


COMMONWEALTH OF DOMINICA

MINISTRY OF TOURISM AND LEGAL AFFAIRS

TOURISM MASTER PLAN 2012 - 2022

- Final Report -

7th June, 2013

DOMINICA TOURISM MASTER PLAN 2012 – 2022

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CHL Consulting Co. Ltd
7th June, 2013

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GLOSSARY OF TERMS

CARICOM	Caribbean Community and Common Market
CHTA	Caribbean Hotel & Tourism Association
CLIA	Cruise Lines International Association
CSO	Central Statistical Office
CTO	Caribbean Tourism Organisation
DCTAI	Dominica Community Tourism Association, Inc.
DDA	Discover Dominica Authority
DHTA	Dominica Hotel and Tourism Association
DASPA	Dominica Air and Sea Ports Authority
DOMLEC	Dominica Electricity Services
DOWASCO	Dominica Water and Sewerage Company
DSC	Dominica State College
DSWMC	Dominica Solid Waste Management Corporation
DWA	Dominica Watersports Association
ECCB	Eastern Caribbean Central Bank
ECU	Environmental Coordination Unit
EIA	Environmental Impact Assessment
EU	European Union
ETDP	Eco-tourism Development Programme
FCCA	Florida-Caribbean Cruise Association
FWI	French West Indies
GDP	Gross Domestic Product
GOCD	Government of the Commonwealth of Dominica
GSPS	Growth and Social Protection Strategy
HRD	Human Resource Development
IDA	Invest Dominica Authority
LIAT	Leeward Islands Air Transport
MOT	Ministry of Tourism and Legal Affairs
NAO	National Authorising Officer
NGO	Non-governmental Organisation
NTO	National Tourism Organisation
OAS	Organisation of American States
OECS	Organisation of Eastern Caribbean States
PMU	Programme Management Unit
PPD	Physical Planning Division
PSIP	Public Sector Investment Programme
PWC	Public Works Commission
RBG	Roseau Botanic Gardens
SHAPE	Society for Historic, Architectural Preservation and Enhancement
TDA	Tourism Development Area
TDF	Tourism Development Fund
TMP	Tourism Master Plan
TPU	Tourism Planning Unit
UNWTO	World Tourism Organisation
WTTC	World Travel & Tourism Council

1. INTRODUCTION

Dominica possesses a wealth of ecological attractions including tropical forests, mountains, rivers, lakes, wetlands and sunken volcanoes with steep drop-offs. Recognising the specialness of Dominica's natural resources, UNESCO designated the Morne Trois Pitons National Park as a World Heritage Site. Within the park boundaries is the aptly named Valley of Desolation and the spectacular Boiling Lake, second largest of its kind in the world. The country also has a varied and interesting patrimony, including home to the last of the indigenous people of the Caribbean – the Kalinago - as well as a colonial historical heritage.

Despite the general recognition of the country's abundant natural and cultural resources, Dominica has been slow in translating this resource base into a significant tourism industry on the international stage. Non-Dominica related leisure tourists number not much more than 31,000 yearly, a figure which has changed little in recent years.

The Government of Dominica wishes to develop the tourism sector as a driver of national economic activity and diversification. It has designated tourism as a priority sector as the country has the ecological and cultural resource base upon which to develop a sustainable industry on the one hand and on the other, take advantage of the expanding market for international travel to and within the Caribbean.

Aims of the Tourism Master Plan

As specified in the project Terms of Reference, the objectives of the Tourism Master Plan are to:

- provide a comprehensive planning framework for the development of the tourism sector so that it can play a key role in the diversification of the Dominica economy.
- elaborate a vision of the future direction and content of the sector, which can help to focus and guide the actions of the various stakeholders towards a shared goal.
- identify priority areas for tourism development, related tourism facilities and supporting infrastructure.
- specify the major programmes, roles and responsibilities of key players, institutional arrangements and resource requirements for achieving the vision.

Tourism Master Plan formulation involved extensive consultations

Extensive consultations were held with stakeholders directly and indirectly associated with the tourism sector in Dominica. A fieldwork mission was undertaken (Sept 24 – Oct 20, 2012) during which product inspection trips were undertaken to all areas in Dominica involving visits to nature sites, touristic attractions and resorts in these areas.

An important part of the consultative process was the convening of focus group meetings with sub-sectors of the industry and general stakeholder's workshops under the aegis of the Ministry of Tourism & Legal Affairs

The participants at these meetings and workshops included individuals from the public and private sectors holding key positions in the industry (hoteliers, tour operators, representatives of industry associations, etc.) together with personnel from different government agencies.

The deliberations and recommendations from these meetings and workshops formed the basis of the tourism development strategy and plan as elaborated in this report.

National Tourism Summit

As recommended by the Consultant, a National Tourism Summit, organized by the Ministry of Tourism and the Discover Dominica Authority was held from March 25-27, at which the draft Tourism Master Plan (together with the draft Tourism Policy, DDA Corporate Strategy & Action Plan and the Access Strategy & Update) were presented to representatives of ten stakeholder groups. The Summit was attended by 50 persons on the first day, and 56 persons (some repeat) on the second day. Some were invited to attend on one day or the other, not both. A further 40-50 persons attended the final session on partnership presentations on the Wednesday. The Summit was also attended by the DDA market representatives. Both the formal responses by representatives of ten stakeholder groups, and the ensuing open discussions, provided the Consultant with valuable feedback for the Final Report.

Report Structure

This Final Report is structured in six parts, viz:

- **Part I:** describe tourism to Dominica today - tourism demand and the significance of tourism to the economy in terms of contribution to the economy, jobs, foreign exchange earnings and tax receipts to Government.
- **Part II:** taking into account the Government's Third Medium Term Growth and Social Protection Strategy (2012-2014), growth objectives are outlined for the national economy. Reflecting the national economic objectives, three tourism development scenarios are outlined - low, medium and high growth scenarios, under which tourism becomes an increasingly important driver of national economic activity.
- **Part III:** contains a product audit and review of Dominica's tourism sector, its natural resource base and patrimony, facilities and services, enabling environment and sector management as well as an assessment of the sector's competitive performance
- **Part IV:** elaborates the vision and future direction for the tourism sector identifying areas for development and the related product development plans, as well as the product-market development opportunities.
- **Part V:** specifies the Tourism Master Plan strategy and action plans in respect of institutional re-arrangements, access transport, destination and product marketing etc., required to achieve the vision.
- **Part VI:** outlines the necessary steps for Tourism Master Plan implementation, taking into account the experience of the earlier TMP 2005 – 2015.

2. EXECUTIVE SUMMARY

2.1 WHERE ARE WE NOW?

Natural and Cultural Resources

Dominica possesses a wealth of ecological attractions including tropical forests, mountains, beaches, rivers, lakes, wetlands and sunken volcanoes with steep drop-offs. Recognising the special quality of Dominica's natural resources, UNESCO designated the Morne Trois Pitons National Park as a World Heritage Site. Within the park boundaries are the aptly named Valley of Desolation and the spectacular Boiling Lake, second largest of its kind in the world. The Waitukubuli Trail is one of the world's outstanding nature trails. The country also has a varied and interesting cultural patrimony, including home to almost the last of the indigenous people of the Caribbean – the Kalinago – as well as a colonial historical heritage.

Size of the Tourism Sector and Performance

In 2012, there were just under 79,000 stay-over arrivals to Dominica. In addition there were some 266,200 cruise visitors, 11,760 yacht visitors and approximately 1,500 excursionists. Total expenditure by all visitors (including the Ross University students) was an estimated EC$214.5 million.

We estimate that just under two-thirds (64%) of tourist arrivals come primarily for vacation/leisure purposes. However, this does not mean that all are non-Dominican. In fact, a significant proportion are Dominican related, as evidenced by the proportion of tourists staying in private homes. Only about one-third of all visitor bed-nights (excluding medical student housing) are spent in paid accommodation.

Allowing for the above, we estimate that non-Dominican related vacation tourists (including scuba dive) number about 31,000 yearly, a figure which has changed little in recent years. Similarly, the number of yacht visitors, business arrivals and students has remained much the same over the last five years; and indeed are at about similar levels as ten years ago.

Cruise visitor numbers have also dropped sharply. In 2010, approximately 518,000 cruise visitors were recorded. Numbers in 2012 were estimated at about 266,200, considerably lower than the numbers recorded in 2004.

Constraints to Growth

Despite Dominica's natural attractions, the tourism sector has been slow to translate this resource base into a growing industry, in that visitor numbers have changed little over the last decade. We undertook a survey among tour operators, travel agents and the DDA market representatives in the source markets, as well as consultations with Dominican tourism stakeholders, to identify the constraints inhibiting the growth of tourism to the island. Their answers were consistently the same:

- inadequate air and sea connectivity
  - poor connections, which can mean overnighting at regional hubs
  - clients don't want to spend 2 days travelling to/from Dominica
  - L'Express des Iles ferry schedules unreliable.

- shortage of 'market ready' accommodation
  - just 460 international standard 'market ready' rooms available
  - not enough boutique hotels
  - no flagship resorts.

- poor tourism infrastructure
  - poor state of some roads, inadequate directional signage
  - urban environment in extreme disrepair, particularly Roseau's streets, sidewalks,, streetscapes
  - no waterfront or focal point on the island like Sandy Ground in Anguilla, St. Lawrence Gap in Barbados, where locals and visitors congregate to mix, dine and relax.

- dissatisfaction with quality of cruise product
  - fewer things to see and do
  - adverse passenger feedback/low overall satisfaction
  - dissatisfaction with shore-side welcome (particularly increased levels of harassment)

- Dominica not known in the market place
  - low level of awareness in source markets
  - with the exception of France and FWI (and Germany), few enquires received by tour operators and travel agents for Dominica.

2.2 WHERE DO WE WANT TO BE?

Tourism Vision

Market feedback is that Dominica should strengthen its position as one of the few comparatively undiscovered 'gems' of the Caribbean and a place to 'really get away' from it all, as many travellers are looking to avoid the overcrowded beaches and the 'super-size' all-inclusive resorts. Its position needs to be re-enforced as 'unspoilt, authentic, fun', capitalising on its major appeals of:

- nature environment, unspoilt wilderness – for nature lovers;
- old world charm – the way life used to be in the Caribbean;
- wild, untamed – simplicity;
- peace and tranquillity – get away from it all;
- safety and security;
- warm, welcoming, friendly people;
- exclusivity and intimacy – a private hideaway – no mass tourism, and
- authenticity, with a distinctive cultural heritage.

These are Dominica's core strengths which must be maintained and enhanced. To further strengthen Brand Dominica we recommend the inclusion of Dominica's beaches. Dominica has a number of very attractive secluded beaches/coves/bays......Batibou, Hampstead, etc.

For potential North American and European tourists, the 'Caribbean' evokes images of sun, sea and sandy beaches. The vast majority of tourists want to be near or have access to a beach. To date, Dominica has downplayed its 'beach' product, which we feel, has limited the country's market appeal. Highlighting and promoting its 'beach' product will help strengthen Dominica's image and appeal in the market.

This accords with the stakeholders' vision of Dominica tourism – that of a 'high-end/low-volume' destination. That said, it has to be recognised that the ''high-end/low volume' segment of the market is exceptionally competitive.

Competitive Market Place

What constitutes a 'top-end' destination now compared with 10 years ago represents a formidable challenge for Dominica.

In this category St. Barths is now the island of choice. Long popular among the French and the yachting community, its present pre-eminence is also due to its popularity among the Russian wealthy, and US and other celebrities. Underlying its popularity is a well ordered tourism product involving excellent infrastructure, a coherent architectural style, a product concept based on top quality villas and small (20 to 40 room) resorts, heightened environmental awareness and adherence to policies and regulations. Mustique and Barbados are also counted among the 'top end' destinations. A newcomer to this group is Canouan in the Grenadines, which offers a championship golf course, a deep water marina, and crucially, an airstrip long enough to accommodate Gulfstream G550s, permitting direct access from as far afield as Europe. A new international airport (capable of handling B747-400s and similar aircraft is scheduled to open on St. Vincent mainland in late 2013.

Focus on High Yield Tourism Product

Whereas Dominica's long term marketing positioning should be in this direction, over the period of this TMP, the focus should be on achieving a high yield (rather than 'top' end) product concept, offering

An exclusive private hideaway – a place where time stands still, the way the Caribbean used to be. A range of high yield and other accommodation would be provided in villas, small to medium sized resorts and guesthouses/inns, and culinary excellence available in a variety of eateries. The back-drop is unspoilt nature with a range of things-to-see-and-do, walking/hiking, scuba diving, yachting, golf with the emphasis on 'refined' relaxation. Roseau, particularly the historical district, through imaginative and sympathetic re-construction, will become an interesting focal point – providing a sense of place where visitors and locals congregate to mix, dine and relax.

with the main competitors being Guadeloupe/Martinique, St. Lucia, Grenada.

Tourism Growth Targets 2012-2022

Government's strategic objective for the tourism sector is to further the creation of a higher standard of living and well-being for the people of Dominica through the development of tourism on a sustainable basis.

As indicated in the Third Medium-Term Growth and Social Protection Strategy, 2012-2014 document, Government sees the tourism sector as a driver of economic activity and diversification. Currently, tourism spending represents approximately 16.5% of GDP (in gross terms). Based on three economic growth scenarios for the national economy, three corresponding tourism development scenarios have been developed.

The first scenario - A, is the **low growth** scenario consistent with maintaining present standards of living (in real terms) for Dominican citizens. The 'low growth' scenario can be interpreted as what would be likely to happen if no initiatives were undertaken and tourism development continued to be constrained by inadequacies of air and sea access transport services and urban tourism infrastructure.

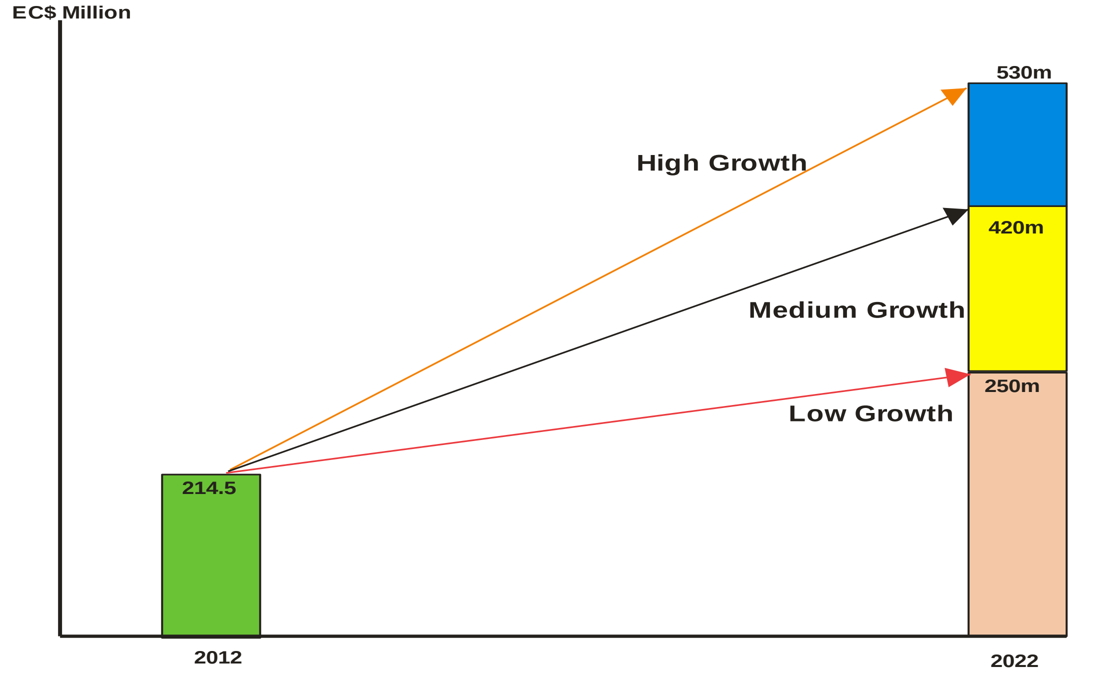
Under this scenario, tourism maintains its share of GDP at the present level implying total expenditure by all visitors (including the Ross University students) increasing from an estimated EC$ 214.5 million in 2012 to just over EC$ 250 million in 2022 in term of constant 2012 money values. This represents an average growth rate of about 1.5% yearly.

Scenario C is the **high growth** scenario which can be interpreted as the rate at which tourism could expand if sufficient public and private sector capital investment was forthcoming to overcome the various constraints.

Under this 'high' growth scenario, the challenge for tourism is to increase its contribution to national output from its current share of about 16.5% to 25%. This means that total expenditure by all visitors would have to increase from the estimated figure of EC$ 214.5 million in 2012 to EC$ 530 million by 2020, in terms of constant 2012 money values. This represents an average growth rate of just under 9.5% yearly over the period.

Between these lie a number of possibilities, one of the more likely being, Scenario B, designated at as the **medium growth** Scenario B.

Under the 'medium' growth scenario, the challenge for tourism is to increase its contribution to national output from its current share of 16.5% to 23%. This means that total expenditure by all visitors would have to increase from the estimated figure of EC$ 214.5 million in 2012 to approximately EC$ 420 million by 2022, in terms of constant money values. This represents a doubling of the size of the tourism sector in 10 years, implying an average growth rate of about 7% yearly for the tourism industry as a whole.



Each of these three growth scenarios are considered in terms of their implications for:

- growth in visitor numbers and receipts,
- room accommodation requirements,
- manpower requirements and HRD,
- air and sea access services,
- destination marketing,

- environmental management,
- economic infrastructure, and
- institutional arrangements.

2.3 HOW DO WE GET THERE?

Move to an Investment Driven Strategy

Currently, Dominica attracts relatively few stay-over leisure tourists. This is because the leisure/activity segment of the tourism industry is totally dependent on its natural attractions as the motivation for tourists to visit. But the natural attractions, though unique in many ways, are not sufficiently strong in themselves to attract the numbers required to support a significant tourism sector. It is a **primary factor-driven** product strategy, characterized by low investment, limited accommodation and medium to low quality product.

Dominica is not alone in this regard. All destinations, where the core products are nature and culture based, but are not considered world class (unlike the Galapagos Islands, Egypt, Greece), face this problem. The strategy that many destinations which do not have recognised 'world class' nature and cultural attractions have pursued is to invest heavily in the product. These destinations have seen their tourism sectors prosper and grow. St. Barths and Ireland are such examples.

To move on to the next stage of development requires an **investment-driven strategy**, with sustained investment in all aspects of the industry – infrastructure, access transport, amenities and attractions, accommodation, destination marketing, human resource development etc.

This requires the implementation of nine strategic initiatives to deal with the issues confronting Dominica's tourism sector, viz.

- Improve air and sea access services.
- Increase resources for destination marketing.
- Expand and diversify the tourism product.
- Improve infrastructure.
- Further develop cruise tourism.
- Enhance human resource development and standards.
- Reorganise and strengthen institutional arrangements.
- Better sector management.
- Strengthen linkages with communities.

PART I TOURISM TO DOMINICA TODAY

3. TOURISM DEMAND AND RECENT TRENDS

3.1 VISITOR ARRIVALS

Visitors to Dominica fall into four broad categories – stay-over tourists, excursionists, cruise visitors and yacht visitors. Recent trends in these main categories are as follows:

Table 3.1: Visitor Arrivals by Main Category, 2007 - 2012

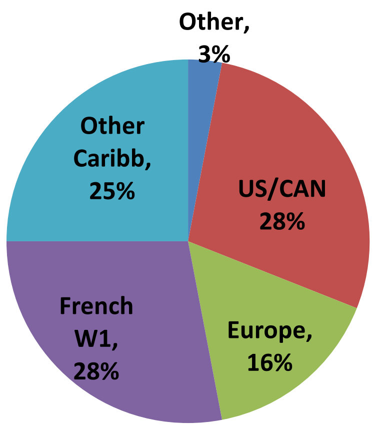
Category	Numbers					
	2007	2008	2009	2010	2011	2012
Stay-over tourists*	77,809	81,112	74,924	76,518	75,546	78,965
Excursionists	901	965	780	783	764	1,500
Cruise Visitors	354,515	380,671	516,405	517,979	341,501	266,178
Yacht Visitors	11,197	11,102	9,532	8,554	10,338	11,763
TOTAL	**444,422**	**473,850**	**601,641**	**603,834**	**428,149**	**358,406**

***Source**: DDA* **Includes Ross University students*

Generally speaking, there is no overall pattern of sustained growth. The numbers of stay-over tourist arrivals and indeed yacht visitors have changed little over the last 5 years, or indeed over the last decade. Although numbers were never high, few excursionists now visit the island. Cruise visitors, having increased to just under 518,000 in 2010, are down significantly and now number about 266,200.

3.2 STAY-OVER TOURIST ARRIVALS

With regard to stay-over tourist arrivals, Dominica has a broad spread of source markets. U.S. and Canadian stay-over arrivals number about 22,000, though this figure includes the Ross University students who account for some 5,000 visits annually.



European tourist arrivals are estimated to be about just under 13,000, of which about 37% are from the UK and 33% from France. Stay-over arrivals from the French West Indies have consistently averaged about 21,000 annually. Tourist arrivals from other Caribbean countries are about 20,000 yearly

Table 3.2: Stay-Over Tourist Arrivals by Source Market

Market	2007	2008	2009	2010	2011	2012
United States	21,495	20,518	18,193	19,266	17,820	19,002
Canada	2,615	3,346	2,618	2,859	2,986	3,063
Europe	10,827	13,787	11,590	10,725	11,538	12,816
– *UK & Ireland*	*6,273*	*7,278*	*4,415*	*4,659*	*4,685*	*4,739*
– *France*	*2,297*	*3,783*	*4,469*	*3,323*	*3,680*	*4,188*
– *German Speaking Market***	*1,067*	*1,300*	*1,363*	*1,416*	*1,636*	*2,168*
Caribbean	40,511	41,092	40,525	41,899	41,210	41,958
– *FWI*	*18,831*	*20,210*	*20,462*	*21,803*	*21,517*	*23,011*
– *Other Caribbean*	*21,650*	*20,882*	*20,063*	*20,096*	*19,693*	*18,947*
Other Countries	2,361	2,369	1,998	1,769	1,992	2,126
TOTAL	**77,809**	**81,112**	**74,924**	**76,518**	**75,546**	**78,965**

***Source:** CSO, Dominica* ***Germany, Austria, Switzerland*

3.3 EXCURSIONISTS

Guadeloupe is Dominica's major market for excursionists (day visitors) who are mainly organised groups generated by one or two travel organisers and who travel by special ferry. (The regular ferry does not bring many excursionists).

Most are organised groups of Guadeloupe residents who visit nature sites as well as the Carib Territory.

3.4 CRUISE SHIP VISITORS

The number of cruise ship and associated visitor calls at Dominica increased steadily until 2010 when 272 calls and just under 518,000 cruise visitors were recorded, as shown on Table 3.3.

Table 3.3: Cruise Ship Calls and Visitors, 2007 – 2012

Year	2007	2008	2009	2010	2011	2012
Calls	252	211	263	272	196	183
Visitors	354,515	380,671	515,405	517,979	341,501	266,178

***Source:** CSO Dominica,* **Consultant's estimates*

In 2011 Carnival Cruise Lines pulled out, resulting in a sharp drop in the number of cruise ship calls and visitors. Various reasons have been adduced for Carnival's decision such as higher costs, poor profitability and overcrowding at site attractions.

3.5 YACHT VISITORS

Although the number of yachts calling at Dominica has increased steadily, there is no consistent pattern in the evolution of yacht visitors, who currently number about 12,000, not much more than in 2007.

Table 3.4: Yacht and Associated Passenger Arrivals

Year	2007	2008	2009	2010	2011	2012
Yacht vessels	2,223	2,160	2,351	2,359	2,600	2,874
Crew/passengers	11,197	11,102	9,532	6,558	10,338	11,763
Average Pax	**5.0**	**5.1**	**4.1**	**2.8**	**4.0**	**4.1**

***Source:** CSO Dominica,* **Consultant's estimates*

A major reason for the lack of growth is that Dominica has very limited infrastructure to support the yachting product.

3.6 VISITOR ARRIVALS BY PRIMARY PURPOSE OF VISIT/ACTIVITY

Based on the CSO E/D card analysis, Table 3.5 shows an indicative breakdown of visitor arrivals by 'primary' activity engaged in during their stay in Dominica.

Table 3.5: Indicative Breakdown of Visitor Arrivals by Activity Motivation, 2012

Activity/Motivation	Numbers*
A. Stay-Over Arrivals	
(i) Vacation	51,000
- general/leisure/VFR stay	-19,000
- nature tourism/leisure	-29,000
¤ scuba dive	- 3,000
(ii) Visit Friends & Relations	8,500
(iii) Business, Meetings, Conventions	9,500
(iv) Study	5,000
(v) Carnival & World Creole Music Festival	4,500
(v) Other	500
Total Stay-Over Arrivals	**79,000**
B. Yacht Visitors	**11,800**
C. Excursionists	**1,500**
D. Cruise	**266,200**

Source: *Consultant's estimates *figures rounded*

We estimate that just under two-thirds (64%) of tourist arrivals come primarily for vacation/leisure purposes. However, this does not mean that all are non-Dominican. In fact, a significant proportion is Dominica-related, as evidenced by the proportion of tourists staying in private homes. We estimate that about one-third (34%) of stay-over arrivals are Dominica-related. Allowing for this, we estimate that non-Dominica-elated vacation tourists (including scuba dive) number about 31,000 yearly, a figure which has changed little in recent years.

Similarly, the number of yacht visitors, business arrivals and students have remained much the same over the last five years.

Little is known about these 31,000 tourists who come to Dominica for nature/dive tourism – where they come from, what they do, how long they stay, how much they spend, etc. As they will continue to represent Dominica's main market segments, research should be undertaken to determine their characteristics and give a sharper focus to the marketing campaigns to these segments.

3.7 TOURIST BED-NIGHTS BY ACCOMMODATION TYPE

The distribution of tourist bed-nights by type of accommodation is shown on Table 3.6. In interpreting the figures it should be noted that the number of bed-nights is calculated on the basis of 'intended length of stay', rather than actual length of stay. However, our review of the figure suggests that any difference is marginal and the statistics are reasonably accurate indicators of the usage of the stock of tourism accommodation.

Table 3.6: Bed-nights by Accommodation Type 2010, 2011 and 2012

Accommodation Type	No. of Bed-Nights*		
	2010	2011	2012**
A. Paid Serviced Accommodation			
Apartments/Cottages	37,920	31,560	32,000
Bed & Breakfast	1,790	1,780	1,400
Dive/Eco Lodge	8,180	9,620	11,400
Guesthouse	25,440	28,340	25,600
Hotel	76,880	85,940	91,100
Inns	1,390	2,140	3,000
Other Paid	5,340	8,350	2,800
TOTAL A	**156,940**	**167,690**	**167,305**
B. Private Homes	**334,850**	**383,770**	**361,700**
Medical School Housing	5,200	15,400	3,500
Other	9,560	9,870	6,900
TOTAL A & B	**506,555**	**576,730**	**539,300**

Source: *DDA *figures rounded **Consultant's estimates*

An analysis of the data on Table 3.6 indicates that:

- about 2/3rd of tourist bed-nights are spent in 'private homes' ... those visiting friends & relatives or those who own their own houses on Dominica
- excluding bed-nights accounted for by medical school housing, the number of bed-nights spent in 'paid serviced' accommodation has increased from about 157,000 in 2010 to an estimated 167,300 in 2012 (representing some 31% of total bed-nights)
- the number of bed-nights accounted for by hotels (including resorts) has increased significantly since 2010.

3.8 USAGE OF ACCOMMODATION BY SOURCE MARKET

Table 3.7 shows the extent to which 'paid-serviced' accommodation is used by the different source markets.

Table 3.7: Usage of Accommodation by Source Market*

Source Market	Stay-Over Tourists in Paid-Serviced Accommodation**						Stay-Over Tourists in Private/ Other Accommodation					
	Numbers			Bed-Nights			Numbers			Bed-Nights		
	2010	2011	2012	2010	2011	2012	2010	2011	2012	2010	2011	2012
United States	6,650	4,600	5,400	46,635	35,960	43,800	8,460	8,450	9,200	71,020	89,550	89,700
Canada	920	850	840	7,545	7,400	7,200	1,500	1,550	1,700	15,000	19,575	20,300
United Kingdom	1,145	1,140	1,200	9,065	9,860	9,600	3,450	3,460	3,500	36,840	46,770	42,700
France	2,120	2,570	2,850	12,155	16,645	17,500	1,200	1,100	1,350	10,440	10,820	10,200
Germany & Scandinavia	1,325	1,725	2,230	10,370	14,060	16,300	555	460	630	6,265	6,380	8,000
Other European	680	730	800	4,700	4,900	5,200	230	300	300	2,500	3,530	3,400
FWI	6,560	6,780	7,800	26,605	34,665	35,100	15,230	14,740	15,200	81,435	91,400	78,300
Other Caribbean	5,745	5,840	5,450	31,155	31,100	25,000	14,290	13,800	13,500	113,725	117,245	107,400
Other Markets	995	1,225	1,400	8,575	13,065	8,500	655	630	720	6,930	8,100	8,600
TOTAL	**26,140**	**25,460**	**27,970**	**156,805**	**167,655**	**170,700**	**45,570**	**44,490**	**46,100**	**344,155**	**393,370**	**368,600**

Source: *DDA *figures rounded **excluding Ross University students*

An analysis of the data on Table 3.7 indicates that:

- the market breakdown of stay-over tourists staying in 'paid-serviced' accommodation is:
  - US and Canada represent just over one-fifth (22%) of numbers and 30% of bed-nights
  - FWI represents 28% of numbers and 20% of bed-nights
  - France represents 10% of numbers and 10% of bed-nights
  - German speaking markets & Scandinavia represent 8% of numbers and 10% of bed-nights
  - UK represents 4% of numbers and 6% of bed-nights

- for tourists staying in 'paid-serviced' accommodation, the FWI, France, the German speaking markets and Scandinavia are the fastest growing markets. Together, these markets represent just under half of stay-over tourists staying in 'paid-serviced' accommodation and 40% of bed-nights.

- average 'intended' length of stay varies by source market and type of accommodation used.

Table 3.8: Average Length of Stay

Source Market	Paid Serviced	Private
United States	8.1	10.0
Canada	8.6	12.0
United Kingdom	8.0	12.2
Germany & Scandinavia	7.3	12.7
France	6.1	7.5
FWI	4.5	5.2
Other Caribbean	4.5	8.0
All Markets	6.1	8.0

3.9 VISITOR EXPENDITURE

The breakdown of visitor spending is shown on Table 3.9.

Table 3.9: Visitor Expenditure by Category of Visitor, 2011 and 2012

Category	Spending (EC$ 000's)	
	2011	2012
Stay-Over Arrivals		
Hotel Holiday	67,132	43,144
Hotel Business	31,694	10,894
Students – Medical	42,234	45,988
Private Homes	113,432	87,662
TOTAL STAY-OVER	**254,493**	**187,687**
Cruise Visitors	31,097	23,754
Excursionists	398	726
Yacht Visitors*	2,068	2,350
TOTAL	**288,055**	**214,517**

Source: *CSO *consultant's estimates*

Although stay-over arrivals increased by 4.5% between 2011 and 2012, with no change in average length of stay, spending by stay-over arrivals dropped sharply by almost 25%. When expenditures associated with the Ross medical students are excluded, the drop in tourist spending was more dramatic (33%).

An analysis of the data shown on Table 3.9 also indicates:

- tourists staying at private homes (generally visiting friends & relatives) account for 47% of total expenditure by stay-over visitors
- Ross University students (numbering about 5,000), account for almost EC$ 46 million, representing about 25% of total
- vacation stay-over visitors account for EC$ 43 million, representing about 23% of the total
- expenditure by cruise visitors account for just over a tenth (11%) of all visitor spending

.

The reasons for the drop in visitor spending need to be investigated.

4. SIGNIFICANCE OF TOURISM TO THE NATIONAL ECONOMY

4.1 POPULATION, LABOUR FORCE AND EMPLOYMENT

In the 2001 census, Dominica's resident population was recorded as 71,242 persons. Since then the population has declined marginally to an estimated 70,739 residents (2011 census) with an implied outflow or migration of 5,208 persons over this intercensal period.

Because of 'double jobbing' and flexible employment conditions, it is difficult to determine employment numbers. However, best estimates put the labour force at about 28,000, of which about 4,000 (or 14%) are unemployed.

4.2 NATIONAL ECONOMIC ACTIVITY

Preliminary estimates for 2012 indicate a national output (GDP) figure of EC$1,295 million for Dominica's economy. After adjusting for inflation, economic output is at about the level recorded in 2008.

Table 4.1: Gross Domestic Product (EC$M), 2007 – 2012

Metric	2007	2008	2009	2010	2011	2012
GDP @ market prices	1114.3	1,220.8	1,301.8	1,282.2	1,286.7	1,295.0
GDP @ constant 2006 prices	1,088.0	1,172.8	1,163.5	1,171.9	1,194.3	1,174.5

***Source**: CSO, Dominica and ECCB*

4.3 VISITOR EXPENDITURE

Visitor expenditure, broken down by category of visitor, is shown on Table 4.2 following.

Table 4.2: Visitor Expenditures (EC$), 2007 - 2012

Expenditure EC$ (000's)	2007	2008	2009	2010	2011	2012
Stay-over arrivals*	145,941	200,567	177,917	211,459	254,492	187,687
Cruise visitors	29,657	36,018	48,883	45,229	31,097	23,754
Excursionists	161	365	355	410	398	726
Yacht visitors	2,239	2,220	1,906	1,711	2,068	2,350
TOTAL	**177,998**	**239,170**	**229,061**	**258,809**	**288,055**	**214,517**

***Source:** DDA and Consultant's estimates* **including Ross University Students*

Total spending by all visitors was estimated at EC$ 214.5 million in 2012.

4.4 VALUE OF TOURISM TO ECONOMY

Tourism's economic impact derives from the spending by visitors and the sector's value is the national economy can be measured in terms of:

- Contribution to national output (GDP)
- employment generation
- tax revenues to government
- income generation at community level
- foreign exchange earnings, helping to offset the Balance of Trade deficit
- linkages with other sectors of the economy.

Contribution to national output (GDP)

In the national accounts, the contribution for the hotels & restaurants sub-sector was estimated at about 2% of total GDP in 2011, a figure which has changed little over the last decade. This undoubtedly underestimates the value of tourism since a number of activities are not included. These activities include taxi/tours, scuba dive, and hiking, spending by excursionists, yacht visitors and cruise passengers.

In 2012, total visitor expenditure (including Ross University students) was estimated at EC$ 214.5 million, representing approximately 16.5% of the estimated total output of the economy (GDP) for the year.

However, it should be noted that this figure of EC$214.5 million of tourism receipts are at gross value and, strictly speaking, the imported inputs to tourism sales should be excluded before expressing them as a proportion of GDP. To the extent, therefore, that direct imports have not been excluded, visitor receipts as proportion of GDP are overstated. There are no published statistics available on the proportion that direct imports represent. However, on the assumption that direct imports represent between one-half and two-thirds of visitor expenditures, tourism's direct contribution to GDP is estimated to be between 5.5% and 8%.

In its annual Economic Impact of Travel & Tourism report, the World Tourism & Travel Council (WTTC) calculates the contribution of tourism and travel to the national economy of a number of countries, including Dominica. In its 2012 report, the WTTC estimates that the tourism & travel sector's direct contribution to Dominica's GDP was 10% in 2011 and projected to be about 10.7% in 2012. (It is worthwhile noting that the WTTC's methodology in calculating tourism's contribution to GDP is consistent with the Tourism Satellite Account Methodological Framework. Moreover, the WTTC calculation includes tourism's indirect contribution to the economy).

Employment

Based on the 2011 census[*] total national employment is estimated at about 24,000. Of those employed, about 5% (1,200) are employed in hotels and restaurants. When those employed in the other sub-sectors of the tourism industry (tour operators, dive shops, tour guides, etc.) are included, we estimate that between 1,600 and 1,800 jobs are directly dependent on tourism.

The WTTC also calculates tourism's contribution to employment generation. For 2012, the WTTC estimates that the tourism & travel sector generated some 3,000 jobs directly, representing approximately 9% of total employment. This includes travel as well as tourism.

Tax Revenues to Government

Taxes are derived from tourism in a number of ways which include excise and customs duties on imported foodstuffs and beverages; departure taxes; incomes taxes, company taxes and the sales tax on accommodation and F&B in hotels.

Government statistics are insufficiently disaggregated to identify tourism's contribution. However, the following figures are indicative of the magnitudes involved.

[*] Population and Housing Census, 2011, Central Statistical Office, Dominica

Table 4.2: Estimated Government Tax Take from Tourism

Revenue Source	Current (EC$000's)	
	2010/2011	2011/2012
A. Tourism Charges/Fees		
(i) Embarkation tax	2,700	4,600
(ii) Cruise Environmental tax	2,100	4,600
(iii) User Fees – Eco Tourism Sites	2,200	2,600
(iv) Other Travel Tax (visas, solid waste disposal)	1,600	1,700
TOTAL A	**9,000**	**14,000**
B. Tourism Related Taxes		
(i) Import duties	n/a	n/a
(ii) Customs service charge	n/a	n/a
(iii) Environmental surcharge	n/a	n/a
(iv) Income tax (individuals)	2,600	2,400
(v) Income tax (corporations)	-	-
(vi) Value added tax	11,200	11,900
(vii) Other (alien fees and land transfer etc)	200	200
TOTAL B	**14,000**	**14,500**
TOTAL TAX TAKE FROM TOURISM	**23,000**	**28,500**
TOTAL GOVERNMENT REVENUE	**357,000**	**365,000**

***Source**: CSO and Consultant's estimates n/a: not available*

Revenue from tourism charges and fees amounted to about EC$9 million in 2010/11 and is estimated to be EC$14 million in 2011/12 representing 2.5% and 3.8% of total Government revenue respectively for these years.

When other tourism related tax revenues (income tax, import duties, value added tax, etc.) are included we estimate total tax revenues from tourism in 2010/11 and 2011/12 to have been about EC$23 million and EC$28.5 million respectively, representing about 6.5% of total Government tax revenues in 2010/11 and 8% in 2011/12.

Foreign Exchange Earnings

Foreign exchange earnings from tourism permit Dominica to have a higher Balance of Trade deficit, and by implication a higher level of economic activity and welfare, than would otherwise be the case.

Dominica's trade deficit in 2011 is estimated to have been about EC$431million – representing about 33% of GDP. In the same year, gross foreign exchange earnings from tourism (EC$ 313.5) offset just under **three quarters (73%)** of this trade deficit, contributing significantly to Balance of Payments stabilization.

Contribution to Income Generation at Community Level

As tourism is characterised by the fact the consumer comes to the product rather than the product to the consumer, the sector has important community impacts in generating incomes and employment at local level.

Linkages with other Sectors of the Economy

In general, tourism tends to have a high 'value-added' content – it is labour intensive and a proportion of what the tourist consumes or purchases can be produced domestically. The beneficial implications are:

- a high 'multiplier' effect of tourism, whereby the initial demand created by tourism spending is passed on to other sectors; and
- high linkage effect with a wide range of other sectors of the economy.

PART II GROWTH OBJECTIVES FOR ECONOMY AND TOURISM

5. NATIONAL GROWTH OBJECTIVES FOR TOURISM

5.1 NATIONAL ECONOMIC CHALLENGE

Dominica's open economy is extremely vulnerable to changes in the external economic environment. This is reflected in the current difficult economic and fiscal situation.

The Third Medium-Term Growth and Social Protection Strategy, 2012-2014 identifies the challenges facing Dominica as being 'those related to attaining growth in the economy that is pro-poor, which will generate jobs and reduce poverty, and improve the quality of life for Dominicans'. The challenges, which include economic, fiscal, social and environmental issues, are to:

- support a thriving and viable population,
- increase standards of living for all Dominica's citizens,
- increase job opportunities and reduce unemployment, particularly in rural areas,
- stabilize and improve the public finances, and
- protect and enhance the environment.

As indicated in the Third Medium GSPS, 'the pursuit of economic growth is the single most important route to poverty reduction and improved quality of life' to which may be added the stabilization of the public finances and the protection/enhancement of the environment. In order to grow the economy, the Government of Dominica is looking mainly to the private sector – particularly tourism, which Government sees as a driver of economic activity and diversification – both by generating higher levels of business in existing enterprises and by attracting new investment.

5.2 GROWTH SCENARIOS FOR THE ECONOMY

Increasing living standards is key to supporting a thriving and viable population. Using GDP per head as an indicator of living standards, Dominicans have experienced increasing standards of living (about 2.0% annually) over the last 5 years as shown on Table 5.1. However, it should be noted that the increasing living standards were achieved through the (net) emigration of some 2,500 Dominicans. Had there been no out-migration during this period, the increase in living standards would have been lower, at about 1.0% yearly.

Table 5.1: GDP per Capita at Constant 2012 Prices

Year	2007	2008	2009	2010	2011	2012
GDP @ Market Prices	1,114.3	1,220.8	1,301.8	1,282.2	1,286.7	1,295.0
GDP Constant 2012 Prices	1,182.3	1,274.5	1,264.4	1,273.5	1,297.8	1,295.0
Population Estimates	70.940.0	70,890.0	70,840.0	70,790.0	70,740.0	70,700.0
GDP per capita (EC$'000)	16,666.4	17,978.0	17,848.1	17,989.6	18,346.4	18,316.8

Source: *CSO Dominica, ECCB and Consultant's estimates*

Going forward, three possible scenarios are:

Scenario A represents the 'low' growth scenario and envisages population growing by its rate of natural increase with living standards increasing by about 1.0% annually. Under this scenario, the economy of Dominica is projected to increase by about 1.6% yearly over the next decade, a growth rate which is marginally higher than what has been achieved over the last 3 years since 2009.

Scenario B represents the 'medium' growth scenario, with an average annual GDP growth rate of 3.5% over the next decade required to support a population of 82,000 people with standard of living improving by the average achieved over the last 5 years. This scenario implies net **immigration** of about 7,000 people.

Scenario C represents the 'high' growth scenario with GDP growing by an average of 5% yearly over the ten years, reflecting a 2% annual population growth and an average 3% yearly increase in living standards. This scenario implies net **immigration** of about 11,000 people.

The increasing population and living standards implications for economic growth are shown on Table 5.2.

Table 5.2: Population and GDP Growth Targets

Scenario	2012	2022	Avg Yearly Growth Rate %
A. Low Growth			
Population	70,700.0	75,000.0	0.6
GDP per Capita (EC$)*	18,316.8	20,200.0	1.0
GDP EC$ (000s)*	1,295.0	1,515.0	1.6
B. Medium Growth			
Population	70,700.0	82,000.0	1.5
GDP per Capita (EC$)*	18,316.8	22,330.0	2.0
GDP EC$ (000s)*	1,295.0	1,830.0	3.5
C. High Growth			
Population	70,700.0	86,180.0	2.0
GDP per Capita (EC$)*	18,316.8	24,620.0	3.0
GDP EC$ (000s)*	1,295.0	2,110.0	5.0

**at constant 2012 prices*

5.3 TOURISM SECTOR GROWTH TARGETS

The strategic objective for the tourism sector is to further the creation of a higher standard of living and well-being for the people of Dominica through the development of tourism on a sustainable basis.

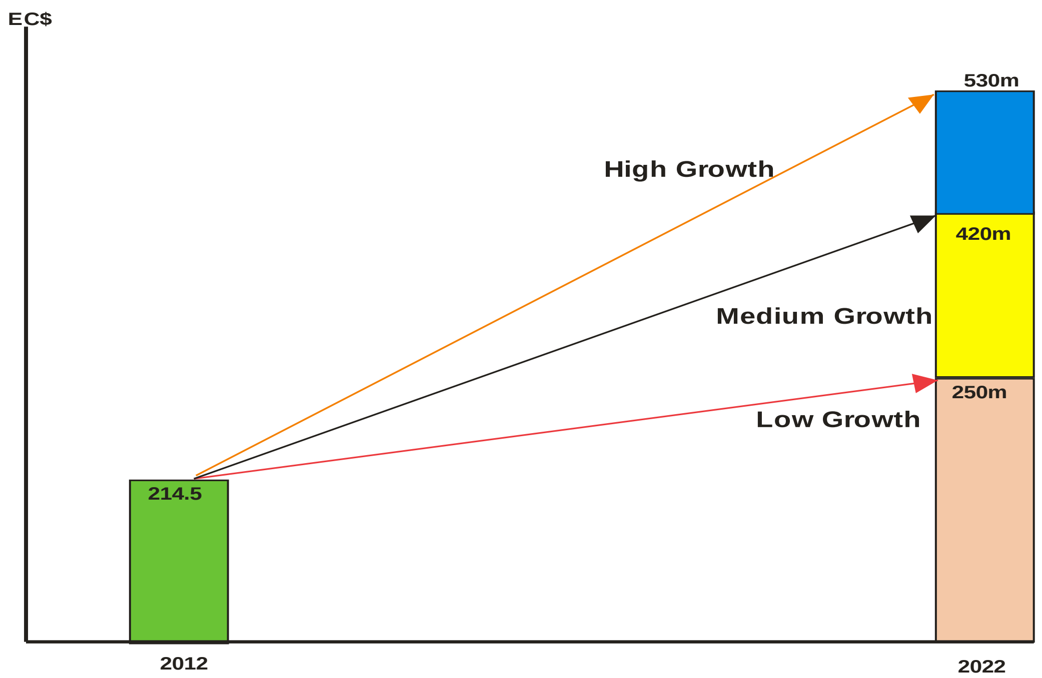
As indicated in the Third Medium GSPS document, Government sees the tourism sector as a driver of economic activity and diversification. This is reflected in the DDA's Mission Statement which is *'to increase the share of tourism's contribution to national economic development'.*

Currently, tourism spending represents approximately 16.5% of GDP (in gross terms). Under the national growth scenarios outlined in Section 5.2 above, the challenge for tourism can be projected as being:

Scenario A: under the 'low' growth scenario for the economy, for tourism to maintain its share of GDP at the present level implies total expenditure by all visitors (including the Ross University students) increasing from an estimated EC$ 214.5 million in 2012 to approximately EC$ 250 million in 2022 in terms of constant 2012 money values. This represents an average growth rate of about 1.5% yearly.

