtaining further resources for the KBA.

(ii) Geneva Heritage Park/Art & Crafts Centre**Content**

While restoration work on what was formerly the 'Massa Quarters' has significantly transformed the building into what is now the Grand Bay Arts & Craft Centre (which forms part of the wider Geneva Heritage Park), there is scope for further development of this site for the presentation of the historical and cultural heritage of this and surrounding communities. It also affords an opportunity of creating a new tourist product with enough critical mass, complexity, interest and variation to have marketability, product and service appeal, and sustainability.

The TMP 2005-2015 recommended the development of a professionally-designed Arts, Crafts and Heritage Complex to add to the existing EU-funded small Arts and Crafts Centre on the grounds of Geneva Estate. Grand Bay could also become a centre for showcasing the products and skills of its own artisans as well as those of surrounding villages.

The complex would comprise four or more now derelict buildings that would be re-designed/reconstructed and used to house the following:

- Arts and Crafts Centre including an area for the performing arts and a display area for high quality locally-produced art and souvenirs;
- Bay Oil, Essential Oils and Coconut Museum: here, tourists would see displays of the raw products, and the old machinery (including stills), understand how the products were grown and processed historically and today, and see finished products which would be available for purchase, e.g. small bottles of bay rum, coconut sweets, coconut water, and other products made from coconut, etc. Dominica Coconut Products and Coalpot Soaps, which use the essential oils, can also be part of this;
- The Coffee and Cocoa Shop where, in addition to beverages, locally produced and roasted coffee beans and coffee could be on display and sold. The process from growing to harvesting could be explained on side panels; and
- Jean Rhys Centre and general museum: in this building, the story of the well-known author, whose family once owned the Geneva Estate, would be told as part of an exposition of the varied social-economic and cultural heritage of the area.

In addition, a series of nature trails with areas for sitting/relaxing would be incorporated into the site. The trails would lead to separate areas where trees and herbs linked to the heritage complex would be displayed for visitors to see. Finally, car parking would be provided to adequately cater for cruise ship passengers and other visitors, as well as local visitors.

The project should also have a training component to ensure production of quality arts and crafts, as well as quality production and presentation of any food and beverage items for sale. The Coffee and Cocoa Shop could be leased to a professional business with input from the communities.

Estimated Cost

The cost of implementation has been provisionally estimated in the TMP at around EC\$1 million, including construction, trail development, sourcing of equipment and materials, training including presentation, management etc. The land is government-owned.

* Carib Territory Community Capacity Building Project: Revised Business Plan 2011-2015 (prepared for the Ministry of Carib Affairs, Eclipse Consulting, March 2011).

Action

This is seen as a major project that would be of great significance for the development of culture and heritage tourism for the whole of Dominica. Implementation would be overseen by the Ministry of Tourism and DDA (design and construction), working together with local architects and historians, and by the Division of Culture as regards sourcing of content, material, personnel.

Technical Assistance should be sought from Guadeloupe or Martinique for the design, management and operation of this complex.

24.4.6 Golf

Project Context

Dominica is one of the few Caribbean destinations - apart from the very smallest - that does not have a golf course.

Golf has been identified as a niche product having good potential for Dominica. It is the sort of product that can appeal to both stay-over tourists (who are said by some local hoteliers to have insufficient things to do) and cruise visitors, as well as local residents, both Dominican and non-Dominican.

The TMP 2005-2015 provides for an 18-hole golf course at the privately-owned Hampstead estate and a 9-hole course on government-owned land at Cabrits, with associated hotel and real estate developments. Other locations in Dominica that could be suitable for golf development include the rolling hills behind Jimmit/Warner (inland from the West Coast); and the Government-owned Londonderry Estate (which offers a combination of flat and gently undulating land, close to sea and river, and would be easily accessible to new tourism developments in the north and along the east coast).

There is need to assess the suitability of these and other potential sites for golf course development. On average, an 18-hole golf course with a practice area will require between 60 and 90 hectares of usable land, and about half of that for a 9-hole course. Typically, golf courses set within a residential development require more land.

Nearly always, golf projects are linked to accompanying real estate developments which help to finance the design and construction of the golf course. The great majority form part of resort cum-real estate developments, but some (e.g. in Barbados, Belize, Bermuda, Martinique, Puerto Rico) are government-owned public courses.

Content

It is essential to establish from the outset whether the project is feasible. This will be determined by the commission of the following studies:

- A report by a golf course architect to examine the suitability of the potential site(s) for golf. (including the physical elements of the sites, such as land area, topography, soils, geology, vegetation, drainage and water availability, and other restraints such as legal and environmental restrictions, surrounding land use, local infrastructure and location of services, and any potential conflicts (such as public rights of way) or safety issues which are likely to occur. The information gathered from this study should allow an approximate golf course construction cost to be compiled; and
- An economic and financial feasibility study covering market demand (residents, stay-over tourists, cruise visitors); ownership structures: whether public, private or resort structure; financial considerations: approximate development cost, annual operating costs; revenue projections; and project financing.

An Environmental Impact Assessment will also be needed to address environmental issues which can be extremely important and even contentious. Some environmentalists believe that a golf course -- which typically requires large applications of fertilizer and pesticides -- could pose a danger, though run-off, to the ecologies of the barrier reef and sea. To overcome this, developers use a special hybrid grass which requires considerably less fertilizers, pesticides and irrigation.

Where a particular site has been identified, these studies can often be combined. Once the feasibility of the project has been determined, the next step would be to develop a master plan using information gathered from the site suitability and economic and financial studies. This will include golf course layout, locations of clubhouse and maintenance facilities, road and infrastructure layout, and approximate construction programmes and budgets.