Scenario B: under the 'medium' growth scenario for the economy, the challenge for tourism is to increase its contribution to national output from its current share of 16.5% to 23%. This means that total expenditure by all visitors would have to increase from the estimated figure of EC$ 214.5 million in 2012 to approximately EC$ 420 million by 2022, in terms of constant money values. This represents a doubling of the size of the tourism sector in 10 years implying an average growth rate of about 7% yearly for the tourism industry as a whole.

Scenario C: under the 'high' growth scenario for the economy, the challenge for tourism is to increase its contribution to national output from its current share of about 16.5% to 25%. This means that total expenditure by all visitors would have to increase from the estimated figure of EC$ 214.5 million in 2012 to EC$ 530 million by 2020, in terms of constant 2012 money values. This represents an average growth rate of just under 9.5% yearly over the period.



6. TOURISM DEVELOPMENT SCENARIOS

6.1 PIVOTAL ASSUMPTIONS

Any considerations of growth scenarios will be predicated by a number of assumptions concerning the fundamental factors determining growth – market demand potential, supportive business environment, favourable climate for investment etc. Similarly in Dominica's case, but unlike most other 'high-yield, low-volume', Caribbean destinations discussed in Ch.18 – four specific factors will have a determining influence on the nature and pace of tourism development on the island.

These assumptions are in relation to access transport services, enhancement of Roseau, the DDA's marketing budget and the economic infrastructure underpinning the tourism sector.

6.2 TOURISM DEVELOPMENT SCENARIOS, 2012 - 2022

Targeted to maintain and increase living standards for all Dominicans, three national economic growth scenarios were outlined in Ch.5 earlier. Based on these economic growth scenarios, three corresponding tourism development scenarios have been developed, summarized on Table 6.1.

The first scenario - A, is the **low growth** scenario consistent with maintaining present standards of living (in real terms) for Dominican citizens. The 'low growth' scenario can be interpreted as what would be likely to happen if no initiatives were undertaken and tourism development continued to be constrained by inadequacies of air and sea access transport services and urban tourism infrastructure.

Scenario C is the **high growth** scenario which can be interpreted as the rate at which tourism could expand if sufficient public and private sector capital investment was forthcoming to overcome the various constraints.

Between these lie a number of possibilities, one of the more likely being, Scenario B, designated at as the **medium growth** Scenario B.

In the following sections, each of the three growth scenarios is considered in terms of their implications for:

- Growth in visitor numbers and receipts.
- Room accommodation requirements.
- Manpower requirements and HRD.
- Air and sea access services.
- Destination marketing.
- Environmental management.
- Economic infrastructure.
- Institutional arrangements

In the elaboration of the implications of the growth scenarios there is an unavoidable element of repetition, particularly in respect of the implications for environmental management, and economic and social infrastructure. This is because irrespective of the growth scenario adopted by Government; there will be a requirement for better sector management.

Table 6.1: Tourism Growth Scenarios

Scenarios	Numbers		Spending (EC$000s)	
Year	2012	2022	2012	2022
A. Low Growth Scenario				
Stay-over visitors*	74,000	90,000	141,685	173,500
Ross University students	5,000	5,000	45,990	46,000
Yacht visitors	11,760	13,000	2,350	2,500
Cruise visitors	266,200	300,000	23,750	27,000
Excursionists	1,500	2,000	725	1,000
Total			214,500	250,000
Bed-nights in paid serviced accomm*.	167,300	223,400		
Bed-nights in market ready accomm*	116,000	145,200		
Rooms @ 40% room occupancy	460	585		
Rooms @ 50% room occupancy	375	470		
Direct Employment in Tourism	1,700	1,700		
B. Medium Growth Scenario				
Stay-over visitors*	74,000	127,000	141,685	300,000
Ross University students	5,000	5,000	45,990	46,000
Yacht visitors	11,760	16,000	2,350	4,000
Cruise visitors	266,200	450,000	23,750	67,500
Excursionists	1,500	5,000	725	2,500
Total			214,500	420,000
Bed-nights in paid serviced accomm*.	167,300	400,000		
Bed-nights in market ready accomm.*	116,000	300,000		
Rooms @ 40% room occupancy	460	1,220		
Rooms @ 50% room occupancy	375	975		
Direct Employment in Tourism	1,700	3,000		
C. High Growth Scenario				
Stay-over visitors	74,000	155,000	141,685	380,000
Ross University students	5,000	5,000	45,990	46,000
Yacht visitors	11,760	20,000	2,350	5,000
Cruise visitors	266,200	600,000	23,750	90,000
Excursionists	1,500	15,000	725	9,000
Total			214,500	530,000
Bed-nights in paid serviced accomm*.	167,300	480,000		
Bed-nights in market ready accomm*	116,000	360,000		
Rooms @ 40% room occupancy	460	1,450		
Rooms @ 50% room occupancy	375	1,160		
Direct Employment in Tourism	1,700	4,000		

*excluding Ross University students

6.2.1 Underlying Assumptions for Scenarios B and C

- Stay-over visitors spending increases from an average of EC$ 1,900 per person in 2012 (excluding air fares and/or sea ferry fares) to about EC$ 2,400 per person in 2022, in terms of constant 2012 prices, reflecting a higher tourism product quality offering.
- Yacht visitors spending increases from an average of EC$ 200 per person in 2012 to EC$ 250 per person in 2022, in terms of constant 2012 prices, reflecting a higher tourism product quality offering.
- Excursionist visitors spending increases from an average of EC$ 480 per person in 2012 (excluding air fares and/or sea ferry fares) to EC$ 550 per person in 2022, in terms of constant 2012 prices, reflecting a higher tourism product quality offering.
- Cruise ship visitors spending increases from an average of about EC$ 90 per person in 2012 to EC$ 150 per person in 2022, in terms of constant 2012 prices, reflecting a higher tourism product quality offering.
- The proportion of 'Bed nights' spent in paid serviced accommodation, which represented about 30% of all visitor bed-nights in 2012, increases to about 40%, as most of the projected growth in demand will be for paid serviced accommodation.
- Room occupancy rates are based on an average of 1.7 sleepers per room.
- Average length of stay falls marginally under both Scenarios, reflecting increasing numbers of vacationers who have a shorter length of stay than those visiting friends and relatives.
- Under Scenario B, the number of yachting visitors will primarily be determined by the number of moorings available, average length of stay and average number of passengers per yacht. Based on some 50 moorings (mainly in Portsmouth) and taking into account the rough seas during Nov – March (exacerbated by absence of a break-water) and hurricanes during the remainder of the year, projected yacht arrivals for 2022 is 16,000. Under Scenario C with a break-water and marina at Portsmouth, the number of yacht visitors is projected to be 20,000 by 2022.
- Cruise visitor projections for Scenario B are based on a partial recovery of the market for Dominica. For Scenario C, with a dedicated cruise terminal and village at Canefield, 600,000 cruise visitors are projected.
- Day trips will come primarily from Guadeloupe.
- Estimates of direct employment are indicative and based on similar ratios used by destinations such as Anguilla and Saba, relating job numbers generated in hotels, guesthouses, restaurants, car rental, tour operators to bed-nights sold in paid serviced accommodation.
- Based on the deliberations of the Access Strategy Conference (25th/27th Sept, 2012), the number of Ross University student visits are assumed to be maintained at around 5,000 during the 2012-2022 period.

6.3 LOW GROWTH SCENARIO A

Visitor Numbers and Receipts

Under this scenario, none of the proposed initiatives takes place. Essentially, things continue much as they are. In consequence, the likely evolution of tourism on Dominica would be as follows:

- Total stay-over arrivals (including Ross University students) to increase to 95,000 by 2022.
- 31,250 non- Dominican related stay-over arrivals in 2022 visiting for
  - general vacation
  - hiking tours and scuba dive
  - short breaks by sports, church, and other special interest groups.
- Some 12,000 stay-over arrivals in 2022 using private homes in Dominica.
- Cruise ship visitors increasing marginally to 300,000.
- Marginal increase to yachting visitor and excursionist numbers.
- Total expenditure by all visitors to increase to just over EC$250 million by 2022.

Table 6.2: Visitor Numbers and Receipts 2012 – 2022

Visitor Category	Numbers		Receipts (EC$000)	
	2012	2022	2012	2022
Stay-Over Arrivals	79,000	95,000	187,675	219,500
Yacht Visitors	11,800	13,000	2,350	2,500
Cruise Visitors	266,200	300,000	23,750	27,000
Excursionists	1,500	2,000	725	1,000
TOTAL VISITORS	358,300	410,000	214,500	250,000

6.3.1 Room Accommodation Requirements

Currently, there are some 1,067 rooms in hotels, resorts, lodges, guesthouses, cottages and apartments. Excluding accommodation primarily used by the Ross University students, DDA estimates that the number of rooms meeting international standards is 460, a figure consistent with the number of 'market ready' properties/rooms featured by traditional and on-line tour operators (such as Expedia). The non-international 'market ready' rooms tend to be used by visitors attending festivals and other group events.

Excluding Medical School housing, demand for paid serviced accommodation was an estimated 167,300 bed-nights in 2012, of which we estimate just under 70% were sold in the stock of 'market ready' properties/rooms. Under Scenario A, demand for bed-nights in paid serviced accommodation in 'market ready' properties is projected to increase to 145,200 by 2022, as shown on Table 6.3.

Table 6.3: Bed-night Demand and Room Requirements in 'Market Ready' Accommodation

Metric	2012	2017	2022
Bed-nights in 'market ready' accommodation	116,000	130,000	145,200
Rooms required @ 40% room occupancy rate	460	515	585
Rooms required @ 50% room occupancy rate	375	420	470

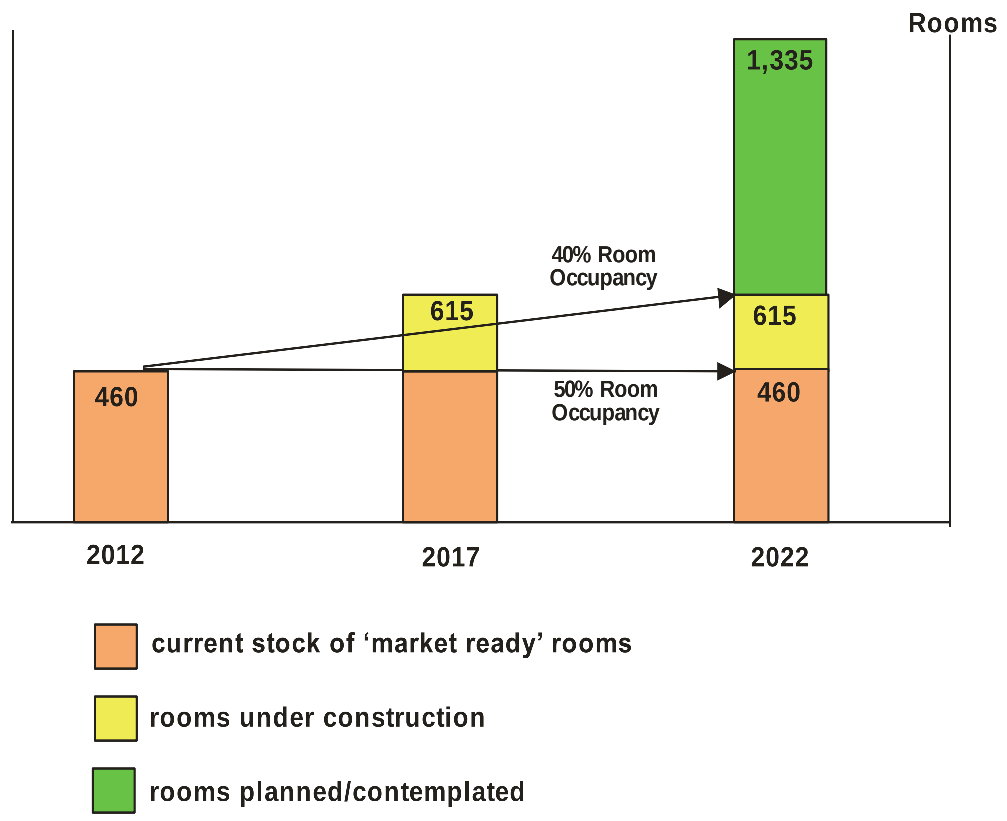
Currently, at an average annual room occupancy rate of around 40% many of the properties are experiencing financial difficulties, and for the industry to return to financial health, an average room occupancy rate of about 50% would be required. At this level of room occupancy rate, the number of rooms that could be supported by 2017 under this Scenario is 420 and 470 in 2022.

The implication of this Low Growth Scenario is that it would not support a net increase in the stock of 'market ready' accommodation, consistent with a financially sustainable sector. The situation is further exacerbated in that, at the moment, there are some 155 new rooms under construction and expected to come on stream in 2013/2014, bringing the total 'market ready' rooms to 615, well above the number of rooms that could be sustained under this Scenario A. Moreover, as outlined in Ch. 12, planned or contemplated developments, but not yet under construction, indicate a further 720 or more rooms.

Table 6.4: Rooms Under Construction and Planned/Contemplated

Currently Under construction	155
Planned/ Contemplated	
a. Woodford Hill Resort (112 accommodation units)	330
b. Cabrits Marina village, villas and 40 room hotel Resort	140
c. Near Pond Casse (75 villas plus hotel)	250

Figure 6.1: Implications for the Accommodation Sector – Scenario A



Other possibilities include a 120 room hotel in Roseau, the Layou River Hotel (120 rooms), the redevelopment of the now derelict Castaways Hotel, Mero (40 rooms) as well as an eco-resort development at Hampstead.

6.3.2 Manpower Requirements and HRD Implications

With no real expansion in the industry, in terms of the number of rooms that could be supported at a financially sustainable room occupancy rate, there is unlikely to be any net increase in the number of jobs in the tourism sector. Indeed, the likelihood is for further labour layoffs in all but a few properties and in other tourism related services

The implications for HRD are modest…..maintaining the present levels of skills in the industry.

6.3.3 Air and Sea Access Services

Under this Low Growth Scenario A, no change in the present air and sea access situation is projected. No improvements in the existing quantity and quality of connectivity between Dominica and the major regional hubs is foreseen.

In effect, poor access continues to be the major constraint to tourism growth

6.3.4 Destination Marketing

Notwithstanding the fact that the current level of resources allocated to Destination Marketing is inadequate, no additional funds are made available to the DDA for market promotions under this Scenario. This is not to imply that there will not be any improvements to the DDA's marketing effort through increased productivity. There will; but there will be no effective increase in market awareness of Dominica, in the context of increased competition from other Caribbean destinations.

6.3.5 Environmental Management

The present quality of environmental management will be maintained. A major project likely to be completed is the formulation of a Physical Master Plan for the island.

Whereas no deterioration to the natural environment is anticipated, there is likely to be increasing problems in maintaining the quality of the hiking trails, particularly the Waitukubuli National Trail, due to the lack of growth in tourist numbers.

6.3.6 Urban Environment and Economic Infrastructure

No significant improvement to the urban environment is projected; in fact further deterioration to the quality of Roseau's historical environment is likely.

Other than the completion of the Melville Hall – Roseau highway, no other major economic infrastructural development is foreseen.

6.4 MEDIUM GROWTH SCENARIO - B

6.4.1 Visitor Numbers and Receipts

Under Scenario B, the tourism sector is projected to increase by about 7% yearly over the next decade. The breakdown of this target for visitor arrivals is shown on Table 6.5

Table 6.5: Visitor Numbers and Receipts, 2012- 2022

Visitor Category	Numbers		Receipts (EC$000s)	
	2012	2022	2012	2022
Stay-over Arrivals	79,000	132,000	187,675	346,000
Yacht visitors	11,760	16,000	2,350	4,000
Cruise visitors	266,200	450,000	23,750	67,500
Excursionists	1,500	5,000	725	2,500
TOTAL VISITORS	**358,300**	**603,000**	**214,500**	**420,000**

Including Ross University students, stay-over arrivals are targeted to increase from 79,000 in 2012 to 132,000 by 2022, representing a growth rate of just under 5.5% yearly over the period.

There is a partial recovery in the number of cruise visitors and, although from a low base, a significant increase in the number of excursionists visiting Dominica.

6.4.2 Room Accommodation Requirements

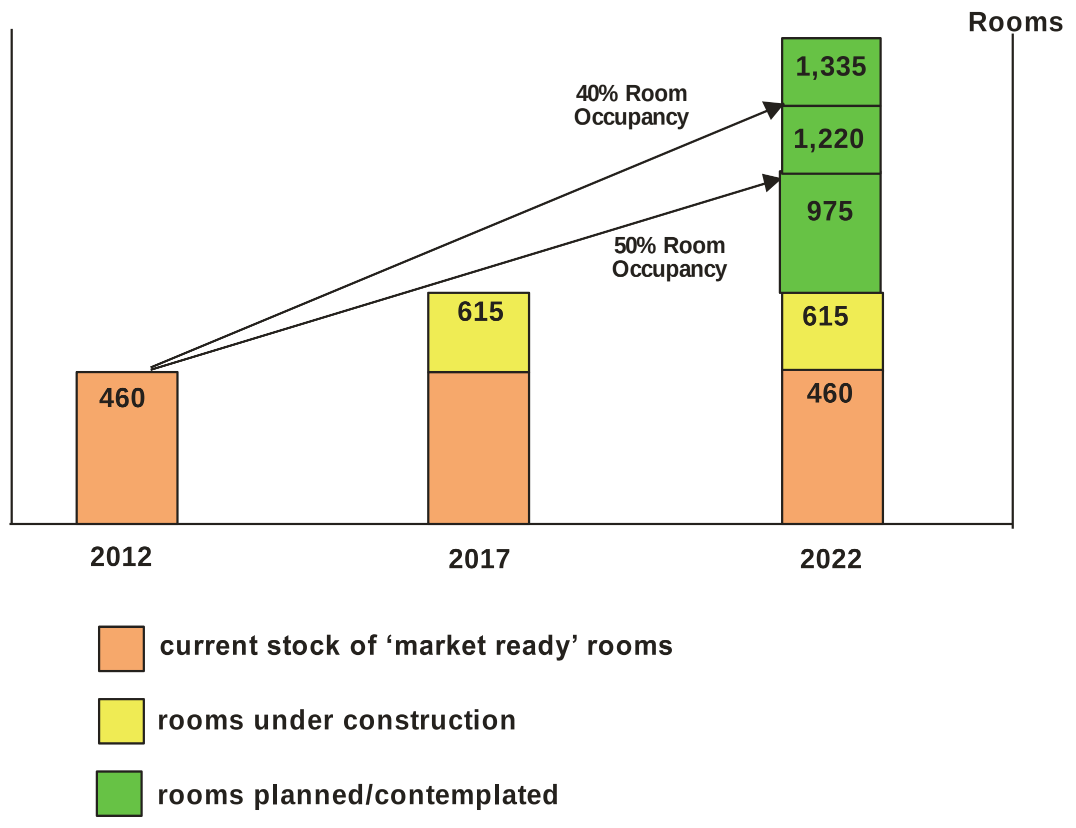
Currently, there are some 1,067 rooms in hotels, resorts, lodges, guesthouses, cottages and apartments. Excluding accommodation primarily used by the Ross University students, DDA estimates the number of rooms meeting international standards is 460, a figure consistent with the number of 'market ready' properties/rooms featured by traditional and on-line tour operators (such as Expedia). The non-international 'market ready' rooms tend to be used by visitors attending festivals and other group events.

Excluding Medical School housing, demand for paid serviced accommodation was an estimated 167,300 bed-nights in 2012, of which we estimate just under 70% were sold in the stock of 'market ready' properties/rooms. Under Scenario B, demand for bed-nights in paid serviced accommodation in 'market ready' properties is projected to increase to 302,500 by 2022, as shown on Table 6.6., reflecting not only an increase in stay-over arrivals, but also an increased proportion of bed-nights sold in 'market ready' accommodation properties.

Table 6.6: Bed-night Demand and Room Requirements in 'Market Ready' Accommodation

Metric	2012	2017	2022
Bed-nights in 'market ready' accommodation	116,000	150,300	302,500
Rooms required @ 40% room occupancy rate	460	750	1,220
Rooms required @ 50% room occupancy rate	375	600	975

Figure 6.2: Implications for the Accommodation Sector – Scenario B



Currently, at an average annual room occupancy rate of around 40% many of the properties are experiencing financial difficulties, and for the industry to return to financial health, an average room occupancy rate of about 50% would be required. At this level of room occupancy rate, the number of rooms that could be supported by 2017 under this Scenario is 600 and 975 in 2022.

The implication of this Medium Growth Scenario is that it would support a net increase of about 515 rooms in the stock of 'market ready' accommodation over the period to 2022, consistent with a financially sustainable sector. The situation at the moment is that there are some 155 new rooms under construction and expected to come on stream in 2013/2014, which will bring the total number of 'market ready' rooms to 615, more or less in line with the number of rooms that could be sustained under this Scenario B by 2017.

However, as outlined in Ch. 12, planned developments, but not yet under construction, indicate a further 720 or more rooms could be constructed over the period to 2022.

Table 6.7: Rooms under construction and planned/contemplated

Currently Under construction	155
Planned/ Contemplated	
a. Woodford Hill Resort (112 accommodation units)	330
b. Cabrits Marina village, villas and 40 room hotel Resort	140
c. Near Pond Casse (75 villas plus hotel)	250

Other possibilities include a 120 room in Roseau, the Layou River Hotel (120 rooms), the redevelopment of the now derelict Castaways Hotel, Mero (40 rooms) as well as a resort development at Hampstead.

6.4.4 Manpower Requirements and HRD Implications

The projected manpower requirements under Scenario B are shown on Table 6.8

Table 6.8: Scenario B Manpower Requirements

Subsector	Rooms	Jobs	Rooms	jobs
Hotels/resorts	495	350	1,582	1,250
B&B, Guesthouses, Inns, etc.	572	200		
Restaurants (outside of hotels, guesthouses)	n/a	50	n/a	1,750
Other (taxis, guides, dive shops, etc.)	n/a	1,100	n/a	
TOTAL	**1,067**	**1,700**	**1,582**	**3,000**

Consultant's estimates

With a projected net increase of 1,300 jobs in the tourism sector, the implications for HRD are important, as a significant number of these jobs will be in the accommodation sector.

6.4.5 Air and Sea Access Services

Under this Medium Growth Scenario B, a significant improvement in the quantity and quality of air and sea connectivity is projected, achieved through:

a. Significantly improved quality of ferry services with Guadeloupe
b. Improved in-transit facilities for Dominica connecting travellers at regional hubs
c. More efficient connections to the international services at the main regional hubs serving Dominica…..Antigua, Guadeloupe, St. Maarten, Barbados

The improved ferry services will facilitate the growth not only of the stay-over market but also the excursionist market.

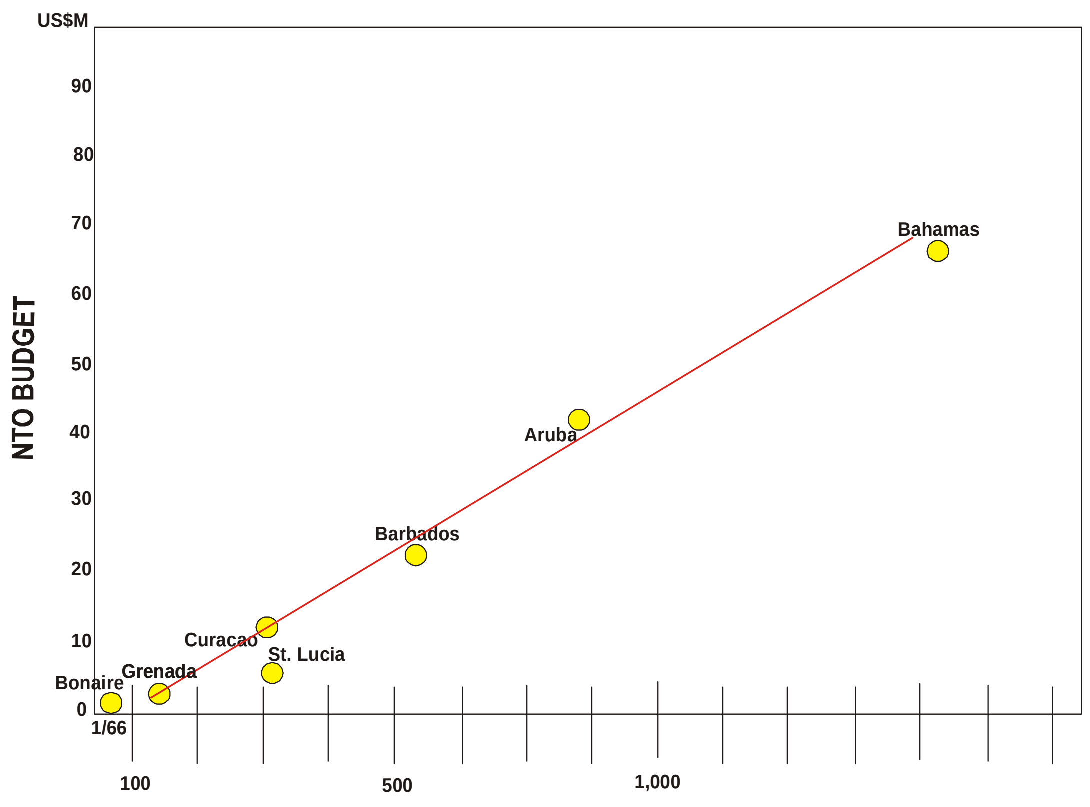
6.4.5 Destination Marketing

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 6.3 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.

Figure 6.3: NTO Budgets and Stay-Over Arrivals, 2009



6.4.6 Natural Environment and Management

The present quality of environmental management will be maintained, a major project likely to be completed is the formulation of a Physical Master Plan for the island.

An important addition will be the development of a BioPark in the Pond Casse vicinity, which will become a major attraction for cruise visitors and excursionists, as well as for stay-over visitors.

The establishment of the Indian River Protected Area is foreseen under this scenario.

There is also likely to be a continuation of the number of properties/sites qualifying for Green Globe or similar accolades.

6.4.7 Economic Infrastructure

Significant improvements to the economic infrastructure are foreseen. In addition to the completion of the Melville Hall – Roseau highway, are the following:

- rehabilitation and upgrading of the scenic road from Grand Bay via Petite Savanne and Delices to La Plaine;
- repair of pavements, gutters and road surface on Victoria Street, Roseau, and
- provision of improved signage, particularly in Roseau, and lay-bys on main roads.
- upgrading of airport departure/arrival facilities at Melville Hall
- upgrading of passenger facilities at Canefield
- upgrading of ferry terminal facilities at Roseau

6.4.8 Urban Environment

The major urban environment improvements will be centred on Roseau and include:

- Roseau River Corridor re-generation
- Restoration of the Historic/Heritage District
- Botanic Gardens to become a multi-use Municipal Park
- Regeneration of the Roseau Waterfront
- Old Market Square Plaza re-generation

6.4.9 Institutional arrangements

Significant improvements to sector management will be achieved through institutional strengthening and reorganization, involving:
- a streamlined and strengthened Tourism Division
- establishment of a Ministry of Tourism & Transport
- establishment of a National Parks Services Agency
- more focused mandate for the DDA
- establishment of an Environmental Protection Agency
  - incorporating existing Environmental Coordination Unit
- establishment of a National Heritage Trust.
  - incorporating existing Museum Trust, Old Market Trust and possibly Cabrits and other national monuments.

6.5 HIGH GROWTH SCENARIO – C

6.5.1 Visitor Numbers and Receipts

Under Scenario C, the tourism sector is projected to increase by about 9.5% yearly over the next decade. The breakdown of this target for visitor arrivals is shown on Table 6.9

Table 6.9: Visitor Numbers and Receipts, 2012- 2022

Visitor Category	Numbers		Receipts (EC$ 000s)	
	2012	2022	2012	2022
Stay-over Arrivals	76,000	160,000	187,675	426,000
Yacht visitors	11,760	20,000	2,350	5,000
Cruise visitors	266,200	600,000	23,750	90,000
Excursionists	1,500	15,000	725	9,000
TOTAL VISITORS	**358,300**	**795,000**	**214,500**	**530,000**

Including Ross University students, stay-over arrivals are targeted to increase from 76,000 in 2012 to 160,000 by 2022, representing a growth rate of just over 7.5% yearly over the period.

There is a major recovery in the number of cruise visitors and, although from a low base, a significant increase in the number of yachts and excursionists visiting Dominica.

6.5.2 Room Accommodation Requirements

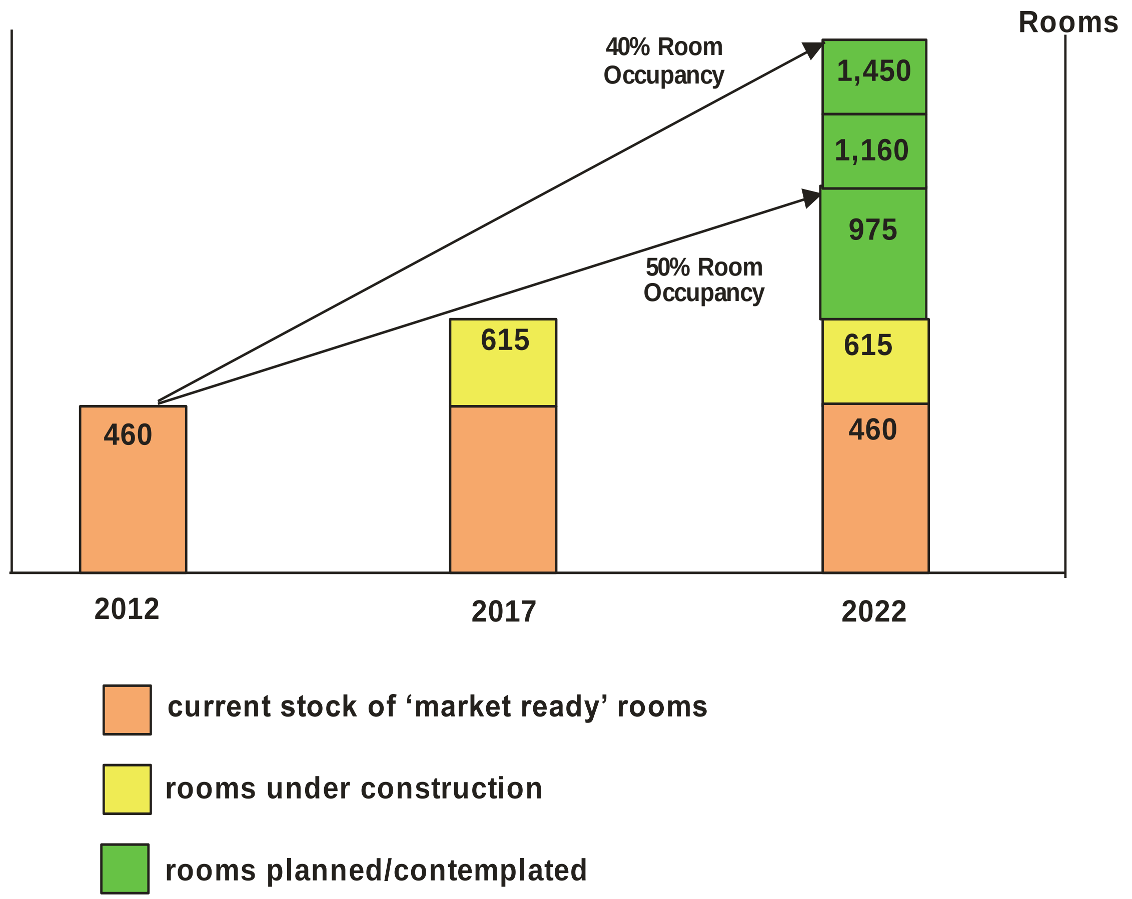
Currently, there are some 1,067 rooms in hotels, resorts, lodges, guesthouses, cottages and apartments. Excluding accommodation primarily used by the Ross University students, DDA estimates that the number of rooms meeting international standards is 460, a figure consistent with the number of 'market ready' properties/rooms featured by traditional and on-line tour operators (such as Expedia). The non-international 'market ready' rooms tend to be used by visitors attending festivals and other group events.

Excluding Medical School housing, demand for paid serviced accommodation was an estimated 167,300 bed-nights in 2012, of which we estimate just under 70% were sold in the stock of 'market ready' properties/rooms. Under Scenario C, demand for bed-nights in paid serviced accommodation in 'market ready' properties is projected to increase to 360,000 by 2022, as shown on Table 6.10., reflecting not only an increase in stay-over arrivals, but also an increased proportion of bed-nights sold in 'market ready' accommodation properties.

Table 6.10: Bed-night Demand and Room Requirements in 'Market Ready' Accommodation

Metric	2012	2017	2022
Bed-nights in 'market ready' accommodation	116,000	200,000	360,000
Rooms required @ 40% room occupancy rate	460	825	1,450
Rooms required @ 50% room occupancy rate	375	660	1,160

Figure 6.3: Implications for the Accommodation Sector – Scenario C



Currently, at an average annual room occupancy rate of around 40% many of the properties are experiencing financial difficulties, and for the industry to return to financial health, an average room occupancy rate of about 50% would be required. At this level of room occupancy rate, the number of rooms that could be supported by 2017 under this Scenario is 660 and 1,160 in 2022.

The implication of this High Growth Scenario is that it would support a net increase of about 700 rooms in the stock of 'market ready' accommodation over the period to 2022, consistent with a financially sustainable sector. The situation at the moment is that there are some 155 new rooms under construction and expected to come on stream in 2013/2014, which will bring the total number of 'market ready' rooms to 615, well within the number of rooms that could be sustained under this Scenario C by 2017.

However, as outlined in Ch. 12, planned or contemplated developments, but not yet under construction, indicate a further 720 or more rooms could be constructed over the period to 2022.

Table 6.11: Rooms under construction and planned/contemplated

Currently Under construction	155
Planned/ Contemplated	
a. Woodford Hill Resort (112 accommodation units)	330
b. Cabrits Marina village, villas and 40 room hotel Resort	140
c. Near Pond Casse (75 villas plus hotel)	250

Other possibilities include a 120 room in Roseau, the Layou River Hotel (120 rooms), the redevelopment of the now derelict Castaways Hotel, Mero (40 rooms) as well as a resort development at Hampstead.

6.5.4 Manpower Requirements and HRD Implications

The projected manpower requirements under Scenario C are shown on Table 6.12

Table 6.12: Scenario C Manpower Requirements

Subsector	Rooms	Jobs	Rooms	jobs
Hotels/resorts	495	350	1,770	1,700
B&B, Guesthouses, Inns, etc.	572	200		
Restaurants (outside of hotels, guesthouses)	n/a	50	n/a	2,300
Other (taxis, guides, dive shops, etc.)	n/a	1,100	n/a	
TOTAL	**1,067**	**1,700**		**4,000**

Consultant's estimates

With a projected net increase of 2,300 jobs in the tourism sector, the implications for HRD are important, as a significant number of these jobs will be in the accommodation sector.

6.5.5 Air and Sea Access Services

Under this High Growth Scenario C, a significant improvement in the quantity and quality of air and sea connectivity is projected, achieved through:

- Significantly improved quality of ferry services with Guadeloupe/Martinique
- An additional ferry service by same operator with Guadeloupe/Martinique
- Additional ferry operator serving Guadeloupe and Martinique
- Improved in-transit facilities for Dominica connecting travellers at regional hubs
- More efficient connections to the international services at the main regional hubs serving Dominica…..Antigua, Guadeloupe, St. Maarten, San Juan, Barbados Connectivity with Hewanorra, St. Lucia
- Canefield upgraded for scheduled passenger use

The improved ferry services will facilitate the growth not only of the stay-over market but also the excursionist market.

6.5.6 Destination Marketing

To achieve the target increases in visitor arrivals, the DDA destination marketing budget will have to be increased substantially.

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$15 and EC$22 million under the High Growth Scenario C by 2022 in terms of constant 2012 money values.

6.5.7 Natural Environment and Management

The present quality of environmental management will be maintained, a major project likely to be completed is the formulation of a Physical Master Plan for the island.

As under Scenario B, an important addition will be the development of a BioPark in the Pond Casse area, which will become a major attraction for cruise visitors and excursionists, as well as for stay-over visitors.

The establishment of the Indian River Protected Area is foreseen under this scenario.

There is also likely to be a continuation of the number of properties/sites qualifying for the Green Globe or similar accolades.

6.5.8 Economic Infrastructure

Significant improvements to the economic infrastructure are foreseen. In addition to the completion of the Melville Hall – Roseau highway, are the following:

- 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 Victoria Street, Roseau;
- provision of improved signage, particularly in Roseau, and lay-bys on main roads;
- upgrading of airport departure/arrival facilities at Melville Hall
- upgrading of airport departure/arrival facilities at Canefield
- upgrading of ferry terminal facilities at Roseau
- construction of dedicated Cruise terminal and village at Canefield
- construction of Portsmouth bypass

6.5.9 Urban Environment

The major urban environment improvements will be centred on Roseau and include:

- Roseau River Corridor re-generation
- Restoration of the Historic/Heritage District
- Botanic Gardens to become a multi-use Municipal Park
- Regeneration of the Roseau Waterfront
- Old Market Square Plaza re-generation
- Beautification of Roseau, involving improvements to streetscapes
- Regeneration of Portsmouth waterfront

6.5.9 Institutional Arrangements

As under Scenario B, significant improvements to sector management will be achieved through institutional strengthening and reorganization, involving:

- establishment of a Ministry of Tourism & Transport
- establishment of a National Parks Services Agency
- a streamlined and strengthened Tourism Division
- more focused mandate for the DDA
- establishment of an Environmental Protection Agency
  - incorporating existing Environmental Coordination Unit
- establishment of a National Heritage Trust.
  - incorporating existing Museum Trust, Old Market Trust and possibly Cabrits and other national monuments.

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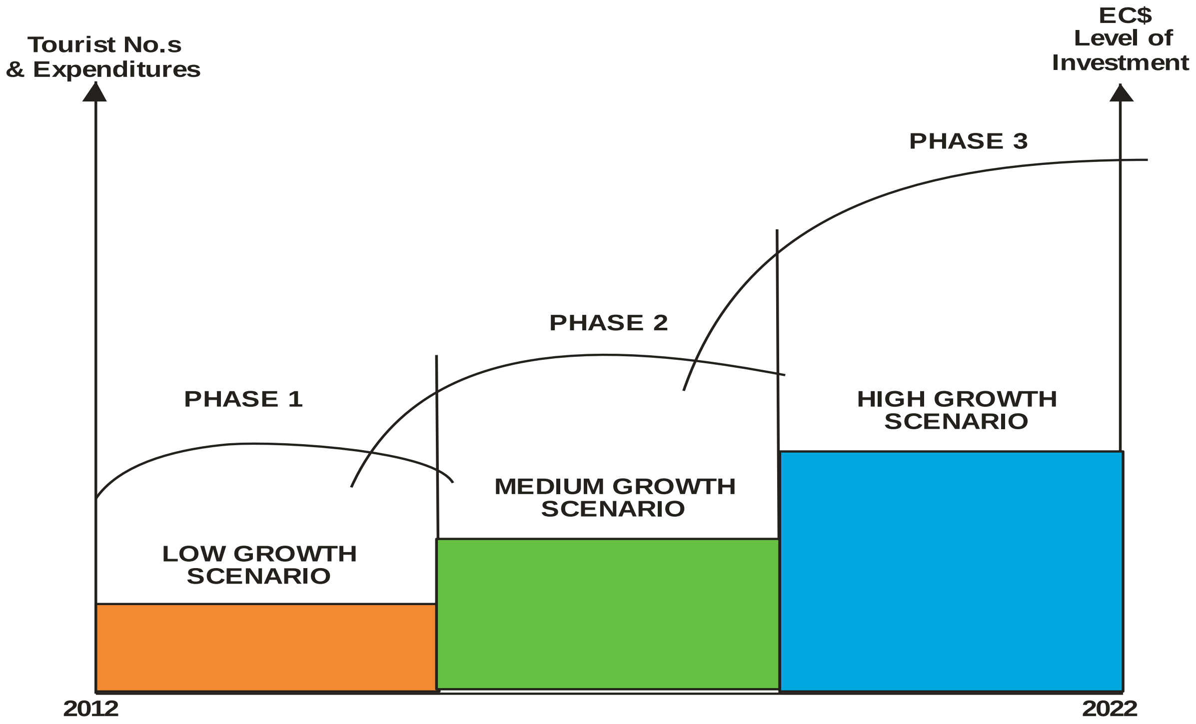
7. INDUSTRY GROWTH PATH AND STRATEGY

7.1 INDUSTRY GROWTH PATH

The low, medium and high growth scenarios are not mutually exclusive. Over time, and depending on both external and internal conditions, the low growth scenario could evolve into the high growth scenario as illustrated on the following diagram.

Figure 7.1: Industry Growth Path



Initially, the industry will follow the Low Growth Scenario – at least until air & sea services are improved; the resources available to the DDA are significantly increased; and investment undertaken to rejuvenate the tourism product and associated infrastructure. With these significant developments, the platform will be established for moving to the Medium Growth Scenario involving the further expansion and diversification of the tourism product - increased stock of accommodation, more things to-see-and-do etc. With the growth momentum generated, the stage is set for moving to the High Growth Scenario.

To achieve the targeted expansion of the tourism sector over the next decade, Dominica will have to

- **Move to an investment driven strategy**

Currently, Dominica attracts relatively few stay-over tourists. This is because the tourism industry is totally dependent on its natural attractions as the motivation for tourists to visit. But the natural attractions, though unique in many ways, are not sufficiently strong in themselves to attract the numbers required to support a significant tourism sector. It is a **primary factor driven** strategy and characterized by limited investment, insufficient accommodation and medium to low quality product.

Dominica is not alone in this regard. All destinations, where the core products are nature and culture based but are not considered world class, (as the Galapagos, Egypt, and Greece), face this problem. The strategy that many destinations which do not have 'world class' nature and cultural attractions have pursued, is to invest heavily the product.

These destinations have seen their tourism sectors prosper and grow. Ireland is such an example.

To move on to the next stage of development requires an **investment driven strategy**, with sustained investment in all aspects of the industry – infrastructure, access transport, amenities and attractions, accommodation, destination marketing, human resource development etc.

7.2 LINKING STRATEGY TO SUSTAINABLE BENEFITS

The wider objective of the growth strategy is to obtain sustainable benefits for the people of Dominica by generating additional economic activity.

The fundamental mechanism to achieve this wider objective is by increasing tourism revenue. Without an increase in revenue there can be: no growth in income; no improvement in employment, or Government tax revenues; and no possibility of improving community benefits from tourism.

The process of securing these sustainable benefits from tourism revenue is shown on the following chart. To increase tourism revenue there must either be:

- More visitors.
- Increased per capita spending by visitors.
- Longer stays.

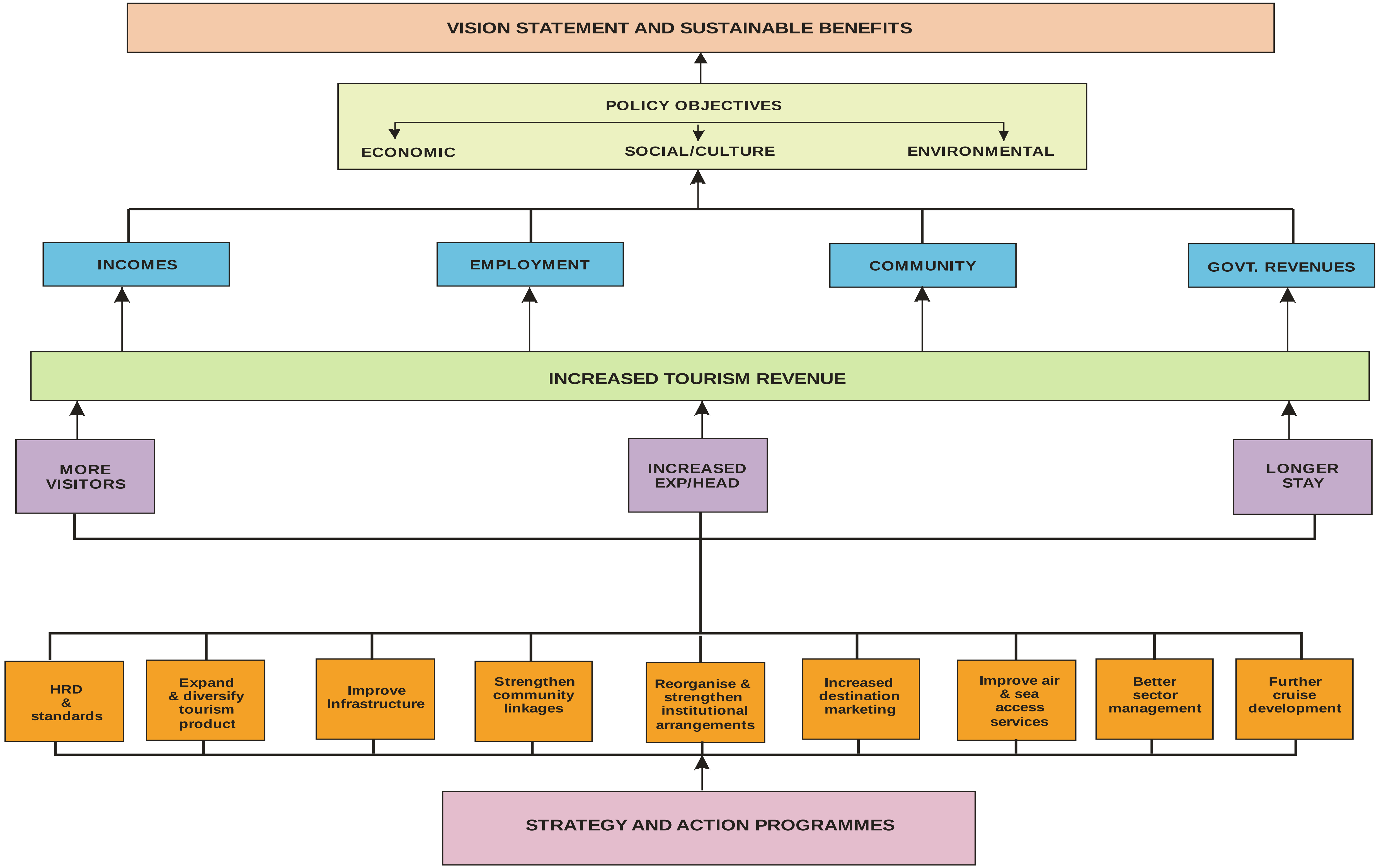
or some combination of the above.

To get more visitors, persuade them to stay longer and spend more money requires the implementation of nine strategic initiatives to deal with the issues confronting Dominica's tourism sector, viz:

- Improve air and sea access services.
- Increased resources for destination marketing and more focussed approach.
- Expand and diversify the tourism product.
- Improve infrastructure.
- Further develop cruise tourism.
- Human Resource Development and standards.
- Reorganise and strengthen institutional arrangements.
- Better sector management.
- Strengthen linkages with communities.

Action plans to effect these strategic initiatives are outlined in Part V.

Chart 7.1: Achieving Sustainable Benefits



PART III PRODUCT AUDIT AND TOURISM SECTOR REVIEW

8. SUSTAINABLE TOURISM DEVELOPMENT

8.1 DEFINING SUSTAINABLE TOURISM DEVELOPMENT

Sustainable Tourism Development means ‘any form of development, provision of amenities or tourist activity that emphasizes respect for and long-term preservation of natural, cultural and social resources and make a positive and equitable contribution to the economic development and fulfilment of people living, working or staying in these areas’ (FNPNR Charter of Sustainable Tourism).

The United Nations World Tourism Organization (UNWTO) has adopted three types of criterion of sustainable tourism development:

- The resources of the environment must be protected.
- Local communities must benefit both economically and in quality of life.
- Visitors must be given a quality experience.

This definition embraces the concept of stewardship – a responsibility to care for the destination in a way that will preserve and enhance its well-being for residents and its appeal for the visitors and future generations. Tourism is not encouraged for its own sake; it is an economic and community development tool and, as such, must take into account the benefits that both the host community and the visitor seek. Good tourism businesses do not stand isolated from the communities in which they operate. They get involved with the community and collaborate with other businesses and stakeholders and help to build local capacity.

Sustainability for tourism, as for other industries, has three interconnected aspects: environmental, social/community, and economic. Sustainability implies permanence, so sustainable tourism includes biological diversity; minimisation of ecological, cultural and social impacts; and maximisation of benefits to conservation and local communities. It also refers to the management structures that are needed to achieve this.

Figure 8.1: Relationship of the Three Pillars of Sustainability

Source: *Draft Design Guidelines for Sustainable Tourism Development* (Physical Planning Division,)

8.2 DOMINICA’S TOURISM PRODUCT

As illustrated on Figure 8.2, Dominica’s tourism product is composed of environment based natural attractions, facilities, amenities, services and supporting economic infrastructure. With regard to the tourism product, it is important to distinguish between:

- The primary tourism attractions – natural environment, cultural heritage etc.
- The economic infrastructure – air and sea ports, roads, utilities, telecommunications, and
- The tourism facilities and services – accommodation, restaurants etc.

The primary tourism attractions, economic infrastructure, and supporting facilities & services are interdependent in that:

(i) If the primary attractions are or become severely impaired by environmental damage, overuse or neglect – the raison d’être for tourism facilities disappears.

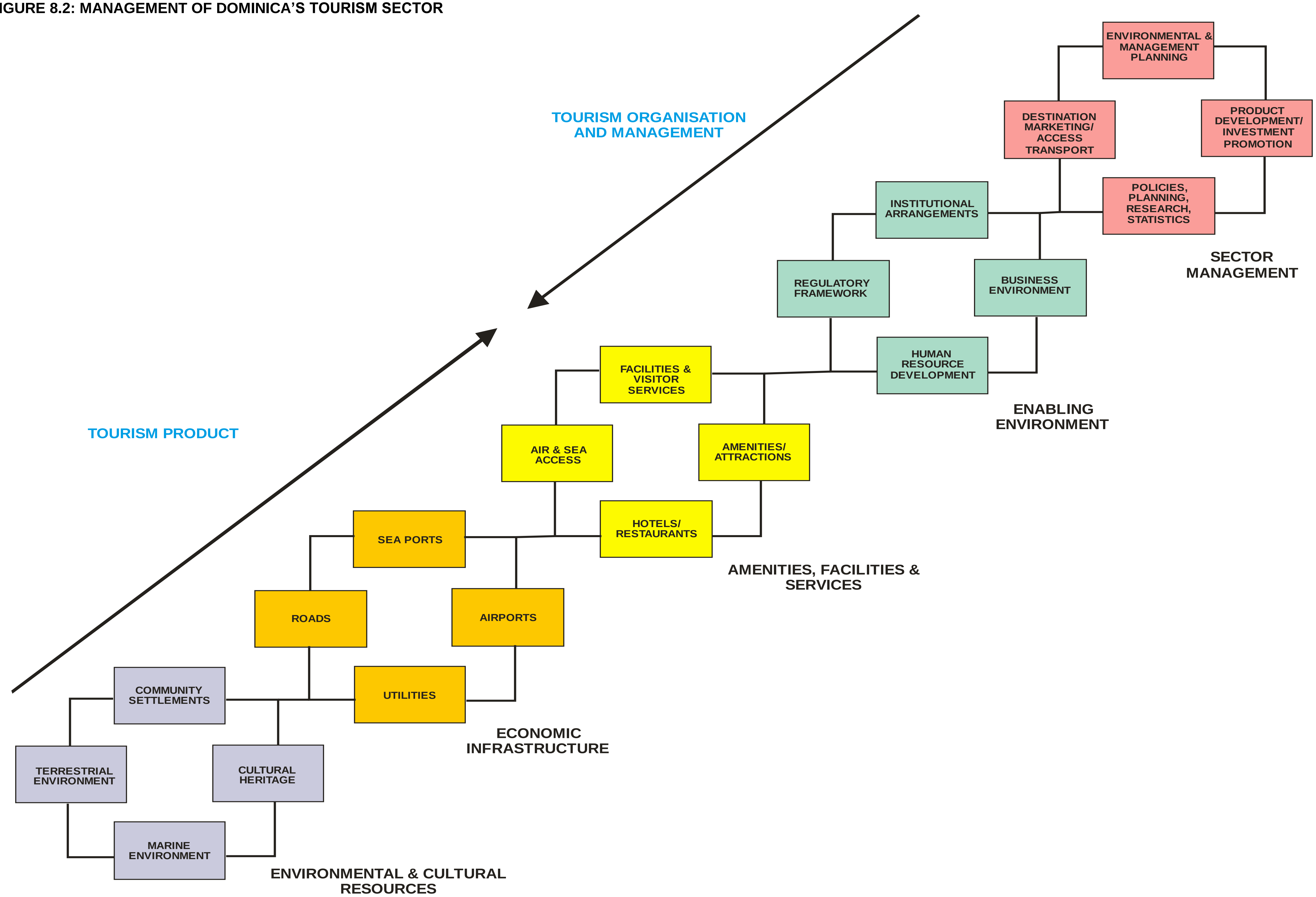
(ii) Conversely, the primary attractions can effectively attract tourism only if the necessary economic infrastructure is in place and there are adequate supporting facilities and services available.

However, for the tourism product to be developed in a ‘**sustainable**’ way, it is necessary that there is:

- An enabling environment of appropriate institutions, regulatory framework and business environment, HRD, and
- Effective sector management covering policies, environmental planning, destination marketing and access transport.

Successful tourism requires many different components to be in place before there is a ‘**competitive**’ product on offer in the marketplace.

FIGURE 8.2: MANAGEMENT OF DOMINICA'S TOURISM SECTOR



8.3 COMPETITIVENESS KEY TO SUSTAINABILITY

Sustainable growth – the ability to increase market share, the ability to continually add-value, the ability to create socio-economic, environmental and cultural benefits, etc. – ultimately depends on competitiveness.

Measures of Competitiveness

Over the years, a number of measures of competitiveness have been developed by international organisations including the World Economic Forum (WEF) and the World Travel and Tourism Council (WTTC).

The WEF has developed a Travel and Tourism Competitiveness Index which comprises three component indices – the regulatory framework index, the business environment and infrastructure index and the human, cultural and natural resources index.

The World Travel and Tourism Council (WTTC)[*] has similarly developed a Competitiveness Monitor, comprising eight separate indices, each of which measures a different dimension of tourism performance and the operating environment for tourism enterprise and activity. Table 8.1 gives the list of these eight indices and their respective component indices. Although some 133 countries were covered by the most recent Competitiveness Monitor in 2009, Dominica is not among them.

Table 8.1: WTTC International Tourism Competitiveness Monitor: Component Indices

Main Indices	Main Pillars
1) Price Competitiveness	Hotel prices, indirect taxes, purchasing power parities
2) Human Tourism	Volume and value of inbound and outbound tourism
3) Infrastructure	Roads, railways, water, sanitation
4) Environment	Population density, CO_2 emissions, ratification of international treaties on the environment
5) Technology	Internet access, telephones, mobile phones, high-tech exports
6) Human Resources	Life expectancy, literacy, enrolment in primary, secondary and third level education, employment in travel & tourism, unemployment, population, gender indicators
7) Openness	Visa requirements, trade openness, taxes on trade, tourism openness
8) Social	Human Development Index, TVs, personal computers, newspapers, crime

[*] WTTC Travel & Tourism Competitiveness Index, 2009

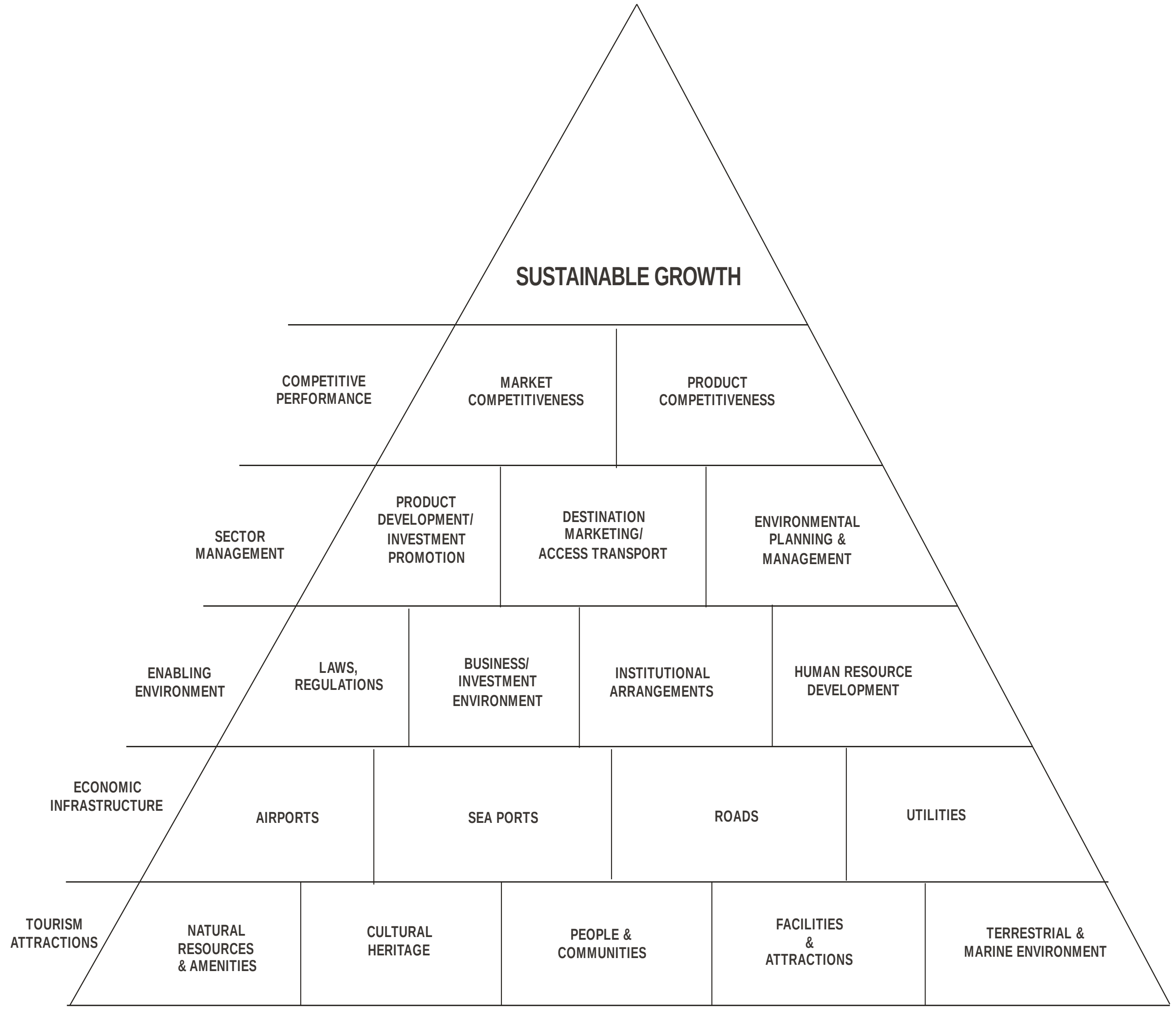
A Competitive Model for Dominica Tourism

As evident from the list of indices in Table 8.1, competitiveness is a complex measure, especially when applied to destinations. It embraces a very wide range of factors which extend into all areas of economic and social activity.

In this context, a more practical approach is to see the management of Dominica's tourism sector in the framework of a **Competitiveness Pyramid** as shown in Figure 8.3.

Sustainable Growth is the apex of the pyramid, and the ultimate objective of national competitiveness in tourism. It is heavily dependent on successful management and delivery with respect to each of the components highlighted on the supporting layers. The implication is that a deficiency in any one component can undermine the capacity of a destination to meet the expectations of tourists. Sustainability in this context encompasses economic, social, cultural and environmental sustainability. While it is impossible to insulate Dominica tourism sector against external shocks, such as economic upheaval in major source markets, sustainable growth is ultimately dependent on the ability of Dominica tourism to remain highly competitive in the long term.

Figure 8.3: Tourism Competitiveness Pyramid



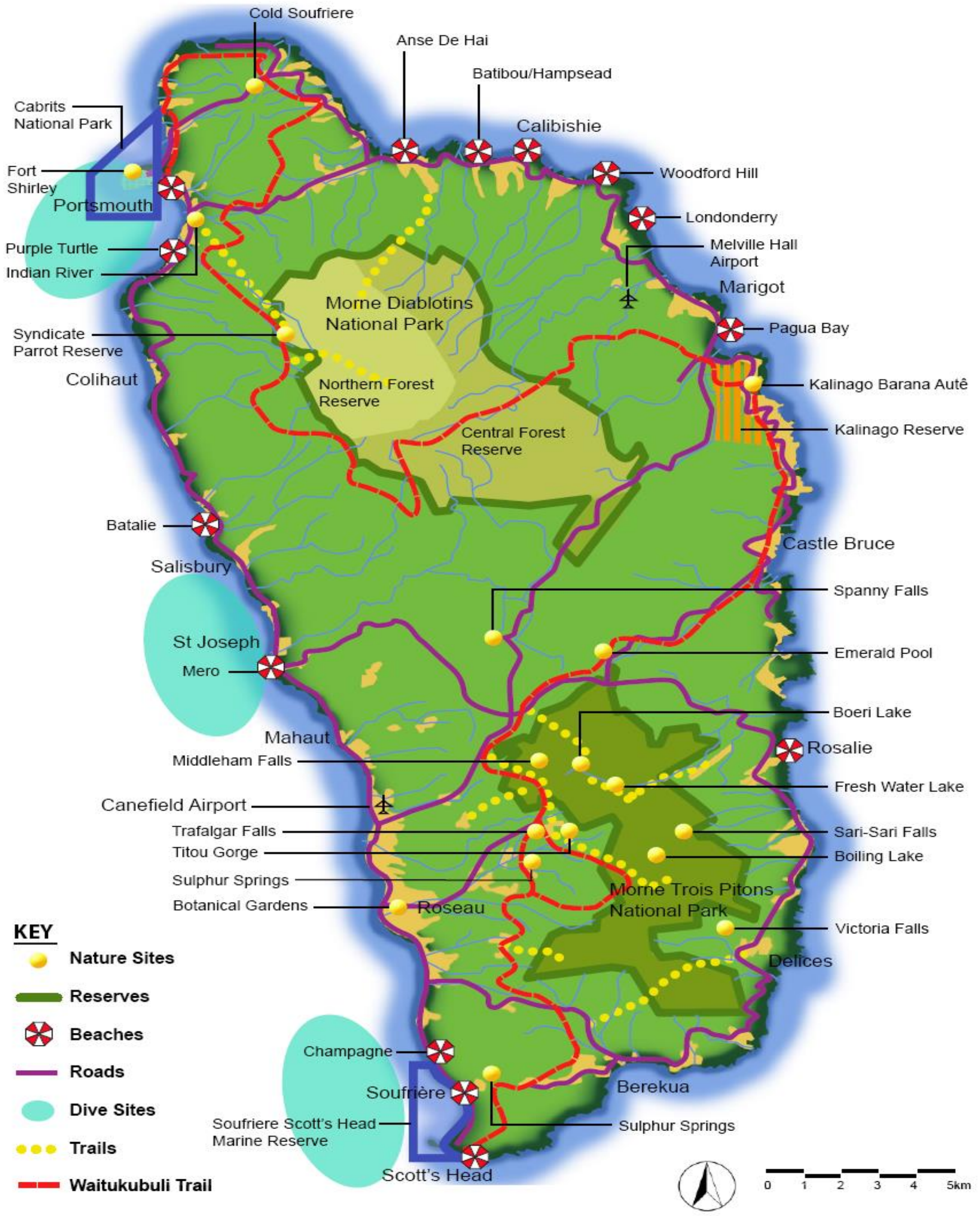
9. ENVIRONMENT AND CULTURAL HERITAGE

9.1 Natural Environment

Dominica possesses a wealth of ecological attractions including tropical forests, mountains, waterfalls, rivers, lakes, wetlands, sunken volcanoes with steep drop offs and beaches. The Boiling Lake in the Morne Trois Pitons National Park is the second largest of its kind in the world. . Dominica's forests are the most extensive in the Lesser Antilles, covering more than 60% of the island.

Dominica's native flora include over 1,000 species of flowering plants, 74 species of orchid and 200 species of fern. There are 166 species of birds including the Imperial Parrot (Sisserou) and the Red Necked Parrot. The forms part of the National Emblem.

Map 9.1: National Parks, Reserves, Nature Sites, Trails, Dive Sites and Beaches



9.1.1 National Parks and Reserves

As illustrated on Map 9.1, Dominica has three National Parks:

Morne Trois Pitons National Park was established as a national park in July 1975 and named a World Heritage Site in 1997. The Park is a significant area of volcanic activity and covers 17,000 acres which includes the Valley of Desolation, a region of boiling mud ponds and small geysers, the Boiling Lake, Titou Gorge and Emerald Pool;

Cabrits National Park was established in 1986, and occupies 1,313 acres and protects tropical forests, coral reefs and wetlands; and

Morne Diablotin National Park covers 8,242 acres, and was established in 2000, primarily to protect the habitat of the endangered Sisserou Parrot. The 4,747 foot high Morne Diablotin is the island's highest, and second highest mountain in the Lesser Antilles.

Other protected areas include two forest reserves, a water catchment area and a wildlife reserve; while there are two marine reserves (Soufriere Scott's Head Marine Reserve in the southwest, and the Cabrits National Park Marine Section in the north). Another marine reserve is envisaged adjacent to the Salisbury in the central west coast. The marine reserves are used for a combination of activities, including diving, snorkelling, swimming and yacht anchoring, as well as inshore fishing.

9.1.2 Nature Sites

Dominica has some 18 nature sites, the more popular being Trafalgar Falls and Emerald Pool, as shown on Table 9.1. 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. In total, some 206,000 visitors were recorded at the main nature sites during 2011, the great majority of whom were foreign.

Table 9.1: Visitors to Nature Sites, 2011

Site	Site Pass	Week Pass	Residents	Children	Exemption	Total
Trafalgar Falls	76,899	5,129	5,358	233	111	87,730
Emerald Pool	48,021	4,138	3,574	92	150	55,975
Cabrits	4,530	3,244	8,698	162	250	16,884
Indian River	9,098	2,819	2,317	91	8	14,333
Freshwater Lake	4,058	2,432	3,692	71	63	10,316
Soufriere Sulphur Spring	1,491	1,656	4,896	69	74	8,186
Middleham Falls	3,016	1,469	814	32	36	5,367
Boiling Lake	1,878	1,703	973	0	1	4,555
Syndicate	744	929	663	17	33	2,386
Morne Diablotin	27	88	64	1	0	180
Morne Trois Pitons	21	4	14	0	0	39
TOTAL	**149,781**	**23,611**	**31,063**	**768**	**726**	**205,951**

Source: *Forestry Division*

The site improvement component of the Eco Tourism Development Programme (ETDP) funded the rehabilitation of different sites. The works included improvements to access routes, boardwalks, safety railings, reconstruction of shelters and reception centres.

Currently, 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 (e.g. snackettes) 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 ship days) is reserved until 12.00am for those passengers on pre-booked tours sold aboard ship. After midday the sites are open to all. After some initial dissatisfaction, this new arrangement appears to have been accepted by most tour and taxi operators.

9.1.3. Waitukubuli National Trail

The 115-mile Waitukubuli National Trail ranks among the world's premier long-distance walking trails. Opened in 2011, it extends from Scott's Head in the south to the Cabrits National Park in the north. En route, the fourteen segments traverse a wide range of terrain, including the island's mountainous interior, rain forests, and a variety of rivers, waterfalls and sulphur springs. Not only for hikers, and those interested in the island's flora and fauna (including birdlife), the trail passes through old plantations, fertile farm lands and small villages that showcase the history and rich cultural heritage of Dominica, including various arts and crafts, and local cuisine. Accommodation is provided in home stays and small guest houses (for which quality standards have been developed).

9.1.4 Beaches

Since Dominica is a steep sided volcanic island consisting of rocky cliffs it does not have many beaches. Those that exist are generally narrow and consist of stones and black volcanic sand. However, along the north-western and north-eastern coasts, there are a number of gold or honey-coloured sandy beaches which, while unsuited to 'mass' beach tourism because of their relatively small size and ecological sensitivity, have potential in the context of smaller resort developments. (In this regard it is interesting to note that in recent years a significant number of investors are choosing beach locations for their developments).

These gold or honey-coloured beaches include Batibou, Calibishie area, Douglas Bay, Hampstead; Picard Beach, Pointe Baptiste/Red Rock, Purple Turtle Beach, Scott's Head, Secret Bay and Woodford Hill Beach.

Some of the notable other beaches are: Batalie (near the Sunset Bay Club); Londonderry Beach (close to Melville Hall airport); Mero Beach (a grey sand beach); Soufriere; and the slightly rocky beach at Castle Bruce Bay on the Atlantic coast.

Apart from the formerly popular Donkey Beach at Canefield (which now suffers from pollution), there are few if any suitable places to swim near Roseau. Botanical Beach (Victoria Street) and Rockaway are considered to be too rocky and difficult to access.

Excepting Mero, Purple Turtle and Red Rock, most other beaches lack even the most rudimentary facilities. A beach bar/snackette has recently been provided at Batibou.

9.2 URBAN AND BUILT ENVIRONMENT

9.2.1 Roseau City – Historic Quarter and Old Market

The majority of the 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 irregular narrow street pattern and array of heritage buildings in an easily walkable area, gives 'character' to Roseau. Although a number of buildings have been maintained, for the most part the historic district has experienced neglect over the years, with little attention being paid to the buildings and maintenance of physical infrastructure. The sidewalks/pavements are in an exceptionally poor state of repair, making walking hazardous for the visitor and resident alike. In addition, there is a challenge with regard to the timely disposal of solid waste, particularly at busy periods (e.g. Christmas Eve) and after major events (e.g. Carnival), while potentially attractive streetscapes are marred by extensive overhead cabling.

The Society of Historic Preservation and Enhancement (SHAPE), supported by EU funding, has produced a self-guided walking tour for those wishing to experience Roseau's vernacular architecture, with its typically Caribbean mixture of styles and periods. However, as mentioned earlier, many of the buildings are in poor repair and very little has been done to restore and develop them. The use of the cobble-stoned Old Market as a vendor's square has been described as 'detrimental to the historic character and architecture of the resource '*Roseau Development Plan, Strategy & Action Plan 2020,* (Baptiste & Associates).

9.2.2 Roseau River

The *Roseau Development Plan* identifies the Roseau River as a potential major attraction in that it would enhance the uniqueness of Roseau as one of the few sites in the Caribbean to have a 'living body of fresh water, unpolluted and providing leisure activities for residents and visitors'. Unfortunately, the river suffers from pollution from solid and liquid waste disposal. Soil erosion, inappropriate dredging and future plans for a parking area are of concern.

9.2.3 Bay/Waterfront

The Bayfront is Roseau's greatest and most underutilised asset. It has the potential to be a very special promenade and 'people place' which the city currently lacks. However, this amenity value is constrained by:

- narrow walkway along the sea wall
- four lanes of traffic
- height of defence wall relative to walkway, making it difficult to appreciate sea views
- parking on 'sea' side of street
- unattractive streetscape
- inappropriate buildings and other structures – e.g. location of fish market.

9.2.4 Portsmouth

Portsmouth is the second largest urban area in Dominica. Although a busy town, enlivened by the Ross University Medical campus, the buildings, streets, etc., are, for the most part in poor condition, which detracts from the town's overall ambience and makes it less attractive for visitors. However, this situation has been improved considerably by the recent removal of old ship wrecks that formerly lined the shore.

9.3 HERITAGE ASSETS

Dominica has a rich cultural heritage extending from pre-historic times to the present day. This includes anthropological and archaeological remains; indigenous Kalinago culture; historic forts and other buildings dating from the colonial period; plantation heritage, Maroon heritage assets; agro-heritage; and creole heritage as exemplified in language, music and events like the World Creole Music Festival and the more recent Jazz 'n Creole.

9.3.1 Anthropological and Archaeological Sites

Dominica has a considerable number of archaeological sites, from Amerindian and Maroon sites to anchorage remains. They represent a time span of human habitation, beginning with the settlement in Dominica of the Arawaks and Caribs (Kalinago).

9.3.2 Indigenous Heritage

The island is home to the largest surviving territory of the indigenous Caribbean people, the Kalinago. Approximately 3,000 Kalinago live along the east coast in the Kalinago Territory where they cultivate land and make traditional crafts such as baskets. Attractions include:

(i) Kalinago Barana Autê

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 6,277 visitor per annum – 1,287 national and 4,990 non-nationals – representing less than one-sixth of the 37,500 visitors originally projected to visit the village. Recommended financial input and staffing have not been realised. 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 meeting held at the KBA in October 2012.

(ii) Touna Kalinago Heritage Village

The Touna Kalinago Heritage Village, near Concord, offers a different opportunity for visitors to appreciate the lifestyles of the Kalinago people and to feel part of a present day indigenous community.

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

(iii) Other

Other important indigenous heritage/mythical sites include L'Escalier Tete Chien and the Spirit of the Rock overlooking Pagua Bay.

9.3.3 Historical Buildings

Numerous historical buildings are spread throughout the island including forts, estate houses, churches, mills, batteries and signal stations. One of the most important is Fort Shirley, located within the Cabrits National Park. Under the EU funded Ecotourism Development Programme (ETDP), the main building has been restored and is now increasingly being used for wedding and other events.

9.3.4 Plantation and Maroon Heritage

The plantation heritage includes the 18th century Bois Cotlette Plantation Estate in Soufriere (which is the best representation of a plantation house in Dominica, with much of its remains still intact and presently undergoing restoration); the Old Mill; and the Macoucherie and Geneva estates.

Associated with this period are the Maroon heritage assets (including trails, old caves, settlements, etc. associated with the freedom-seeking slaves).

9.3.5 Agro-Heritage Tourism

This includes farm tours, with opportunities to sample organic and other fresh farm produce, Creole cooking, etc. Bay oil distilleries used in the local bay oil industry, which are mainly concentrated on the south-eastern coast, still use very traditional methods for extracting oil from the bay leaf.

9.3.6 Festivals and Events

Festivals and events include music, Carnival, flower shows (e.g. Giraudel-Eggleston) as well as Independence and Emancipation celebrations. While the majority of these events (e.g. the World Creole Music Festival and Jazz 'n Creole) are at present primarily focused on resident Dominicans and the intra Caribbean market, they have the potential to be more internationally-driven.

9.3.7 Arts and Crafts

Arts and crafts are an important attraction for tourists and can be a significant source of income for the local artists and crafts' people. Most tourists wish to take home some mementoes of their travel experience. A key issue in the development of arts and handicrafts is that they are authentic. The basketry of the Kalinago people, for example, is quite distinct from other West Indian straw work. Visual artists' studios can be found across the island (Roseau, Portsmouth, Grand Bay and in the interior).

9.3.8 Other

Related other attractions include:

- Dominica Museum
- Old Mill Cultural Centre which also displays works of local artists
- Papillote Tropical Gardens
- Coal Pot Soap factory
- Macoucherie Rum Distillery
- Giraudel-Eggleston Flower House and Gardens
- Grand Bay Arts & Craft Centre/Geneva Heritage Centre.

10. COMMUNITY TOURISM

Community involvement in tourism is a natural extension of the principle of economic development being extended to rural communities and has been an implicit policy of the Government of Dominica for at least fifteen years, and probably more. This policy is made explicit in the *National Tourism 2020 Policy* statement, as follows:

- To actively open up opportunities for rural communities to increase their involvement in the tourism industry, particularly in tourism planning and the running of enterprises;
- To work actively to increase the representation of the informal tourism sector and community interests in existing and future tourism forums;
- To ensure that rural communities have greater access to the benefits from tourism by creating appropriate legal mechanisms and establishing appropriate incentives;
- To ensure that private sector tourism enterprises on state-owned land involve and benefit local residents, and take place in areas and in forms acceptable to local people;
- To encourage the formal tourism sector to work with the informal sector in recognition that this is not only in the long-term interest of the tourism industry, but also that this is a social responsibility and a contribution to Dominica's national development objectives of improved equity, poverty alleviation and sustainable growth; and
- To ensure that tourism development within Dominica is environmentally sustainable.

Communities in Dominica have traditionally been organised around the Local Government system which is one of the strongest and oldest in the Caribbean. Separate from this formal structure, there are community groups and NGOs working within and across communities for meaningful socio-economic and cultural development. In a number of instances, tourism committees have been formed and registered as legal entities to spearhead community projects in their respective communities. Ideally, the NGOs and Tourism Committees should work in close partnership with the Village Councils in their respective areas, but this is not always the case.

Community Projects

One of the recommendations of the TMP 2005-2015 was the strengthening of the linkages between communities and the tourism sector, the aim being to enhance the benefits of tourism to the communities on the one hand and, on the other, to enhance the experience of visitors to Dominica to build the necessary linkages between tourism and the agricultural and rural sectors.

Subsequently, a European Development Funded (EDF) community support programme was established and implemented in two phases: the Eco-Tourism Development Programme (2002-06) and the subsequent two-year Tourism Sector Development Programme (SFA). Under the ETDP, thirteen small and medium sized community projects received support amounting to EC$1.4 million, while the SFA programme focused on developing community tourism products in a further eleven communities (Portsmouth/Indian River, Mero, Layou, Wotten Waven, Eggleston/Giraudel, Bellevue Chopin,Sineku, Freshwater Lake, Vieille Case (Itassi), Mahaut (Rodney's Rock) and the South East. Assistance was given to established or newly-formed community groups in each area, mainly for physical infrastructure (such as visitor centres or attractions), but also (particularly under the SFA project), for human resource development; business planning; package and tour development; and marketing.

Map 10.1: Location of Local Municipalities/Village Councils and Community Tourism Projects

In addition, branded websites were developed for 13 communities. Brochures were also prepared highlighting the tours and packages available within those communities. There is also an overall community tourism website which assists the community groups in marketing their products and services not only on a local basis but internationally (www.communitytourism.dm).

Further details are given in Table 10.1.

The following community groups also received support under the project but are not represented on the MoT website: Calibishie Tourism Development Committee; Grand Bay Tourism and Environmental Committee (GTEC); Penville Tourism Development Committee; and Scott's Head Improvement Committee.

Other approved projects (whose present status is unclear) include the construction of a bamboo café; construction of a picnic shelter/change room and trail development at Dernier Waterfall, Grand Fond; construction of a stage and toilet facility at the Castle Bruce Reunion Centre; and); development of a multipurpose Tourism Information and Interpretation Centre for the North and Northeast Tourism & Economic Development Committee.

There are mixed views as to the extent to which the Communities affected actually benefited – at least until now – from these programmes, and whether or not more immediate benefits might have been achieved by direct support to hotels serving their local communities through provision of direct and indirect employment, and purchases of local suppliers of goods (e.g. fruit & vegetables, fish, etc., and provision of services). These and other issues affecting the development of community-based tourism are discussed in Chapter 27.

Community Tourism Association

The Dominica Community Tourism Association Inc. (which held its inaugural Annual General Meeting in August 2011) is the umbrella organization of all community tourism organizations on the island, including the newly-formed Heart of Dominica Tourism Development Association.

Nearly all of the community groups that were beneficiaries of the two EU programmes are members of the DCTAI, one of whose first activities was the organization of a 'mini trade show' in Mero which helped to showcase the heritage, products, and services of the members of the various community tourism associations around the island, providing an opportunity for community tourism service providers and product suppliers to meet and possibly form lasting partnerships.

The MoT is working closely with the community tourism organizations through the DCTAI, and has prepared a Community Tourism Draft Action Plan and Draft Management Agreement which will assist in ensuring greater focus on the overall objective of sustainable community ecotourism in Dominica.

Table 10.1: Community Tourism Projects

Community	Community Organisation	Promotional Brand	EU-assisted projects
Bellevue-Chopin	Bellevue Organic Farmers Group	Organic Farms Tour	Construction of Tourism Reception Centre
Calibishie	Calibishie Tourism Development Committee	not on Ministry website	Development of an Information Centre & Souvenir Shop
Eggleston-Giraudel	Eggleston-Giraudel Flower Growers Group, Inc.	Creole Cooking & Gardens Tour	Construction of a Flower House/ Botanical Centre/ Flower Show Site
Grand Bay	Grand Bay Tourism and Environmental Committee (GTEC)	not on Ministry website	Art & Craft Centre, Construction of ground facilities and setting up of a production centre in an adjacent building
Laudat	Freshwater Adventure Group	The Lakes Experience	Support to Lake Adventure Facility and Interpretation Centre
Vieille Case	Itassi Tourism Environmental and Development Committee	Historic Tour	Construction of gazebos, boardwalk and benches at Au Parc
Layou	Layou Improvement Committee	River Fun & Lake Tour	Tourism Resource Centre
Mahaut	Mahaut Marine & Recreation Group	Snorkelling Experience	Support for the construction of facilities at Rodney's' Rock
Mero	Mero Enhancement Committee	Beach & Waterfall Tour	Beach development & enhancement including vending units/stalls, changing room, stage, and landscaping
Penville	Penville Tourism Development Committee	not on Ministry website	Support for development of trail and other facilities at Cold Soufriere and for craft outlet/shop, viewing point
Portsmouth	Portsmouth Community Tourism Association	Indian River & Historic Cabrits Tour	Indian River Rehabilitation and Extension Project (i) Tourist Reception Facility – landing site/tour boat dock (ii) Construction of Information Centre in Indian River
Scott's Head	Scott's Head Improvement Committee*	not on Ministry website	Renovation of Caribantic Building and creation of additional facilities around the building
Sineku	Sineku Improvement Committee	Heritage Tour ~ The Kalinago	Support for Heritage Village at the L'Escalier Tete Chien
Southeast	Southeast Environment & Tourism Development Corp.	Waterfalls, Rivers & Ravines	Development of Wavine Cyrique trail, Secret Beach, Twa Basen and Morgan Falls; Interpretation Centre and Bar
Touna, Concord	-	not on Ministry website	Support for Heritage Village
Wotten Waven	Wotten Waven Development Committee, Inc.	Natural Spa ~ Hot Pools	Construction of a Tourism Information & Computer Centre, and washroom facilities.

** in association with the Scott's Head Local Area Management Authority (LAMA) which is responsible for managing the Scott's Head-Soufriere Marine Reserve (SSMR)*

11. ECONOMIC INFRASTRUCTURE

The economic infrastructure directly related to tourism is shown on Map 11.1.

11.1 AIRPORTS

Dominica is served by two airports, Melville Hall and Canefield. Melville Hall, located on the North East coast of Dominica is about 65-75 minutes' drive from Roseau (using the newly-upgraded direct road) while Canefield is located just outside of the capital on the South West coast.

11.1.1 Melville Hall

Melville Hall has a 5,761ft runway and night landing facilities that are presently underutilized. It has a NDB (Non Directional Beacon) but in the absence of an ILS (Instrument Landing System) landing under poor weather conditions can be constrained. LIAT uses this airport exclusively for its services to Dominica.

Terminal facilities have been improved since 2006 (spacious departure lounge, adequate parking facilities), and are at the moment, adequate to facilitate the present level of passenger traffic. However, for the airport to facilitate higher levels of passenger traffic over the next decade, improvements are required to deal with the following deficiencies:

- limited number of check-in desks;
- following check-in, passengers have to queue outside terminal building before being admitted in batches of 2 or 3 to pass through security;
- security area too small and only one screening facility;
- only one baggage belt in baggage claim area and any delays in delivery of baggage from aircraft will result in congestion in this area; and
- no arrivals concourse.

11.1.2 Canefield

In 2010, Canefield airport recorded about 3,000 passenger movements and some 2,000 aircraft movements. In contrast, in 1986 Canefield recorded 67,000 passenger movements and 9,000 aircraft movements.

Many factors contributed to the decline of traffic into Canefield. The main factor was LIAT's (the main operator at the time) change in its fleet of aircraft from Twin Otters (DHC6) to the Dash 8. As Canefield could not accommodate the Dash 8, activity switched to Melville Hall. The commencement of the ferry service between Dominica, Martinique and Guadeloupe also contributed. With passenger traffic shifting to the ferry service, airlines such as Air Guadeloupe and Air Martinique eventually stopped operating due to poor passenger loads.

A widely held misconception is that Canefield is an 'unsafe' airport due to the field conditions (i.e. high winds, turbulence and wind shear). Although there are periods during the year, (generally during the months of January to February and sometimes into March) when the field conditions may not be conducive to the safe flight operations, these periods are few and far between. For example, in 2012 there were only four airport closures due to high wind/turbulence/wind shear. In 2011 there were only three airport closures. During these periods, flights were diverted to Melville Hall. Significantly, Canefield Airport has maintained a high safety record over the years and there have been no accidents or incidents at Canefield Airport that can be attributed to 'adverse' weather conditions.

Map 11.1: Infrastructure

The major threat to Canefield is the possibility of coastal erosion affecting the airstrip, which if unchecked and the necessary actions not implemented, would threaten the integrity of the runway itself.

From a technical standpoint, the limitations are the length of the runway (3,600ft) and the lack of any instrument approach procedure. At present, only daylight flights are allowed. It is understood that the runway could be lengthened to about 4,100ft, if the orientation were changed.

The following aircraft are capable of safely using this airport: DHC-6 Twin Otter, Britten Norman Islander, Cessna 404 and most light class private aircraft. However, the suitability of these aircraft for carrying passengers is constrained by the relative paucity of passenger comforts which limits the effective range to c.a. 60-90 minutes flying time. Thus, the Twin Otter has a maximum effective range at full passenger load of c. 182 nautical miles; the Islander, under the same criteria, c. 110 nautical miles; and the Cessna 402 c. 321 nautical miles. These ranges may be further reduced by the operating policies of the airlines. For example, Cape Air restricts the commercial operating range of its Cessna 402s to 200 nautical miles.

11.2 SEA PORTS, TERMINALS AND HARBOURS

11.2.1 Cruise Ship Berths

(i) Roseau Cruise Ship Berth (RCSB)

Cruise ships visiting Dominica mainly berth at the Roseau Cruise Ship Berth which is on the bayfront, adjacent to the main shopping centre of Roseau. There is no shore side facility as such. However, directly across the road from the jetty are located the Tourist Information Centre, Dominica Museum and the Old Market Square. Limited parking is available off the jetty, which is used by taxis/mini buses collecting cruise passengers. To facilitate the collection/delivery of cruise passengers, the Bayfront road is closed to other vehicular traffic when a cruise ship is in port.

Roseau

Cabrits

(ii) Woodbridge Bay Berth

Woodbridge Bay Port, (nearly 2km north of RCSB), is the main port for containerised shipping, but is also used for the larger cruise ships and when there are a number of cruise ships in port. There are no passenger facilities.

(iii) Cabrits Berth

The cruise ship berth at Cabrits National Park near Portsmouth is a dedicated cruise facility. It includes a 12,000 sq. ft. (1,114m^2) passenger reception centre which houses offices, craft shops and a cafeteria. With only the smaller vessels occasionally using this facility, this cruise ship berth is under-utilized.

11.2.2 Passenger Ferry Terminal

The Roseau Ferry Terminal is situated along the bayfront in central Roseau catering for inter-island passenger ferries – from Guadeloupe and Martinique primarily. Passenger facilities at the terminal are poor. Although check-in times and security checks are similar to those at airports, passenger facilities are not good enough to accommodate the numbers involved in reasonable comfort. In high season, or when there are large groups, passengers (even those with only hand baggage) can experience long delays clearing Customs & Immigration.

The ferry terminal is used to facilitate passengers disembarking from launches and tenders from cruise ships at anchor in Roseau Bay.

11.2.3 Harbours

There are two harbours of importance – one in Roseau at the fish market and the other near Marigot, which is a large fishing harbour.

11.3 ROADS

Dominica has a strong network of roads which link all major towns and villages. The road network extends to some 905km, of which 320 km are categorised as main roads and the remaining 585 km as secondary, feeder or urban roads. In 2007, some 25% the network was found to be in good condition, and 75% in fair to very poor condition. Of the secondary, feeder or urban roads, only 2% was found to be good condition, with the remainder fair to very poor. The poor road conditions in Dominica are in part a result of the country's difficult and costly (from a road construction standpoint) terrain, and heavy rains.

The main objective of the ***National Roads Policy*** is to provide an accessible road network (viz. to get the road network into good condition; and to maintain the road network in good condition) in order to contribute to the safety, efficiency and comfort of road travel; contribute towards economic growth; and reduce vehicle wear and tear for the approximately 18,000 vehicles in Dominica, not including motor cycles (of which 10% are cars; 20%-25% are small SUVs and pick-ups; and the remainder are buses).

Under its 10-Year Road Sector Plan, Government has targeted that 85% of the road network be in good condition by end 2015, and 95% by end 2020. Availability of funding will determine the extent and rate of fulfilment of these goals.