Draft Terms of Reference for the required feasibility studies have already been prepared (and are with DDA). The next step is to secure funding for these studies and to recruit and appoint a suitable consultant, with experience of golf projects.

25. IMPROVE ECONOMIC INFRASTRUCTURE

25.1 UPGRADING OF AIRPORT TERMINAL FACILITIES

Melville Hall

- increase number of check-in desks and more space for security screening;
- additional baggage belt in baggage claim area;
- construct arrivals concourse.

Canefield

The major infrastructure need is a fuel supply facility to increase the revenue payload of flights to/from Canefield. Further, if hours of operation have to be extended (not envisaged in the near term) then the lighting system will have to be restored. The infrastructure for such is already in place.

25.2 ENHANCEMENT OF CRUISE TERMINAL AND PASSENGER FACILITIES

Project Context

Space constraints at both Roseau and Woodbridge Bay affect the island's capacity to provide adequate terminal and passenger facilities for the new generation of cruise vessels. It has been suggested that these facilities could alternatively be located at Donkey Beach, adjacent to the existing Canefield industrial estate. The depth of water is more than adequate but there is at present no protection from strong winds and heavy seas. A breakwater would need to be provided. The terminal should be capable handling one mega-cruise ship without limitations, and have a covered reception area, adequate passenger facilities and infrastructure, and bus and taxi terminals. In other destinations (e.g. St. Thomas), the cruise lines themselves have contributed towards the cost of new port facilities, attracted too by potential real estate development opportunities.

This would allow the withdrawal of cruise traffic from Woodbridge Bay, which would then revert to handling only commercial traffic, while Roseau would accommodate mainly smaller vessels more appropriate in size to the city's receptive capacity.

Content

It is essential to establish from the outset whether the project is feasible and how it might impact on operations at Canefield airport. This should be determined by the commission of the following studies:

- A detailed marine investigation
- A report to examine the suitability of the potential landside site(s) for the proposed development. This study should examine the physical elements of the site(s), such as land area, topography, soils, geology, vegetation, drainage and water availability, legal and environmental restrictions, surrounding land use, local infrastructure and location of services, and identify any potential conflicts (such as public rights of way) or safety issues which are likely to occur; and
- An economic and financial feasibility study covering financial considerations: approximate development cost, annual operating costs; revenue projections; and project financing (including cruise line contributions).

The next steps are for DDA/DASPA to prepare terms of reference and secure funding for the (i) marine; (ii) site suitability and (iii) the economic and financial feasibility studies.

25.3 ROAD IMPROVEMENTS

Project Context

The recent and on-going improvements to the road network open up the possibility of developing a self-drive or chauffeur-driven general touring product in Dominica, which can produce benefits for both the visitor (stay-over and cruise) and host communities.

In order to further develop this product, the main needs are (i) designation and upgrading of touring routes; (ii) provision of improved road signage, lay-bys for scenic viewing, picnic sites; and (iii) a better road map and touring brochure (indicating points of interest, tourist facilities and amenities, and other useful information). In time, small scale refreshment facilities could be provided along the routes.

Road improvements are also needed in urban areas, particularly Roseau.

Content

For tourism purposes, the priority road improvement projects are

- rehabilitation and upgrading of the scenic road from Grand Bay via Petite Savanne and Delices to La Plaine;
- construction of a new road between Rosalie and Petit **Soufrière** (which is now the only 'missing link' on the proposed *Ring of Dominica* scenic coastal route circumnavigating the island);
- repair of pavements, gutters and road surface on and around Victoria Street, Roseau (which, for such an important tourist area, are in a deplorable condition); and
- provision of improved signage, particularly in Roseau, and lay-bys on main roads.



26. FURTHER DEVELOP CRUISE TOURISM

26.1 DEMAND AND SUPPLY

Cruise tourism has been one of the fastest growing tourism products in recent times, recording an annual compound growth rate of 7.4 percent in the number of passengers from 1990-2012. Over the past decade, the cruise industry has consistently outperformed economic performance and that of the travel and tourism sector in particular, with CLIA member ships sailing at 100+ percent occupancies throughout the recent recession period in North America and Europe.

With the expansion of the cruise fleet, passenger numbers are expected to continue to grow, reaching 22.4 million worldwide by 2015 compared with the 13.2 million people who took cruises in 2008, an increase of 70 percent [Source: Cruise Line Industry Association].

Part of the recent (and projected) increase in the number of cruise passengers is driven by increased supply as more ships enter the market each year and more berths need to be filled.

CLIA's associated lines added a total of 17 new ships to their fleets in 2008, 14 more in 2009 and more than 12 in 2010-12, including CCL's *Carnival Breeze* (3,690 passengers), Celebrity Cruises' *Reflection* (3,030 passengers), and Royal Caribbean's *Oasis of the Seas* which, together with its sister ship *Allure of the Seas*, has the world's largest passenger capacity (5,400 passengers or more). The cruise lines are poised to add a further 17 new ocean-going ships in 2013-15 including CCL's *Carnival Magic* (3,652 passengers); Celebrity Cruises' *Silhouette* (2,850 passengers); MSC Cruises' *Divina* (3,502 passengers); Princess' *Royal Princess* (3,600 passengers) and another as yet unnamed (also 3,600 passengers); NCL's *Norwegian Breakaway* and *Breakaway Plus* (each 4,200 passengers) and the Disney Cruise Line's *Dream* (4,000 passengers) and *Fantasy* (2,500 passengers).

Reflecting the trend towards ever larger 'mega-ships', Royal Caribbean has confirmed that it is looking to build a third Oasis-class ship for delivery in 2016 in addition to two 4,100-passenger ships, code-named *Project Sunshine*, due for delivery in 2014 and 2015.

The continuing economic downturn has forced cruise lines to offer substantial price discounts in order to generate the requisite volume for these new ships which they need to fill almost at any price. Growth strategies to date have been driven by shorter cruises; use of more local ports; new destinations and new on-board/on-shore activities; increased choice in dining experiences, including more local sourcing of food; and continued evolution of on-board spas, including top-branded spa partners.

These activities are helping to increase penetration in a core North American market that still has considerable growth potential given that only slightly more than half of the North American target market (53 percent) has ever taken an ocean cruise.

26.2 GROWTH FORECASTS

According to *Cruise Market Watch*, the total number of cruise passengers is projected to increase from 20.1 million in 2012 to 22.4 million in 2015, representing an average growth rate of around 3.6 percent per year (down from 5.0 percent in 2012 and 4.1 percent in 2011). For North Americans taking a cruise (62 percent of the total in 2012), the average growth rate is somewhat lower at 3.1 percent per year. Details are shown in Table 26.1.

Among the expected "hot" destinations of the coming years are all regions of Europe, including European rivers, which are currently enjoying increasing consumer interest, as well as the Caribbean, South America, Asia, and the Pacific.

Table 26.1: Number of Cruise Passengers by Region of Origin, 2009-2015

Year	North America ('000)	Europe ('000)	Other ('000)	Total ('000)	Annual % Change
2009	10,887	4,339	1,990	17,216	-
2010	11,749	4,453	2,220	18,421	7.0
2011	12,177	4,684	2,317	19,177	4.1
2012	12,582	5,053	2,500	20,135	5.0 (e)
2013	12,972	5,261	2,627	20,860	3.6 (p)
2014	13,374	5,476	2,761	21,612	3.6 (p)
2015	13,789	5,701	2,902	22,392	3.6 (p)

(e) estimated (p) projected

Source: CLIA and Cruise Market Watch

26.3 CARIBBEAN

The Caribbean is the world's most popular cruise destination. According to CLIA, in 2011 some 40 percent of the industry's global bed day capacity was deployed throughout the Caribbean, including The Bahamas. Put differently, this means that cruise ships operating in the region had sufficient capacity to carry over 6.0 million passengers in 2011. [Note: CTO estimates that about 20 million cruise passengers arrived at 22 reporting destinations in the Caribbean during 2011, but, since cruise ships call at multiple destinations on any single itinerary, passenger arrivals are always significantly higher than passenger capacity].

Data from the 2010/11 FCCA/BREA survey of cruise tourism for 21 participating destinations in the Caribbean shows that some 70 percent of total passengers and crew covered by the survey arrived at participating destinations in the Eastern Caribbean, including Dominica, compared with 13 percent at destinations in the Southern Caribbean and 17 percent at destinations in the Western Caribbean. Over three-quarters of the surveyed passengers were residents of the United States, with a further 12 percent from Canada; 10 percent from the United Kingdom; and the remaining 3 percent from a broad range of countries.

The growth forecast of 3.1 percent per year for the number of North Americans taking a cruise in 2012-15 is therefore broadly applicable to the Caribbean, particularly the eastern Caribbean, which depends so heavily on the US/Canada cruise market. Thus, although lower than the forecast for destinations outside the Caribbean, demand for Caribbean cruises is expected by FCCA (as stated in *Cruise Industry Overview 2012*) to remain buoyant over the next few years. This optimistic outlook is also based on current consumer attitudes and trends. For example, CLIA's most recent *Cruise Market Profile Study* shows that some 36.1 million Americans (from a core target market of 133 million) expressed an interest in cruising within the next three years, up from 31 million in 2006. This is attributed to the fact that US vacationers may choose less expensive cruise tours rather than paying for more costly holidays in other parts of the world.

For Dominica, this is reflected in a healthier booking schedule for the 2013/14 cruise season, with Carnival planning to make a crucial return visit in December 2013. As well as continued marketing to cruise lines, there is need to address some of the less-than-high satisfaction levels amongst cruise passengers with their onshore experiences in Dominica, particularly the overall shopping position (including variety of shops and prices) for which it was placed last in comparison with eight other eastern Caribbean destinations, and for the 'friendliness of its people' for which it was placed joint last (but this may reflect instances of harassment on the BayFront by vagrants and similar persons).of

26.4 RECOMMENDATIONS

The following are the main recommendations for further developing cruise tourism:

- (i) Enhance the quality of the experience at nature sites for cruise (as well as other) visitors, without compromising the integrity of the resource. Under the TMP 2005-2015, detailed proposals were put forward for increasing carrying capacity and other measures at Trafalgar Falls and Emerald Pool (the two most threatened sites). This is still necessary even with the recent designation of Trafalgar Falls as a "premium site" for cruise visitors. These proposals are reproduced in section 24.4.1 above.. In the case of Trafalgar Falls, it will be necessary to expand the publicly-owned land area by acquiring additional land from the adjoining owner.
- (ii) Construct a new dedicated cruise terminal and cruise village for the next generation of cruise ship, including mega ships. It was originally proposed to achieve this through redevelopment of Woodbridge Bay to facilitate larger cruise ships and provide better facilities for passengers, including a new Cruise Village.
- (iii) Given the lack of available space at both Roseau and Woodbridge Bay, it has been suggested that these facilities could alternatively be located at Donkey Beach, adjacent to the existing Canefield industrial estate. The depth of water is more than adequate but there is at present no protection from strong winds and heavy seas. A breakwater may need to be provided. The terminal should be capable handling one mega-cruise ship without limitations, and have a covered reception area, adequate passenger facilities and infrastructure, and bus and taxi terminals. In other destinations (e.g. St. Thomas), the cruise lines themselves have contributed towards the cost of new port facilities, attracted too by potential real estate development opportunities. This would allow the withdrawal of cruise traffic from Woodbridge Bay, which would then revert to handling only commercial traffic, while Roseau would accommodate mainly smaller vessels more appropriate in size to the city's receptive capacity. Detailed feasibility studies would first need to be carried out; and
- (iv) Implementation of the TMP's proposal for development of a BioPark at Pond Casse that would showcase Dominica's flora and fauna and offer visitors, including cruise visitors who would constitute its principal target market, an interactive experience with nature. This project (for which initial studies have been done) should be pursued energetically as having the potential to become a major new attraction not only for Dominica, but for the entire eastern Caribbean.