There has been considerable emphasis on road development in recent years with much new and on-going construction. Among these are the major works on the West Coast Road (now completed with support from the People's Republic of China) which has significantly reduced the travel time between Roseau and Portsmouth, and the Pond Casse to Melville Hall Airport Road (under construction with support from the French Government with completion expected in 2013) which will reduce the driving time between Roseau and Melville Hall to just over one hour. In addition, under the first phase of *the Roseau Road Reinstatement Project* (jointly funded by the Kuwait Fund for Arab Economic Development and the Government of Dominica, with support from the PRC) the existing western bridge was widened; an additional bridge constructed to the north of the existing bridges at the end of the Bath Road; the main road leading up to the Trafalgar Falls and other main tourist sites in the Roseau Valley was widened; and a new road constructed from the new bridge around the new Windsor Park sports stadium to the main Roseau Valley road. The latter has particularly benefited cruise passengers from Woodbridge Bay.

While good progress has been, and is continuing to be, made in respect of main roads, there is some catching up to be done in respect of the secondary and feeder roads due to lack of financial resources, while traffic and parking in Roseau are major issues when cruise ships are in port.

11.3.1 <u>Directional Signposting</u>

The road system is not well signed, particularly were there are one-way systems, and there is very limited and inconsistent signage for tourism attractions.

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11.4 UTILITIES – POWER, WATER, SANITATION, TELECOMMUNICATIONS

11.4.1 <u>Power</u>

The majority privately-owned Dominica Electricity Services Limited (DOMLEC) is the sole entity involved in the generation, transmission, distribution and sale of electricity in the Commonwealth of Dominica. As such, its role in the country's economic development is extremely important.

Under the provisions of the Electricity Supply Act of 2006, DOMLIEC is now regulated by the Independent Regulatory Commission (IRC) and has been granted an exclusive licence foe power production and distribution up to the year 2015. However, the new power sector regulations allow for private entities to be licensed to self-generate power and to supply power to the grid e.g. small renewable energy systems such as wind and solar photovoltaic systems.

DOMLEC currently employs diesel and hydro power. Research and/or proposals for wind, geothermal, and biogas have been on-going for some time with varying degrees of success. Private individuals have introduced solar power that is being used primarily for household water-heating.

DOMLEC operates three hydro-electric power stations, namely: Laudat, Trafalgar and Padu; and two diesel power stations at Fond Cole and Sugar Loaf. The transmission and distribution (T&D) network serves about 98% of the island's population.

The system peak demand is 17.4 MW, while total generation installed capacity is 26.6 MW, of which over 70% is now is supplied by the diesel stations. The 'firm capacity' allows for a dip in hydro generating capacity during the dry season, but is still capable of meeting peak demand levels.

Dominica's energy situation exhibits a high and growing dependence on oil which Government hopes to reduce (or even eliminate) through the anticipated transition to renewable energy technologies, specifically geothermal.

Partly as a result and partly due to the rising cost of fossil fuels, Dominica has (according to the Carilec Tariff Survey) the highest costs of electricity for industrial and commercial consumers in the region and, across certain consumption bands, for domestic consumers as well. The hotel sector also points to the growing expense and at times unreliability of electricity supply.

11.4.2 <u>Geothermal Energy</u>

After drilling three test wells, it has been confirmed that there is an exploitable geothermal resource in the Roseau Valley, with power production capacity of over 300 MW. Following exploration financed under the EU and French government funded Geo-Caraibes project, the Government has "commenced the process of negotiation" for building a 10 to 15 MW geothermal plant within two to three years (**Source:** 2012/2013 Budget Address). A second, privately-financed venture has undertaken test drilling activities in the Soufriere Geothermal Resources area.

The electricity generated by the Roseau Valley geothermal plant will be used exclusively to augment the domestic supply, 70 percent of which is currently dependent on the importation and use of diesel fuel, leading to a possible reduction, or at least no further increases, in average electricity costs which are already amongst the highest in the Caribbean region. The next step would be to supply Guadeloupe and Martinique with electricity via an underwater cable, for which the feasibility study is on-going. Montserrat and Nevis have similar plans with regard to their own geothermal energy expectations. Coordination of geothermal plans has been addressed under INTEREG IV B PROJECT: Caribbean Geothermal Energy; Phase II.

11.4.3 Water Supply

Water supply is the responsibility of the Dominica Water and Sewerage Company Limited (DOWASCO), a statutory corporation wholly owned by the Government, which has the sole exclusive licence to utilise the water resources of the country. It currently services over 90% of the total population.

The company extracts over 10 million imperial gallons per day from over 40 separate river intakes owned and managed by DOWASCO to satisfy potable water demands. The largest single source, serving the urban area of Roseau and a number of nearby communities, has a capacity of 3 million gallons per day. The other systems serve rural communities. Chlorination occurs at the gravity-fed storage tanks.

Overall, the water supply situation is adequate to meet the water demands of the country, though some communities can experience low pressures or sometimes even water shortages (especially during the dry season or when a cruise ship is taking water on board). It is estimated that an additional 4.1 million cubic metres is needed to meet future demand, including future tourism-related needs.

DOWASCO also supplies bulk water to cruise and cargo ships berthing at the island's various ports, as well as local bottled water companies. The dedicated bulk water terminal in Newtown has a discharge capacity of 6 million gallons per day. The source of the bulk water is the Freshwater Lake at the foot of Morne Micotrin. Bulk water in smaller quantities for cruise and cargo ships and ferries is available at the Woodbridge Bay Port, Bayfront Terminal and Portsmouth Cruise Ship Berth. The recent construction of a 500,000 gallon water storage tank at Morne Bruce in 2012 is expected to improve the water supply system for the city of Roseau and environs as well as to provide water for the Windsor Park Sports Stadium and a supply for the sale of bulk water to cruise ships. The current West Coast Water Supply Project will significantly improve the water supply to residents along the west coast of Dominica by providing potable water to residents from Salisbury to Capuchin.

DOWASCO sees the need to continuously upgrade the system in order to ensure provision of sustainable water supply services to residents and business establishments as well as supporting the new thrust towards tourism development. In so doing, the main challenge it faces is how best to meet rising maintenance costs and service its loans. Water tariffs in Dominica continue to be among the lowest in the Caribbean.

11.4.4 Sanitation

The Roseau Water and Sanitation Project, completed in 2004, has rehabilitated the urban sewer and waste system, and provided better disposal and treatment methods, in the Roseau area (serving about 60% of the total urban area). The collection system, which is maintained by DOWASCO, discharges raw sewage (after processing the removal of solids) at a sea outfall 200 feet off Pottersville shoreline. For the future, a sewage treatment plant is needed to eliminate the dumping of raw sewage into the sea. Elsewhere on the island, there are no sewage collections or treatment systems, but implementation of a proposed sewage and water filtration system for Portsmouth is planned.

11.4.5 Solid Waste

The **Dominica Solid Waste Management Corporation (DSWMC) is responsible for** developing solid waste management facilities for storage, collection, treatment and disposal of solid waste. Under the Waste Management Act (1996), solid waste, or refuse, is defined as encompassing all biodegradable and non-biodegradable, combustible or non-combustible solid wastes, except human body wastes. These include garbage, ashes, household, industrial and street refuse; dead animals, abandoned vehicles, demolition and construction, sewerage, and hazardous refuse.

The Fond Cole Sanitary Landfill, located one mile north of Roseau, occupies approximately 18 acres and has been designed to accept waste from the island for a fifteen year period. Operations commenced in September, 2005. Projected increases in tourism demand in the North due to the planned construction of resort hotels will require the construction of a second sanitary landfill in that part of the island.

The growing eco-tourism market is imposing demands on countries to raise and maintain standards on environmental matters such as sewage disposal, street litter and recycling.

Some measures have already been taken to address these issues. There is an island-wide garbage collection service, which includes the emptying of litter bins, provided by LIME, in Roseau (but this does not appear to extend to the unsightly accumulation of litter on the beach where the Roseau River enters the sea); the DSWMC's Recycling Programme (which facilitates the recycling of: used engine oil; used tyres; lead-acid batteries; derelict vehicles; white goods; glass; plastics; and cardboard, and also encourages composting); and DSWMC's Adopt A Block Campaign (which encourages businesses in Roseau to take responsibility for their immediate area and keep it clean). However, other environmental awareness programmes for the public and schools are needed in order to be able to continue to promote the island to the ecotourism market.

11.4.6 Telecommunications

Telecommunications infrastructure in Dominica is broadly competitive with that of the other islands of the Caribbean. As a member state of the Eastern Caribbean telecommunications authority (ECTEL), Dominica has gone through a similar liberalisation process and, as required by ECTEL, a National Telecommunications Regulatory Commission has been established as the local regulatory body.

There are now three providers of public fixed voice telephony (LIME, Marpin and SAT Telecommunications) compared with only one (Cable and Wireless) in 2005, while both LIME and Digicel offer mobile telecommunications services. Internet service is offered by LIME, Marpin and SAT Telecommunications, but, at only 10% of the population, the internet penetration rate is lower than in most other Eastern Caribbean states.

The quality of both the telephone and internet services are rated highly by members of the business community, and this is not perceived as a constraint on the country's ability to attract investment. However, there are some areas of the island that do not have access to telecommunications services.

12. AMENITIES, ACTIVITIES, FACILITIES AND SERVICES

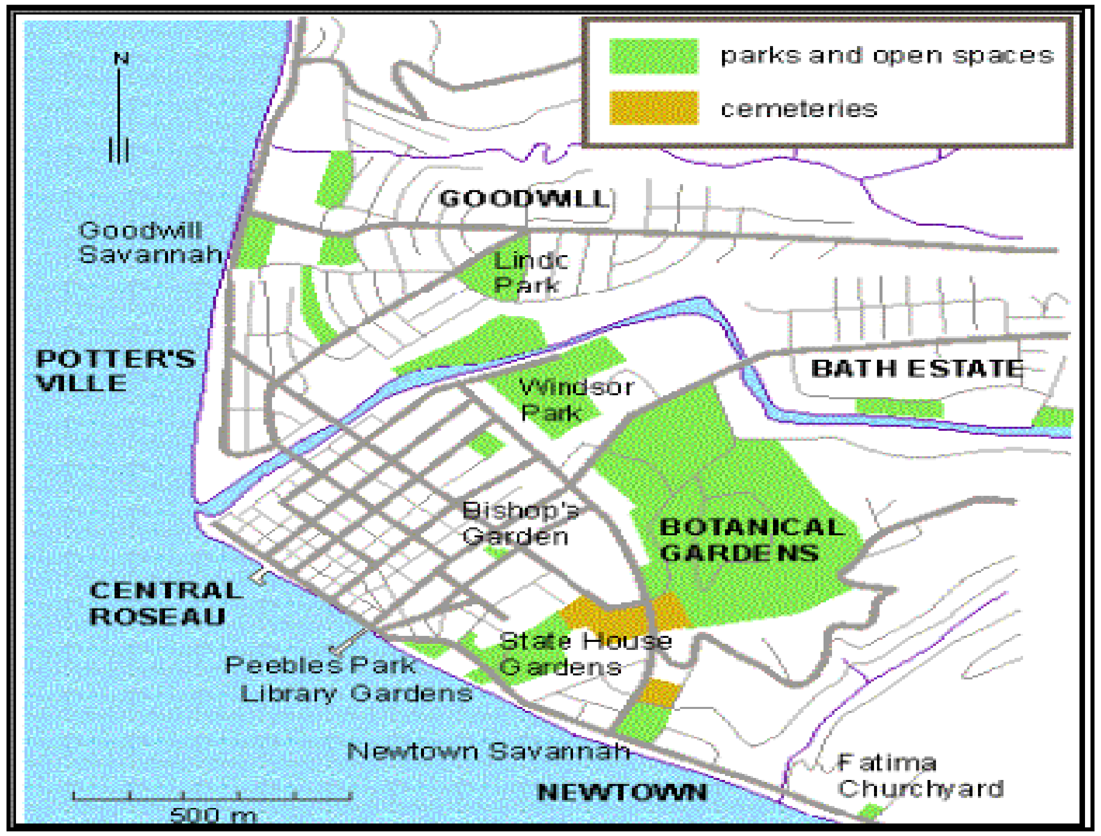
12.1 AMENITIES

In addition to the National Parks and Reserves, Dominica's other major amenity is the Roseau Botanic Gardens (RBG).

12.1.1 Botanic Gardens

Bounded by Valley, Bath and Elmshall roads, the RBG covers an area of approximately 40 acres. In a city noticeably lacking greenery and open green spaces, it is a major amenity, which is visited by cruise visitors and tourists.

Map 12.1: Location of Botanic Gardens



Adapted from Kim Thurlow – RBG and Peripheral Link Project

The Gardens are home to over 50 types of indigenous plants and imported trees as well as the Sisserou Parrot. In addition there are 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 consultancies regarding their future use and development) do not showcase Dominica's biodiversity in terms of range of exotic plants, trees, etc.

They are bisected by a main road and, in general, lack cohesion. Moreover, there is increasing pressure on the RBG as a result of growing use of the gardens by schools and individuals due to the lack of recreational and sports facilities in the city in general and in particular owing to the loss of Windsor Park due to the construction of the stadium there.

12.2 ACTIVITIES

Hiking and Diving are promoted as the two most popular activities.

12.2.1 Hiking

Dominica offers a wide range of hiking experiences. There are a number of well-established trails including the Caribbean's first long distance trail, the *Waitukubuli National Trail*. Composed of 14 segments, this trail runs 115 miles south-north, and takes at least two weeks to complete. A welcome development is the 'adoption' of certain trail segments for maintenance, etc. by private tourism interests. For the period January – August 2012, there were 215 non-resident users of the Waitukubuli Trail. In addition, there are other trails (most connecting with, or in close proximity to, the national trail), which are divided and categorised into four classes of difficulty: easy; intermediate; advanced and very difficult. Details are given in Table 12.1.

For the most part, the trails are in good condition. While there is now an *Users' Guide to the Waitukubuli National Trail* describing the various segments of the trail (including location, maps, distance, places to stay, etc.), less information is available in respect of the other trails. In general, without a knowledgeable guide, the trails offer comparatively little in way of interpretation of the various historic or cultural attractions along the route, and of the at times relatively few sightings of birds or other wild life.

Table 12.1: Hiking Trails

Name	Area/Region	Length	Duration	Forest Type
Easy Hikes Syndicate Nature Trail Titou Gorge Jaco Flats/Steps – Emerald Pool Trafalgar Falls Fresh Water Lake Trail	 West Roseau Valley Interior East Roseau Valley	 0.8 miles 0.5 miles I mile 0.7 miles 0.2 miles 2.5 miles	 45 minutes 5-10 minutes 45 minutes 25 minutes 20 minutes 1.5 hours	 Rainforest Secondary Forest Rainforest Secondary Forest Montane Forest
Intermediate Hikes Boeri Lake Lake Victoria Falls Chemin L'Etang Middleham Falls Sari Sari Falls Syndicate to Portsmouth Morne Anglais Trail Morne Crabier	 Roseau Valley East East Roseau Valley Southeast Northwest Southwest Southwest	 1.25 miles 0.4 miles 2.5 miles 3.6 miles 2 miles 4.97 miles	 1.5 hours 45 minutes 1.5 - 2 hours 1.5 hours 1.5 hours 2.5 hours 3 hours 2 hours	 Upper Montane to Cloud Forest (elfin woodland) Rainforest Secondary Forest to Upper Montane Forest Rainforest Rainforest Rainforest to Secondary Forest Secondary Rainforest to Cloud Forest (elfin woodland) Dry Forest, Secondary Forest and Savannah
Advanced Hikes Morne aux Diables Morne Trois Pitons Trail	 North East	 1.06 miles	 4 hours 6 hours	 Secondary Rainforest to Cloud Forest (elfin woodland) Secondary Rainforest to Cloud Forest (elfin woodland)
Very Difficult Hikes Boiling Lake Perdu Temps Trail Morne Diablotin Bolive Falls	 Roseau Valley Southeast Northwest East	 8 miles 4.8 miles 1.25 miles	 6 hours 8-10 hours 5-6 hours 6-8 hours	 Fumarole Vegetation, Montane Forest, Cloud Forest (elfin woodland) Secondary Forest to Mature Rainforest Rainforest to Cloud Forest (elfin woodland) Rainforest to Upper Montane Rainforest

Source: *DDA /Forestry Division*

Map 12.1: Trails and Dive Sites

12.2.2 Diving

More than 20 individual dive sites are listed on the DDA website. The main ones (from north to south) are:

- Toucari Bay (with access from the beach);
- Cabrits (several sites);
- Five Finger Rock (Cabrits National Park);
- Rina's Hole (north of Whaleshark Reef);
- Nose Reef and Whaleshark Reef;
- Rodney's Rock;
- Champagne Reef;
- Scott's Head Drop Off; and
- The Village.

One of the most popular sites for snorkelling is the Champagne Reef dive site which is shallow enough to be enjoyed by snorkelers and scuba divers alike, but for those wishing to swim, access to the sea over stones is difficult. No studies appear to have been undertaken to assess the carrying capacity of Dominica's dive sites in terms of number of divers and/or of dives, but industry representatives consider that at present this is not a constraint and the island could accommodate a threefold increase the number of visiting divers (presently around 3,000 per year).

Eight dive operators are listed on the DDA website:

- ALDive, Loubiere,
- Anchorage Whale Watch and Dive Centre
- Dive Dominica, Castle Comfort
- Cabrits Dive, Portsmouth;
- Sunset Bay Club, Coulibistrie;
- East Carib Dive, Salisbury;
- Fort Young Hotel, Roseau; and
- Nature Island Dive, Soufrière.

of which only two are DDA-certified.

For most, businesses are operating at about one-third of capacity in terms of boats, equipment, etc. Air access (connectivity and price), rather than market demand, is seen as the main constraint, plus the lack of space for dive equipment on LIAT and other airlines using small aircraft.

12.2.3 Thermal Springs

Natural spas, fed by Dominica's volcanic sulphur springs, provide a range of services including hot tub baths, mini-waterfalls, mud pools and other experiences. They include:

- Grand Soufrière Sulphur Springs, Soufrière;
- Ti Kwen Glo Cho, Wotton Waven;
- Tia's Bamboo Cottages, Wotton Waven;
- Screws Sulphur Spa, Wotton Waven;
- Rainforest Shangri-La Resort, Wotton Waven (currently closed); and
- Papillote Wilderness Retreat, Trafalgar.

There are also several local herbalists and organic specialists who produce herbal medicines, organic soaps, oils, spices, juices and other products, as well as a number of alternative medicine practitioners offering holistic medicines and nutrition, and other health care services. These are listed in DDA's *Health and Wellness Directory* which as well as providing information on Dominica's hot springs, organic cuisine and rejuvenating activities, also contains listings of practitioners in a range of holistic therapies including crystal bowl therapy, baby massage, herbal medicine, meditation and yoga.

Dominica has the natural features and assets to become a major player in the health and wellness tourism industry. However, there needs to be better coordination of efforts to expand and grow this segment, including attracting a major international resort spa operator.

12.2.4 Other Activities

There is a wide range of other activities and things to do and see, including Whale Watching; Bird Watching (including the native Sisserou and Jaco parrots); extreme sports such as Canyoning and Freediving; General Touring (facilitated by recent improvements in the road network); Horseback Riding on the island's mountain trails; Kayaking (e.g. at Freshwater Lake or the placid Soufrière Bay); Sea Turtle Viewing (best be seen at Rosalie Beach between March and October when the turtles come ashore to breed); and Biking (with scope for developing a round-island *Tour de Dominique*).

River tubing and ziplining are not presently available following the temporary suspension of Wacky Rollers' facility at Layou River, and the cessation of ziplining at the former Aerial Tramway.

Almost uniquely in the Caribbean, there are no opportunities for visitors wishing to participate in more traditional sports such as golf or tennis.

12.3 TOURIST FACILITIES AND SERVICES

Tourist facilities and services consist of accommodation, restaurants, customs & immigration, banking and other services.

Based on the DDA list of **certified** tourism facilities and services, the following represents a current pen-picture of the tourism sector.

Table 12.2: Tourist Facilities and Services, 2011/12

Facility/Service	Number of Properties/Operations	Number of Rooms/ Units
Accommodation		
Hotels/Resorts	26	495*
GH/B&B/Inns	40	278
Campgrounds	3	15
Apartments/Cottages/Villas	46	279
Total Accommodation	**115**	**1067**
Certified Entities (Oct 2012)		
Accommodation	31	
Restaurants	1**	
Craft/Gift Shops	n/a	
Taxi Services***		
- Taxi Operators (owners of vehicles)	275	
- Taxi Drivers	103	
Vendors	193	
Hair Braiders	7	
Tour Guides	137	
Tour Operators	18	
Vehicle Rentals	6	
Dive Operators	2****	
Travel Agency	1	

Source: *Discover Dominica Authority*
**Includes Portsmouth Beach Hotel (80 rooms) which is used mainly by Ross University medical students*
******** *refers only to restaurants meeting the DDA standards; however, all food outlets must meet environmental heath criteria and are inspected by the Environmental Health Department*
**** inspections have been outsourced to the Police Traffic Department*
***** out of eight on the DDA website*

The size of the tourism sector is relatively small; and its structure is weaker still when the quality of the operations is taken into account. Thus, for example, there are estimated to be some 1,120 operators in the tourism sector, of which only about 820 are certified by the DDA, representing approximately 75% of the total.

12.3.1 Accommodation

In 2011, there was a total of 1,067 rooms in tourist accommodation establishments, of which 495 were in hotels, 278 rooms in guest houses, bed & breakfast establishments and inns; and 279 in apartments/cottages/villas. In addition, there were 15 accommodation units in campgrounds, while there are also a number of private houses (not included in the above total) offering home stays, particularly in locations on or adjacent to the Waitukubuli Trail.

The total number of rooms increased from 588 in 1995 to 1,067 in 2011, with the greatest absolute and percentage increase occurring in the Apartments and Cottages category. The growth in the number of hotel rooms included the opening of Jungle Bay Resort (2005, 35 rooms), Rosalie Bay Resort (2010, 28 rooms & suites)**;** Pagua Bay House Oceanfront Cabanas (six cabanas, still under construction) and Secret Bay Resort (2011, 4 villas and bungalows, with more planned). These represent mainly up-market accommodation, commanding high room tariffs.

Table 12.3: Tourist Accommodation, 1995 – 2011

Year	Hotels/Resorts		Guesthouses, B&B and Inns		Apartments, Cottages & Villas		Total	
	No.	Rooms	No.	Rooms	No.	Rooms	No.	Rooms
1995	20	335	18	160	20	93	58	588
2000	19	433	25	228	22	100	66	761
2005	20	442	26	239	22	106	68	787
2010^R	24	470	40	279	48	287	112	1036
2011	26	495	40	278	49	294	115	1067

Source: *DDA* ** including campgrounds after 2000*

The licensing and certification programme being implemented by DDA through its Quality Assurance Unit is aimed at ensuring that all tourist accommodation establishments conform to recognised international standards. As a result, the number of certified properties increased from some 15 properties (222 rooms) in 2007 to 31 properties (462 rooms) in October 2012.

The standards that have been developed for campgrounds and home stays need to be enforced.

In 2011, almost 44 percent (462 rooms) of the total tourist accommodation capacity was concentrated in the Roseau area (including Roseau South and Roseau Valley), with the next largest concentration in the Portsmouth area (179 rooms), but, as previously mentioned, this includes Portsmouth Beach Hotel (80 rooms) which is used mainly by Ross University medical students (who are classified as tourists in the official statistics).

Table 12.4: Tourist Accommodation by Area, 2011

Area	Rooms
Caibishie	59
Canefield-Jimmit	89
Carib Territory	8
Castle Bruce	13
Central	26
Giraudel	4
Grand Bay Area	4
Marigot Area	35
North	10
Portsmouth Area	179
Roseau Area	248
Roseau South	104
Roseau Valley	110
South	6
South East	85
West Coast	51
TOTAL	**1031***

Source: *DDA* ***** *excludes some properties included in Table 12.3*

Room Occupancy Rates

There are no official statistics available on average room occupancy levels. However, the consensus in the industry is that for tourism accommodation establishments conforming to recognised international standards – i.e. market ready – average annual room occupancy for the sector in the high season (from end-October to April) is between 40% to 60%, falling to an average of 20% to 30% in the low season. For the estimated 'market ready' segment of the accommodation sector, we estimate an average annual room occupancy rate of about 40%; for hotels/resorts we estimate a room occupancy rate of about 45% and for apartments/cottages, less than 30%

There is good VFR and other regional business during the Creole Festival, Independence and Carnival periods, and during the summer holidays. Accommodation units of international standard tend to have higher average annual room occupancies, particularly some of the smaller boutique hotels and resorts.

New Developments

Hotel/resort developments currently under construction include:

- Cabrits Hotel & Spa (68 rooms and suites) being constructed with financing from the Government of Morocco. The details of the management and operation of the hotel have yet to be finalised;
- Atlantique View Resort & Spa, Anse de Mai, (40 rooms). As a member of the Ascend Collection (Choice Hotels) group, this high-rise 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, but 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) in the vicinity of Springfield Plantation is understood to be under active consideration, while Government has announced its intention to commission designs for a 120-room hotel on a site owned by the Public Works Corporation in 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.. Government is also considering a way forward with the presently-abandoned Layou River Hotel Project. There is continuing private sector interest (but as yet nothing definite) in the redevelopment of the now derelict Castaways Hotel on Mero beach.

Together, planned or contemplated developments could add a further 720 or more rooms to Dominica's accommodation stock. As against that, a number of hotel properties are reported to be in financial difficulties, with some actually closed or for sale.

12.3.2 Conference Facilities

At present, the largest conference facilities are at the Garraway Hotel with seating capacity for 175 persons (theatre style) and the Fort Young Hotel (with seating for 120 persons, theatre style). Other hotels have smaller facilities that are suitable for meetings and retreats. Additional conference facilities will be provided in new hotels under construction at Cabrits and Anse de Mai (Atlantique), and in the proposed 120-room hotel in Roseau. The renovated State House in Roseau will also include meetings facilities.

12.3.3 Other Tourist Facilities and Services

Food & Beverage: Of the registered 18 or so recognised food & beverage facilities, (excluding the restaurants in accommodation establishments), few are of international standard, with only one having completed the DDA certification process. More than half of all F&B facilities are located in Roseau, with relatively few on the main tourist routes.

Local Transport: For the visitor wishing to travel around Dominica, the options are car rental, taxi or organised bus tour. Presently, six certified car rental companies offer saloon cars and 4WD vehicles. There is an adequate supply of vehicles and the rates are competitive. However, the narrow mountainous roads, with limited safety features (guard rails, lights, reflectors) and inadequate signage, can make self-drive an adventurous task for inexperienced or nervous drivers. There are three main taxi associations, with a total of 275 certified taxi operators (owners of vehicles) and a further 103 taxi drivers. Taxis can be expensive and sometimes difficult to arrange, especially when cruise ships are visiting. There are currently no taxi stands at strategic points in central Roseau.

Ground Tours Operators/Handling Agents: Although there are some 18 certified ground tour operators, their business is mainly offering local tours to cruise ship visitors. The inbound tour business is not well developed, primarily because comparatively few tourists purchase package holidays.

Customs & Immigration: Visitor facilitation in regard to customs and immigrations at the air and seaports is considered to be friendly and courteous, but less so at the Roseau sea ferry terminal. Both customs and immigrations personnel have participated in DDA organized customer services training courses.

Visitor Information: Visitor information services are provided by DDA at the Tourist Information Office on the Roseau Bayfront and at Melville Hall Airport. At Melville Hall, a tourist information rack with materials would suffice.

Medical Services: The main hospital serving both local people and visitors is the Princess Margaret Hospital (PMH) in Goodwill, Roseau. The hospital has recently been refurbished and upgraded with funding from the People's Republic of China. Smaller hospitals are located at Grand Bay, Marigot and Portsmouth. In the rural areas, there are health clinics with restricted opening hours. The ambulance service is operated by the Fire Department, with approximately six ambulances, while a sea rescue service is now available at the north end of the island. Visitors suffering heart attacks or severe injuries due to accidents have to be evacuated from the island. A recompression (hyperbaric) chamber exists at PMH for divers suffering from decompression illness.

Banking Services: Dominica has a well-developed banking sector, including both local banks and branches of overseas banks, with 24-hour ATMs available in Roseau, Portsmouth and some other locations across the island.

Shopping, Provisioning: There is a variety of handicraft, souvenirs and art work available, as well as locally produced pottery and Carib traditional handicrafts. Outlets are concentrated in the Roseau area. Street vendors also carry a range of souvenir items, but many are imported rather than locally-made. Duty-free outlets are limited to a small number of outlets in Roseau. There are opportunities for specialist retail services, such as provisioning for visiting yachts (where chandlery and other services are now more widely available).

Entertainment: Organised entertainment is very limited. With the exceptions of the World Creole Music Festival, Jazz 'n Creole, Carnival and to a lesser extent a few village festivals, entertainment products geared to stay-over visitors are limited to one night a week entertainment at a few hotels and some small clubs.

12.4 PUBLIC SAFETY AND SECURITY

One of the greatest attractions of Dominica for visitors is the friendliness of the local people, the low incidence of crime and the ability to walk safely in Roseau and elsewhere without fear of being molested or harassed (although there is some begging). However, in recent years, there has reportedly been an increase in the number of crime incidents, some serious. Some have targeted visitors or persons using isolated beaches, such as Batibou.

13. CRUISE TOURISM IN DOMINICA

13.1 OVERVIEW

Cruise tourism is a major product for Dominica. In 2012, Dominica attracted 183 cruise ship calls with 266,178 passengers. In that same year, the total expenditure by cruise visitors was estimated at EC$23.8 million - representing 11.1 percent of gross visitor expenditure (down significantly from 21.3 percent in 2009).

13.2 RECENT PERFORMANCE

Although the number of cruise visitors to Dominica is about the same as ten years ago, there has been no obvious pattern to this growth. In common with many Caribbean islands, Dominica experienced a sharp decrease in cruise passenger arrivals in 2007, followed by a recovery in 2008. In 2009, the number jumped by 38% to a peak of over 532,000 passengers (and 518,000 in 2010), but, as experienced in most destinations in the eastern Caribbean, there was another sharp decrease in 2011 to 341,500. A further decline to 266,200 occurred in 2012.

Table 13.1: Cruise Ship Calls and Passengers, 2001-2012

	2001	2006	2007	2008	2009	2010	2011	2012
Cruise Ship Calls	231	314	252	213	273	272	196	183
Passengers	207,627	379,643	354,515	386,414	532,352	517,979	341,501	266,178
Average Pax per call	899	1,209	1,407	1,814	1,950	1,904	1,742	1,455

Source: *DDA and DASPA*

The number of cruise ship calls has mirrored the erratic movement in cruise passenger arrivals, reaching a high of 314 in 2006 and (after the withdrawal of calls by Carnival Cruise Lines in November 2010) falling to 196 in 2011 and 183 in 2012, but, as a result of the increasing size of vessels, average passenger numbers per ship doubled from 899 in 2001 to 1,950 in 2009, but fell back to 1,742 in 2011 and 1,455 in 2012.

The cruise ship passenger schedule for the 2012/2013 cruise season (13 October to 27 April) anticipates a total of 159 calls, indicating a further decline in cruise activity. Of these scheduled calls, there are 18 vessels with more than 3,000 passenger capacity, including MV Emerald Princess, the largest with 3,592 passenger capacity.

As with Dominica, there was a decrease in the number of cruise passenger arrivals in many other Caribbean destinations (particularly in the eastern Caribbean) in 2011.

Table 13.2: Cruise Passenger Arrivals in the Caribbean, 2010-2011

Countries	Cruise Passenger Arrivals		
	2010	2011	% Change 2011/2010 (rounded)
Eastern Caribbean			
Antigua	557,600	606,500	+8.8
Barbados	664,700	619,100	-6.9
BVI	501,500	484,700	-3.3
Dominica	**518,000**	**341,500**	**-34.1**
Grenada	333,300	309,600	-7.1
Guadeloupe	n.a.	n.a.	n.a.
Martinique	74,600	41,100	-44.9
St. Kitts			
St. Lucia	670,100	630,300	-5.9
St. Maarten	1,512,600	1,656,200	+9.5
St. Vincent & the Grenadines	111,000	88,900	-19.9
Trinidad and Tobago	101,800	60,300	-40.8
USVI	1,858,900	2,009,000	+8.1
Rest of Caribbean			
Aruba	569,400	599,900	+5.4
Bahamas	3,803,100	4,161,300	+9.4
Belize	764,600	724,500	-5.2
Bermuda	347,900	416,000	19.6
Cayman Islands	1,597,800	1,401,500	-12.3
Cozumel (Mexico)	2,911,100	2,871,100	-1.4
Curacao	383,000	400,900	+4.7
Dominican Republic	352,500	347,900	-1.3
Haiti (Jan-Aug)	330,400	411,700	24.6
Jamaica	909,600	1,125,500	23.7
Puerto Rico	1,191,100	1,124,400	-5.6

N.B: Figures are subject to revision by reporting countries
Source: *Caribbean Tourism Organization (CTO)*

Carnival Cruise Lines

One of the main reasons for the sharp decline in the number of calls and passengers from 2010 was the decision by Carnival Cruise Lines to discontinue calls by the *MV Victory* at Dominica in November 2010. Ships belonging to other cruise lines forming part of Carnival Corporation, including Princess Cruises, Cunard Line, Holland America Line and Seabourn, have continued calling at Dominica. It has been announced that Carnival will be returning to Dominica in December 2013, but as yet only for one visit. At the time, Carnival said that its decision was based on economic and ship positioning matters, but it is believed that it was also influenced by adverse passenger feedback and some concerns about the quality and profitability of Dominica's cruise product.

In the interim, Government has taken steps to woo Carnival to return by upgrading the island's cruise product by, *inter alia*, making improvements to the road to the Roseau Valley (including Trafalgar Falls), to the quality of the bulk water taken by cruise lines and to the arrangements for management of vendors and tour operators/taxis on the bayfront. It has also declared Trafalgar Falls to be a "premium site" which, on cruise days, will be reserved until 12.00 am for those passengers on pre-booked tours sold on-board ship. After some initial dissatisfaction, this new arrangement appears to have been accepted by most tour and taxi operators.

13.3 CRUISE PORT FACILITIES

Cruise ships visiting Dominica mainly berth at Roseau, where the Cruise Ship Berth has recently been upgraded and is now capable of accepting the Queen Mary 2 and other large vessels. The formerly somewhat disorganized ground tour handling system has recently been improved. The other cruise ship berths are at Woodbridge Bay (nearly 2 km north of Roseau), where terminal facilities are lacking and passengers must thread their way past containers in what is essentially a commercial port, and at Cabrits National Park, near Portsmouth, which at present is used by smaller cruise vessels (including cruise sailing and 'boutique' vessels).

13.4 CRUISE PASSENGER EXPENDITURE

Data from the FCCA/BREA annual sample survey of cruise passengers* provides information on destination expenditure patterns and satisfaction levels for the 21 participating destinations that contribute to the funding of the study and also provide cruise related data, such as passenger arrivals and port fees.

As stated in the survey report, the economic benefits of cruise tourism at each destination arise from three principal sources:

- onshore expenditures by passengers which are concentrated in shore excursions and retail purchases of clothing and jewellery;
- onshore spending by crew which are concentrated in purchases of food and beverages, local transportation and retail purchases of clothing and electronics; and
- payments to ports for passenger taxes and port services, such as navigation and utility services, and payments to local businesses for supplies and services, such as food and beverages and other stores.

The main results for Dominica are shown in Table 13.3, and summarized below:

In the 2011/12 cruise year, the total of 459,200 passengers and crew visits to Dominica generated an estimated US$16 million spending for local goods and services (of which, passenger spending: $14.1 million; crew spending: $1.9 million). The cruise lines added another $2.0 million in spending for port services and other local goods and services, bringing total cruise tourism expenditures to $18 million for that period. Based on the authors' economic model, the $18 million in direct cruise tourism expenditures is estimated to have generated total direct and indirect employment of 484 residents and $3.7 million in employee wages. These figures place Dominica ahead of only Grenada, Nicaragua, and St. Vincent & the Grenadines in the overall rankings of the 21 participating destinations.

It should be noted that the FCCA/BREA figure of US$14.1 million for expenditure is considerably higher than Dominica's Central Statistics Office estimate of US$9.7 million.

Table 13.3: Total Economic Contribution of Cruise Tourism by Destination, 2011/2012 Cruise Year

Destinations	Passenger Onshore Visits (Thousands)	Average Expenditure per Passenger	Total Passenger Expenditures ($US Millions)	Total Crew Expenditures ($US Millions)	Estimated Expenditures by Cruise lines ($US Millions)	Total Cruise Tourism Expenditures ($US Millions)
Antigua & Barbuda	524.1	$ 65.30	$ 34.2	$ 6.2	$ 4.5	$ 45.0
Aruba	533.5	$ 95.40	$ 50.9	$ 8.8	$ 4.0	$ 63.7
The Bahamas	3,725.6*	$ 64.80	$ 241.5	$ 79.3	$ 73.0	$ 393.8
Barbados	606.8**	$ 65.60	$ 39.8	$ 5.9	$ 8.0	$ 53.7
Belize	608.4	$ 73.00	$ 44.4	$ 7.5	$ 9.1	$ 61.0
British Virgin Islands	361.1	$ 65.50	$ 23.7	$ 3.1	$ 3.5	$ 30.3
Cayman Islands	1,296.0	$ 93.70	$ 121.5	$ 11.3	$ 24.9	$ 157.7
Colombia	260.8	$ 98.80	$ 25.8	$ 1.5	$ 6.1	$ 33.4
Costa Rica	174.4	$ 71.50	$ 12.5	$ 2.0	$ 4.0	$ 18.5
Curacao	407.5	$ 71.70	$ 29.2	$ 5.0	$ 5.2	$ 39.4
Dominica	294.6	$ 47.80	$ 14.1	$ 1.9	$ 2.0	$ 18.0
Dominican Republic	238.0**	$ 69.50	$ 16.5	$ 1.0	$ 3.8	$ 21.4
Grenada	274.9	$ 40.80	$ 11.2	$ 2.0	$ 1.9	$ 15.2
Honduras	265.0	$ 62.20	$ 16.5	$ 1.2	$ 2.6	$ 20.4
Nicaragua	31.3	$ 45.60	$ 1.4	$ 0.2	$ 0.3	$ 2.0
Puerto Rico (San Juan)	1,112.3**	$ 118.10	$ 131.4	$ 22.6	$ 32.6	$ 186.6
St. Kitts and Nevis	560.6	$ 108.90	$ 61.1	$ 4.6	$ 4.9	$ 70.6
St. Maarten	1,586.4	$ 185.40	$ 294.1	$ 45.2	$ 16.9	$ 356.2
St. Vincent and the Grenadines	58.8	$ 27.10	$ 1.6	$ 0.1	$ 1.3	$ 3.0
Turks and Caicos	724.2	$ 63.90	$ 46.3	$ 5.0	$ 9.3	$ 60.6
U. S. Virgin Islands	1,795.9	$ 146.70	$ 263.5	$ 47.3	$ 28.9	$ 339.8
All Destinations	**15,440.3**	**$95.92**	**$1,481.1**	**$261.9**	**$246.9**	**$1,990.0**

* *Only includes passenger arrivals at Nassau and Freeport.*
** *Includes passengers aboard both port-of-call and homeport cruise ships.*
Source: *Port Authorities, Caribbean Tourist Organization and the FCCA*

The Bahamas led all destinations in terms of total cruise tourism expenditure with US$393.8 million, followed by St. Maarten (US$356.2 million), the U.S. Virgin Islands (US$339.8 million), Puerto Rico (US$186.6 million) and the Cayman Islands (US$157.7 million). Combined, these five destinations accounted for 72 percent of the total cruise tourism expenditures among the 21 destinations.

Of the cruise parties who disembarked in Dominica and went ashore (estimated at 88 percent of all passengers), approximately 60 percent made at least one purchase while ashore (down from 66% in 2008/2009). The typical cruise party consisted of 2.1 passengers and spent an average of 3.8 hours ashore.

Average per passenger onshore expenditures (including spending for shore excursions) ranged from a low of US$27.10 in St. Vincent & the Grenadines to a high of US$185.40 in St. Maarten, and averaged US$95.92 per passenger visit across the 21 destinations. For Dominica, the figure was US$47.80 per passenger, or US$100.3 per cruise party that went ashore, one of the lowest among the destinations surveyed.

Cruise passenger expenditure in the Dominica was concentrated in three categories which accounted for nearly 75 percent of total onshore expenditures: shore excursions, local crafts and watches & jewellery. Similar results were found in other reporting destinations, except in St. Thomas and St. Maarten, where cruise visitors allocated higher percentages of their onshore expenditure to purchases of watches and jewellery. This bears out the anecdotal evidence that cruise passengers are convinced that there are better bargains to be had in the purchase of watches and jewellery in St. Thomas and St. Maarten than in Dominica and other destinations. This has serious implications for the type of shopping that Dominica can

* Florida-Caribbean Cruise Association: *Economic Contribution of Cruise Tourism to the Destination Economies, Vols I and II* (BREA Business Research & Economic Advisers, September 2012). The latest figures are for the 12-month period from May 2011 through April 2012. A total of 28,822 passenger surveys and 7,915 crew surveys were returned for processing, including 1,815 passenger surveys and 411 crew surveys for Dominica.

offer, and is reflected in the apparent concentration on cheaper clothing items and local (but not all locally-made) souvenirs.

13.5 SHORE EXCURSIONS

More passengers purchased shore excursions than any other category of goods or services. Passengers have several options on how to purchase their tours. Most purchase their excursions on-board the cruise ship. The cruise line then retains a portion of the price charged as a management fee or sales commission. This is important when it comes to estimating the local impact of shore excursions.

Further details for Dominica are given below:

- 64% of the passengers that went ashore purchased a shore excursion. This is down slightly from 67% in the 2008/09 study, but is higher than the average of 55% for all destinations;
- Almost three-quarters (74%) of passengers who purchased a tour did so through their cruise line, 14.5% purchased their tour directly from local tour operators and 11.5% purchased their tour through a travel agent or some other means. These figures are similar to the averages for all destinations. The often intense competition for tour passengers amongst both licensed tour operators (who can enter the restricted port area) and unlicensed tour operators and taxis (who cannot or should not) is now being better controlled;
- The remaining 36% reported that they did not purchase a tour for their onshore visit, compared with 44% for all destinations. Ground tour operators report an increasing tendency for passengers to “just walk around town” (which can be an off-putting experience for those unused to broken pavements, undisciplined traffic and unwelcome attention from vagrants), and spending comparatively little. Many seem to be in a hurry to return to their ship, with some finding the Botanic Gardens a little “tired”;
- The average price of a tour purchased on-board ship was $54.63 per passenger, compared with $23.75 per passenger if purchased on-shore and 44.50 if purchased through a travel agent;
- Local tour operators received an average of $36.41 for tours purchased on-board ship by cruise passengers. This figure is 35 percent lower than the average price received by the cruise lines.

While the price paid onshore to a tour operator or taxi for a shore excursion is significantly lower compared to those purchased through the cruise line or another channel, it is considered (according to BREA) that it is “highly likely that higher value tours are purchased on a cruise ship relative to those purchased on shore”.

Table 13.4: Average per Passenger Purchase Price of a Shore Excursion by Sales Channel

	Dominica	All Destinations
Purchase of Tour	**63.6%**	**55.1%**
- Cruise line	74.0%	74.8%
- Onshore	14.5%	15.5%
- Travel Agent/Other	11.5%	9.7%
Did Not Purchase a Tour	**36.4%**	**43.8%**
Average Price of Tour Purchased From		
- Cruise Line	$54.63	$57.05
- Onshore	$23.75	$24.80
- Travel Agent/Other	$47.50	$49.61
Local Effective Price of a Tour	**$35.63**	**$36.41**

Source: *FCCA/BREA*

The most popular tours purchased by cruise visitors are visits to Trafalgar Falls and/or the Emerald Pool, and, to a lesser extent, Mero Beach. These have become even more-frequented with the closure (temporarily or otherwise) of the formerly-popular Rainforest Aerial Tram and Wacky Rollers’ river tubing and other activities. In comparison, relatively few cruise visitors purchase tours to other attractions, such as Wotten Waven sulphur springs; the Carib Territory; Cabrits National Park (unless berthing at Cabrits); or the north-east coast beaches. However, dive operators in the Roseau area have reported an increase in business from cruise visitors.

Capacity carrying issues can arise at Trafalgar Falls and Emerald Pool on peak days when visitor numbers can be of the order of 1,700 at Trafalgar Falls and 1,500 at Emerald Pool. Such congestion detracts from the visitor’s enjoyment of their stay in Dominica.

Development needs (as set out in the 2005-2015 Tourism Master Plan) included expansion of carrying capacity at more popular nature sites; development of new attractions to relieve pressure on existing ones; creation of additional opportunities for cruise visitors to spend more in Dominica; further development of cruise port infrastructure to facilitate the larger cruise ships and passengers (including the construction of a cruise village); and measures to encourage cruise ships to pay more for using the island’s resources.

13.6 CRUISE PASSENGER SATISFACTION

The FCCA/BREA survey also asked the passengers to rate their satisfaction with their destination visit in respect of a number of experiences. The results for Dominica and other destinations in the eastern Caribbean (excluding St. Lucia for which data were not available) are shown in Table 13.5.

Table 13.5: Cruise Passenger Satisfaction Score by Activity, 2011/12

Visit Attributes	Mean Score (maximum = 10.0)								
	Antigua	Barbados	BVI	Dominica	Grenada	St. Kitts	Sint Maarten	St. Vincent	USVI
Overall Visit	7.3	7.9	7.4	**6.7**	7.1	8.0	7.8	6.3	7.9
Visit Met Expectations	7.0	7.5	7.1	**6.4**	6.9	7.7	7.3	6.1	7.4
Likelihood of a Return Visit	4.5	4.8	5.4	**3.5**	3.7	5.0	5.0	3.4	5.8
Informed of Tours & Activities	7.7	7.9	7.4	**7.5**	7.7	8.0	7.8	7.3	8.0
Initial Shoreside Welcome	7.1	7.6	7.3	**6.8**	7.6	7.7	7.7	7.2	7.6
Guided Tour	8.3	8.5	7.9	**8.1**	8.3	8.7	8.0	8.2	7.9
Historic Sites/Museums	7.2	7.8	6.6	**6.6**	7.3	7.9	6.7	6.5	7.0
Variety of Things to See & Do	6.6	7.4	6.3	**6.1**	6.7	7.1	7.2	5.3	7.2
Friendliness of Residents	7.6	8.2	7.8	**7.6**	7.8	8.4	8.0	7.4	8.1
Overall Shopping Experience	6.6	7.2	6.6	**5.6**	6.7	7.5	7.4	4.9	7.5
- Courtesy of Employees	7.6	8.1	7.8	**7.4**	7.9	8.2	8.0	7.2	8.2
- Variety of Shops	6.6	7.3	6.0	**5.0**	6.4	7.1	7.4	4.7	7.2
- Overall Prices	6.4	6.7	6.3	**6.3**	6.5	7.2	7.0	5.8	7.0
Taxis/Local Transportation	7.5	7.7	7.3	**6.8**	7.2	7.8	7.8	7.1	7.6

Source: *FCCA/BREA*

The main results were as follows:

- In terms of overall satisfaction with their visit, Dominica scored 6.7 points, which was the second lowest and just above St. Vincent at 6.3, and well below the highest score of 8.0 points received by St. Kitts amongst a sample of nine eastern Caribbean destinations (and the average of 7.6 points for all 21 reporting destinations in the full BREA sample);

- A similar result emerged in respect of how well expectations were met, with Dominica (6.4 points) again second lowest (just above St. Vincent's 6.1), and with St. Kitts (7.7) again obtaining the highest mark from the eastern Caribbean sample;

- Dominica's highest scores were recorded for Guided Tours (8.1 points); Friendliness of Residents (7.6 points) and Informed of Tours and Activities (7.5 points), but, in each instance, these were below the average for all reporting destinations and exceeded by Grenada in the eastern Caribbean sample. Even the island's much-vaunted reputation for friendliness of its people was exceeded, or equalled, by the scores in seven of the other eight eastern Caribbean destinations;

- Guided Tours (or Shore Excursions) received the highest score of all visit attributes with a mean score of 8.3, indicating that cruise passengers were 'very satisfied' with their Dominica shore excursions; and

- Average scores between 6.0 and 7.0 (falling within the "somewhat satisfied" category) were given for the Initial Shore-side Welcome (6.8); Taxis/Local Transportation (6.8); Historic Sites/Museums (6.6); and Variety of Things to See and Do (6.1). However, while passengers thought shop employees were very courteous (7.4), satisfaction with the Overall Shopping Experience (5.6) was brought down to last position by lower perceptions of the Variety of Shops (5.0) and Overall Prices (6.3).

13.7 LIKELIHOOD OF RETURNING FOR A LAND-BASED VACATION

Cruise visitors are often seen as potential return visitors to the destination for a land-based vacation. This is seen as applying particularly to those making their first visit to the destination (approximately three-quarters, (74%), of the survey respondents for Dominica compared with 67 percent for all destinations in the full BREA sample).

Overall, respondents passengers to the survey stated that they were not too likely to return to the destination for a land-based vacation, with only one USVI (5.8) receiving a score over five points, and Dominica (3.5) in second last position just above St. Vincent (3.4).

Only one-third said that they were likely to return to Dominica for a land-based vacation compared with around half (49 percent) for the full sample.

This does not appear to reflect any marked dissatisfaction with tours or variety of things to do and see on Dominica. This needs further investigation. It could simply be a matter of better 'showcasing' of the island's nature trails, diving, tourist accommodation, beaches and other attractions.

Table 13.6: Likelihood of Returning for a Land-Based Vacation

	Dominica	All Destinations
Extremely Likely	10%	17%
Very Likely	11%	15%
Somewhat Likely	12%	17%
Not Too Likely	12%	11%
Not At All Likely	55%	40%
Likely	**33%**	**49%**
Not Likely	**67%**	**51%**

Source: *FCCA/BREA*

In order to gain further information on whether or not cruise visitors are potential return visitors to the island for a land-based vacation, a special Dominica-specific survey was carried out via DDA in 2009 of a representative sample of cruise passengers. The main findings were as follows:

- While a high proportion were regular cruise customers, a significant number (45%) had previously taken stay-over vacations in the Caribbean, but very few of these were in Dominica;
- Only 58 % had cruised the Caribbean before, so it could be said that they were trying out a new destination;
- 59%[*] said they would consider returning to Dominica for a land-based vacation of around 5-8 nights duration, but not as high as those who would consider returning on another cruise (91%);
- Some 92% said that they would recommend Dominica to others for a vacation;
- The main reasons for *not* wanting to return to Dominica were that respondents preferred cruises and liked seeing new destinations. However, a significant minority (particularly amongst Europeans) would be prepared to consider Dominica if it had more activities/things to do; and

[*] In another survey, almost 70% expressed interest in returning to Dominica for a stay-over vacation, identifying Culture, Heritage and Festivals (36%); Diving/Other Water Sports (34%); Health Tourism/Spas/Wellness (31%); General/Sites (29%); Hiking (22%); Wedding & Honeymoon (13%) as the main attractors.

- The principal factor which would allow respondents to consider returning to Dominica for a land-based vacation was special offers/promotions.

In summary, the survey results appeared to bear out the widely-held belief that, while persons who take cruise vacations are frequent vacationers who also take land-based vacations, they are more likely to take another cruise. They may be interested in returning as stay-overs, but (according to the experience of local hoteliers) rarely do so. The respondents expressed interest in coming back to Dominica, particularly for culture and events, and diving/water sports, but would like more interesting things to see and to do. Price discounts would be the most effective way of persuading cruise visitors to return as stay-overs, but this is something that is also being heavily promoted by cruise lines anxious to fill the increasing number of new berths in the new vessels that are coming on market.

14. INSTITUTIONAL ARRANGEMENTS AND LEGAL FRAMEWORK

14.1 INSTITUTIONAL ARRANGEMENTS

14.1.1 Central Government

Because of the diverse nature of tourism, there are many ministries, departments, state owned enterprises (SOEs) and NGOs which have important roles in relation to tourism.

The tourism sector is affected to a greater or lesser extent by the policy decisions and actions of nearly all other ministries, but particularly the ministries responsible for finance; public works & transport; agriculture & land; forestry & parks; Carib affairs; customs & immigration.

Ministry	Tourism Related Role
Tourism & Legal Affairs	• tourism policy, planning • management of site attractions
Finance	• capital and operations budgets • economic planning • central statistics office
Agriculture & Forestry	• park management • trails network maintenance • site management
Environment, Natural Resources, Physical Planning & Fisheries	• environmental management • parks management • physical (land use) planning • town & country planning
Social Services, Community Development & Gender Affairs	• community involvement in tourism
Public Works, Energy & Ports	• Dominica Air & Sea Ports Authority • roads
Employment, Trade, Industry and Diaspora Affairs	• Dominica Bureau of Standards • Invest Dominica Authority
Education & Human Resource Development	• training • Dominica State College
Culture, Youth & Sports	• culture and heritage • sports events
Carib Affairs	• Carib community involvement in tourism

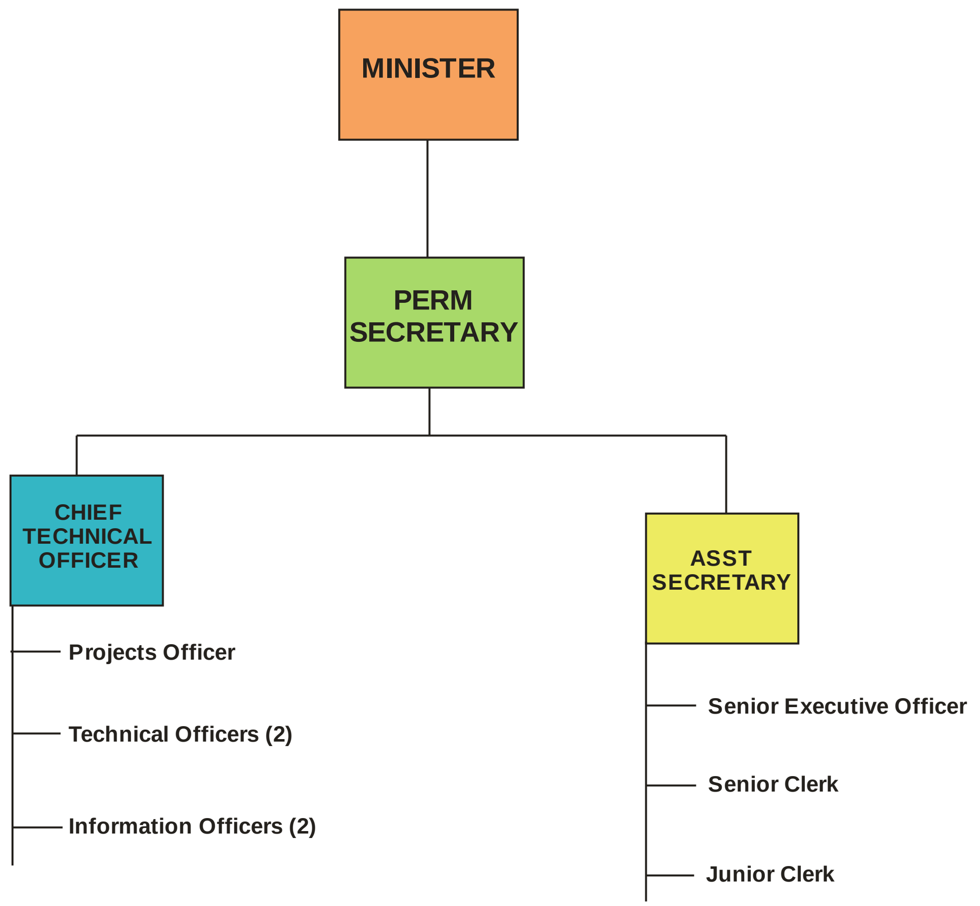
Source: *Government of Dominica website, November 2012*

(i) Tourism Division

The ministry with responsibility for tourism is the Ministry of Tourism and Legal Affairs. This function is discharged by the Tourism Division.

Including provision for the Discover Dominica Authority (DDA), the Tourism Division receives an annual budget of about EC$ 10.75 million (2012/2013) and has a staffing complement of 12 posts.

Diagram 14.1: Tourism Division Organigram



The main functions of the Tourism Division are:

- policy formulation and national tourism planning
- regulations
- international tourism relations
- maintenance (together with the Forestry & Wildlife Division) of 12 Community and 6 Eco-tourism sites
- site rehabilitation and development
- sector management
  - coordination of activities of sectors.

The Tourism Division manages a number of site attractions, such as Emerald Pool and Trafalgar Falls. As project management requires a completely different skills set to policy and planning, the designation of this function within the Tourism Division should be reconsidered as it causes confusion with regard to roles and responsibilities at various sites. For example, at Emerald Pool the Tourism Division is responsible for the maintenance of the buildings whereas the Forestry & Wildlife Division is responsible for the maintenance of the trail leading to the pool.

Tourism Coordinating Committee

A formal Coordinating Committee has been established under the aegis of the Tourism Division, Chaired by the PS Tourism, the Committee's is composed of senior officers from relevant Ministries. The Committee meets every two months.

(ii) Forestry & Wildlife Division

The Forestry & Wildlife Division of the Ministry of Agriculture & Forestry is responsible for

- park maintenance and management
- trail network maintenance
- site management – Indian River, Cabrits
- collection of conservation fee.

(iii) Environmental Coordinating Unit

Within the Ministry of Environment, Natural Resource, Physical Planning & Fisheries, the Environmental Coordinating Unit, (ECU) functions to:

- advise Government on the development of coherent environmental policies;
- promote interest, and encourage public participation in environmental matters through public awareness activities;
- serve as the focal point for regional and international agreements on environmental issues, and monitor and report on Dominica's compliance with the articles and decisions of the Environmental Conventions;
- serve as the Government agency with responsibility for the dissemination of information on the environment;
- undertake basic research and coordinate studies on the impacts of development projects on the environment; and
- liaise with Government and private sector agencies on issues that impact on the environment.

The ECU's activities are severely constrained by lack of resources.

(iv) Human Resource Development (HRD)

The Ministry of Education and Human Resource Development is responsible for the Dominica State College which has an annual grant-in-aid which amounted to EC$ 3.5 million (approved estimate) in 2011/12. This grant has been reduced in recent years, causing severe financial constraints and a fall in enrolment due to rising fees.

14.1.2 Local Government and Community Affairs

Dominica has one of the more developed systems of local government in the region. The basic unit of the system is the village council. The main purpose of village councils is to influence developments at local level through ensuring that the views of the local community are represented and through the implementation of projects.

With regard to tourism, a number of village councils have tourism officers whose job is to promote tourism in the locality. As described in Ch. 10 (Community Tourism) earlier, the types of tourism projects which the village councils undertake include handicraft development, information centres, events and co-operative ventures. The Roseau City Council, Portsmouth Town Council, Canefield Urban Council and the Carib Council exercise wider powers and functions.

Local government has a very important role in relation to urban development, particularly in Roseau and Portsmouth in respect of planning, building regulations, streetscape. etc.

14.1.3 State Owned Enterprises and Organisation

The organisation having the lead role in tourism is the Discover Dominica Authority (DDA). The other State owned Enterprises (SOEs) relevant to tourism are the:

- Dominica Air and Sea Ports Authority
- Invest Dominica Authority.

14.1.4 Discover Dominica Authority (DDA)

(i) Statutory Functions

The Discover Dominica Authority is a statutory body established under the Discover Dominica Authority Act, 2007. The functions of the DDA are to:

a) promote, assist and facilitate the efficient development of tourism
b) assign and implement suitable marketing strategies for the effective promotion of the tourism industry
c) encourage the establishment of amenities and facilities appropriate for the proper engagement of Dominica as a tourist destination
d) carry out market intelligence in order to inform the needs of the tourism industry
e) manage, license and supervise the Tourism licensing programme and other Tourism services in accordance with the Tourism (Regulation and Standards) Act 2005
f) identify training needs for the tourism service industry; and
g) do all such other things that in the opinion of the Authority, would facilitate the proper discharge of its functions or would be incidental or conducive thereto.

Although not designated as specific functions, the DDA is currently taking a lead role in relation to air & sea access transport and has been given responsibility for the Film Commission and the Festival & Events Committee (DFC).

In summary, the DDA is attempting to fulfil roles in respect to:

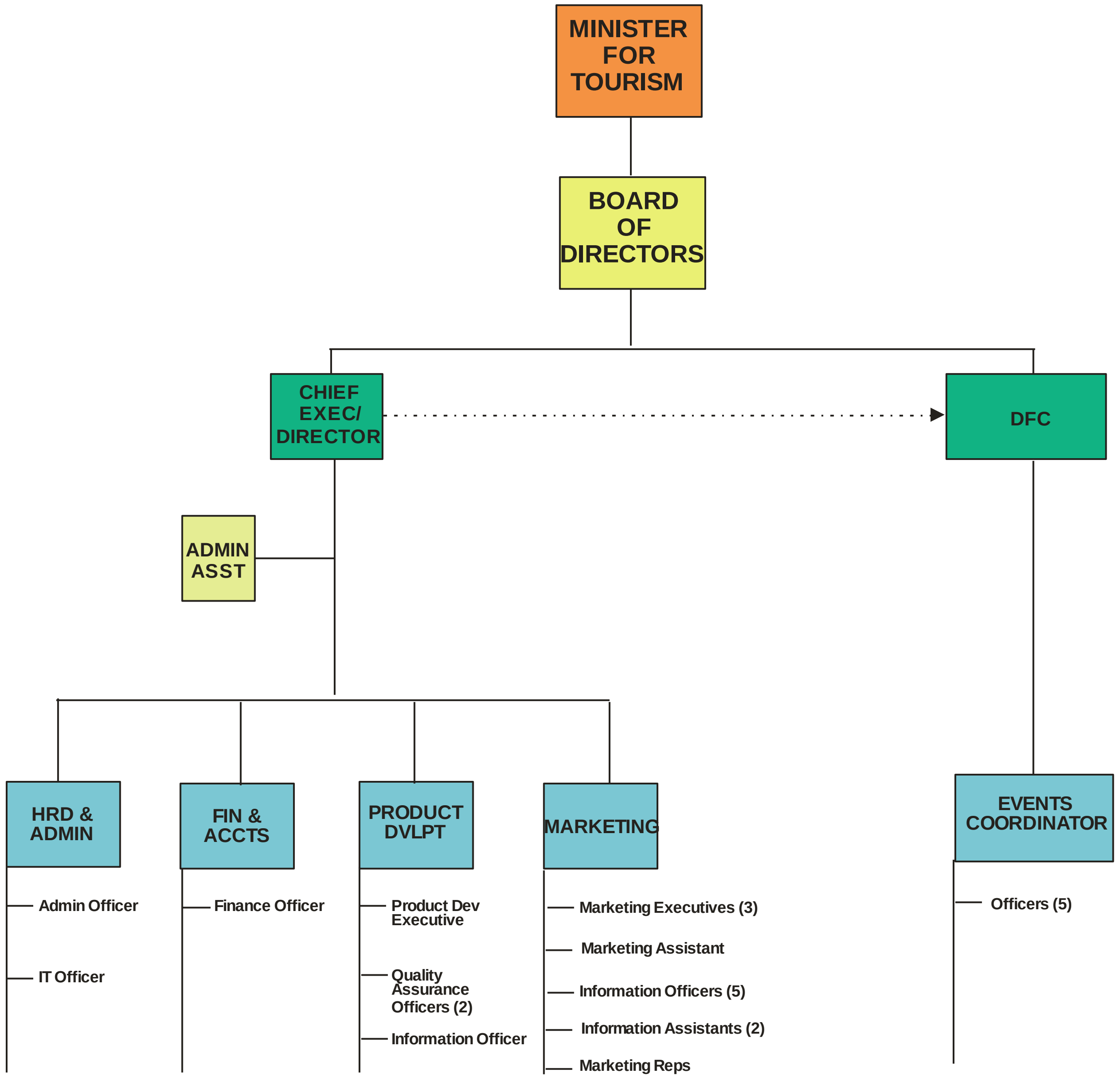
- destination marketing
- product development
- training
- market research
- tourism awareness
- tourist information offices
- licensing of operators
- quality standards
- promotion of festivals/events
- promotion of Dominica as a location for film productions.

The DDA has neither the budget human resources nor skills set to adequately fulfil all these functions. Moreover, few, if any, national tourist organisations (NTOs) in the Caribbean (or indeed, the world) are mandated to undertake such a wide range of functions. These days, international best practice is for an NTO to focus on destination marketing and market research.

(ii) Organisational Structure and Staffing

The DDA's organisational structure is shown on Diagram 14.2.

Diagram 14.2: DDA Organigram



Including the Chief Executive Officer, the DDA has a staff complement of 26 people. However, 3 of the posts (Administrative Assistant to the CEO, IT officer and Finance officer) are shared with the Invest Dominica Authority (IDA).

On paper there is a clear division of roles and responsibilities within the DDA. In practice this is not always the case. Because of inadequate staff/budgetary resources, lines of authority and definition of roles can become blurred. Staff get on with whatever task is at hand, and display a strong team spirit by 'pitching in' wherever and whenever necessary. Because of the extensive range of the DDA's function, staff are overstretched. Indeed that the organisation is able to respond to the many and diverse demands arising from the DDA's extensive range of functions is due to a committed, willing and well intentioned staff.

Obviously, increased resources, both financial and human, are required. In addition, the effectiveness of the organisation could be improved through a:

- Rationalization of the range of functions undertaken by the DDA, and
- Streamlining of roles and responsibilities within the DDA.

These recommendations are elaborated in the DDA Corporate Strategy Document.

(iii) Disposition of the DDA Budget

Excluding salaries and general administration expenses, the allocations of the DDA activities budget for 2011/2012 is shown in Table 14.1.

Table 14.1: Allocation of the DDA Activities Budget 2011/2012

Marketing Mix	EC$ (000s)*	%	Description
Marketing	3,102	66	representative fees, advertising etc.
Film	168	4	promotion of Dominica as location for film production
Product Development	136	3	Promotional activities, including cruise, Quality Assurance
Awareness	46	1	Domestic promotion
Festivals	170	4	Operational support
Air Access	266	6	Consultancy studies
Other	770	17	Website maintenance, collaterals etc.
Total	**4,658**	**100**	

Source: *DDA * figures rounded.*

Within a very limited activity budget of just over EC$4.6 million, it is not possible to give adequate attention to the DDA's range of functions for which the organisation is mandated – a fact which is recognised by the DDA is how it allocates its resources. As shown in Table 14.1, only about 3% of the budget is allocated for product development, with air access and support for festivals accounting for a further 10% of the budget. Essentially, DDA activities are primarily destination marketing.

14.1.5 Dominica Air and Sea Ports Authority

The Ports Authority was established under the Dominica Air and Sea Ports Authority Act, 2006 with responsibility for the operations of the ports, regulation and control of navigation, and provision of navigational services and aids in relation to the ports. Basically, the Authority has the responsibility for the management, maintenance and development of Melville Hall and Canefield airports, Woodbridge and other sea ports as well as the cruise ship berthing facilities at Roseau and Cabrits.

Although the Authority has the responsibility for the maintenance and development of cruise ship infrastructure, it does not have the designated responsibility for the promotion of cruise tourism.

14.1.6 Invest Dominica Authority

Invest Dominica Authority was established in 2006 with the responsibility to encourage both foreign and domestic direct investment particularly in industries which generate jobs, foreign exchange earnings and have a positive effect on the citizenry. Dominica encourages investment in the following tourism-related sectors: hotel accommodation including eco-lodges; adventure tourism services; fine dining restaurants; IT services; film, music and video production; water export & bottled water operations; medical and nursing schools; health and wellness tourism; and English language training services. Additional sectors may also be subject to approval.

14.1.7 Non-Governmental Organisations/Councils

There are a number of NGOs (such as the Dominica Youth Environmental Organisation, the Waitukubuli Ecological Foundation) Councils and other bodies whose policies and actions affect the direction, nature and pace of tourism development. One of the most important is the Dominica Community Tourism Association, Inc.

14.1.8 Private Sector Associations

The major ones include:

- Hotel & Tourism Association
- Taxi Associations (3)
- Watersports Association
- Indian River Tour Guide Association
- Vendor's Associations (2)
- Eco-Tourism Association

14.2 LEGISLATIVE AND REGULATORY FRAMEWORK

The formation of institutional structures and the execution of tourism policy and strategy by these structures require enabling legislation. There are three main areas to be addressed:

- the enabling legislation for the national tourism organisation
- the regulatory framework for the industry; and
- environmental legislation.

14.2.1 Legislation in Relation to a National Tourism Organisation

The legislation setting up the DDA designates it as the national agency responsible for destination management, covering marketing, HRD,, licensing, market research etc.

14.2.2 Regulations for the Industry

The purpose of regulatory legislation is to:

- provide an environment in which business may be carried out within the framework of law
- provide mechanisms for arbitration in the event of disagreement
- provide for consumer protection
- ensure health and safety.

There are many pieces of legislation which have an impact on tourism but which are not specifically enacted for the benefit of tourism alone. These include laws in such areas as taxation, customs and immigrations, transport, public safety, health environment and planning etc. Legislation in these fields is properly the responsibility of the relevant ministries and not of the ministry responsible for tourism. However, it is appropriate that the tourism sector should have a consultative input into those aspects of legislation in other fields which impact on tourism.

With regard to tourism, the regulatory framework is the Tourism (Regulations and Standards) Act, 2005 and Amendment No. 11 of 2008, covering accommodation, food & beverage, tour guides, travel agents and tour operators.

The purpose of the Act is for "the creation of sustainable, internationally accepted and holistically approached programme, to be known as the Nature Island Standards of Excellence (NISE), to be applied by persons in the public and private tourism sectors and to regulate and certify certain tourism services".

The tourism services listed in the Act include:

- all types of accommodation offered wholly or mainly to tourists
- transportation services (taxi operators, taxi drivers and car rental)
- vending
- tour operators
- travel agents
- tour guides
- water sports
- food and beverage.

The accommodation classification schedule specifies the following categories:

(i) hotels
(ii) apartment hotels/cottages
(iii) motels
(iv) resorts
(v) inns
(vi) guest houses
(vii) bed & breakfast
(viii) camp grounds
(ix) speciality lodging
(x) host homes.

Standards have been established by the Bureau of Standards in consultation with the industry. Tourism enterprises must meet with the specified standards to become licensed to operate. This Act provides for enforcement of standards through a system of licensing and quality assurance as a license to operate a tourism business under the provision of the Act is mandatory.

The Act also provides for the establishment of a Quality Assurance Unit with the responsibility to carry out all functions which are required for the effective monitoring of the tourism services and tourist accommodation and to ensure compliance with the standards, classifications and ratings established under the Act, involving:

a) periodic inspections of tourist accommodations, vehicles and locations where tourism services are offered
b) investigating complaints concerning standards within the tourism sector
c) issuing non-compliance notices to service providers within the tourism sector
d) requiring remedial or corrective measures be taken when non-compliance has been identified
e) recommending, implementing and administering approved programs and measures to ensure compliance with the Act and Regulations
f) circulating, publishing and otherwise disseminating up-dated information relating to standards, classifications and ratings
g) undertaking and carrying out surveys, monitoring investigations and collating data on collation compliance within the tourism sector and,
h) preparing and submitting compliance reports on licensees.

The Quality Assurance Unit currently forms part of DDA's product development division.

Although the Tourism Regulations & Standard Act, and the establishment of the Quality Assurance Unit provides the framework for maintaining and improving the quality of standards in tourism, the applications of the standards has and continues to face a number of practical difficulties, viz:

- Government agencies have difficulty in adhering to some of the established standards;
- Private operators also have difficulties in adhering to the code of standards established for their particular sector, due mainly to financial problems;
- The DDA does not have a fully functioning Quality Assurance Unit, and no budget for activities/operations; and,
- There are only two QA officers to cover approximately 740 tourism operators in respect of licensing, inspection and compliance.

14.2.3 Environmental Legislation

There are several pieces of legislation relevant to environmental protection ranging from the National Parks & Protected Areas Act to the Physical Planning Act 2002.

In addition, the Roseau City Council and other local government bodies around the island make bye-laws from time to time to regulate issues of sanitation, keeping of domestic animals, removal of abandoned or derelict objects, public entertainment etc.

Although it is outside the scope of the TMP exercise to review all of the environmental and physical planning legislation, from the tourism perspective, a number of regulatory gaps have been identified[*], viz:

- National Parks and Protected Areas Act does not provide sufficiently for the establishment of a National Parks Service, which would be responsible for the management, maintenance and development of all protected areas, including nature sites.
- River catchment areas not protected from commercial development.

[*] Report on the Review of the Legislative Framework for National Parks

15. AIR AND SEA ACCESS

15.1 PASSENGER TRAFFIC

Passenger traffic by mode of transport is shown on Table 15.1.

Table 15.1: Passenger Arrivals by Air and Sea, 2006 – 2012

MODE	2006	2007	2008	2009	2010	2012
Air						
Visitors**	61,640	56,038	55,349	48,253	49,030	49,500
Excursionists	-	-	-	-	-	-
Residents	32,965	27,792	27,710	25,976	24,675	25,000
TOTAL AIR	**94,605**	**84,100**	**83,059**	**74,229**	**73,705**	**74,500**
SEA						
Stay-over	22,394	21,632	25,763	26,601	27,488	29,500
Excursionists	939	901	965	780	783	1,500
Residents	5,637	6.333	7,856	8,473	8,584	9,000
TOTAL SEA	**28,970**	**28,866**	**34,584**	**35,854**	**36,855**	**40,000**
TOTAL AIR & SEA	**123,575**	**112,966**	**117,643**	**110,083**	**110,060**	**114,500**

*Source: DDA *Consultant's estimates*
***visitors = stay-over arrivals plus excursionists*

Passenger arrivals reached a peak of 123,575 in 2006, declined to just over 110,000 in 2009 and have, more or less, stabilized at this figure since then.

With regard to the composition of passenger traffic, stay-over arrivals account for nearly 70%; residents for just over 29% and excursionists for the remainder.

An analysis of the data indicates that since 2006 air transport has become less significant and sea transport more important as a mode of transport to Dominica for all categories of traveller – tourists, excursionists and residents. In 2006, over three quarters (76.5%) of passenger arrivals to Dominica were by air whereas preliminary figures for 2012 suggest that this percentage has fallen to just below 64%.

The deepening relationship with nearby Guadeloupe and Martinique may account in large measure for this shift.

Table 15.1 above provides further details on the shift towards sea transport that has emerged since 2006:

- visitor arrivals by air to Dominica have declined steadily since 2006 and now stand at about 27% below the figure recorded in that year;
- the number of residents using air services has followed a similar downward trend since 2006 such that by 2012 the percentage of residents travelling by air was 25% below the figure recorded in 2006;
- stay-over arrivals by sea on the other hand have increased by an average of 5.6% per annum over the period 2006 to 2010;
- the number of residents using sea ferry services increased by an average of 13.4% per annum over the same period.

This trend does have some measure of policy and strategy implications as it shows sea access assuming greater significance as a mode of transport amongst residents and visitors alike.

15.2 REGIONAL AIR ACCESS SERVICES

Travelling to Dominica from outside a limited number of Eastern Caribbean countries entails flying to a regional hub and then connecting with one of the LIAT, Air Sunshine or BVI Airways services to Melville Hall. Scheduled services from the regional hubs to Melville Hall airport in 2012 were as follows (subject to seasonal variation):

- ANU-DOM v.v. three (3) times daily
- BGI-DOM v.v. three (3) times daily
- SJU-DOM v.v. daily
- SXM-DOM v.v. four (4) times per week
- PTP-DOM v.v. daily.

Table 15.2: Regional Air Services to Dominica

Airports	Performance	Regional Airline & Capacity
Antigua	• Arrivals out of ANU peaked in 2009 at 25,000 • By 2011 arrival numbers fell to 20,600 – a 17% decline over 2 years • Has been prime access hub – responsible for 43% of Dominica's visitor air arrivals in 2011	• Main carrier – LIAT • Number of direct flights – 2 non-stop daily, 1 via PTP daily, 1 3 x weekly • Aircraft type – Dash 8 • Capacity – 50
Barbados	• BGI accounts for 18% of total air arrivals in 2011 • Between 2009 and 2011 arrival numbers increased from 4,900 to 8,800 – 80% increase over two years	• Main carrier – LIAT • Number of direct flights – 2 non-stop daily, 1 via SLU daily • Aircraft type – Dash 8 • Capacity – 50
St. Maarten	• Arrivals out SXM accounted for 6% of total air arrivals in 2011 • Arrivals out of SXM increased from just over 500 in 2009 to 2,900 in 2011	• Main carrier – BVI Airways • Number of direct flights – 4 x weekly • Aircraft type – Jetstream 32 Jet Prop • Capacity 19 • Other carrier – LIAT • Number of direct services – 0 arrivals, connections on network • Aircraft type – Dash 8 • Capacity – 50
Guadeloupe	• For the period under review arrivals out of Guadeloupe peaked at 1,300 in 2006 • By 2011, this figure had just about halved to 679 visitors	• Main carrier – LIAT • Number of direct flights – 1 daily (origin ANU) • Aircraft type – Dash 8 • Capacity – 50

San Juan	• SJU is the 2nd largest access hub for air arrivals to DOM • Arrivals out of SJU peaked at 18,000 in 2007 • Following consistent annual declines, 11,800 arrivals recorded in 2011	• Main carrier – American Eagle* • Number of direct flights – 1 daily • Aircraft type – ATR 72 • Capacity – 55 • Other carrier – Air Sunshine • Number of direct flights 4 x weekly via St. Thomas • Aircraft type – Cessna 402C, Embraer EMB 110 Bandeirante & Saab 340A • Capacity – 9 to 30 • Other carrier – LIAT • Number of direct flights – 1 daily (seasonal via ANU), otherwise connections on network • Aircraft type – Dash 8 • Capacity - 50
St. Thomas	• In 2008, arrivals out of STT peaked at 1,200 • By 2011, arrival numbers were just above 300	• Main carrier – LIAT • Number of direct flights – 0, connections on network • Aircraft type – Dash 8 • Capacity – 50
St. Lucia (Hewanorra)	• Need to encourage a third tier link between UVF-DOM	• No regional services

*note: American Eagle ceased operating in March 2013

The regional air access issues which have become accentuated since 2006 are:

- with the demise of Caribbean Star/Sun in 2006/7, LIAT has become (once again) the dominant airline to Dominica, carrying 69% of passenger arrivals by air in 2010; LIAT rationalised service which led to a reduction of seats by LIAT when compared to the combined LIAT/ Caribbean Star/Sun services in 2006
- complex and tight scheduling of services by the carriers serving Dominica means that any unexpected delay on the route network will impact not only on booked passengers, but also on services over a wider area. This can result in unscheduled overnight stays, luggage not travelling with passenger, etc, which is a particular issue with the 'dive' segment of the market. However effective Winter 2012-13 LIAT has reduced its scheduled flights system-wide so as to mitigate these problems

15.3 INTERNATIONAL CONNECTIVITY TO MAJOR REGIONAL AIRPORTS

The Dominica Access Strategy Study* reviewed the traffic at nearby airports with international operations including Dominica's current major hubs, Antigua, San Juan and Barbados. The study also reviewed traffic at other such airports in the Eastern Caribbean - St. Maarten and St. Thomas as well as Guadeloupe, Martinique and Hewannora Airport, St. Lucia. The details for the week of March 10 – 16, 2012 are shown on the following Table 15.3 and are highlighted in the following paragraphs:

- Service from the United States at all nearby airports with international operations is focused on the Eastern Seaboard. Luis Munoz Marin International Airport in San Juan, the furthest hub from Dominica (321 nautical miles flying time), provides the greatest spread and density of service from the Americas. In addition there were 8 flights per week from Europe – of which 4 are from Frankfurt and 1 from London. The London flight will shortly cease.
- The V.C. Bird International Airport, Antigua, Dominica's most important hub to date, is much nearer to Dominica (99 nautical miles) and is LIAT's home base and primary hub.

  However, Antigua which has recently increased its facilitation fees for all passengers, including intransits, has a low density and spread of services from the Americas but has a good level of service from the United Kingdom.

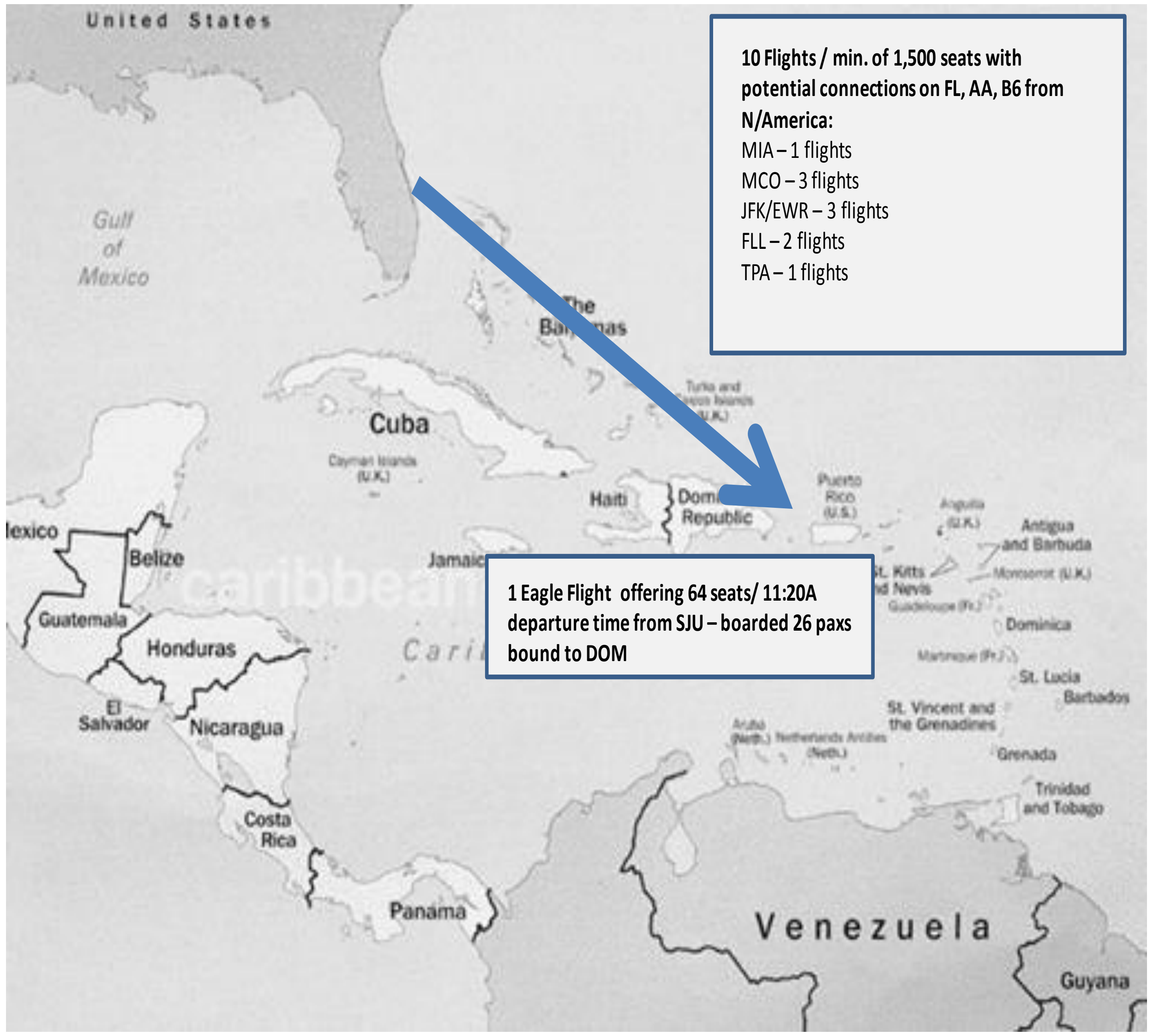
- The Grantley Adams, International Airport, Barbados, 181 nautical miles south of Dominica, is an important LIAT hub and continues to have a greater density and spread of service than Antigua, inclusive of service from the United Kingdom and Canada.
- All three hubs at present have non-stop Global Distribution Systems' (GDS) displayed scheduled services to Dominica. GDS displays make flight bookings much easier to access and process and so reduce the hassle of getting to a destination.
- Princess Juliana International Airport in St. Maarten and the Cyril E. King Airport in St. Thomas are two regional airports with international services that are currently under-utilised by Dominica. Both have far greater services from the United States than Antigua or Barbados and Princess Juliana has significant European service. However, neither airport has service from the United Kingdom nor non-stop GDS displayed scheduled services to Dominica (this situation has been corrected from April 2013 with direct LIAT daily SXM-DOM service). St. Thomas is 269 nautical miles from Dominica and St. Maarten, 182 nautical miles. St. Thomas, with a relatively large Dominican Diaspora, is already an important source of visitors to Dominica by air, being among its top 6 source markets. St. Maarten and Barbados are the same distance away from Dominica.
- Pointe-a Pitre Le Raizet Airport, Guadeloupe and Aime Cesaire International Airport, Martinique serve primarily metropolitan France, each with multiple services per day. Guadeloupe's airport is 45 nautical miles away from Dominica and Martinique's, 60 nautical miles. Air Caraibes is the major regional airline at both airports but does not serve Dominica. LIAT does have a daily non-stop service from Guadeloupe to Dominica but none from Martinique. St. Lucia hopes to establish a hub at Hewannora Airport which is well served from the United Kingdom, but at present there are no Global Distribution Systems' (GDS) shown regional scheduled services at that airport. Hewannora is 110 nautical miles from Dominica.
- Neither San Juan nor St. Thomas have services from Canada. The other hubs, with the exception of Barbados, have a relatively low level of service from Canada.

Table 15.3: International Connectivity with Regional International Airports (March, 2012)

INTERNATIONAL FLIGHTS									
Regional Airport Hubs	**San Juan**	**St. Thomas**	**St. Maarten**	**Antigua**	**Guadeloupe**	**Martinique**	**St. Lucia**	**UVF Barbados**	**Total**
Distance from DOM (NM)	321	269	182	99	45	60	110	181	
International City/ Flights									
USA	463	86	66	19	0	0	21	32	687
Canada	7	1	8	6	3	1	9	17	52
United Kingdom	1	0	0	20	2	2	10	36	67
Europe	7	0	13	2	36	31	1	3	93
Netherlands	0		2	0	0	0	0	0	2
Germany	4	0	0	0	0	0	0	3	7
France	0	0	10	0	34	31	0	0	75
Latin America	22	0	4	0	0	0	0	1	27

* Dominica Access Strategy Study, El Perial Management Services, 2012

Connecting Opportunities to DOM from North America via SJU on Eagle Saturday 15th September, 2012



15.4 AIR FARES AND CONNECTIVITY

The following table shows the cost of air access to Dominica in winter 2012-13 for travel from the US, UK and France, using different regional hubs.

Routing	Breakdown of Fare US$*	Flight Time (hrs)	Ease of Connection
US			
New York – San Juan	305.40		
San Juan - Dominica	387.00	100 mins	Same Day connection possible
New York – Antigua	647.90		
Antigua - Dominica	355.20	40 mins	Same Day connection possible
New York – St. Maarten	441.90		
St. Maarten – Dominica		50 mins	Same Day connection possible four (4) times per week
New York – Barbados	436.40		
Barbados – Dominica	325.00	60 mins	Same Day connection possible
UK			
London – Antigua	1036.90		
Antigua – Dominica	355.20	40 mins	Same Day connection possible
London – Barbados	987.40		
Barbados – Dominica	325.00	60 mins	Same Day connection possible
Europe			
Paris (ORY)– Guadeloupe	912.30		
Guadeloupe – Dominica (air)		30 mins	No same day connection
Guadeloupe – Dominica (ferry)		Minimum 105 mins	No same day connection
Paris – St. Maarten			
St. Maarten – Dominica		50 mins	Same Day connection possible four (4) times per week

**economy return fare. International leg booked on Orbitz for period Feb 02-08, 2013, non-stop flights. Note that JFK-SJO is $711.07. Also looked at non-stop flights only on connecting service to Dominica.*

15.5 SEA ACCESS

L'Express des Iles is a high-speed catamaran passenger ferry that services Roseau, Dominica from Pointe-a-Pitre, Guadeloupe and from Fort de France, Martinique.

L'Express Schedule

From	Time	Days	To	Time*
Guadeloupe	0800	Mon, Wed, Fri, Sat (1400)	Roseau	1015 1615
Martinique	1530	Sun	Roseau	1745
Roseau	1045	as above	Martinique	1215
Martinique	1345	as above	Roseau	1515
Roseau	1530	as above	Guadeloupe	1800

**departure/arrival times vary*

The ferry service is geared towards meeting the needs of the persons domiciled in Dominica, Guadeloupe and Martinique who want to travel between these islands and for whom affordable travel cost is more important than portal to portal time.

However, such operations do not meet the needs of airline passengers from Europe trying to make effective same day connections to/from Dominica.

These passengers (actual and potential), who have been relatively small in number compared to the regular ferry passengers, would require connecting air services which, as the analysis above shows are non-existent at this time. However, the ferry services do facilitate dual destination vacations by European residents.

15.6 AIR AND SEA CONNECTIVITY – THE MARKET VIEW

With the assistance of the DDA's overseas marketing representatives, tour operators and travel agents were surveyed on the views in respect to air and sea connectivity with Dominica.

Across all markets, Dominica's is perceived as hard to get to because of lack of flights and poor (LIAT) connections.

15.6.1 Are air access connections perceived as a major issue influencing choice of Dominica as a vacation destination?

An analysis of the tour operator and travel agents' responses indicated an emphatic **YES** to this question. As summed up by the DDA's market representative..............'These days, most people have limited vacation time. Which means they look to minimise their time "getting to/from" their destination. For the true adventure traveller, being a little off the grid may be okay (and part of the appeal), but given our time-starved nature, another day travelling takes away another day of vacation. This restricts Dominica's appeal to the eastern half of the US/Canada'.

The point was put succinctly by a Canadian travel agent. 'For a 7 day vacation, clients do not want to spend 2 days travelling to/from the destination. Connecting flights with LIAT do not always line up, which means overnights at main hubs or long delays. It's just easier to go somewhere else'.

For French and German travellers, the majority access Dominica via the French Antilles. However, the travel trade does not have confidence in LIAT's reliability (from Guadeloupe) and there is no connection by air from Martinique.