27. STRENGTHENING LINKAGES WITH COMMUNITIES

Strengthening the linkages between communities and the tourism sector is an important objective of both tourism policy and the TMP. Sustainable tourism development cannot function solely on its own. Instead, it should become an integrated part of the local community.

The main issue is what is the best modality to achieve this aim.

One approach is to support particular community tourism-related initiatives; the other is to support the location of commercial enterprises (e.g. hotel development) close to a community, which would benefit from supplying goods and services to the operation as well as the direct and indirect employment generated. The former modality was the approach adopted under the EU funded ETDP and SFA programmes, and there are mixed views as to the extent to which the communities affected have actually benefited – at least until now – from these programmes. Although the second approach has not been formally adapted to date, there is some evidence that such a modality can yield significant direct and indirect benefits to the local community. From this perspective, it is argued that it is the hotels that are providing the real benefits for communities through employment generation and purchases from local suppliers. In Dominica, some hotels have already become an integral part of the community, supporting various community projects over the years (education, youth development, craft training, etc.) as well as providing direct employment for members of the local population (and their extended families) and income for local suppliers of fruit, vegetables, fish, etc. In addition, some hoteliers participate in an island-wide entrepreneurship development programme for Dominicans.

Thus, in practice, the two modalities are not mutually exclusive, and each can be pursued in tandem. New developments should provide employment, utilize local resources, skills and labour and connect with any community tourism products that exist in the area. The mutual respect achieved from a functioning relationship between a community and a development, can lead to a strong bond and contribute to a tourism project's chance of success.

Challenges

The main challenges (as seen by DCTAI) affecting the development of community tourism in Dominica are listed in Table 27.1:

Tourism in Villages

DCTAI has also proposed a possible new dimension in Dominica's tourism product, i.e. development and promotion of, "Villages as Businesses" where groups of visitors will be guests of the communities/villages. There they will receive an 'experience' from within the community.

Under this scheme, packages would be developed and sold on the market for visitor groups for three or five day stay-overs within the community. Village Councils would play a part in ensuring and assisting with cleanliness and standards being kept both in the community and the home-stays.

Table 27.1: Challenges Affecting Community Tourism Development

Challenge	Solutions	Remarks
Harassment of visitors at facilities	Full-fledged community policing Employment of social workers within communities	To commence as a matter of urgency More scholarships for social workers
Harassment of visitors on Waitukubuli Trail	Employment of security/policing on identified segments	Urgent legislation with incorporation of stiff penalties
Assistance with project development/proposal writing	Officer to be attached to Ministry for sole purpose specifically	Employment of a consultant for a minimum of two years
Need for well-trained tour guides	Financial assistance with their training	Particular training to specific areas
Infrastructural support for communities on seafronts	Engagement of specialists e.g. marine engineers	Feasibility and design for Caribantic, Rodney's Rock, Au Parc, Portsmouth/Indian River and Layou
Infrastructural assistance for other community facilities	Design and funding requirements	Capuchin, GTEC, Bense/Chaudiere, River Cyrique, L-Escalier Tete Chien
Need for official Secretariat establishment	Funding for Secretariat	-
Smooth coordination with Council and other community-based organisations where they exist.	Committees comprising representatives from various local agencies	Frequent meetings to apprise of developments/changes, etc.
Elimination of political dimensions		Caribantic, Portsmouth/Indian River entity
Efficiency in management of community tour product	Establishment of proper management structures	-
Product enhancement/extension procedures and assistance	Identification of agencies to assist	e.g. Forestry, DDA
Identification of agencies willing to assist the community tourism project	-	e.g. GEF, BNTF, EU, UNESCO, USAID, Rio Summit and Mexican Gov't
Identification of linkages among communities for effectiveness of the product	-	e.g. Soufriere and Scott's Head, L-Escalier Tete Chien and Kalinago Barana Aute
Regulation and finalization of the agreement, etc. where facilities/products traverse through private lands	Government surveys and discussion with property owners	e.g. Cold Soufriere and Wotten Waven
Assistance with the construction of home stays BUILDINGS	Funding to assist community folk with additions to homes to accommodate over-nighters	
Insurance of community sites		

Source: Dominica Community Tourism Association, Inc.

A key component of that experience would be the development of friendships with the schools and elders of the community that might even result in the generation of assistance with community projects e.g. roads, community structures, etc.

For this new venture the question of 'home-stays' has to be addressed in terms of:

- having home-stay accommodation meet the standards of the DDA; and
- assistance to community residents (preferably grant) to develop/improve on rooms and/or extension to homes within the community

Waitukubuli National Trail

The Waitukubuli National Trail ranks amongst the premier walking trails of the world, and is attracting a growing number of users (but needs many more to ensure its survival). As stated in *The Users' Guide to Waitukubuli National Trail* (DDA 2011), the provision of accommodation along, or adjacent to, the Trail will give the rural communities a vested interest in its success as providers of accommodation and other services. In turn, it gives walkers an opportunity to get to know the people who live and work along the route. At the end of the Users' Guide, there is a list of the accommodation providers. The majority are classified as home stays, and the remainder are guest houses. It is stated that all the listed accommodation providers can provide a "hearty" evening meal and a packed lunch. In addition, some of the villages along, or close to, the Trail have restaurants and all have small shops that sell drinks and snacks.

While this is all very well on paper, in reality there are a number of issues (some of which have been raised by respondents to our market surveys) that need to be addressed before communities can reap the anticipated benefits from the Trail and its users, including:

- Need for good quality accommodation and food at end of each trail segment. While quality standards have been approved for home stay accommodation, as well as guest houses and other types of visitor accommodation, few if any food providers have been certified by DDA and the standard of food can often fall below expectations;
- Need to upgrade some of the accommodation being offered to users of the Trail. This could take the form of soft loans, or better still grants, to accommodation providers, perhaps (as was done in Ireland) through a special rural or farmhouse accommodation fund;
- Need to streamline marketing and reservation arrangements (e.g. through a central bookings facility operated via a paid secretariat at the CTA headquarters). Individual tour operators (such as *Experience Caribbean* and Khatt's) would continue to do their own marketing and operation of home stay/farm tour packages, including arrangements for the transfer of hikers' sleeping equipment from one stop to the next along the Trail; and (perhaps most important of all)
- Need to 'nip firmly in the bud' any evidence or tendency, whether anecdotal or real, of harassment of users' of the Trail.

To guide any future support for community tourism projects, it would be useful to establish benchmarks in respect to the optimum modalities for achieving a better integration between tourism and the communities. These benchmarks could be determined by means of a separate study covering:

- A survey among hotels, restaurants and other tourism operations to determine the direct employment (full-time and part-time) and the extent to which they purchase goods and services from the local community where they are located and any difficulties encountered;

- A survey among the community itself to determine the extent to which they consider that they benefit from tourism; and any difficulties they encounter in getting more involved in tourism; and
- consideration of best practice elsewhere and lessons from experience.

LOCATION OF LOCAL MUNICIPALITIES/VILLAGE COUNCILS AND COMMUNITY TOURISM PROJECTS



28. ENHANCE HUMAN RESOURCE DEVELOPMENT AND STANDARDS

28.1 ESTABLISH A TOURISM HRD PROGRAMME

28.1.1 Training Needs

The coming on-stream of the planned investments as outlined earlier in section 6.4.4 will create around 1,300 new job opportunities in the tourism sector over the next ten years. There is need to not only provide training for persons wishing to enter the hospitality sector but also on-going on-the-job training for existing staff within the industry who currently lack adequate skills to perform their jobs in a satisfactory manner.

The requirement is to establish a system for formal, certified training at all levels, including

- vocational craft skill (table waiting, bar service, cooking, food preparations and presentation, housekeeping);
- supervisory and middle management; and
- senior management/entrepreneurial levels.

This should also include specialist training for tour guiding (urban/cultural/heritage guiding and nature/wildlife guiding); customer care training for all front-line personnel (such as customs & immigration), and in foreign languages (especially French, Spanish, German).

The CTO Dominica Training Needs Assessment (2004) identified the priority training requirements for all staff categories as (in descending order)

- Computer Literacy;
- Foreign Languages: French, Spanish, German;
- Customer Relations; and
- Communication.

with Marketing singled out as priority for Managers and Customer Relations for skilled/semi-skilled and unskilled workers.

This assessment needs to be updated.

28.1.2 Training Delivery

DSC should, as has been mandated, assume responsibility for the delivery of all tourism training. It would do this through the Tourism and Hospitality Department (and the Department for Continuing Education for short ad hoc courses). Some foreign language training might be outsourced (e.g. French via the *Alliance Française*).

For this, DSC will require the necessary technical and financial support. The most pressing need is for suitable new accommodation to house the Tourism & Hospitality Department (for which no provision is made in the new building currently under construction at the Stock Farm campus). The present accommodation is very inadequate.

Some EC\$1.6 million was originally allocated from STABEX funds for the construction and equipping of training rooms and a demonstration kitchen at the College, which originally was

expected to have been completed by mid-2007. The EU had originally allocated EC\$ \$500,000 as the first tranche for this project, but the project did not go ahead and in the meantime the cost will have increased to around EC\$2 million at today's prices. The DSC needs to make a new application to the EU for funding of this project. The original unused allocation is presumably still available. Drawings and a plan for the new building have already been sent to the Physical Planning Division for approval. This also needs to be followed up.

28.2 RAISE QUALITY STANDARDS

28.2.1 Quality Standards

Implementing a licensing and standards system is a complex and lengthy task which requires the backing of the industry, trained and proficient inspectors, and regular, impartial monitoring. It is important that sufficient resources are allocated for its implementation.

Whilst standards are generally accepted as necessary, there is some resistance in Dominica to the interpretation of the standards during inspections and some operators do not have the wherewithal to invest to meet the standards. There is also resistance to the compulsory training that is required as part of the licensing requirements.

Lessons learned from other countries are that there must be a robust compliance regime that has the confidence of the sector. It must be backed up by consistent equitable application of penalties for those enterprises not in compliance. At present, penalties for non-compliance are not enforced consistently.