Among European tour operators and travel agents, the L'Express des Iles (ferry service) has a poor reputation because of poor response, lack of communications, ferry cancellations, and the fact that it doesn't operate during two weeks in June and two weeks in September (due to maintenance needs/lack of substitute vessels). The company does not view the French metropolitan market or indeed, the Central European markets as interesting, preferring to focus on the local FWI market.

15.6.2 To what extent is the cost of air travel to Dominica considered competitive?

Almost all tour operators and travel agents who responded to this question replied that the cost of travel is less competitive than to competing destinations – primarily because of the add-on fare from the regional hub (Antigua, French Antilles, Puerto Rico, etc.). However, a number mentioned that the higher cost of travel is less of an issue than the poor airline service.

16. HUMAN RESOURCE DEVELOPMENT AND STANDARDS

16.1 HUMAN RESOURCE DEVELOPMENT

16.1.1 Sector Employment

There are no statistics on numbers employed in the tourism sector. However, based on the product inspection visits undertaken by the consultants, a sectoral breakdown of jobs in tourism is estimated to be as follows:

Table 16.1: Breakdown of Employment in Tourism

Sub-sector	Job Numbers
Hotels	300 to 400
Guesthouses/Apts/Cottages	150 to 250
Restaurants*	50
Dive Centres/Watersports	25
Tour Operators/Car Rental	70
Craft Shops / Vendors	300
Duty Free Shopping	10
Air & Sea Ports (Cruise)	85
Air & Sea Carriers	15
Tour Guides	150
Taxi Services	400
Other Attractions	50
Estimated Total	**1,600 – 1,800**

** International standard, outside of hotels/guesthouses but excluding fast food*
Source: *Consultants estimates*

Overall, it is estimated that there are between 1,600 and 1,800 jobs in the sector, including the self-employed. Not all of these jobs are full-time. In fact a significant proportion is likely to be part-time.

16.1.2 Skill Levels and Service Standards

As far as can be ascertained, no study has been undertaken to determine the profile of employment in the tourism sector – numbers employed, job categories, gender and age profile, education and skills for the different job categories, staff turnover, etc.

Skill levels and service standards in the tourism sector are low – from supervisory to craft skills (table waiting, bartending, etc.). This is not the fault of the employees themselves – invariably they are obliging and friendly. The problem is the lack of training facilities to provide basic skills. For the most part, training is 'on-the-job' – which generally means that the inadequacies of the supervisor are passed on to the employee.

16.1.3 Training Needs

The CTO carried out a Dominica tourism training needs assessment in 2000-2004 which identified a number of areas where skills improvements are required. These are:
- management/supervisory skills;
- train-the-trainer;
- front office;
- customer care;
- cookery and food preparation;
- foreign languages (especially French);
- bar tending;
- housekeeping;
- tour guiding; and
- waitering skills.

16.1.4 HRD Interventions

All persons wishing to offer tourism services in eight areas specified under the Tourism (Regulations & Standards) Act 2005 are required to be licensed to enable them to operate. They need to be certified before they become licensed, and, in order to be certified, they must undertake training.

Currently, not all hotel staff have certification (do not need); policy that all should be certified by 2015. Some hotels think that there is no need for their staff to have formal qualifications, and that the training they receive in-house is adequate. There is need to change this mind set.

Training Courses

Before the establishment of DDA, the National Development Corporation (NDC) was responsible for tourism training. This focused on short training courses for different target groups. Under the ETDP, a large number of training courses were carried out for NDC, including short training courses for Tour Guides, Taxi Drivers, Vendors, Hair Braiders, Tour Operators, Front Office, Housekeeping and Restaurant Servers, Primary and Secondary Teachers workshops; and Customer Service training for Customs/Immigration Officers.

This has continued under DDA with the following courses delivered (using external trainers) in 2011/12:

- Customer Service Training: 87 persons;
- Taxi Operator/Driver Training: 200 persons;
- Vendor Training: 40 persons; and
- Tour Guide Training: 40 persons.

Some of these courses have been provided in collaboration with the Department of Continuing Education of the Dominica State College which offers flexible programmes on an ad hoc basis that can be tailored to meet individual and organizational needs.

16.1.5 HRD Facilities

Dominica State College

The Dominica State College (DSC), formerly the Community College, was re-established and re-named in September 2002 under the Dominica State College Act of 2002 as the product of an amalgamation with the then existing Technical College and the Sixth Form College. The College currently has a student population of about 1,400, and approximately 100 teaching and administrative staff, some of whom are part-time.

DSC is supported by the Ministry of Education and Human Resource Development through which it receives an annual subvention budget which amounted to EC$ 3.5 million (approved estimate) in 2011/12. This grant has been reduced in recent years, causing severe financial constraints and a fall in enrolment due to rising fees.

A new main building, which is being built with an EC$ 30 million loan from the Chinese government, is expected to be completed by December 2013. No provision is made for the Tourism and Hospitality Department whose existing accommodation and facilities are very inadequate (see below).

Tourism and Hospitality Department

Established in 2005, the DSC's Tourism and Hospitality Department is the designated department for preparing the workforce for the tourism sector.

Over the past six years, it has been offering a two-year Associate Degree programme in Tourism and Hospitality Studies, and to-date has graduated over two hundred and fifty students in this discipline. Effective academic year 2011, the Programme has been divided into two distinctive majors; Tourism Studies and Hospitality Studies. This was done to open up opportunities for students wishing to branch out into specific sub sectors of the industry.

There are two full-time staff members - a Tourism Coordinator/Tourism Lecturer and a Hospitality Lecturer - one of whom has a first degree in Hospitality Management and the other with a first degree in Business Management and a MA in Tourism Development. Support staff are drawn from other DSC departments (accounting, English and Maths, Economics, etc.) plus some external lecturers. Attachments/internships are offered by a number of hotels, including Anchorage, Fort Young, Portsmouth Beach).

On average, about 70-75 students graduate at the completion of the Associate Degree programme. Some find jobs in tourism/hospitality sector in Dominica, but currently most are employed by the call centres that have recently been established in Dominica. The private sector says that the programme is not providing adequately trained graduates and that they have to re-train. In addition, some businesses do not want to meet the cost of training for their staff (even though all need to be certified). It has also been suggested that the private sector should provide scholarships for students with guaranteed jobs after graduation.

Continuing Education

As previously mentioned, in addition to the Associate Degree programme, training courses are provided by DSC on an ad hoc basis through the Department for Continuing Education. This has included training for tour guides for which curricula have been developed.

OECS Centre for Excellence in Tourism Training

The establishment of an OECS Centre for Excellence in Tourism Training in Antigua is under consideration. This Centre would coordinate linkages to other islands who would specialize in specialized areas (e.g. Antigua: central reservation system/main server plus resort development; St. Lucia: F&B training; Grenada: site management; and Dominica; nature-based studies). Students would do the first year in their respective islands and then transfer to Antigua, with standardised examinations and curricula. While, the details have s not yet been fully agreed, DSC supports the general concept.

16.2 QUALITY STANDARDS

16.2.1 Standards

Quality Standards have been produced by DDA and the Dominica Bureau of Standards covering nine areas of tourism services[*]. Another two guidelines have been developed for Homestays – Kalinago and the Waitukubuli National Trail, while draft standards for Camp Grounds, and Sites & Attractions) have also been developed. These are *minimum* standards to be observed by all tourism-related operators in the relevant sectors.

16.2.2 Quality Assurance

The DDA Quality Assurance (QA) Unit is responsible for the monitoring of tourism services and ensuring compliance with the standards established under the under the Tourism (Regulations & Standards) Act. A Licensing Committee has been established to review applications and make recommendations on the issuance or non-issuance of licences, on the basis of reports received from the QA Unit.

The QA Unit has two Quality Assurance officers (reporting to the Head of Product Development) whose work is primarily focused on compliance in three areas; taxi operators, guides and vendors, and the accommodation sector.

Inspection of taxis and tour buses has been outsourced to the Traffic Department Police, while some discussions have taken place with regard to outsourcing of inspection of Food and Beverage Preparation, Storage and Sale to the Environmental Health Department, and of dive operations to the Maritime and Fisheries authorities. This has allowed the QA officers to concentrate on other sectors, particularly accommodation where there has been some resistance to the concept of mandatory standards.[*]* As a result, the number of certified properties increased from some 15 properties (222 rooms) in 2005 to 31 properties (462 rooms) in October 2012, but still representing less than half of the total accommodation stock in October 2012 and mostly located in the Roseau area.

Implementation of the recommendation***[*] that licensing should be a requirement before enterprises can participate in any DDA marketing initiatives has also served as an incentive to for hotels and other tourism entities to meet the certification criteria.

At the regional level, the CARICOM Regional Organisation for Standards and Quality (CROSQ) is responsible for the development and enforcement of regional standards for the sustainable production of goods and services (including tourism services) in the CARICOM Single Market and Economy (CSME).

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[*] Codes of Practice for Food and Beverage Preparation, Storage and Sale; Travel Agencies; Tour Guides, Tour Operators; and Vending Craft and Merchandise.
Specifications for Accommodation Facilities; Home Stays; Rented Vehicles; Tourism Taxi Services; and Water Sports.

*[*] See Final Report: *Technical Advisory Services to the Ministry of Tourism and Legal Affairs through the Discover Dominica Authority* (CHL Consulting Ltd., March 2009)
**[*] Ibid.

17. DESTINATION MARKETING

17.1 MARKETING BUDGET

With a total budget of about EC$ 4.6 million in 2011, the DDA allocates about 60% (EC$ 2.8 million) to the function of destination marketing.

17.2 COMPARATIVE BUDGETS OF CARIBBEAN NATIONAL TOURISM ORGANIZATIONS (NTOS)

In the context of a highly competitive international tourism market, the DDA's budget is small. However, as illustrated on Table 17.1 the budget is not only small, but also well outside the range of about 2% to 3% of visitor expenditure, which would appear to be the norm for many Caribbean NTOs.

Table 17.1: Expenditure by National Tourism Organizations, 2007/2009

Country	Total Budget US$ (000's)		Visitor Expenditure US$ (000)		Budget/Exp Avg 2007/2009
	2007	2009	2007	2009	%
Antigua	3,700	4,000	115,000	102,000	3.6
Aruba	23,595	23,595	808,400	858,100	2.8
Bahamas	67,150	73,331	2,056,400	2,501,000	3.1
Barbados	22,137	22,137	953,400	1,184,000	2.1
Bermuda	35,900	35,299	513,200	401,800	7.8
Bonaire	1,676	1,888	83,700	121,100	1.7
BVI	4,115	11,580	436,700	552,400	1.6
Curacao	9,343	10,121	276,400	330,300	3.2
Dominica	1,000	1,100	64,700	84,100	1.4
Montserrat	n/a	650	7,450	6,070	10.5
St. Kitts/Nevis	3,238	3,328	106,900	126,100	2.7
St. Lucia	6,918	6,918	284,600	311,000	2.3
Turks & Caicos	n/a	2,316	n/a	304,000	0.8

Dominica's budget, as a proportion of visitor spending, is the smallest among the Caribbean NTOs surveyed. Moreover, it doesn't tell the full story. Other destinations, particularly those with direct scheduled international flights from the main tourism source markets get considerable additional promotional support from the international airline(s) with scheduled services to the destination and also from the travel trade in the market(s). Thus Bonaire, which has a relatively small marketing budget, gets additional promotional support in Europe from KLM (which has 8 flights per week to the island) and from the Dutch travel trade.

Moreover, there is a minimum amount which must be spent when marketing activities are engaged in. Printing of collaterals, appointment of a PR agency are typical examples.

17.3 AWARENESS OF DOMINICA IN THE MARKET PLACE

With very limited funds for destination marketing it is unsurprising that overall awareness of Dominica in the market place is very low. This low awareness is evidenced by the low level of customer enquiries for Dominica recorded by the travel trade in all except the French/FWI markets.

In Germany, US, Canada and UK markets most of the tour operators and travel agents recorded less than 50 enquiries in the last year.

In the French/FWI markets, 40% of tour operators recorded less than 50 enquiries for Dominica in the last year; a further 40% recorded between 50 and 100 enquiries and the balance (20%) 100 or more enquiries.

17.4 MARKETING STRATEGY AND PLAN

Dominica's marketing strategy and plan is described in the DDA's **Marketing Budget 2012/13 Justification** document, which covers all the main topics, viz:

- **Marketing Strategy**
  - continued brand awareness of Dominica,
  - partnership with the trade,
  - access, specifically air access, and
  - product development and diversification.

- **Geographic Market Focus**
  - USA
  - France & FWI
  - Germany & Scandinavia
  - Canada
  - United Kingdom
  - Caribbean.

- **Marketing Mix**
  - print advertising
  - consumer and trade shows
  - sales calls and familiarization trips and seminars
  - tour operators partnerships and other strategic partnerships
  - public relations
  - contests/sweepstakes
  - e-marketing and interactive marketing to include database marketing, online social networking and website marketing.

17.4.1 Structure of the Marketing Plan

The elaboration of the annual marketing plan is important, not just in giving direction to the efforts of the DDA (including the market representatives) but also in keeping the tourism sector informed as to where opportunities lie, where and how private sector operators can dovetail their individual marketing campaigns with the national effort etc.

Going forward, the structure of the marketing plan could benefit by including:

- Review of the previous year's outcome and lessons learnt
- Specific targets for the main source markets
- More detailed elaboration of strategy
- Identification of joint or co-op DDA/Dominica private sector promotional programmes

- Indicators of performance.

17.5 RESEARCH AND STATISTICS

In general, tourism research statistics are important for a number of reasons, in particular

- Strategy formulation – formulating strategies to develop tourism.
- Monitoring effectiveness – assessing the effectiveness of policies, strategies and use of scarce resources.
- Estimating the macro-economic and social contribution of tourism to the economy – in terms of value added, jobs, incomes generated, foreign exchange earnings, gender equality, etc.

Although Dominica's professionalism and commitment in relation to research and statistics is one of the better among Caribbean islands – indeed Dominica is one of a few countries which undertakes a visitor exit survey on a regular basis – the statistical data base is weak because of a number of inadequacies, viz:

- The results of the Visitor Exit Survey are not consistent with the information gleaned from the E/D cards.
- The basis of the visitor expenditure estimates is not clear.
- Inadequate coverage of particular categories of visitor – yachting visitors, cruise passengers particularly.
- No figures on direct employment and characteristics.
- No business reporting – e.g. room occupancy rates in hotels, levels of business and advance bookings etc.

18. COMPETITIVENESS PERFORMANCE

18.1 MARKET COMPETITIVENESS

Competitiveness is a relative measure, describing a state which is better or worse than that of others, the acid test of which is market share.

In broad terms, where Dominica has maintained or increased market share can be interpreted as maintaining or improving market competitiveness. Conversely, where Dominica has lost or is losing market share, this can be taken as an indicator of loss of competitiveness. In this context, the gains or losses in competitiveness may be due to changes in product quality, standards of service, access, changing consumer trends, etc, and not just changes in relative prices.

Market share performance can be addressed at a number of levels – globally, regionally, competitor grouping, individual source markets.

18.1.1 Caribbean Region

With just over 75,500 stay-over arrivals, Dominica's share of total tourist arrivals in the Caribbean is less than 1% (0.3%).

18.1.2 Competitor Group Market

From the general perspective, Dominica is in competition with every other tourist destination in the Caribbean Basin area. However, from its product offering perspective Dominica is in close competition with little more than a handful of other destinations offering a similar type product.

With the assistance of Dominica's market representatives identification of destinations considered to be Dominica's main competitors was determined by means of a market survey among tour operators and travel agents in the major source markets. Although many destinations were identified as competitive, the primary ones are shown on Table 18.1.

Table 18.1: Dominica's Competitors

Market	Competitor Destinations
US	St. Lucia, Grenada, Jamaica, Saba
Canada	St. Lucia, Cuba, Grenada, Jamaica
UK	St. Lucia, Barbados, Antigua, Grenada
France	St. Lucia, Guadeloupe, Martinique, Saba
Germany	Guadeloupe, Martinique, St. Lucia, Grenada

The responses from the French, FWI and German markets were from tour operators. However, in the US, Canada and UK, the returns were almost entirely from retail travel agents whose responses reflected where they were sending their clients. Based on this feedback, we refined the definition of the competitor set for those markets to take into account the type of product offering.

Dominica's share of its competition set is shown on Table 18.2.

Table 18.2: Dominica's Share of Competitor Set

Destination	Number of Stop-Over Arrivals**					
	2007	2008	2009	2010	2011	2012
Dominica	77,800	81,100	74,900	76,500	75,500	79,000
Grenada	129,000	129,600	113,400	106,100	118,300	112,500
Martinique	503,100	481,200	443,200	476,500	496,500	496,000
Saba	11,600	12,000	12,000	12,300	12,500	13,000
St. Lucia	287,400	295,800	278,500	305,900	312,400	306,000
TOTAL	**1,009,000**	**999,700**	**922,000**	**977,300**	**1,015,200**	**998,500**
TOTAL STAY-OVER ARRIVALS TO CARIBBEAN (000S)	**19,491**	**19,789**	**19,043**	**19,943**	**20,640**	**21,000**

Source: *CTO *consultant's estimates **figures rounded*

For 2012 we estimate that Caribbean destinations recorded some 21 million stay-over arrivals, representing a growth of almost 2% compared with 2011.

With regard to competitiveness, a number of conclusions can be drawn from Table 18.2:

- Dominica's competitor group attracts about 5% of all stay-over arrivals to the Caribbean Basin area.
- The competitor group's share has been more or less maintained over the last 5 years.
- Dominica's share of the market for its competitor group is between 7 and 8% - a range which, taking into account the inexactitude of the data, has been consistent over the last 5 years.
- Overall, Dominica has neither gained nor lost competitiveness since 2007.

There is considerable room for Dominica to expand its share of the market.

18.1.3 US Market

US travel to the Caribbean changed little between 2007 and 2010, but since then has increased by 14.5% and is projected to have reached a record high of 6.5 million stay-over arrivals in 2012.

It is interesting to note that as a proportion of total stay-over arrivals to the Caribbean, the US market has consistently represented about 30% since 2007.

Table 18.3: Dominica's Share of the US Market Competitor Set

Destination	Number of Stay-Over Arrivals**					
	2007	2008	2009	2010	2011	2012*
Dominica	21,500	20,500	18,200	19,300	17,800	19,000
Grenada	27,100	25,900	24,700	24,600	27,400	26,000
Saba	4,500	4,500	3,800	3,800	3,900	4,000
St. Lucia	113,400	108,600	98,700	129,100	122,400	115,100
TOTAL Competitor Group	**168,600**	**161,400**	**147,000**	**178,500**	**173,000**	**163,300**
TOTAL US STAY-OVER ARRIVALS TO CARIBBEAN (000S)	**5,649**	**5,687**	**5,530**	**5,716**	**6,032**	**6,500**
TOTAL STAY-OVER ARRIVALS TO CARIBBEAN (000S)	**19,491**	**19,789**	**19,043**	**19,943**	**20,640**	**21,000**

Source: *CTO & US 0TTI *consultant's estimates **figures rounded*

Total US stay-over arrivals to Dominica's competitive group is more or less the same now (2012) as five years ago in 2007. Excluding St. Lucia, US arrivals to Dominica, Grenada and Saba have declined over the period.

- Allowing for the inexactitude of the data, Dominica's competitor group share of US travel to the Caribbean is about 3% and has been declining over the last 5 years.
- Within the competitor group, Dominica's market share has also been declining since 2007.

It is worthwhile noting that whereas Dominica and Saba are off-line destinations, Grenada and St. Lucia have direct air services from the US.

18.1.4 Canadian Market

Canadian travel to the Caribbean has grown consistently over the last 5 years. Caribbean destinations are estimated to have recorded about 3 million Canadian stay-over arrivals in 2012, representing an average growth rate of 8% yearly since 2007.

Table 18.4: Dominica's Share of Competitor Set in Canadian Market

Destination	Number of Stay-Over Arrivals					
	2007	2008	2009	2010	2011	2012*
Dominica	2,600	3,300	2,600	2,900	3,000	3,100
Grenada	6,000	6,900	6,900	7,000	7,200	7,100
Saba	640	760	910	1,100	1,200	1,300
St. Lucia	18,600	26,300	28,600	32,200	35,400	37,700
TOTAL Competitor Group	**27,840**	**37,260**	**38,010**	**43,200**	**46,800**	**49,200**
TOTAL CANADIAN STAY-OVER ARRIVALS TO CARIBBEAN (000S)	**2,038**	**2,349**	**2,482**	**2,600**	**2,800**	**3,000**
TOTAL STAY-OVER ARRIVALS TO CARIBBEAN (000S)	**19,491**	**19,789**	**19,043**	**19,943**	**20,640**	**21,000**

Source: *CTO & ECCB *consultant's estimates*

Canadian stay-over arrivals to Dominica's competitor group has increased year-on-year from 27,840 in 2007 to an estimated 49,200 in 2012, representing an average growth rate of 12% yearly. With the exception of Montserrat, all members of the competitor group have recorded increases in Canadian stay-over arrivals.

The competitor groups' share of total Canadian travel to the Caribbean is very small – less than 2%.

18.1.5 UK Market

Total UK travel to the Caribbean has declined consistently since 2007, but as of 2012 appears to have stabilized around 870,000 visits annually, about 17% below the 2007 peak. As a proportion of total stay-over arrivals to the Caribbean, UK residents now account for about 4%, compared with a figure of about 5.5% in 2007.

Table 18.5: Dominica's Share of Competitor Set in UK Market

Destination	Number of Stay-Over Arrivals					
	2007	2008	2009	2010	2011	2012*
Dominica	6,200	7,200	4,350	4,600	4,600	4,670
Grenada	33,800	34,600	27,100	25,900	27,200	24,500
St. Lucia	79,200	83,700	71,850	67,400	73,000	75,670
TOTAL Competitor Group	**119,200**	**125,500**	**103,300**	**97,900**	**104,800**	**104,850**
TOTAL UK STAY-OVER ARRIVALS TO CARIBBEAN (000S)	**1,045**	**947**	**894**	**873**	**866**	**870**
TOTAL STAY-OVER ARRIVALS TO CARIBBEAN (000S)	**19,491**	**19,789**	**19,043**	**19,943**	**20,640**	**21,000**

Source: *UK Office of National Statistics; ECCB *consultant's estimates*

UK stay-over arrivals to Dominica's competitor set has declined in line with general UK trends to the Caribbean, maintaining its share at about 12%.

Dominica's share of the competitor set is about 4.5%.

18.2 DOMINICA'S MARKET PLACE POSITION

A number of elements go to make up a competitive tourism product, the key ones being:

- Direct and frequent access from source markets and/or hubs.
- Range of good accommodation and high standards.
- Variety of attractions, things-to-do-and-see.
- High quality infrastructure – urban, ports, roads, utilities.
- Relative prices – good value for money.

Certainly, not every destination in Dominica's competitor group ticks all these boxes, but none (except Montserrat) are as severely disadvantaged as Dominica in respect of all the key elements which go to make up a competitive tourism product.

The findings of the survey among tour operators and travel agents in Dominica's main source markets confirm this. The responses to the question *'What are the major weaknesses of Dominica's tourism product as perceived by your market'* were as shown on Table 18.6.

Table 18.6: Major Weaknesses of Dominica's Tourism Product

Response / Market	US	Canada	UK	France & FWI	German Markets
A. Air and Sea Access					
• limited and difficult flight connectivity	✓	✓	✓	✓	✓
• poor connectivity with LIAT flights					✓
• unreliability of schedules by l'Express des Iles				✓	✓
B. Accommodation					
• not enough boutique hotels		✓			✓
• not enough quantity and quality accommodation	✓	✓	✓	✓	
C. Infrastructure					
• poor infrastructure	✓	✓	✓		✓
D. Variety of Attractions/Things to-see-and-do					
• lack of night-life				✓ (FWI)	
E. Other					
• inadequate response from ground tour operators				✓	
• lack of information on Dominica's attractions				✓	
• lack of French speaking guides				✓	
• properties unwilling to work with travel trade	✓				
• lack of awareness of Dominica	✓		✓		

As perceived by the market, the main weakness of Dominica's tourism product is poor air and sea connectivity, followed by insufficient quantity and quality (i.e. market ready) accommodation, and poor infrastructure (urban buildings, streets, ferry terminal, etc).

18.3 FIRST VS REPEAT VISITS

Another indicator of competitiveness is the extent to which stay-over arrivals are on their first visit. Generally speaking, repeat visitors usually represent about 25% of stay-over arrivals to a vacation destination. For example, in the Turks & Caicos, 23% of stay-over arrivals are repeat visitors. However, for Dominica, the proportion of repeat visitors is particularly high.

Table 18.7: Previous Visits

Year			2012	
	2008	2010	Jan	Aug
First Time %	34	29	42	39
Repeat %	64	63	55	54
Not Stated %	2	8	3	6

Source: *CSO, Visitor Exit Survey.*

On one hand having a high proportion of repeat visitors is good as it reflects a significant 'loyal' core segment in the various markets. However, too high a proportion of repeat visitors suggests that a destination is not appealing to 'new' prospective tourists and in this context is not as competitive as other destinations.

PART IV TOURISM VISION AND FRAMEWORK FOR DEVELOPMENT

19. TOURISM VISION AND GUIDING PRINCIPLES

19.1 FORMULATION OF VISION

The formulation of the Tourism Vision for Dominica is the result of a participatory process characterised by extensive consultation with stakeholders, involving public and tourism sector representatives, and market surveys undertaken among tour operators, travel agents, market & hotel representatives in the main source markets (US, Canada, UK, France, Germany, and the French West Indies). It is therefore grounded in the reality of what the island can support and, secondly, reflects what is special about what Dominica has to offer.

The feedback from the stakeholder meetings, supported by the findings of the market surveys, indicates that Dominica's attractiveness lies in its:

- nature environment, unspoilt wilderness – for nature lovers;
- old world charm – the way life used to be in the Caribbean;
- wild, untamed – simplicity;
- peace and tranquillity – get away from it all;
- safety and security;
- warm, welcoming, friendly people;
- exclusivity and intimacy – a private hideaway – no mass tourism;
- authenticity, with a distinctive cultural heritage.

These are Dominica's core strengths which must be maintained and enhanced.

Any future tourism development must be in harmony, and enhance these core strengths, which should be reflected in the image promoted.

The suggested vision for tourism builds on the vision recommended in the 2010 National Tourism Policy (originally prepared in 2005 and re-articulated in GSPS 2008 and again in GSPS 2012-14). This has been refined in the new Tourism Policy 2020 to reflect today's global tourism market and the potential tourism offers to enhance quality of life in select destinations.

19.2 TOURISM VISION

Reflecting Dominica's core strengths, the 1997 Vision Statement* is still relevant:

Dominica will pursue sustainable tourism that enriches the lives of all citizens by creating economic, social and cultural opportunities, protecting the natural resources and scenic, heritage and cultural features of the country, nurturing community involvement in tourism at sustainable levels, and by creating career paths for the young people of Dominica.

Translating the vision into reality is the objective of the updated Tourism Master Plan. Its implementation will result in a vibrant tourism industry, as described in the following snapshot of what Dominica's tourism sector might look like in 2022.

* Dr. Maria Bellot, Tourism Master Plan, 1997

VISION FOR DOMINICA TOURISM 2022

Over the past ten years, Dominica has become much sought after visitor destination, with its more diversified product offer, expanded range of excellent accommodation and service, authentic cultural experiences with a distinctive Caribbean flavour; warm and friendly welcome, and a clean and safe environment. Stay-over tourist arrivals have increased by more than two-thirds since 2012 with resulting benefits for all those dependent or linked to the Tourism industry, accompanied by increased contribution to strengthening of the rural and agricultural economy to ensure sustainability. Consequently, tourism is now the main growth engine of the local economy. .

The foundations for this transformation were initiated in 2013 with the implementation by the Programme Management Unit of the updated Tourism Master Plan which put in place the necessary supporting tourism infrastructure on the one hand, and, on the other, a capacity building programme to encourage and support the various tourism enterprises, with the commitment of all stakeholders.

Increased recognition of the importance of the tourism sector led to a substantial increase in the budgetary allocation for tourism marketing and promotion in the existing main markets of North America, UK/Europe and the Caribbean. This has been welcomed and wholeheartedly supported by the private sector, including shared funding of joint promotions in niche markets and, initially, support guarantees to airlines to induce them to commence or continue service.

Reflecting the increased demand, air and sea access was improved with airlines and ferry operators now enjoying higher load factors. While Melville Hall continues to attract mostly larger aircraft, Canefield airport is served by a greatly increased number of smaller aircraft from the main regional hubs. In addition, the airport terminal was redeveloped.

With the resumption of calls by Carnival and more direct marketing targeted at boutique cruise lines, cruise tourism now exceeds the previous peak levels experienced in 2008. A new cruise terminal and cruise village has been constructed at Donkey Beach in order to cater for the new generation of cruise vessels. This has allowed Woodbridge Bay to concentrate on commercial traffic.

The number of yachts visiting the island has also increased - particularly (following the development of a marina/real estate and retail complex at Cabrits) at Prince Rupert Bay, but also at anchorages along the Newtown, Castle Comfort and Loubiere coasts, south of Roseau, where moorings and other yacht facilities and services are widely available.

Existing hotels and villas now enjoy better room occupancy rates and tariffs, while new properties, often commanding premium rates, especially the new 5-star golf resort complex at Cotton Hill, near Cabrits. and the resort spa and villa development at Woodford Hill, as well as other health/wellness boutique hotels, have become major drivers of tourism activity.

The development of guest houses and home stay accommodation has been facilitated by the launch of a special Tourism Development Fund (which offers grants and/or soft loans for those wishing to upgrade/develop existing and/or new tourism-related businesses and services), and by training to assist individual entities to meet quality standards. In addition, Dominica is becoming increasingly known for its pool of high quality rented villas. Owners and long-term visitors are attracted by the attractive and highly competitive incentives package that is now available for fractional or outright property ownership.

The product offer while still based on the island's world class hiking, diving and whale watching, is more developed and diverse with an increased range of attractions and activities. These include a new range of upscale boutique hotels and eco-lodges; marina and waterfront developments in Cabrits; and a BioPark at Pond Casse *(which is not only hugely popular among cruise visitors, thereby also helping to relieve pressure on Trafalgar Falls, Emerald Pool and Roseau city itself, but also attracts visitors from neighbouring islands).*

A major focus has been on the promotion of historical and cultural sites and attractions, including the now flourishing Kalinago Barana Autê *(following implementation of product development and marketing recommendations); and the further development of the Geneva Heritage Centre at Grand Bay. The various EU-funded community tourism projects have become more profitable following establishment of closer links with neighbouring hotels.*

These (and other attractions) have become favourite stopping places for touring motorists taking advantage of the island's greatly improved main road network and well-signed touring routes, including the dramatic and much-improved Wild Coast and the round-the-island Ring of Dominica routes, where visitors also have the opportunity to stop at lay-bys and purchase refreshments and snacks at villages such as Le Plaine, Castle Bruce, Scott's Head, etc. Cyclists, especially from Martinique and Guadeloupe, come each year to participate in the challenging and now well-established Tour de la Dominique.

Festivals are now an even bigger attraction both for regional as well as an increasing number of overseas visitors.

Roseau itself has become an 'in destination' following rejuvenation and pedestrianization of the historic Old French Quarter and the Old Market; reinstatement of roads, pavements and gutters; relocation of vendors to a new Vendors' Market Arcade; construction of a multi-storey public parking building at Windsor Stadium; and provision of new bus terminals on the city outskirts. It now has a lively waterfront area with regional and other visitors attracted by the New Bayfront boardwalk and the Roseau River promenade. These measures have contributed to Roseau's emergence as one of the more attractive capital cities in the Caribbean.

The Botanic Gardens have, as recommended, been converted into a multiple-use municipal city park including children's playground, tennis courts, water feature, and gazebo, prohibition of vehicular through traffic and the re-location of the agricultural research station to Pond Casse*, adjacent to the new BioPark.*

With the growing concentration of new tourism-related developments in the north of the island, Portsmouth has taken on a new role as a tourist centre and service provider. This is reflected in recent improvements to the urban landscape and infrastructure centred around the enhancement of the area around Borough Square; construction of a coastal boardwalk from the Borough Square to Cabrits; and development of a Creole Village at Lagon, as well as construction of a by-pass from Glanvillia to Cabrits and completion of a badly-needed new sewerage and sewage treatment system.

The now flourishing Waitukubuli National Trail has an important role in anchoring and linking the various projects through the provision of associated accommodation and interpretative information on local tourism sites and attractions.

Sustainable development has been promoted through the designation in 2013 of seven Tourism Development Areas (TDAs) for the island: Cabrits/Portsmouth; North-East Coast; East Coast; South Coast; Roseau and environs; Heart of Dominica; and West Coast, and their associated tourism centres. Subsequently, Action Plans were drawn-up for each TDA to effect the integration of developers' proposals, environmental management plans, government plans and infrastructure programmes within the framework of the overall National Physical Plan.

The integrated coastal management plan and associated legislation has resulted in the protection and promotion of the marine environment for the benefit of both recreational users (diving and yachting) and fishermen, while the designation of a new Indian River Preserve (intended to safeguard the river from pollution arising from uncontrolled development) sets a standard for other riparian eco-systems. In addition, more and more hotels and other tourism entities are qualifying for Green Globe and/or similar certification while community 'clean-up' programmes are becoming more widespread under the new Tidy Villages competition.

The tourism sector is now better organised and managed. The respective roles of the Ministry (policy), DDA (marketing and product promotion) and DHTA and DWA (industry representation) have been clearly defined and fully harmonised. Both the Ministry and DDA have been provided with the additional resources – both human and financial – needed to carry out their responsibilities, while DHTA and DWA continue to play active parts in overall tourism development. The tourism business licensing and certification regulations ensure that more and more operators now meet the stipulated Quality Standards.

Matching attention has been paid to human resource development. The development of the tourism sector, creating over 1,000 new job opportunities, required an intensive skills training programme both for persons wishing to enter the hospitality sector as well on-going on-the-job training for existing staff. Additional human and financial resources were provided for the DSC's Tourism & Hospitality Studies Department (including re-housing in a new state-of-the-art building) to deliver both formal and ad hoc training courses. As a result, Dominica now provides quality service that often exceeds customers' expectations, while more young Dominicans are motivated to seek and find employment in the tourism sector – not just as waiters and chambermaids, but also increasingly in managerial positions.

Population is rising again as more Dominicans from the Diaspora return to take up the enhanced opportunities afforded in the tourism industry, but the crime and drug problems often associated with economic growth have been avoided. From the outset, visitor security was recognised as a top priority, especially at isolated beaches and along the Waitukubuli National Trail. An awareness campaign and a zero tolerance attitude to crime by police and residents have resulted in a safe environment in which both visitors and locals can move freely about.

So, growth of the tourism sector has generated widespread benefits for all: for local residents (new business and job opportunities, a greater sense of pride in Destination Dominica, and better appreciation and adoption of active and healthy lifestyles); for school leavers (the chance of a rewarding career); for Government (increased tax revenues); and for visitors (improved access, enhanced product offerings, improved quality customer service and an expanded range of activity-oriented water & land-based activities and adventures.. Most importantly, development has not negatively impacted on that which attracts people to Dominica time and time again, namely, unparalleled natural beauty and the feeling of intimacy and bonding with local people in a safe and peaceful environment. Visitors love Dominica's clean, tranquil, welcoming environment, and above all, its authenticity.

19.3 REALISING THE TOURISM VISION

19.3.1 Guiding Principles

Dominica will be guided by several principles to shape how tourism is developed and managed to achieve the country's Vision for the sector. These guiding principles are as follows:

These guiding principles are as follows:

(i) tourism policy and development programmes will be integrated with national economic, social and cultural policy;
(ii) all tourism activity will be designed to improve the quality of life enjoyed by Dominica's citizens;
(iii) development of the tourism sector will be market-driven and private-sector-led;
(iv) the focus will be on 'low volume, high yield' tourism within the parameters of the island's limited absorptive capacity.
(v) Government will foster a positive pro-business environment for the tourism sector; ;
(vi) tourism sector planning and management will be based on partnerships and collaboration;
(vii) local communities will play a meaningful role in the tourism sector, one that ensures economic, social and cultural benefits to each participating community;
(viii) maintain and enhance Dominica's pristine environment;
(ix) tourism policies, programmes and standards to conform with the principles and directions required of the tourism sector arising from 'Green Globe and/or other certification programmes; and
(x) ensure safety and security for all, both visitors and residents alike.

19.3.2 National Tourism Policy

The guiding principles are further developed and articulated in the updated and revised National Tourism Policy 2020.

COMMONWEALTH OF DOMINICA
MINISTRY OF TOURISM AND LEGAL AFFAIRS

NATIONAL TOURISM POLICY 2020

20. TOURISM DEVELOPMENT STRUCTURE PLAN

20.1 TOURISM DEVELOPMENT CONCEPT

As illustrated on Map 20.1, the proposed development concept builds on the strengths of the nature product by clustering development around the national parks and forest reserves in the north, south and centre of the island.

Planning Framework

Two planning concepts are applied to the future development of tourism in Dominica.

(i) Tourism Development Areas (TDA)

A TDA is an area that contains tourist attractions, accommodation and other tourist facilities and services, all well serviced by a road network. Designation of tourism management areas provides the basis for integrated planning of the area so that it functions efficiently and is relatively self-contained. From the planning perspective the importance of having designated TDAs is that they:

- Help create critical mass – making it economic to provide a range of facilities and services in an area.
- Diversify the product offer in a way that can be promoted to different niche markets, thereby facilitating product branding.
- Allow different forms of tourism development to co-exist – designating particular areas for nature tourism only, other areas for more intensive use.

It is important to emphasise that the designation of TDAs does not imply zoning in any form. The TDAs are simply the frameworks for effective physical planning.

(ii) Tourism Centres

Within a TDA, it is often desirable to designate or establish tourism centres. The purpose is to provide a concentration of facilities, services and information for tourists. This makes it easier for the public and the private sectors to develop these facilities and services.

For the north of the island, three integrated mixed use TDAs are being proposed with an emphasis on quality recreational activities in tranquil settings – North West Coast, North East Coast and West Coast.

In the south and south-east, the intention is to develop the nature, heritage dive, whale watching and community based tourism products in and around Roseau and along the East South Coasts offering an 'experience', but not compromising the integrity of the resource.

Bisecting the north and south of the island is an important road – the Imperial Drive – linking the east and west coast and giving access to Roseau and Melville Hall Airport. It is vital that this area be subject to stringent conservation controls to minimise development impacts, thereby preserving the nature isle image. In the centre of the country is the Heart of Dominica TDA.

Map 20.1: Tourism Development Areas and Centres

Based on the location of the tourism products and their spatial relationship with the islands ecological resource base and infrastructure, we recommend the following eight Tourism Development Areas (TDAs) and associated Tourism Centres (TCs).

	Development Areas	Tourism Centres
(i)	Cabrits/Portsmouth	Cabrits NP, Portsmouth Town, Vieille Case, Indian River
(ii)	West Coast	Mero Beach, Layou Valley
(iii)	Roseau	Donkey Beach/Canefield, Roseau City, Roseau Valley/Wotten Waven, Area south of Roseau City
(iv)	South Coast	Soufriere, Grand Bay, Scott's Head
(v)	East Coast	Carib Territory, Castle Bruce, Rosalie
(vi)	North East Coast	Calibishie, Woodford Hill, Hampstead
(vii)	Heart of Dominica	Pond Casse
(viii)	National Parks	

Within each of these development areas the plan specifies the most appropriate products to be put in place, taking into account the area's geography, ecology and infrastructures as described in the following sections.

An important element of the development plan is the anchoring and linking of the tourism development areas by developing products that effectively integrate sites, attractions, events, activities and associated accommodation. To effect this, the plan includes the development of tourism circuits, scenic routes and trails with appropriate signage, and interpretative information and linkages.

The products which both anchor and integrate the development areas are the:

- general touring product
  - Imperial Drive and other scenic routes
  - 'Ring of Dominica' scenic route
- Waitukubuli Trail
  - with themed sections
- visitor and interpretative centres.

20.2 ROSEAU TOURISM DEVELOPMENT AREA

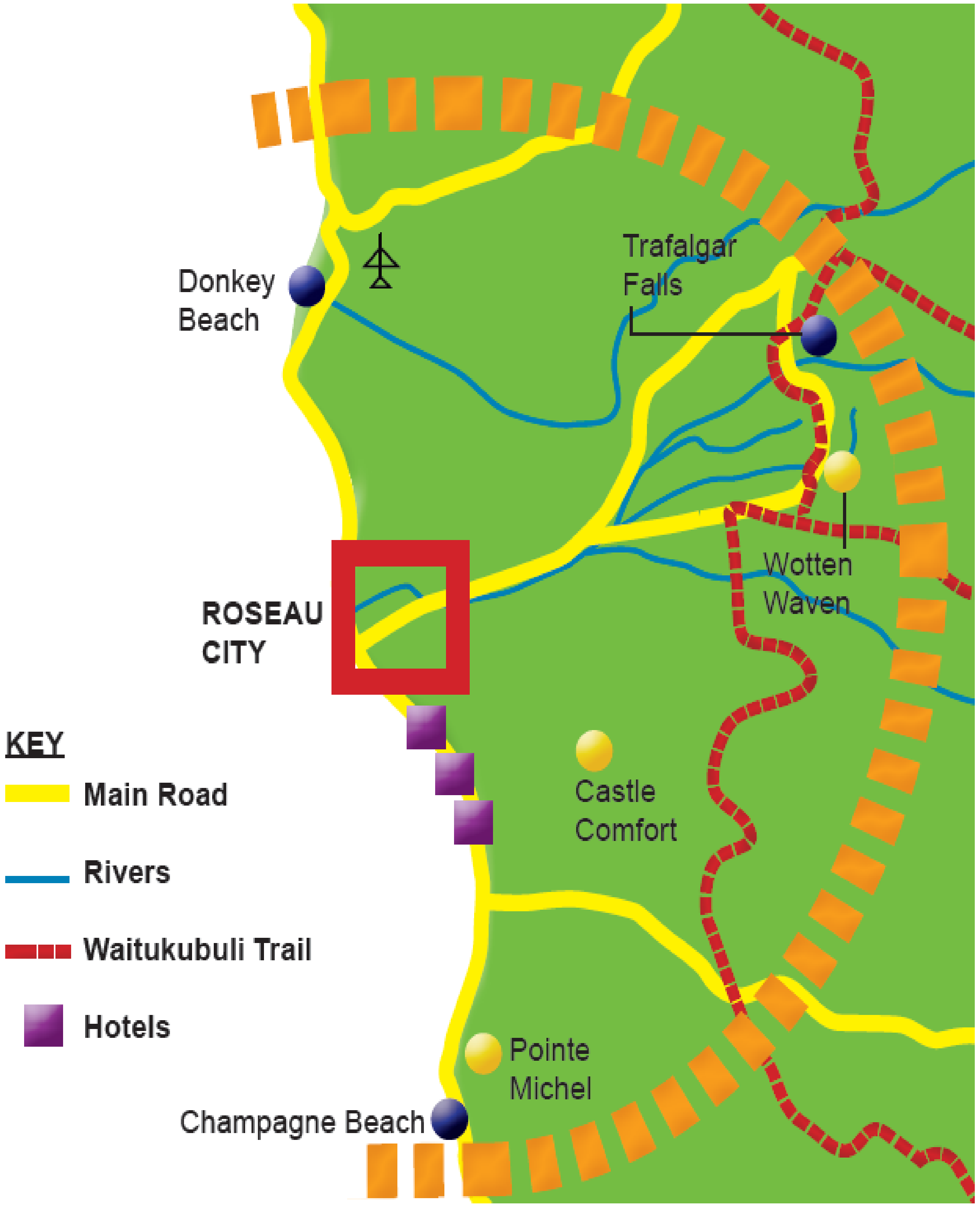
As shown on the accompanying map, the Roseau TDA stretches along the coast from Donkey Beach to Champagne Beach and inland to encompass the Roseau Valley area as far as Wotten Waven. The tourism product of this TDA is characterized by:

- urban attractions of Roseau City
- thermal springs and related Health & Wellness facilities at Wotten Waven
- numerous restaurants, both high and medium priced
- range of hotels – Fort Young, Garraway, Anchorage, etc
- diving and whale watching
- nature sites – Trafalgar Falls
- cruise tourism
- Canefield Airport.

Within the Roseau TDA, we have identified four Tourism Centres, viz

- Roseau City
- Donkey Beach/Canefield
- Roseau Valley/Wotten Waven, and
- Champagne Coast (to the South of Roseau).

Map 20.2: Roseau Tourism Development Area



20.2.1 Roseau City

Roseau City is arguably Dominica's most unappreciated asset, (the other being the island's beaches). Virtually unique in the Caribbean, the City possesses an attractive waterfront, river corridor, historic/heritage quarter, botanic gardens, with a backdrop of spectacular mountain scenery.

However, as depicted in various physical planning studies/reports*, the City has been much neglected over the years, resulting in derelict buildings, hazardous sidewalks, potholed streets, garbage littering the river front, unattractive streetscapes due to placement of telegraph/electricity wires, etc.