To carry out all the above tasks, the presently understaffed and over-burdened QA Unit must be strengthened and restructured. The main recommendations are

- recruitment of a Compliance Officer as well as an Administrative Officer;
- re-location of the QA Unit to the Ministry of Tourism;
- Outsourcing of additional inspections (e.g. Food & Beverage Preparation and Water Sports); and
- if, after every effort has been made and sufficient time given to enable operators to comply, they still do not do so, then the prescribed legal sanctions should be enforced following the procedures specified in the Act.

Additionally, there must be support mechanisms in the form of quality improvement programmes to assist operators to improve their competitiveness.

28.2.2 Quality Assurance

At present, the QA Unit's work is primarily towards compliance with little opportunity to support quality assurance.

Quality assurance programmes and methodologies are designed to enable tourism enterprises to improve their business processes and, as a consequence, their competitiveness. They are designed around recognized methodologies such as the

Hospitality Assured (HA) programme (currently being introduced via CTO into the Caribbean region). So far, two hotel properties in Dominica have received certification under the HA programme. More should be encouraged to do likewise.

The appointment of a Product Development Executive will enable the Head of the DDA Product Development Department (who is a trained HA supervisor) to devote more time and resources to quality assurance. In addition, there should be greater outreach to the tourism sector to apprise operators of quality assurance matters. These should include regular consultations with industry associations such as DHTA and DWA.

28.2.3 Classification and Grading

We are not at this stage recommending the immediate introduction of a classification or grading system which might in any case be sub-contracted to a respected external rating agency.

29. BETTER SECTOR MANAGEMENT

29.1 TOURISM DEVELOPMENT FUND

29.1.1 Project Context

Reflecting the current difficulty of obtaining bank loans, partly because the present lending terms (interest rate, deposit, payback period) are perceived as too onerous, there is need for a soft loan facility for worthwhile projects in the tourism sector. This is particularly needed in the case of home stay accommodation and community-based projects.

29.1.2 Content

The aim of the fund is to support the development of the smaller enterprises in the tourism sector through the creation of a soft loan facility for approved tourism-related projects. It would be administered via a financial institution. Whilst this is likely to be used primarily for loans to accommodation providers and community-based projects, it should also be available for related marketing activity and training and could also be accessed by promoters of tourist attractions and for community projects.

Disbursements from the Fund could take the form of soft loans or grants, or some combination of both. Based on experience in other countries, it is likely that the success rate for loan-assisted projects would be considerably higher than in the case of grants, especially when administered by a commercial financial institution. In Montserrat, assistance under the Tourism Challenge Fund was provided in the form of grants rather than loans, up to a maximum of EC\$200,000 for any one project. The overall success rate was about 30%-40% which is regarded as "about normal" for grant-aided projects.

It is therefore proposed that a Tourism Development Fund be established within one of Dominica's commercial banks or credit unions for disbursement at reduced borrowing rates for worthwhile tourism-related projects. A Selection Panel or Board of Trustees would oversee the selection of successful applicants. If administered via a commercial bank, the bank would require (a) an administration fee and (b) a guarantee that it would be able to obtain compensation from the Fund in the case of non-performing loans so as to ensure that its bad debt provision remained within the Eastern Caribbean Central Bank's capital requirements.

The Fund would need to be capitalized with an initial sum of circa EC\$5 million to be provided through GOCD. The initial sum would be returned, less outright grants, when the scheme is wound up after a specified period.

29.2 PERFORMANCE MONITORING AND CONTROL

An important management tool is to have some monitoring and control mechanism for ensuring that expenditures on marketing activities to stimulate demand for travel are synchronised with the access transport capacity and services, and that both are in sync with the supply of the tourism product (particularly accommodation) and the supply of skilled labour. In the absence of such a mechanism there can be considerable waste of resources and effort on all sides.

To provide such a monitoring and control mechanism which would demonstrate the interdependencies between marketing, access, accommodation supply and labour requirements, we recommend the construction of a practical statistical model which would

simulate the operation of the tourism sector in respect of these factors. Whereas use of such a model would not provide answers to specific questions such as how much should be spent on marketing or how many seats should be provided on a particular air route, the model would nonetheless provide indicators with regard to capacity bottlenecks or excess supply or misallocation of marketing resources and prompt timely action to address these issues.

This monitoring and control model would also have the capability of simulating different tourism growth scenarios and showing their implications for marketing, access transport, accommodation supply, labour, and economic infrastructure. In this regard it would assist the regular updating of the TMP and Tourism Policy and underpin the SMART approach to tourism planning and implementation.

Using Microsoft Excel, the model would be a simple and practical management tool, easy to understand and up-date regularly, without the need for extensive data collection or complex statistical algorithms.

29.3 TOURISM AND ENVIRONMENTAL AWARENESS

The growth and expansion of the tourism sector will need to be underpinned by a broad tourism and environmental awareness programme if it is to be successful. Although the environment can be protected to some extent by legislation and regulations, these are reactive measures. The ideal situation is one where people have an appreciation and positive interaction with the environment.

It is also important to sensitise communities and the population in general to the nature of tourism – how tourism benefits the country, how individuals and communities can benefit from tourism, etc – in order to manage expectations. While the objective of spreading the economic benefits from tourism to communities is a valid one, this aim is neither easily nor equally achieved for all communities. As a result there is a danger of unrealistic expectations turning into disillusionment for some communities or mistrust of tourism as a strategy for economic development.

The elements of this programme would include:

- Leaflets on the value of tourism to Dominicans and to communities.
- Leaflets on how to treat tourists and other visitors.
- Regular 'clean-up' campaigns
 - annual 'tidy communities or villages' competition
- Radio tourism programme.
- Tourism awareness week.
- Tourism and Environment Awareness courses directed to various stakeholders (secondary tourism suppliers, schools, customs & immigration, etc.).
- Booklet on careers in tourism for Dominicans.

29.4 GREEN GLOBE AND SIMILAR BENCHMARKING

As the first country ever to receive benchmark designation from the prestigious eco-tourism organisation, Green Globe 21, Dominica is a leader in the promotion and development of sustainable tourism, not just in the Caribbean but globally. This helps to further position Dominica as a world class eco-tourism destination.

In addition to the national designation, a number of hotels in Dominica have also achieved successful benchmarking status from Green Globe 21, meeting specified standards in key performance areas, such as carbon footprint, energy consumption, solid waste production, greenhouse gas production, social commitment, resource and habitat conservation, sustainability policy, community involvement and more.

It is important that, as well as existing hotels and other tourism-related enterprises, all new developments conform to the image that Dominica wishes to project as *Nature Island of the Caribbean* by meeting eco-tourism performance standards set by Green Globe, EarthCheck, the UK-based Green Tourism and other sustainable tourism certification programmes, as well as helping to protect and conserve the island's natural cultural heritage, and respecting social and community values.

29.5 LAND USE AND PHYSICAL MASTER PLAN

The approach to tourism product development extends well beyond the elements of the tourism themes and marketing strategy. The tourism industry must also be attuned to development and planning procedures. Tourism growth will put additional pressures on the planning process. These pressures will be compounded by growing environmental awareness and greater community participation in planning. Physical planning in Dominica needs to be substantially strengthened and emphasized in the development process since the island faces difficult choices about resource allocation and management of the environment.

29.5.1 Prepare Land Use and Physical Master Plan

It is important therefore that a Land Use and Physical Master Plan be prepared as soon as possible to provide an explicit policy and physical planning framework conducive to long term economic and tourism development. Clear land-use zoning and associated physical development plans will permit a more efficient and sustainable use of land resources. Environmental management capacity building will provide support for technical evaluation, regulation and monitoring of development projects.

Within the context of the Physical Master Plan development guidelines would be outlined. The land use plan would also examine the issue of 'carrying capacity' for identified tourism zones and sites.

29.5.2 Prepare TDA Action Plans

TDA Action Plans should also be prepared as soon as possible. TDAs are proposed to take an environmentally strategic view of tourism areas and lay down the first steps for future actions on the part of Government in achieving long term sustainable development.

Additional resources – both human and technical – will be needed by the Physical Planning Division to prepare the Land Use and Physical Master Plan and the TDA Action Plans.

30. REORGANISE AND STRENGTHEN INSTITUTIONAL ARRANGEMENTS

The findings of our review are that the current institutional arrangements are not appropriate for the future development of tourism in Dominica.

We recommend:

- establishment of a Ministry of Tourism & Transport
- a streamlined and strengthened Tourism Division
- a National Parks Services Agency
- a focused mandate for the DDA
- an Environmental Protection Agency
- a National Heritage Trust.

30.1 ESTABLISHMENT OF A MINISTRY OF TOURISM & TRANSPORT

Because air and sea access is key to the successful development of Dominica's tourism industry, transport and tourism affairs should be coordinated within one Ministry.

30.2 STREAMLINED AND STRENGTHENED TOURISM DIVISION

As the Tourism Division will be responsible for spearheading the implementation of the TMP, the organisation will need to be streamlined and strengthened.

With the transfer of site management operations to the proposed Forestry & Wildlife Division (and subsequently to the National Parks Services Agency), we recommend the accompanying organisational structure (Diagram 30.1).

Additional staff will be required, particularly for the project management unit needed to coordinate the actions necessary to implement the TMP. Management and technical training will also be necessary for existing staff to expand their capacity to undertake additional responsibilities.