The main thrust of the Tourism Master Plan is to integrate the key projects identified in these plans, viz

a) Roseau River Corridor regeneration
b) Regeneration of the Waterfront
c) Old Market Square Plaza regeneration
d) Beautification of Roseau
e) Restoration of the Historic/Heritage District
f) Botanic Gardens to become a multi-use Municipal Park

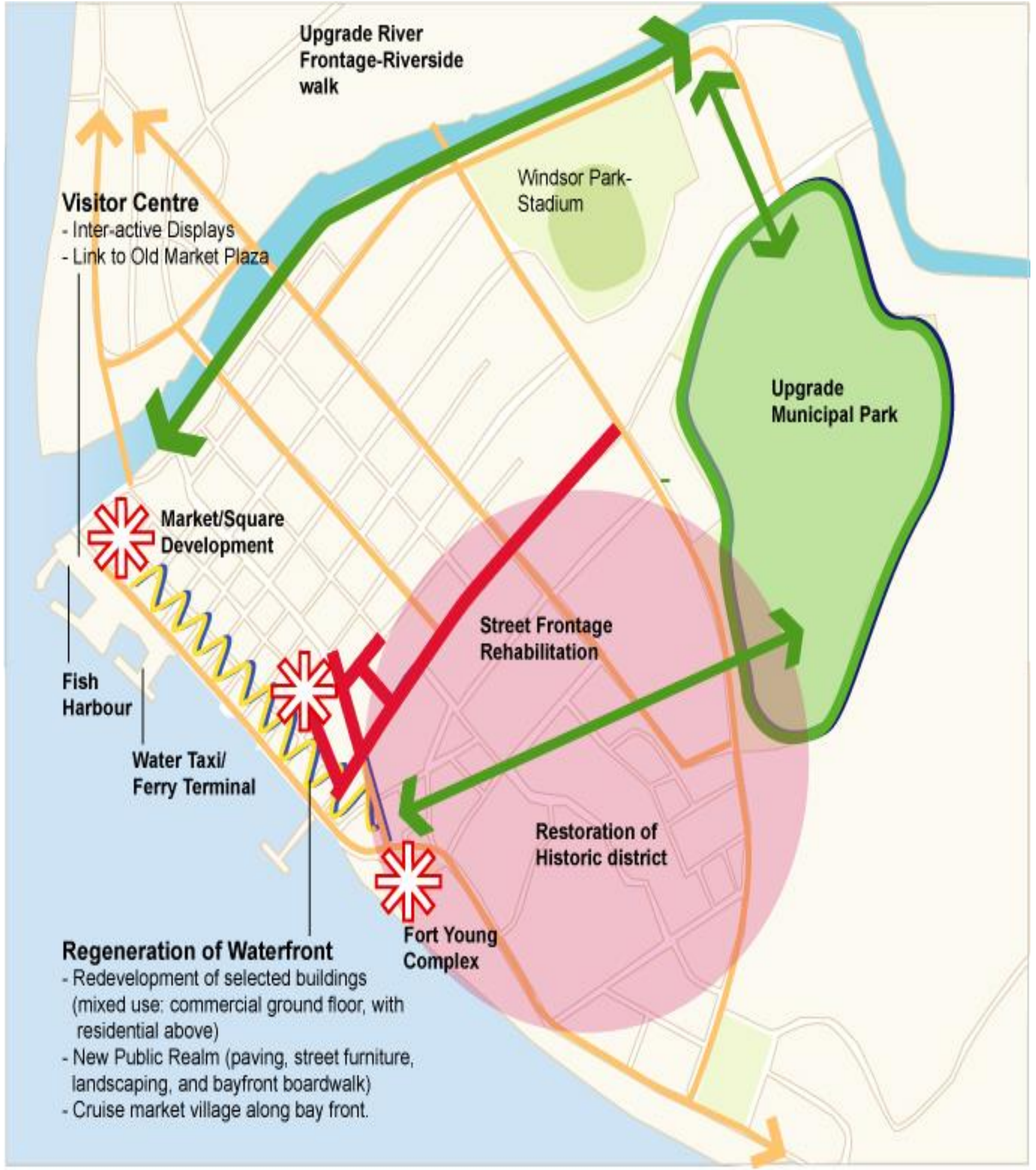
Roseau River Corridor Regeneration

The concept is to:

- develop recreational facilities – river pathway, seating areas, etc
- stabilization and landscaping of river banks
- improve drainage to prevent pollution and improve water quality.

Part of the riverside walk could include a promenade. This concept has been developed by Sorell Consulting, and features a boardwalk, snack bars, mini-mall, and recreational facilities.

Map 20.3: Roseau River and Waterfront Regeneration



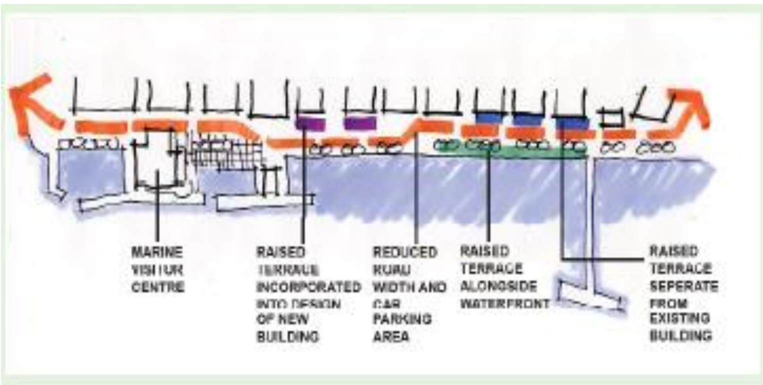
* Roseau Development Plan, 2020 Baptiste & Associates Ltd, June 2005
* Master Plan for Roseau Botanic Gardens, 2006
* Roseau Revitalization Strategy,
* Roseau River Promenade Report, Sorell Consulting Ltd, 2010

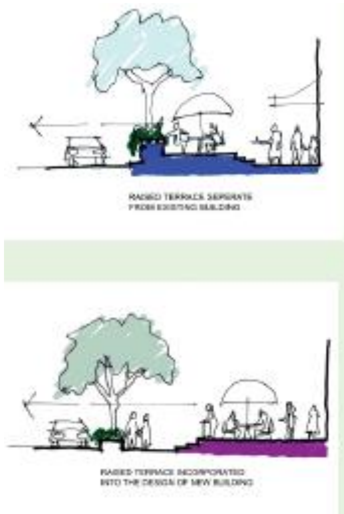
Regeneration of the Waterfront

Roseau waterfront has the potential to be a very special ‘people place’ which Roseau currently lacks. The waterfront can be much improved through regeneration.

This has been addressed in the Roseau Revitalization Strategy study which includes recommendations for:

- Roseau bayfront boardwalk, providing views to sea, seating for relaxation
- relocation of vendors from Waterfront to proposed vendors’ arcade
- permanent shelter on platform of cruise ship berth for the dispatch of organised and private tours
- creation of temporary market on cruise ship days, with uniform type stalls for vendors.





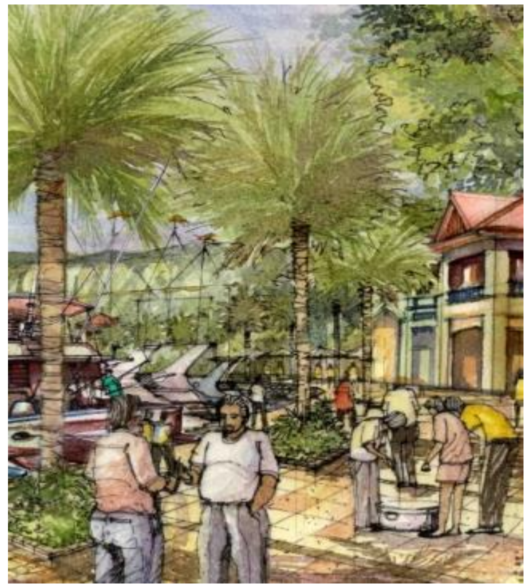
However, no matter how unique or exciting a waterfront development is, it will be a success only if it functions well on all levels. From access and circulation to adequate parking capacity, to ease and comfort of pedestrian movement, to the visitors overall experience, all levels must sequence successfully, as well as meet capacities on peak cruise ship days.

Old Market Square to become a Plaza

Currently the Old Market Square is occupied by vendors’ stalls. As described in the Roseau Revitalisation Strategy study, this is a ‘measure of valuable urban open space’. Roseau lacks plazas – focal points for the visitor and resident alike.

The market square should be designated the Old Market Plaza, as a public realm with cafe, seating for relaxation, use of the stand for entertainment etc.

The developments recommended will generate a significant number of visitors to Roseau, increase spending and create new jobs. The regeneration of the waterfront is also expected to act as a catalyst for further development in the city. The result would be a significant stimulus to the local economy, assisting businesses ranging from hotels, restaurants, shops and places of entertainment, to the existing museum and market square and streets beyond.



In parallel, immediate measures will be taken to eliminate the increased incidence of harassment by vagrants and other such persons which has become a serious threat to Roseau’s visitor appeal.

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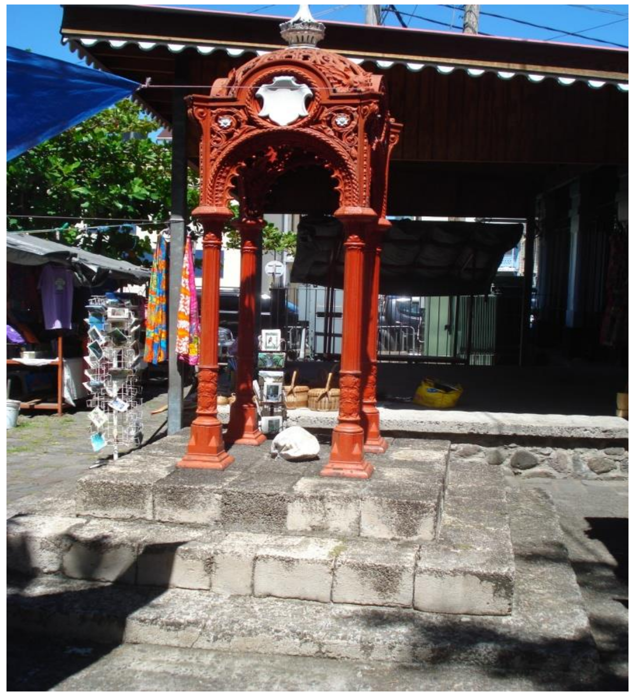


Beautification of Roseau

As illustrated in the *Roseau Revitalization Strategy*, much of old Roseau has fallen into disrepair, with derelict buildings, abandoned properties, hazardous sidewalks, traffic congestion and unappealing streetscapes.

With a beautification programme, Roseau could become one of the most attractive capitals in the Caribbean – a destination in itself.

Streets with sidewalk cafes with identity and promote social interaction.

Restoration of Historic/Heritage District

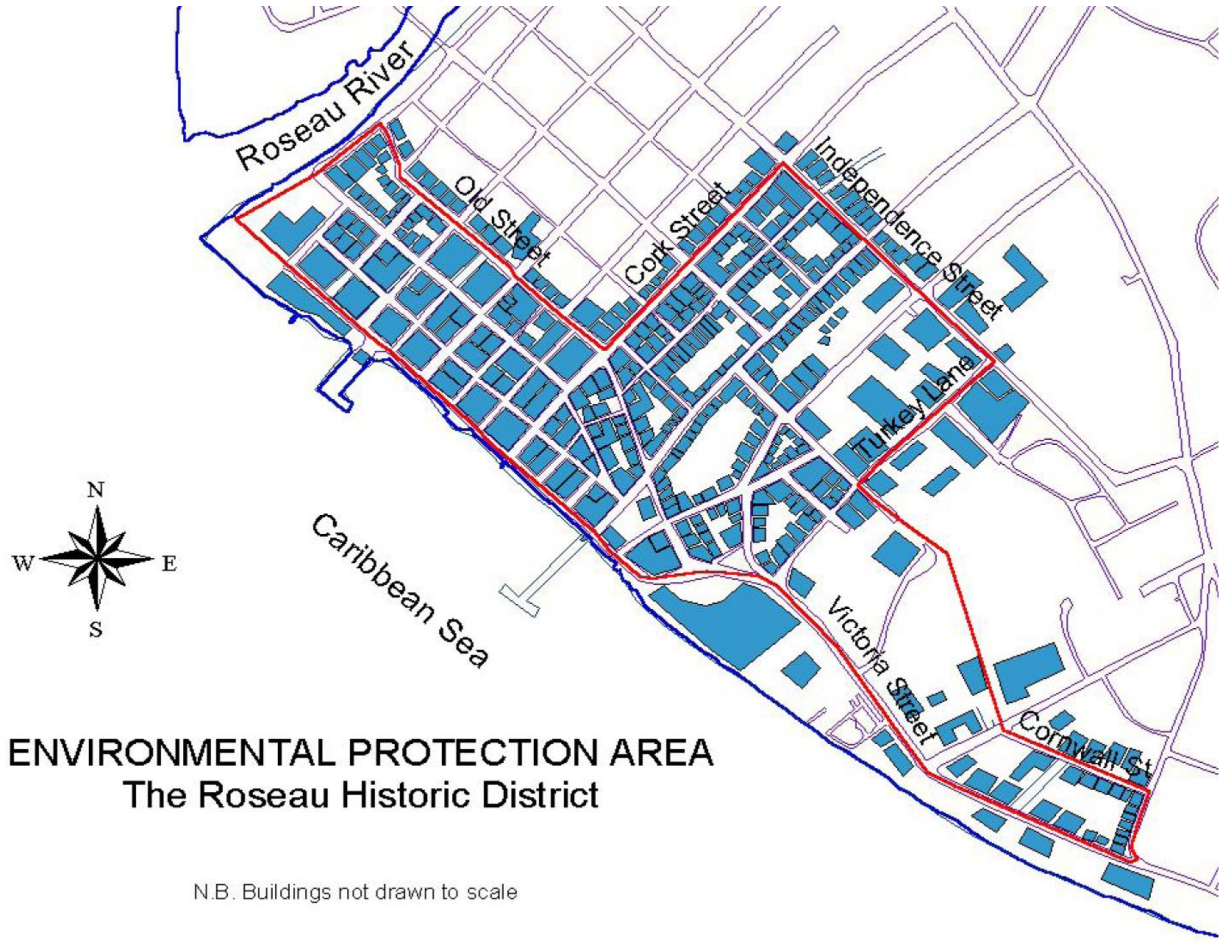
The historic district of Roseau, encompassing the Old French Quarter, has a fascinating array of heritage buildings in an area that is easily 'walkable'. Indeed, the area gives 'character' to Roseau. However, many of the buildings are in poor repair. Formal establishment of a historic district to preserve the City's cultural and architectural heritage has been promoted by the PPD (in collaboration with SHAPE) for some time and this should be enacted, including establishment of a traffic-free pedestrianized zone.

The boundaries of the proposed historic district encompass approximately two-fifths of Central Roseau. Draft building control guidelines and an incentive package for property owners and developers of land in the district should be formulated for submission to Government.

Although the historic district is easily 'walkable' in terms of the size of the area, the poor state of the streets makes it hazardous for pedestrians. The streets are in urgent need of repair, to include pavements, gutters etc.

Visitors like to explore and experience a city – appreciate the architecture, visit historical buildings, shop for curios and handicrafts etc. Laid out heritage trails with appropriate signage, detailed route maps/brochures, etc. are necessary to facilitate this.

ROSEAU HISTORIC DISTRICT



Botanic Gardens to become a Municipal Park

'The Roseau Botanic Gardens is the last remaining significant green space in Roseau. Over the years it has been used for a multitude of purposes including entertainment, a thoroughfare, playing field and sports ground, research, government offices etc.' [*]Rather than trying to return the gardens to their original status, the Master Plan for the Gardens takes a pragmatic approach and proposes a plan that accommodates the multiple uses of the garden but with the appropriate management regime to ensure that the gardens continue to function as a place of relaxation and beauty in the centre of the city.

Plan implementation involves a number of actions which include better management, physical developments (trails, restoration of fountain, nursery, etc.) and revenue generation activities (visitor fees etc.).

In the medium / longer terms we are recommending the development of a BioPark in the Pond Casse area, which would incorporate the plants, trees, aviary etc. currently housed in the Botanic Gardens. With the development of the BioPark, the Gardens could be designated as a multiple use amenity park, with facilities for picnics, children's playground, tennis/basketball courts, etc. The existing through road should be diverted and vehicular traffic prohibited from entering the park.

[*] Master Plan for the Roseau Botanic Gardens, Scribal Consultancy Services, 2006

20.2.2 Donkey Beach/Canefield

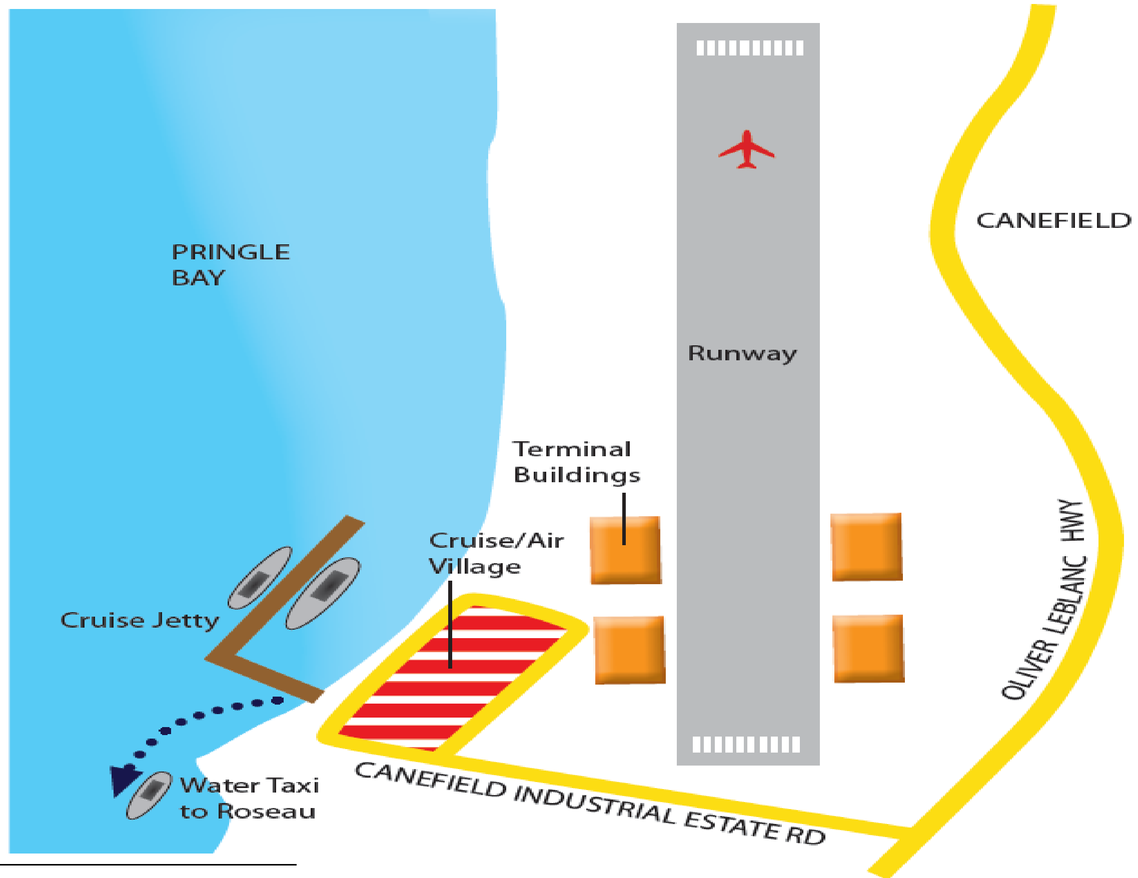
With ever increasing size of cruise ships, Dominica's ability to maintain and even strengthen its position on cruise ship itineraries will depend not only on site attractions, but also on the capability of the system to handle these larger ships and to disburse the increased number of passengers disembarking.

It has been long recognised that the present arrangements, which can cause considerable congestion and social disruption on the Bayfront, are inadequate. The possibility of relocating all cruise ship calls to Woodbridge Bay has been considered. Concept plans were drawn-up by Gee & Jenson* and include a

- new cruise berth
- cruise village, and
- parking facilities.

However, when the indirect costs arising from the reorganisation of port operations were added to the projected direct costs of the new cruise berth and associated facilities, the proposal as a whole was considered uneconomic.

The positioning of a dedicated cruise facility at Donkey Beach is another possibility. With the recommendation from the Access Strategy Study that regional air services should be attracted to Canefield Airport, the development of a 'cruise/air village' with retail, cafes/restaurants, residential etc, could be a more economically viable proposition. For visitors, a water taxi service to the Bayfront could be provided in addition to the usual taxi/mini bus service. Further research is needed before this project can be implemented.



* Woodbridge Cruise Ship Berth, Gee Jenson, 2005

20.2.3 Roseau Valley/Wotten Waven

Up the Valley Road from Roseau are an important cluster of attractions. These include:

(i) Nature Sites:

- Trafalgar Falls - accessible by car / minibus
- Middleham Falls - access by hiking trail
- Freshwater Lake - accessible by car / minibus
- Boeri Lake - access by hiking trail
- Titou Gorge - accessible by car / minibus
- Boiling Lake - accessible by hiking trail
- Sulphur Springs - accessible by car / minibus
- Papillote Tropical Gardens - accessible be car / minibus

(ii) Hiking Trails

- Waitukubuli National Trail
- Middleham Falls, Boeri Lake, Boiling Lake

(iii) Facilities

- Thermal spring facilities in Wotten Waven
- Hotels, restaurants

The key tourism product development recommendations for the Roseau Valley/Wotten Waven Tourism Centre include:

- promotion of Wotten Waven as a centre for health & wellness
- attract new investment in health & wellness to complement existing resort and B & B facilities
- on-going nature site improvement programme
- promotion of Freshwater Lake for kayaking and fishing
- promotion of Laudat as a centre for hiking to surrounding nature sites.

20.2.4 South of Roseau

Located in the vicinity of Castle Comfort south of Roseau are a number of accommodation facilities which include the Anchorage Hotel Whale Watch and Dive Centre, Castle Comfort Dive Lodge, Evergreen Hotel, Sea World Guesthouse. The key product development recommendation is that this cluster of facilities should be promoted as a centre for diving and whale watching along a renamed 'Champagne Coast', with improved sea bathing facilities.

20.3 WEST COAST TOURISM DEVELOPMENT AREA

The West Coast TDA, stretching from Rodney's Rock to around Coulibistrie and hinterland, has a cluster of resorts and attractions, which include:

(i) Resort Hotels/Restaurants

- Tamarind Tree
- Sunset Bay

(ii) Attractions

- Macoucherie Rum Distillery
- scuba diving / snorkelling
- Wacky Rollers river tubing/zip lining activity centre (temporarily closed due to river flooding)

(iii) Amenities

- Batalie Beach
- Mero Beach
- Layou River Valley

Following the bursting of an upriver lake dam in October 2011, the Layou Valley was subjected to a flood which swept a considerable amount of sand downstream, which is now being mined. With the extraction of the sand, the river is expected to revert to its original course. Provided there is no lake formation upriver, the consensus is that the Layou Valley will be among the safest valleys on the island.

The key product development recommendations for this zone include:

➢ ***Development of residential tourism***

The area is well suited for residential tourism - real estate development including holiday homes, villas, and condominiums.

➢ ***Mero tourism facility and beach improvement***

The objectives is to develop a central, multipurpose beach facility that could be used for community tourism interaction along the lines of Oistins in Barbados (fish fry, strictly local foods and entertainment) or Gros Islet in St. Lucia. The facility would be under the management of the Mero/Enhancement Committee.

20.4 NORTH WEST COAST TOURISM DEVELOPMENT AREA

The North West Coast TDA contains four tourism centres, viz

- Cabrits
- Portsmouth
- Indian River
- Vieille Case

20.4.1 Cabrits

The 1,313 acre Cabrits National Park and Marine Reserve is just north of the town and is a protected site, containing a number of natural features including deciduous forest, swampland, coral reefs as well as the 18th century Fort Shirley.

Restoration works have been undertaken at Fort Shirley and the complex now has informative interpretation panels, walkways, reception rooms for weddings and other functions, hostel accommodation. One end of the Waitukubuli Trail is at Fort Shirley.

The jetty at Cabrits can accommodate the smaller cruise vessels – up to 1,800 passengers approximately. The Tourism Master Plan recommendation is that Cabrits should continue to be marketed to the luxury/niche operators (who have smaller sized ships and luxury yachts) as this is a future growth area. The jetty could accommodate a possible new ferry service between Portsmouth and Guadeloupe/Martinique following the cessation of the JEANS ferry service in December 2012.

A beach/marina resort hotel (funded by the Moroccan Government) is currently under construction at Cabrits, with plans for the future development of a marina.

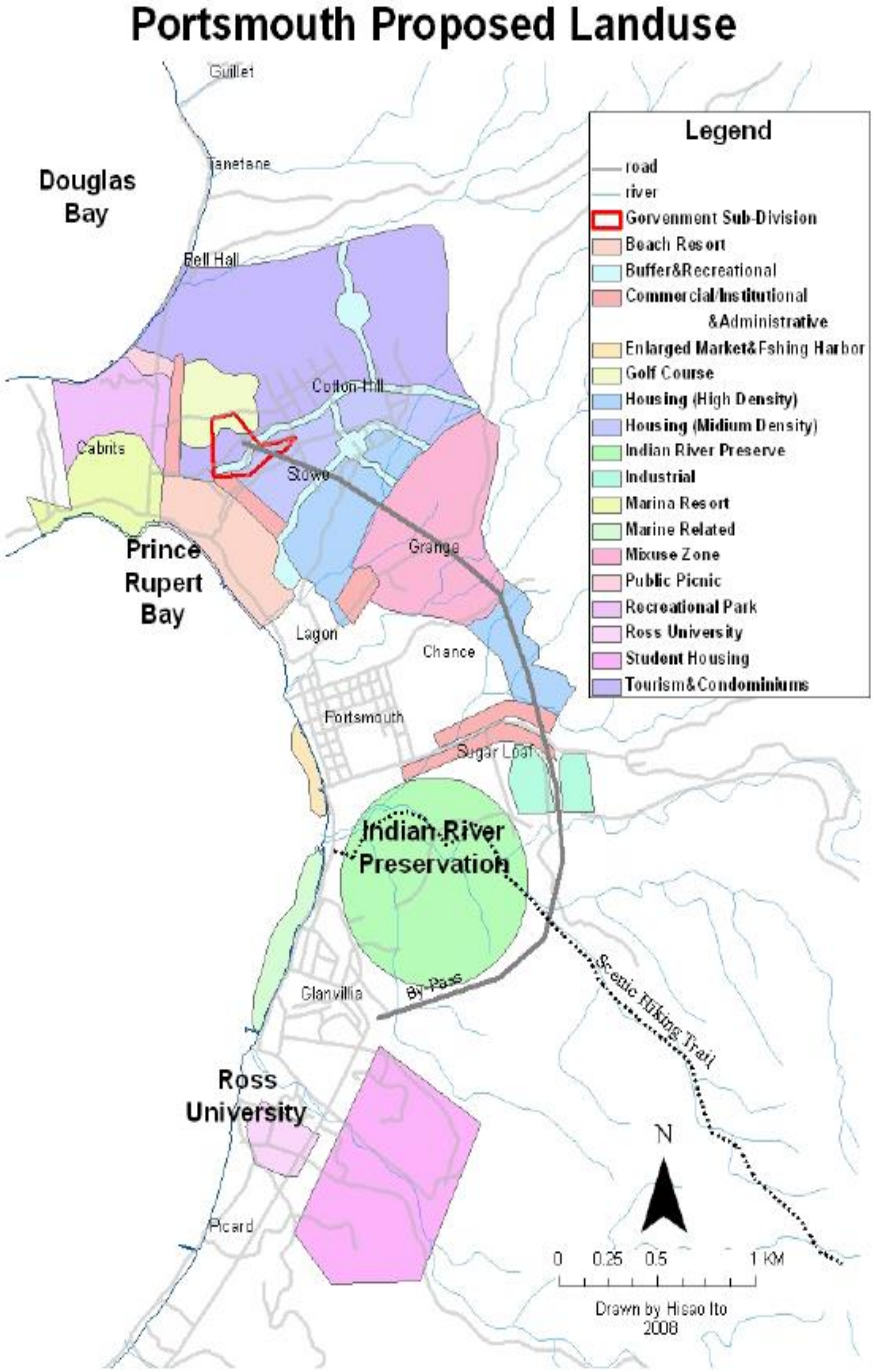
20.4.2 Portsmouth

Proposals for the physical planning and development of Portsmouth are contained in a comprehensive report prepared by the Portsmouth Citizen's Planning Commission*. The development strategy outlined in this plan includes a by-pass from Glanvillia to Cabrits, passing behind a proposed new Indian River Preserve; the enhancement of Borough Square and adjacent Old Town Pier; a coastal boardwalk from the Borough Square to Cabrits; and construction of a Creole Village at Lagon.

These proposals are reflected in the PPD's land-use plan for the area between Lagon and Cabrits which, as shown on the accompanying map, incorporates

- beach resort
- marina and associated resort
- golf course
- villas and condominiums

It is envisaged that Portsmouth will become increasingly important as a focal centre for tourists staying not only in the area itself but also in both the West and North East Tourism Development Areas.



* Physical Planning and Development of Portsmouth; Portsmouth Citizens Planning Commission

20.4.3 Indian River

The Indian River is a proven, unique tourism attraction in Dominica. While benefiting from the EU funded eco-tourism development programme with the development of the river landing area and a visitor reception centre, the amenity needs further support to ensure its long run sustainability. In particular, the river needs protection from

- development/commercial activities along river, and
- coastal erosion.

The PPD proposed Land Use plan recommends the establishment of an Indian River Preservation area.

Construction of sea defences (groyne and sea wall) at the mouth of the river will afford protection from erosion.

The beach area adjacent to the Visitor Centre should be enhanced (without detriment to existing fishing activities) with improved landscaping and the development of a boardwalk, the objective being to attract more visitors and entice them to spend longer (and more money) at the amenity centre.

The beach facility could also be used for community tourism interaction along the lines of Oistins in Barbados (fish fry, strictly local foods and entertainment) or Gros Islet in St. Lucia.

20.4.4 Vieille Case

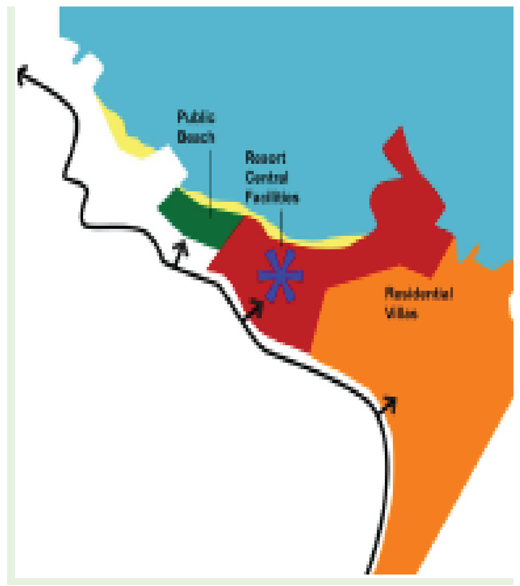
First inhabited by the Kalinago people, referred to as Caribs by the Europeans, Itassi is the Kalinago name for the Vieille Case area. Vieille Case (and Penville) also have strong French links from former times. The church in Vieille Case was built by the French in the early 17th century. Vieille Case is also the birthplace of the politician E. O. Leblanc, often referred to as 'father of the nation'. Capitalising on this, the area should promote its rich cultural heritage and strategic location on the proposed Northern Discovery Route, with the EU-funded projects at Au Parc and Cold Soufriere serving as further attractions.

The beachfront hotel will have the guest's facilities and bedrooms in the main building, as well as a restaurant, bar/lounge with entertainment area, pool bar, fitness and wellness area, large infinity outdoor pool, shops etc.

The villa units could be sold, managed, serviced and rentals marketed by the resort hotel. Physical and service standards would be comparable to the resort hotel so that available villas could be used to cater for peak periods when demand for hotel rooms exceeds supply.

The construction and operation of infrastructural facilities should strictly conform with ecological standards, so as to achieve an environmentally friendly resort development, including use of solar energy and energy recovery, a biological sewage treatment plant to be a source of irrigation for the gardens and the landscaped areas, and integration of the resort's utilities and overall maintenance facilities for re-cycling purposes where possible.

The final resort concept will depend on design, technical, operational, and financial considerations and the experience of the developers and resort management (which, ideally, should feature a world class spa resort operator).



20.5 NORTH EAST COAST TOURISM DEVELOPMENT AREA

Capitalising on the number of attractive golden/honey coloured sand beaches in this area, the Tourism Master Plan main recommendation for the area is the development of a luxury resort, at Woodford Hill, catering to the top end of the market. The development concept outlined is indicative of the possibilities. .

20.5.1 <u>Woodford Hill</u>

The concept is for an integrated hotel/villa development on approximately 50 acres of land with beach frontage at Woodford Hill. Under the current proposal, this would 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.

20.5.2 <u>Calibishie</u>

Located between Woodford Hill and Hampstead, Calibishie is close to some of Dominica's best beaches: Batibou, Hampstead, Hodges, Point Baptiste, Red Rock and Woodford Hill Beach. It has a number of hotels/guesthouses and restaurants, and in recent years has attracted a significant number of retirees and other villa owners. The future evolution of Calibishie is as a tourism centre providing a range of services – restaurants, hiking/guiding services, visitor information.

20.6 EAST COAST TOURISM DEVELOPMENT AREA

With a focus on community and heritage, the East Coast TDA comprises three distinct centres, viz

(i) Kalinago Territory
(ii) Castle Bruce
(iii) Rosalie

Both Melville Hall Airport and the Marigot fishing harbour are located close to the northern end of this TDA.

20.6.1 Kalinago Territory

Dominica is the home of the largest remaining territory of the indigenous Caribbean people, the Kalinago. Approximately 3,000 Kalinago live along the east coast in the Kalinago Territory where they cultivate land and make traditional crafts such as baskets. It is close to Melville airport and has a number of fine beaches (including Londonderry Bay and Pagua Bay).

The Kalinago Barana Aute was opened in March 2006. It offers visitors cultural group performances, demonstration of Kalinago crafts, an interpretation centre along with local catering for individuals and groups. It also provides an outlet for the native arts and crafts of the indigenous people. EU assistance has been provided for another Kalinago heritage centre at the inland Touna Village, near Concord.

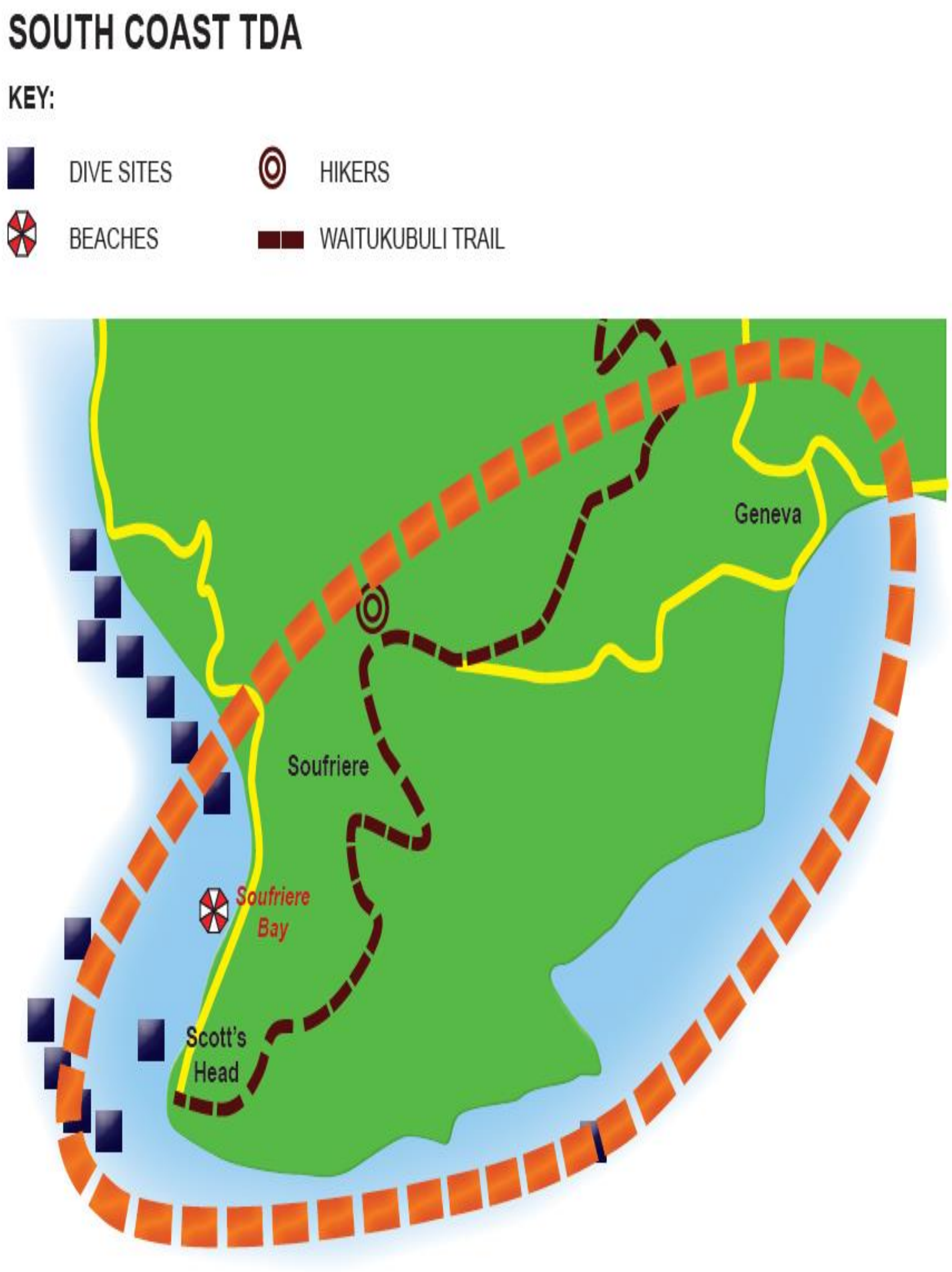
20.6.2 Castle Bruce

Castle Bruce is the largest settlement in St. David's Parish, with a population of 1,087 in the 2011 census. It is a service centre for the surrounding area, with a number of guest houses and restaurants. The main beach is at Anse Quanery (or St. David's Bay).

20.6.3 Rosalie

Although not in itself a centre of population apart from the adjacent small village of Grand Fond (where there are a few shops), Rosalie has a number of hotels and lodges, including the Rosalie Bay Resort and the Rosalie Forest 3 Rivers Eco-Lodge. The beach is a protected area for sea turtles and this is where the ROSTI (Rosalie Sea Turtle Initiative) in located. Nearby, there are the remains of the historic Rosalie Plantation.

The magnificent stretch of coastal scenery stretching from Rosalie to Grand Bay is given the name of Wild Coast (or, in French *Cote Sauvage)*. The village of La Plaine can be developed as a convenient stopping place for touring motorists on this route, while accommodation, restaurants and other facilities are available at Citrus Creek and Jungle Bay. En route, there are also opportunities to visit the Sari Sari and Victoria Falls. The roads are presently in very poor condition after recent storms.



20.7 SOUTH COAST TOURISM DEVELOPMENT AREA

The South Coast TDA has two centres;

(i) Geneva/Grand Bay, and
(ii) Scott's Head/Soufriere

20.7.1 Geneva/Grand Bay

An arts and heritage centre has been developed at Geneva. Under the EC funded Ecotourism Development Programme, restoration work has been carried out at one of the buildings, which now houses a collection of arts and crafts. Currently, the centre receives few visitors.

To make the centre a 'must see' attraction, it would be necessary to develop a number of other attractions which could include:

- bay oil and coconut museum – how products grown and processed historically
- coffee and cocoa shop – using locally grown beans
- Jean Rhys Centre – story of the famous Dominican born author.

20.7.2 Scott's Head/Soufriere

Predominately a fishing village, Scott's Head overlooks Soufriere Bay, which is protected as the Soufriere Scott's Head Marine Reserve. It is also a popular snorkelling and diving site for tourists, with a number of bars, restaurants and places to stay. As Scott's Head is one end of the Waitukubuli Trail, an interpretation/orientation centre for the trail should be established here. The Carabantic shoreline and isthmus sea defences need to be further strengthened.

The beach at the adjacent village of Soufriere also affords opportunities for swimming and snorkelling, while the Grand Soufriere Sulphur Springs receive large numbers of local and foreign visitors throughout the year. There is also an attractive walk on a trail between the villages of Tete Morne and Gallion, via the Sulphur Springs.

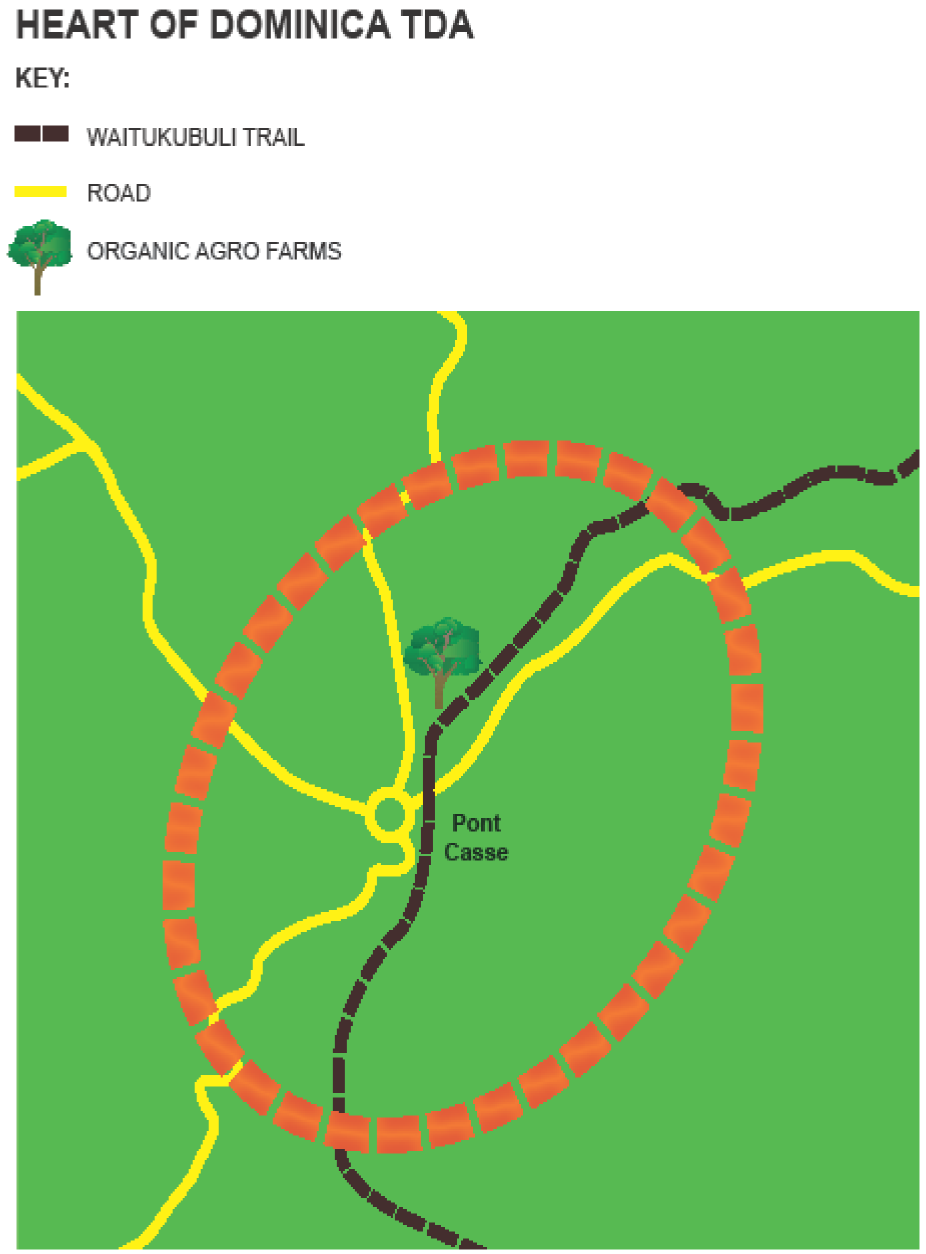
20.8 HEART OF DOMINICA TOURISM DEVELOPMENT AREA

The Heart of Dominica Tourism Development Area (TDA) is centred on the mountain village of Pont Casse, in the parishes of St. Paul and St. Joseph, at the heart of the island where the island's major cross-country roads connect, including the Melville Hall to Canefield highway. Other villages/ hamlets within the community include Antrim, Springfield, Sylvania, Corona, Riviere La Crois, Despor, William Settlement Penrice, Belles, Wet Area, G'leau Gommier and Soultan. The tourism development affairs of the TDA are being managed under the umbrella of the community-based Heart of Dominica Inc. Tourism Development Association.

Providing access to a diversity of authentic experiences - including Culture & Heritage, Organic Farming and Hiking - the Heart of Dominica TDA is the location of the headquarters of the Waitukubuli National Trail Management Unit from which trail segments 4 and 5 radiate, in some places following the old Kalinago 'traces' (or trails).