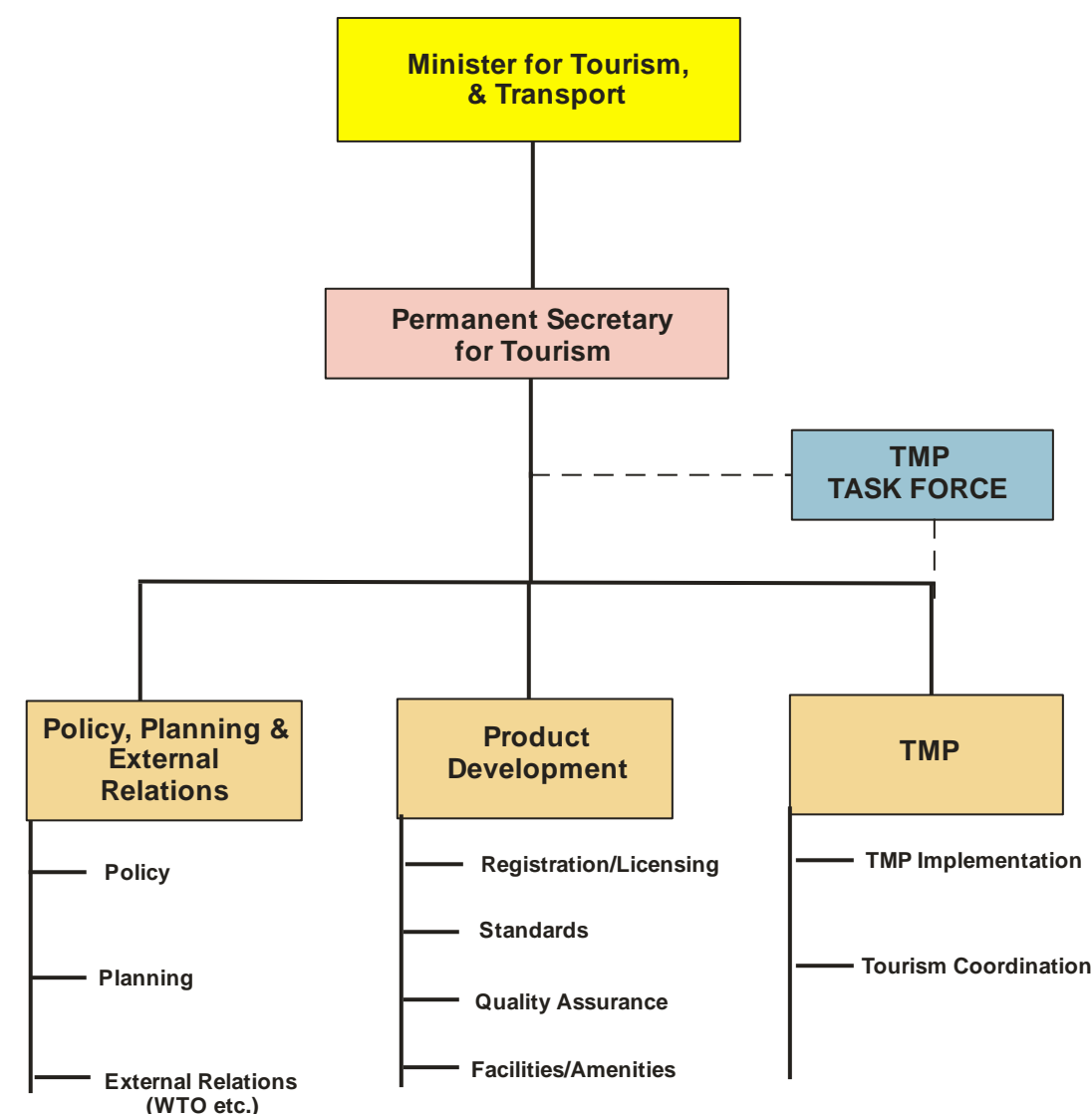
30.3 FOCUSED MANDATE FOR THE DDA

The Discover Dominica Authority Act, 2007 conceives of the DDA as being the executive arm of the Ministry and empowers it to undertake almost any function which has the objective of furthering the development of tourism to Dominica. It is a sound piece of legislation which should stand the test of time in that it is flexible enough to deal with any changed circumstances which may require the DDA to undertake different activities for the development of tourism.

However, just because the Act empowers the DDA to undertake almost any function for the development of tourism does not mean that it should undertake them all. Different circumstances at different times will require the DDA to focus on one or a number of the functions for which it is empowered. These circumstances may be market related, product related, HRD related or, indeed, funding related.

Currently, the functions exercised by the DDA relate to destination marketing, product development, HRD, (tourism awareness), festival coordination/support and the Film Commission. With a limited budget of EC\$4.6 million, it is not possible to give adequate attention to all of these functions – a fact which is recognized by the DDA in how it allocates its resources.

Diagram 30.1: Proposed Tourism Division Organigram



The TMP recommendation is that

- the DDA focuses on the functions of
 - destination marketing
 - air and sea access
 - product promotions (including cruise)
 - market research and statistics.
- Festival & Events function transferred to the Ministry with responsibility for Cultural Affairs.
- Film Commission transferred to the Invest Dominica Authority
- Functions of Product Development, Registration/Licensing and the Quality Assurance Unit transferred to the Tourism Division.
- DDA to have its own separate internet/web management function.

The implications of the above strategic recommendations are elaborated in the DDA Corporate Strategy and Action Plan.

30.4 ENVIRONMENTAL COORDINATION UNIT TO BECOME ENVIRONMENTAL PROTECTION AGENCY

Hand-in-hand with land use policy and physical planning is environmental management. As outlined in Part III, relevant legislation and regulations are on the statute books and several agencies exist that attempt to look after environmental issues such as coastal erosion, pollution of rivers and beaches, agricultural practices, mining, waste disposal, sewage, habitat depletion and historic preservation.

The problem is lack of enforcement. An Environmental Coordination Unit is already established. However, while undertaking considerable work in promoting greater awareness of environmental issues, it lacks the mandate to be pro-active in getting enforcement.

What is required is an Environmental Protection Agency which not only has the mandate to enforce compliance with legislation and regulations, but is pro-active in doing so. This agency would incorporate the existing Environmental Coordinating Unit.

30.5 ESTABLISH A NATIONAL HERITAGE TRUST

The recommended National Heritage Trust would incorporate the existing Museum Trust, Old Market Trust and possibly Cabrits and other national monuments and museums.

30.6 ESTABLISH A NATIONAL PARKS SERVICE AGENCY

As outlined in Ch. 14, the situation with regard to the management of the different nature sites is unsatisfactory in that some are managed by the Ministry of Tourism (such as Emerald Pool) and others by the Forestry & Wildlife Division of the Ministry of Agriculture & Environment.

As the national parks, nature sites and trails are the bases of Dominica's tourism products, the TMP endorses the recommendation that their maintenance, development and management should be coordinated by one agency. This should be a National Parks Service

Agency which would operate at an independent, semi-commercial agency – having the statutory authority to levy and collect fees, raise funds, etc. The legislative framework for a National Parks Service Agency has been revised and it is understood that a 'National Parks Service' Authority or Agency* is to be established which would be responsible for the operational activities related to the maintenance and management of parks, reserves, nature sites and other protected areas.

In the meantime the TMP recommendation is that the Tourism Division's function of site maintenance be transferred to the Forestry & Wildlife Division as a first step in the rationalisation process.

* Report on the Review of the Legislative Framework for National Parks, National Parks Consortium, 2010.