Other attractions include over 13 waterfalls at the Emerald Pool, Jaco (Hibiscus) Falls, Spanny Twin Falls, Salton/Soultan 9-Diamond Falls, and Middleham Falls, all within or on the foothills of the Morne Trois Pitons National Park and World Heritage Site. Important historic maroon sites include Bala Caves and Jacko Steps (site of maroon camp under African-born chief Jacko). Organic farm experiences, farm stays, and agro-processing tours are also a feature in this agricultural belt, as well as the opportunity to visit art studios, purchase locally produced art and crafts, sample organic fruits and vegetables, and other local produce. The cross-roads at Pont Casse also provide access to the four coasts and many of the island's other major attractions, including the Kalinago Territory, within 20-45 minutes.

Accommodation is available in a range of villas, apartments, cottages homestays and camp sites, while there are a number of local restaurants and bars. Certified trail & tour guides are available locally.



➢ ***BioPark***

It is recommended that the proposed BioPark (see section 24.4.3 below) should be located in the vicinity of Pond Casse in the Heart of Dominica TDA, close to the headquarters of the Waitukubulii Trail Management Unit.

Capitalising on Dominica's major strength – its nature resource – the BioPark would showcase the island's flora and fauna. Uniquely 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 concept has been assessed by The Development Institute* and the findings indicate the proposal to be environmentally, economically and financially feasible.

The BioPark product would be a major attraction and not just for stay-over tourists. It would be instrumental in:

- reviving the excursionist market
- developing the short-stay / long weekend market
- extending business / vacation stays
- reinforcing Dominica's position on cruise ship itineraries as it would be a uniquely new attraction for cruise visitors.

Its location in the central Pond Cassé area will have the effect of attracting visitors (stay-over, excursionists and cruise passengers) southwards from Cabrits / Portsmouth/North East Tourism Development Area and northwards from Roseau. As the BioPark will be a major attraction for cruise passengers, it will not just increase Dominica's capacity to handle greater numbers, but also relieve pressure on Trafalgar Falls, Emerald Pool and Roseau city itself.

* Layou Biopark, the Development Institute (Williams & Lugay), 2010

20.9 NATIONAL PARKS AND NATURE SITES

20.9.1 National Parks

The national parks and reserves are central to Dominica's tourism product and must be preserved at all costs. This will include:

- designation of buffer zones around the protected areas to check future development;
- environmental and social impact assessments undertaken as part of the tourism development process so that appropriate levels of acceptable change are established and incorporated in the management plans;
- ensuring that environmentally sensitive design principles are applied in any form of development within the protected areas and buffer zones;
- working in conjunction with park managers to jointly present, interpret and market potential tourist resources and sites; and
- assisting with the establishment of baseline data and on-going monitoring of visitor use and impacts, and to vary management systems accordingly.

20.8.2 Nature Sites

As nature sites are the focal points of the sightseeing, touring, walking/hiking products, their on-going maintenance and improvement is essential.

It is acknowledged that the needs of eco/nature tourists differ from those of cruise passengers. Care is therefore required to ensure that the needs of one group do not conflict with those of another. The Tourism Master Plan recommendation is therefore to develop a wider range of nature and heritage sites for stay-over tourists, while confining cruise ship and excursionists to selected intensive use sites.

Within this context, certain principles are important to note in guiding investment in site maintenance, upgrading and development. These (which are listed below) are essential to maintain the integrity of the resource while offering quality experiences to cruise, day trip and stay-over visitors:

- from a tourism perspective, the site should be designed and developed to offer an 'experience'. It is not just a matter of developing a tourism product or attraction; the most important design consideration is the quality of the experience offered;
- the experience offered must not compromise the integrity of the resource and must impact a sense of respect for the resource through site treatment and interpretation activities;
- the experience must also consider the needs of the visitor for facilities, again without compromising the integrity of the resource; and
- development on the site to create the experience must follow internationally accepted practices and standards for resource management and protection and clearly demonstrate resource sustainability.

Sites should therefore be developed in a low key manner and in keeping with the setting of the area. The findings of market surveys undertaken by Ecosystems* in 1997 are still valid today. Both cruise and stay-over visitors surveyed favour minimal development of facilities.

* Integrating Conservation with Ecotourism in Dominica, Eco systems, 1997

They do not want to see concrete buildings and paths within the rainforest, but small-scale rustic structures with information, site signage, and litter bins with minimal visual impact. Based on the current and projected number of visits, the sites requiring attention are as follows on Table 20.1:

Table 20.1: Visits to Nature Sites, 2011

Site	Jan – Dec	Peak Month	Busiest Day	Proposed Designation
(i) Trafalgar Falls	87,700	Jan: 16,600	2,000	Intensive use
(ii) Emerald Pool	56,000	Dec: 11,300	1,600	
(iii) Indian River	14,300	Mar: 2,100	n/a	
(iv) Cabrits	17,000	Aug: 1,900	n/a	
(v) Soufriere Hot Springs	8,200	Apr: 1,200		Non-intensive use
(vi) Freshwater Lake	10,300	Mar: 1,400		
(vii) Middleham Falls	5,400	Apr: 800		
(viii) Boiling Lake	4,500	Feb: 600		

Source: *Forestry Division* **Figures rounded*

Non-Intensive Use Nature Sites

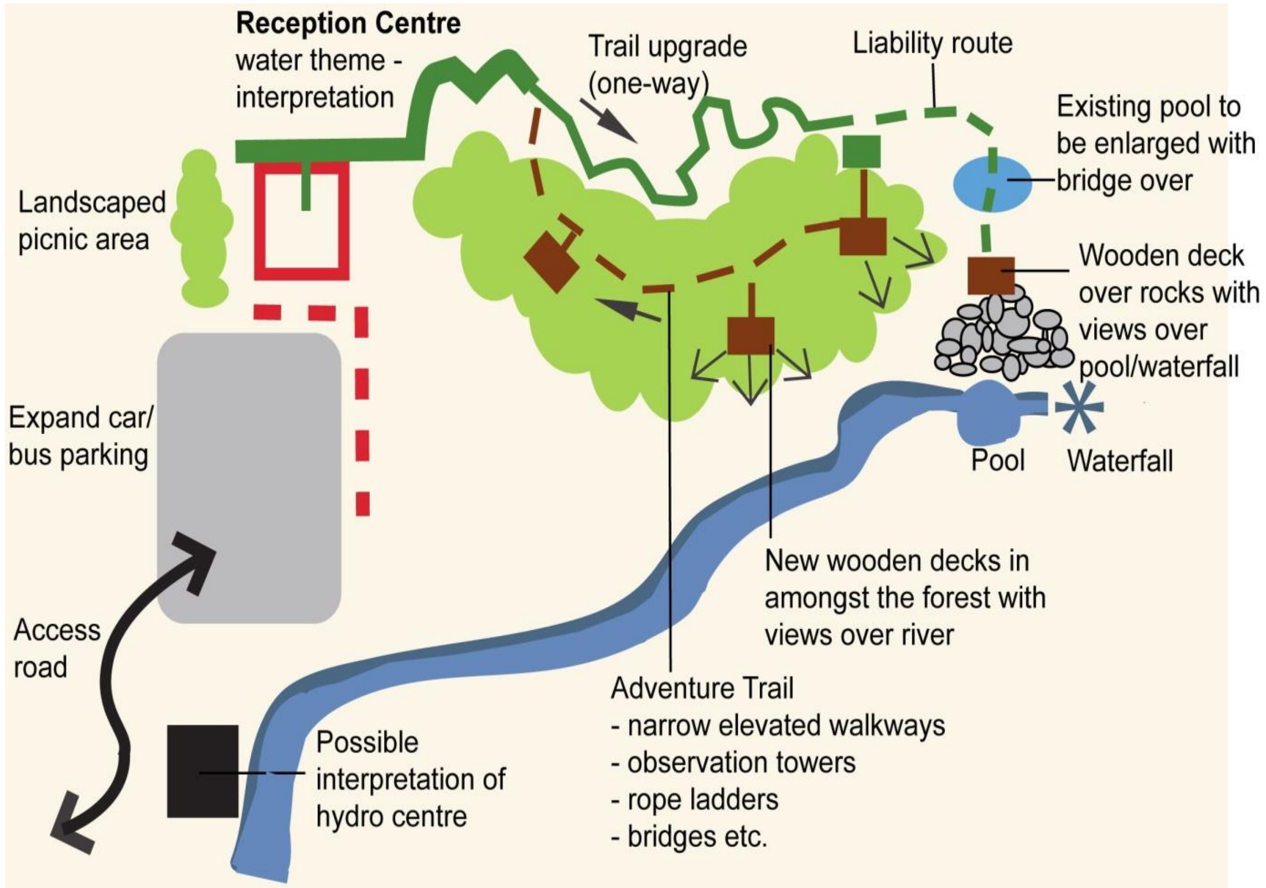
At the non-intensive use sites, Soufriere Hot Springs, Freshwater Lake, Middleham Falls and Boiling Lake, only minimal development should be undertaken.

Intensive Use Nature Sites

The proposed intensive sites are the popular locations where investment has already taken place - Trafalgar Falls, Emerald Pool, Indian River and Cabrits. At Trafalgar Falls and Emerald Pool, the Forestry Division in examining the possibility of increasing their respective carrying capacities by establishing new trails (board walks above ground and in tree tops), one way traffic systems, providing more things-to-see-and-do and visitor education and environmental awareness. These sites will be targeted towards the cruise passenger and also provide a recreational resource for local residents, with Trafalgar Falls maintaining its present 'premium site' status.

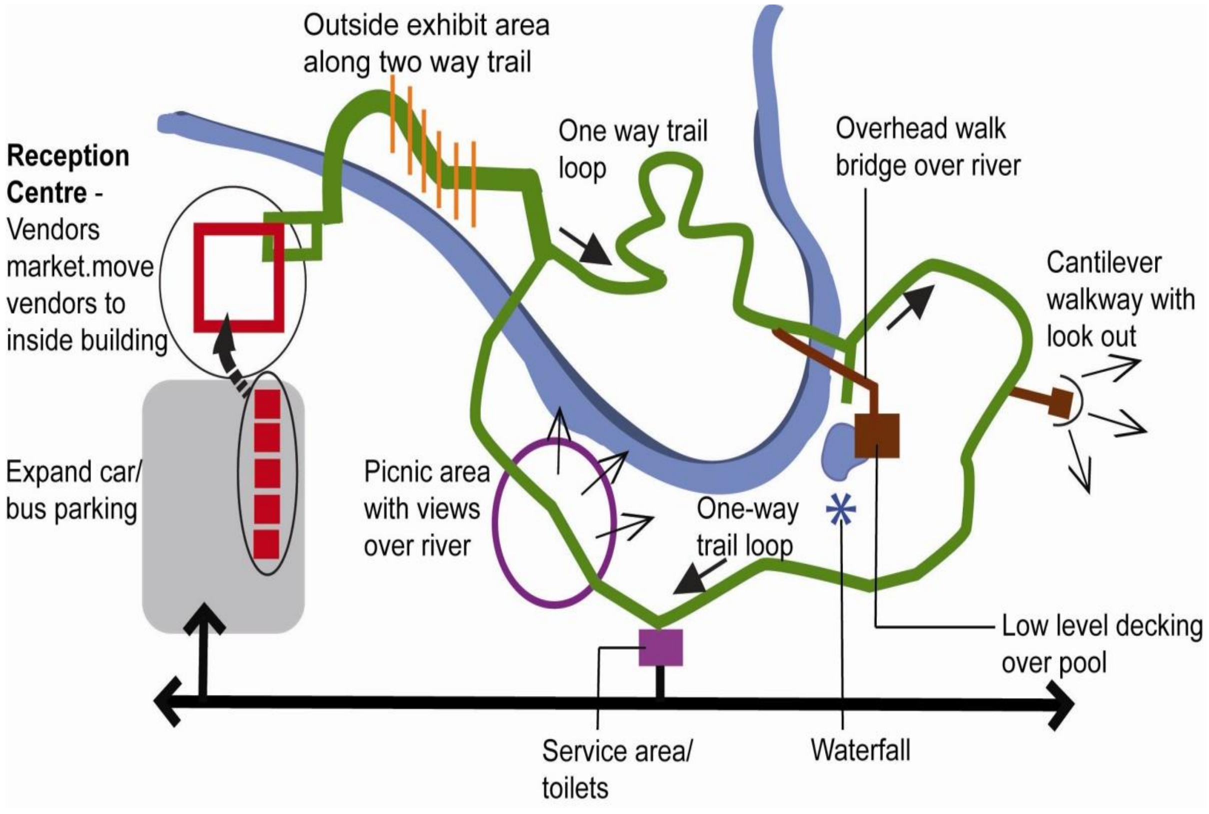
Trafalgar Falls Development

To cater for the projected increase in cruise visitors, Trafalgar Falls will need to have its carrying capacity increased. A development concept is shown as follows, though there are other possible variations.



Emerald Pool Development

Similarly, Emerald Pool will need to be developed to expand its carrying capacity. A development concept is shown as follows, although again there are other possible variations.



20.10 GENERAL TOURING PRODUCT

The improved road network, as outlined in Ch. 11, opens up the possibility of developing a ***touring product***, which can be either chauffeur driven (mini-bus) or 'go-as-you-please' car rental. This latter product is particularly popular in destinations such as Barbados and Tobago, and benefits both the visitor and host communities.

For the visitor

- enriches the experience of visiting Dominica
  - creates feeling 'I've really been to Dominica'
  - better understanding of Dominica, the heritage, natural resources, people and communities
- makes visitors want to 'discover' more

For host communities

- dispersal of visitor spending on island related to
  - accommodation
  - facilities & services
- creates business opportunities
  - sale of refreshments
  - local art & crafts galleries

Development of the touring product requires the designation of routes, signage, lay-bys for scenic viewing, picnic sites, road map and touring brochure indicating points of interest, describing local communities and local history. The routes would also act as foci for the establishment of small scale recreational facilities including viewpoints, car parks and picnic areas, and for the development of local enterprises involved in the sale of refreshments, and local arts and crafts, and in the promotion of touring and guiding services. The following routes would constitute the primary network.

- ***Melville Hall – Roseau***
  - with interpretation, rest-stops, lay-bys, viewing stops
- ***The Northern Discovery Route*** (one/two days depending on stops)
  - Roseau, Syndicate/Morne Diablotin, Cabrits National Park, Cold Soufriere, Carib Territory, Emerald Pool, Roseau.
- ***The Southern Discovery Route*** (one day)
  - Roseau, The Old Mill, Emerald Pool, Sari-Sari Falls, Victoria Falls, White River, Grand Bay, Roseau.
- ***The Trafalgar Falls Discovery Route*** (full or half day)
  - Freshwater Lake, Boeri Lake, Trafalgar Falls, Sulphur Springs.
- ***The Wild Coast Route***
  - Roseau, Bellevue-Chopin, Soufriere, Scott's Head
    Grand Bay, Carib Village, Roseau…
- ***'Ring of Dominica' Scenic Coastal Route***
  - circumnavigating the island (including completion of the 'missing link' between Rosalie and Petit Soufrière)

Map 20.1: Touring Routes

21. MARKET AND PRODUCT DEVELOPMENT OPPORTUNITIES

21.1 DEMAND TRENDS FOR STAY-OVER ARRIVALS

Between 2003 and 2012, international travel to the Caribbean increased from 17.3 million to 21 million tourist arrivals, representing an average growth rate of just under 2.2% yearly. However, this growth was unevenly spread across the region, with Cuba and the Dominican Republic being the high growth destinations. Excluding these two countries, growth to the traditional Caribbean destinations has been averaging about 1.5% yearly.

21.2 'NEW' GEOGRAPHIC MARKET OPPORTUNITIES

As described in Ch. 17, Dominica's marketing strategy to date has been to target the following source markets:

- North America: US and Canada.
- Europe: UK; France and German speaking markets.
- Caribbean: French West Indies.

'New' Market' Opportunities in Europe

Western Europe: there are few 'new' market possibilities for Dominica in Western Europe. At first sight, the Western Europe market (with 3.7 million stay-over arrivals to the Caribbean annually) suggests considerable potential for Dominica as currently the country receives a less than 1% market share. However, the reality is different for a variety of cultural, historical and structural reasons.

Firstly, for the most part, the French travel to the French islands, the Dutch to the Dutch islands, the Spanish to the Hispanic islands and the British to the English-speaking islands.

Secondly, if the French islands are excluded, about 80% of European travel is to five destinations – Dominican Republic, Cuba, Cancun, Barbados and Jamaica.

Thirdly, direct air access, whether by scheduled or charter flights, determines tourist flows.

However, one 'new' European market which offers considerable potential for Dominica is The Netherlands. Nature tourism, hiking, diving appeal to a significant number of Dutch holiday makers, many of whom travel to Saba and St. Eustatius. There is a direct service from Amsterdam to St. Maarten, and it is possible to make a same day connection from St. Maarten to Dominica. This routing can also be used by visitors living in north-western Germany, opening up another large potential growth market.

Eastern Europe: Hungary, Poland, Baltic States, Russia, Balkans, etc – these do represent 'new' market possibilities, but only in the longer term. Currently, tourists from these markets are 'discovering' Western Europe, US and Canada, South-East Asia. Except for relatively few (and those mostly the rich) the Caribbean is not yet on their holiday destination 'radar', particularly for the less well known islands.

'New' Market' Opportunities in South America

South America: the two more important South American source markets are Brazil and Venezuela.

Although the Brazilian outbound travel market is the largest in South America and there are direct flights from San Paulo to St, Maarten, and Puerto Rico, we are of the opinion that Dominica has limited appeal for Brazilians. In general, Brazilian holidaymakers like colourful destinations – sun and beach, music and entertainment, active leisure activities, shopping and different culture. They also like:

- High quality hotels in urbanized centres where shopping, restaurants, discos etc., are located.
- Casinos – as gambling is prohibited in Brazil.
- Duty free shopping – particularly for branded goods.

Currently, Dominica cannot meet these needs. Moreover, language would be an additional barrier.

For the most part, Venezuelans take short break vacations in Caribbean destinations and are looking for good beaches, shopping and entertainment. Importantly, the holiday break is associated with relaxation and tranquillity rather than cultural/educational or soft/hard adventure. The type, quality and location of accommodation is also important – with preference for the 4* and 5* larger hotel in urbanized centres where the shopping, casinos, discos and restaurants are located.

Moreover, the Venezuelan market is a volatile market, due to a 'roller-coaster' economy, driven by oil prices and political interference. Adding to the volatility of the Venezuelan market is the fact that the market is very much driven by charters due to very high seasonal patterns of travel demand.

Dominica unlikely to appeal to the Venezuelans.

21.3 CUSTOMER TRENDS

International tourism and its markets are facing unprecedented change because of increasing affluence, demographic shifts, changing lifestyle values and rapidly evolving technologies. This changing profile of customers makes it difficult to determine the pattern of future tastes and preferences. The complexity of the market makes the concept of the typical or average tourist of little practical use for tourism planning purposes.

Dominica's 2006 Marketing Strategy/Plan document identified some characteristics of tomorrow's customer which can provide pointers for Dominica as to their needs:

- They are older, more physically and mentally active
  - activities and interests increasingly determine choice of destination
  - greater range and depth of niche market customer segments.
- They are increasingly using the Internet to get information on destinations and make bookings, rather than the traditional retail travel agent
  - looking for value-for-money and transparent cost structures.
  - Women make more holiday decisions than their male partners, and account for 70% of the travel guide purchasers.

- They also use the Internet to voice dissatisfaction: disappointed customers are quick to report their dissatisfaction, and the Internet gives a huge international reach to their negative comments. This greatly increases the premium to be placed on customer satisfaction and rapid response to complaints.

- They are better educated, more discerning and look for fulfilling experiences as well as relaxation
  - The traditional division of vacation demand into concepts of nature v beach holiday; touring v resort holiday is now obsolete. It is the capacity of a destination to provide a range of fulfilling experiences that is determining choice. Consumers may seek out a selection of differing experiences during the course of their holiday.

- Key customer needs which tourism and leisure activities should seek to satisfy including delivering:
  - authenticity, reward, rejuvenation, relaxation, fun, self-actualisation (mental stimulation/learning), discovery, energising experiences, freedom, safety and healing. The set of needs and emphasis on particular ones varies from customer to customer. Good destinations respond to a wide range of needs; individual products may focus on just one, but need to ensure clarity of communication of their content and deliver to a high standard.

- More and more tourists, especially in older age groups, seek authenticity, and the values they seek in destinations and products include:
  - ethnical, natural, honest, simple, beautiful, rooted and human.

The brand promise of a destination needs to embody trust, safety and quality assurance.

21.4 PRODUCT - MARKET MATCHING

In planning for the realization of the plan's growth objectives, a major issue is the extent to which the supply of Dominica's tourism product can be expanded and diversified.

An assessment of what the market wants, linked to Dominica's ability to supply the required tourism products is shown on the following matrix. Correlating what the market wants with what Dominica can realistically supply indicates how the island's tourism product can be expanded and diversified and what is necessary to achieve this in terms of product development which is consistent with the sustainable tourism vision for Dominica.

As the complexity of the market makes the concept of the typical or average tourist of little practical use for tourism planning or indeed marketing purposes, the required approach is to match the product offer to motivational characteristics of the customer segment. This includes positively exploiting from a PR and marketing standpoint the country's environmental and other policies (e.g. the marketing opportunity arising from the GOCM's decision to abstain from supporting commercial whaling and the proclamation to be carbon negative by 2020/25 which have won the support of both regional and international environmental groups).

21.5 RANGE OF PRODUCT DEVELOPMENT OPPORTUNITIES

Dominica's existing and potential tourism products comprise:

- **Primary Products**: diving; hiking; whale watching; natural spas and wellness; festivals and events; Heritage/Culture, Kalinago Experience; Education Tourism; and Sporting Events.
- **Secondary Products:** Beach/Eco Lodges; Yachting; Community Tourism; Meetings & Conferences.
- **Other Products:** Golf; Residential Tourism; Soft Adventure/Extreme Sports; Sea Fishing; Bird Watching; and General Touring.

Cruise tourism is discussed separately in Chapter 27.

Table 21.1: Dominica's Tourism Products – Existing and Potential

Primary Products	Secondary Products	Product Opportunities
Hiking Diving Whale Watching Natural Spas & Wellness Festivities Heritage/Culture Kalinago Experience Education Tourism Sporting Events	Beach/Eco Lodges Yachting Community Tourism Meetings & Conferences	Golf Residential Tourism Soft Adventure/Extreme Sports Sea Fishing Bird Watching General Touring

Source: *DDA/Consultant*

Broadening the product involves moving from an offer of essentially of nature, dive and cruise tourism to a wider product offering which includes the above secondary and other potential products, targeting both the general leisure market (Nature Enthusiasts, Hikers, Divers, Romance Seekers, Cultural and Heritage Explorers) and the second generation VFR market (more international in outlook but still Dominican). But the product offer must be carefully matched with what these markets want.

The potential of each of the existing and potential product attractors is discussed in the following paragraphs.

21.6 PRIMARY PRODUCTS

DDA will focus investment on a product mix that generates Caribbean experiences unique to Dominica. The product offering will be based on the destination's natural resources and their core attributes:

Table 21.2: Dominica's Primary Tourism Products

Tourism Product	Core Attributes
Diving	Crystal clear waters, high visibility, healthy dive sites, vibrant and colourful reefs
Hiking	Diverse terrain, wide range of flora and fauna, oceanic rainforest, No known poisonous/dangerous species of snakes
Whale Watching	Year round sightings, diversity in species, and longevity leading to generational families
Natural Spas and Wellness	Natural springs; purity of water, clean air, natural fresh foods
Festivals & Events	Creole culture, unique music festivals – Creole music enthusiasts
Heritage/Culture	Roseau Historic District, Fort Shirley, etc.
Kalinago Experience	Last and largest population of the region's indigenous Carib population and their cultures
Education Tourism	Nature education and research programmes as part of Dominica's sustainable product offering Education, business and conference markets in health, wellness and environment. Ross University: will occupy prime attention both as an education tourist segment and as a lead in generating interest in the island's range of tourism products.
Sporting Events	Sporting events with particular focus on Cricket & Football. Sports events and activities – clubs and groups in the Caribbean.

Source: *DDA presentation at Air Access workshop, September 2012.*

(i) Diving

With an industry estimate of fewer than 3,000 dive visitors per year at present, there is considerable growth potential. In 2007, it was estimated that around 2.7 million divers took a diving holiday, of whom approximately 400,000 visited Caribbean destinations such as Aruba, the Cayman Islands, Bonaire and Curacao. Added to this is the growing number of resort-based tourists who take a one-off diving lesson as part of their overall holiday experience.

Carrying capacity in terms of number of divers and/or of dives is not a constraint and industry representatives believe that the island could accommodate a threefold increase in the number of visiting divers, without overcrowding. Presently, businesses are operating at about one-third of capacity in terms of boats, equipment, etc. Air access (connectivity and price), rather than demand, plus the lack of space for dive equipment on airlines using small aircraft, are seen as the main constraints holding back the further development of this key sector.

(ii) Hiking

Dominica offers a wide range of hiking experiences, with most of the trails connecting with, or in close proximity to, the Waitukubuli National Trail, For the most part, the trails are well-maintained and in good condition. While there is now an *Users' Guide* to the Trail describing the various segments of the trail (including location, maps, distances, places to stay, etc.), less information is available in respect of the other trails.

Other needs are more training of tour guides (including in French and other foreign languages); the provision of technical assistance to help with raising standards in the accommodation and cuisine available in guest houses and home stays at the end of each WNT segment. The goal is to meet, and then exceed, visitors' expectations and thereby encouraging repeat visits.

(iii) Whale Watching

Whale watching tourism has grown substantially since the mid-1980s. A 2009 study, prepared for IFAW estimated that 13 million people went whale watching globally in 2008, up from 9 million ten years earlier. Commercial whale watching operations were found in 119 countries, including a large number in the Caribbean.

The deep sheltered bays along Dominica's western coast provide a haven for the Sperm Whale to breed and calve. Although possible all year long, sightings are most common between November and March. From small beginnings in 1988, there are now four operators offering whale watching tours from Dominica, which together attract over 5,000 whale and dolphin watchers (including some cruise visitors).

Coastal communities have started to profit directly from the whale watching tourism, significantly adding to popular support for the protection of these animals from commercial whaling. Most importantly, in Dominica, whale watching has been put on a positive footing in terms of education and science, partly due to international workshops. The challenge now will be to grow sensibly, to manage any boat traffic problems that develop, and to continue to invest more and more in education which will entertain the visitor and improve the business while at the same time benefiting the whales.[*]

(iv) Natural Spas and Wellness

The Health and Wellness market has been identified both in the 2005 TMP and the DDA Marketing Strategy as an important niche market for Dominica which can contribute significantly to the growth in visitor arrivals. Dominica can develop a unique and competitive health and wellness package based on the variety of products that it has to offer. This would allow resort spas to cooperate with hot springs operators; local herbalists and organic specialists; and alternative medicine practitioners (listed in a DDAs Health & Wellness Directory).

At present, this market is relatively underdeveloped in Dominica compared with competing destinations in neighbouring islands in the Caribbean. There is a need to encourage investment in 'flagship' resort spas to act as a catalyst for the further development of this sector. Industry trends are indicating that, rather than being an 'amenity' offered at hotels and resorts, spas will increasingly be the deciding factor or the primary motivation in choosing a vacation. In addition, improvements are needed to the physical infrastructure at some of the existing natural spa facilities to enable them to meet international standards

Reflection the 2005 TMP recommendation, a planned resort development at Woodford Hill, providing a total of 112 accommodation units, would include a high quality wellness spa under the management of Six Senses/Evasion or some other luxury spa group.

[*] See Hoyt, E: *The Potential of Whale Watching in the Caribbean: 1999+.* (Whale and Dolphin Society, 1999)

(v) Festivals and Events

Festivals and events include Carnival, World Creole Music Festival, Jazz 'n Creole, Independence and other celebrations. Currently, they attract some six percent of total stay-over tourists. However, the majority of these events are primarily focused on resident and non-resident Dominicans and the intra-Caribbean market (especially the French West Indies). Whilst these are interesting attractions for North American and European visitors who happen to be on the island at the time, they have not in themselves been a reason for such persons to visit Dominica. If the numbers and spending are to increase, the product must be made more attractive for residents of these markets too.

(vi) Heritage/Culture

Heritage and cultural tourism is of increasing importance globally, including the Caribbean (e.g. Barbados, Curacao, Nevis). This includes both visits of monuments or sites as well as experiences and interaction with local people. It is estimated that 35%-40% of tourist trips worldwide incorporate some form of cultural heritage or historical activity, but this is reduced to about 10%-15% if it includes only those that specifically go on holiday to visit a cultural, heritage site or historical attraction. In the Caribbean, the proportions are probably lower.

Cultural tourists are an attractive market segment, tending to be mid- to upper-income earners, good spenders, well educated, frequent travellers, and mostly independent tourists. Key drivers are cultural attractions, museums, historic architecture, scenery, and experiencing music and the arts. However, they are also very discriminating, seek authenticity in cultural interpretation, and desire quality in all aspects of the product.

Dominica has much to offer in this respect. It has the only dedicated Carib (Kalinago) territory in the Caribbean, while both the Roseau Historic District, Fort Shirley (within the Cabrits National Park), the 18th century Bois Cotlette Estate in Soufriere (which is the best representation of a plantation house in Dominica, with much of its remains still intact) 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 the World Creole Festival) which promote local culture and heritage.

Thus, the essential platform of cultural heritage attractions already exists in Dominica, but at present, apart from Fort Shirley and some of the major festivals, they are not a stand-alone reason for visiting Dominica. They need more enrichment and development, including integration of attractions more fully with national interpretative and promotional strategies; and enhancement of the quality of ambience, exhibition, performance, access and interpretation.

(vii) Kalinago Heritage

The Carib cultural village (Kalinago Barana Autê) offers visitors cultural group performances, demonstration of Kalinago crafts, the local architecture, an interpretation centre along with local catering for individuals and groups. However, from its inception the KBA has been operating at a loss, with visitor numbers less than one-sixth of the projected figures. Recommended financial input and staffing have not been realized. A recent report[*] identified problems with management, product development, maintenance and marketing. The report's findings and recommendations need to be implemented. The Touna Kalinago Heritage Village, near Concord, offers a different opportunity for visitors to appreciate the lifestyles of the Kalinago people and feel part of a present day indigenous community. This can be facilitated through the Kalinago Homestay Programme.

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

(viii) Education Tourism

The growing demand for 'alternative' touristic experiences increasingly includes a number of educational and learning elements designed to provide a distinctive visitor experience which is both educational and entertaining. This potential growth market is frequently characterised as one where people have a relatively high tendency to travel as well as the time to visit destinations and attractions. The definition of education tourism also includes those wishing to carry out academic research where the potential beneficiaries include universities and colleges, schools, language centres and training institutes. The focus can also include course work for non-graduates and graduates.

In Dominica, the Archbold Centre at Springfield provides classrooms, laboratories and dormitories for students and professors wishing to undertake environmental research. The educational experience is enhanced by actively working with community groups or NGO's on specific projects. In Portsmouth, Ross University has a similar role with regard to those wishing to carry out medical research, as well as more broadly generating interest in the island's tourism products.

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Nature education and research programmes can become an even more important part of Dominica's sustainable product. However, there is need for more research into the various educational tourism market segments and a clearer understanding of the consumer needs and travel requirements of education tourists.

(ix) Sporting Events

In other Eastern Caribbean destinations, there is a wide range of sporting events and competitions that attract considerable numbers of participants, fans and other spectators, including some from outside the region. In some cases, training facilities are provided for overseas clubs and colleges (e.g. tennis in Anguilla, football in Montserrat, and swimming in Barbados).

In Dominica, the focus appears to be exclusively on Cricket and, to a lesser extent, Football played at the 12,000-seat Windsor Park Stadium (which also serves as the venue for national activities such as the World Creole Music Festival, the finals of the annual Calypso Competition and the Miss Dominica pageant among others). The Stadium is presently operating at a significant loss.

Suitable facilities for other sporting events are either non-existent (e.g. golf, and tennis) or not actively organized or promoted. For example, there are no significant swimming, sailing, fishing or cycling events or competitions - not even a cycling *Tour de la Dominique* to rival similar events in Guadeloupe and Martinique or an annual Sailing Regatta like that in Anguilla.

21.7 SECONDARY PRODUCTS

The potential of each of these attractors is discussed in the following paragraphs:

(i) Beach Resorts and Eco-Lodges

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 unspoiled gold or honey-coloured beaches and secluded coves (which are especially appealing for honeymoon couples and others not looking for long expanses of sand crowded with hotels). It is significant that many (but not all) recent investors are choosing beach locations for their new developments in Dominica.

Dominica should continue along this path, encouraging the development of a mix of accommodation types that appeal to a variety of market segments (as reflected in responses to the market research questionnaires). However, a major emphasis should be on up-market boutique hotels or eco-lodges that can command high prices.

(ii) Yachting

Conveniently located in the middle of the chain of eastern Caribbean islands, Dominica is an ideal halt for sailing vessels cruising the Caribbean. It is strategically situated between two large nearby yachting centres, Guadeloupe and Martinique, making it an attractive destination for French charter vessels in particular. The most popular anchorage at Prince Rupert Bay, Portsmouth can often have over 100 yachts at one time. However, compared with competing destinations such as Antigua, St. Bart's, St. Lucia and the BVI, Dominica has been slow to exploit the full potential of the yachting market.

Currently, there are no marina or boat repair facilities, and only limited (but improving) chandlery and provisioning services (with yachties even denied use of the fuel pump at the new fishing jetty in Portsmouth). 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.

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. However, it is understood that a marina with up to 200 slips, haul-out yard, restaurants, bars, shops, offices, condominiums, hillside villas and a 40-bedroom hotel extension is now under active consideration at Cabrits at a site and on a scale previously identified in the TMP 2005-2015. Whether or not this will form part of the Cabrits Hotel & Spa, which is presently being constructed, is unclear.

(iv) Community Tourism

Sustainable tourism development cannot function solely on its own. Instead, it should become an integrated part of the local community.

One of the recommendations of the TMP 2005-2015 was the strengthening of the linkages between communities and the tourism sector, the aim being to increase the benefits of tourism to the communities on the one hand and, on the other, to enhance the experience of visitors to Dominica. Subsequently, the EDF-funded community support programme was established and implemented in two phases under which over twenty small and medium sized community projects received support for the provision of physical infrastructure (such as visitor centres), but also, particularly under the second phase, for human resource development; business planning; package and tour development; and marketing.

There are mixed views as to the extent to which the communities affected have actually benefited – at least until now – from these programmes. Some argue that that the existence of commercial enterprises (e.g. hotel development) close to a community, or vice versa, is the best way to provide real benefits for communities through employment generation and purchases from local suppliers, as happens already.
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 hotel's success.

(v) Meetings and Conferences

The MICE (Meetings, Incentives, Conventions, Exhibitions) market is mostly business-oriented, involving obligatory or non-discretionary travel. However, the incentives segment tends to be more leisure-based as it is usually offered to employees or dealers/distributors as a reward for exceptional performance. In the Caribbean (e.g. Aruba), this is a growing market whose potential has hardly begun to be exploited by Dominica.

Dominica can also be promoted as an attractive venue for regional meetings and smaller conferences not only because of its expanding accommodation base but also for its range of attractions and reputation for safety and security (which can be promoted as one of the island's stronger selling points).

However, at present, it lacks the capacity to host large conferences. Currently, the largest conference facilities are at the Garraway Hotel (with seating capacity for 175 persons) and the Fort Young Hotel (for 120 persons). Other hotels have smaller facilities that are suitable for board meetings and retreats. Additional conference facilities will be provided in new hotels under construction at Cabrits and Anse de Mai, and perhaps in a proposed 120-room hotel in Roseau. The renovated State House in Roseau will also include new meetings facilities.

21.8 OTHER PRODUCT OPPORTUNITIES

(i) Golf

Golf has been identified as a niche product having good potential for Dominica which presently is one of the few Caribbean destinations - apart from the very smallest - that does not have a golf course. Golf is the sort of product that can appeal to both stay-over tourists and cruise visitors, as well as local residents, both Dominican and non-Dominican.

The TMP 2005-2015 provided 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. There is need to re-assess the suitability of these and other potential sites for golf course development. Nearly always, golf projects are linked to accompanying real estate developments which help to finance the design and construction of the golf course.

It is essential to establish from the outset whether the project is feasible. This will be determined by the carrying out of site suitability, and economic and financial feasibility, studies. An Environmental Impact Assessment will also be needed to address environmental issues which can be extremely important and even contentious. Once the feasibility of the project has been determined, the next step would be to develop a master plan covering golf course layout, locations of clubhouse and maintenance facilities, road and infrastructure layout, and approximate construction programmes and budgets. The developer, rather than Government, should bear the cost of such studies.

However, to enable Dominica to be marketed as a destination for golf enthusiasts, rather than just a place where a round or two of golf might be played whilst on vacation, at least a second championship course would be necessary.

(ii) Residential Tourism

Residential tourism has long been an important part of the tourism industry in a number of countries in the Caribbean region (e.g. in pre-volcano Montserrat which had over 200 villas many of which were available for renting when not being used by their mostly-expatriate owners). For destinations, the benefits of residential tourism are that the spending by owners or renters impacts more directly on the local economy as they shop locally, eat locally and employ builders, gardeners, pool and maintenance workers, security guards, and domestic helpers. This product also includes fractional (or partial) ownership of a property, which is becoming extremely popular as an easy and economical way to own a share of a vacation property which can be placed in a resort rental pool when not being used by the owner(s).

Many countries in the Caribbean are seeking to capitalize on this growing niche market by offering various incentives to beneficiaries, including residence status and tax concessions for approved investments, particularly in property. While Dominica has many of the attributes that would be of interest to certain segments of the residential and retiree market, including an unspoilt environment with a relatively good record for security and safety; and friendly people, this needs to be backed up by a deliberate policy to promote the destination to the target market segment. This should include a competitive incentives package vis-à-vis those that obtain (and in some cases are currently more attractive) in other Caribbean countries such as Barbados and St. Lucia. This needs to be kept under review on a regular basis.

Now that Government has approved the recommendations of the White Paper on Proposals for Residence Tourism Policy for Dominica (October 2006), the most important remaining next step is the inclusion of a new clause under 25 (1) (h) of the Income Tax Act to exempt “any income accrued from a source outside Dominica to a Beneficiary under the Residence Tourism programme, whether the persons resides in Dominica, or not”.

Further development will also depend on the availability of suitable land at attractive prices and/or the quality of new projects such as the planned Woodford Hill Resort (with a total of 112 accommodation units) and other real estate developments either under construction or planned in the La Plaine (Citrus Creek/Taberi Estate) and Castle Bruce areas.

The programme should be accommodated in designated areas where adequate infrastructure exists; where services can be properly delivered; and where any issues of safety and security can be addressed. This would also enable Government to better manage possible spill-over impacts of escalating land prices on local residents.

(iii) Soft Adventure/Extreme Sports

Soft adventure comprises the range of outdoor activities in which tourists frequently engage as part of their holiday. All are accessible to, and can be enjoyed by, non-specialists. Examples of such activities include: walking, cycling, horse-riding, angling, adventure centres and water sports (kayaking, sailing, windsurfing, etc.). on the other hand, extreme sports tend to have a higher level of inherent risk, especially for non-specialists.

Dominica offers a variety of soft adventure products to visitors. These include hiking, cycling, horse riding and water sports. Until forced to close after the severe flooding in the Layou River Valley caused by the collapse of the Matthieu Dam in July 2011, Wacky Rollers offered varied activities including river tubing, kayak tours, zip lining, aerial rope bridges walks, and is now seeking to relocate the river tubing activity to the river at Coulibistrie. The Aerial Tram Company (which was only the second such aerial tramway of its kind in the Caribbean region after Costa Rica), and also incorporated an 840-foot long zip line suspended over the 350-foot drop to the Breakfast River Gorge, announced its closure in June 2012. The Dominica government has indicated that it is examining the situation to see what can be done about salvaging the tram service and the jobs of the affected employees.

Canyoning (also known as rappelling) and other extreme sports are also available in Dominica. These activities often involve a high level of physical exertion, and highly specialized gear.

The availability of good quality, accessible facilities for these pursuits greatly enhances the tourism product by providing visitors with a range of experiences which enriches their holiday.

There is potential to continue to develop these and other adventure sports, and promote them more actively. This will make them more accessible and that a policy of continuous product improvement is in place. Product quality standards and staff training are also inherent elements of this strategy.

(iv) Sea Fishing

While the seas have provided the people of Dominica with food and nutrition since earliest times, the recreational aspects of fishing are so far considerably underdeveloped. Although not specifically promoted on the DDA website, sea fishing is reported to be excellent offering a variety of catches, including tarpon, marlin, dorado, tuna, sailfish, wahoo, mackerel, and barracuda.

There are several fishing boats for hire and a number of small operators offering deep sea fishing charters, including three in the Roseau area and one in Portsmouth. Boats range from traditional fishing boats to fully-equipped 10 or more metre vessels. The boats tend to be smaller than those used in neighbouring islands such as Antigua and Guadeloupe, but they nevertheless offer a good level of comfort with (in some cases) air conditioning, fridge, ice machine, TV, microwave, coffee maker, marine head and a ‘fighting chair’. Use of fish attracting devices (FAD) moored in deep water means that fishing can be enjoyed year round.

Shore fishing is possible at several locations. There is also scope for developing freshwater fishing in the island’s many lakes and rivers (e.g. Freshwater Lake), but at present river fishing is restricted to residents.

(v) Bird Watching

Bird watching has the potential to become a significant niche market for Dominica. An estimated three million international trips are taken each year for the main purpose of bird watching. However, for many more, bird watching is often a secondary purpose of a holiday visit.

The most famous birds of Dominica are the Sisserou (Imperial) and the Jaco (Red Necked) parrots which are found mainly in the northern part of the island and are protected. A breeding programme at the Parrot Research Centre located in the Botanic Gardens has been in place for several years and has helped the populations to recover. Parrots are now spreading further south. Bird-Watching Tours are offered by several hotels and by certified tour guides: Dominica also offers ‘twitchers’ the exciting prospect of finding species that are new for the country.

(vi) General Touring

Recent and on-going improvements to the road network open up the possibility of developing a general touring product in Dominica, which can be either in chauffeur-driven mini-buses or in self-drive rented vehicles. This product can produce benefits for both the visitor (stay-over and cruise) and host communities as follows:

Visitors: it adds to the visitor's experience by providing a better understanding of the island's natural attractions, people and culture;

Host Communities: it helps to spread visitor spending more widely throughout the island, creating business opportunities for provision of accommodation, sale of snacks and drinks, and indigenous arts and crafts.

In order to further develop this product, the main needs are (i) designation of touring routes; and (ii) provision of improved road signage, lay-bys for scenic viewing, picnic sites, and a better road map and touring brochure (indicating points of interest, tourist facilities and amenities, and other useful information). In time, small scale recreational facilities, including viewpoints, car parks and picnic areas, and refreshment stalls, could be provided along the touring routes. The routes that would constitute the primary general touring network are set out in the 2005 TMP. They include the 'Ring of Dominica' Scenic Coastal Route circumnavigating the island.

Priority projects for enhancement of this product are the rehabilitation and upgrading of the scenic 'Wild Coast' route from Grand Bay to Petite Savanne and Delices; and construction of a new road between Rosalie and Petit Soufrière (which is now the only 'missing link' on the proposed *Ring of Dominica* touring route. To which should be added the importance of improved signage, particularly in Roseau, provision of lay-bys on main roads and construction a possible Portsmouth by-pass.

Table 21.3: Product - Market Potential for Expansion and Diversification

Market Segment	Characteristics	Requirements	Development Potential and Actions
A. Nature Tourism			
• bird watching • botanical • natural history • whale watching	• moderate use of tourism plant . high spend • seasonal • moderate growth rate	• nature reserves/parks • guides & ground tour arrangements • range of accommodation • good interpretation	• Important potential, but • interpretation lacking, • need for biodiversity tours • need for foreign language skills e.g. French-speaking guides
B. Activity Tourism			
• hiking • mountain biking • kayaking, river tubing • zip-lining • extreme sports (canyoning, etc.)	• moderate use of tourism plant • moderate spend • seasonal • moderate growth rate	• nature reserves/parks • marked trails • activity centres • range of accommodation	• major potential of Waitukubuli National Trail • increased on-going maintenance of trails • activity centres needed
C. Community Tourism			
• community projects • agro-tours • culture and heritage	• short stay • low rate use of tourism plant • moderate spend	• active community support • accessibility • good interpretation and tour guiding • B&B, home stays	• significant potential • improved accommodation and cuisine standards • enhanced interpretation and tour guiding • maps and other information • strengthen linkages with hotel sector
D. Culture/Heritage			
• Kalinago experience • Roseau Historic District • Geneva Heritage Centre • Cabrits	• Diaspora, regional and international • short stay • moderate use of tourist plant • low environmental impact • high repeat	• high presentation and maintenance standards • cultural and heritage displays and experiences • entertainment/local ambience • range of accommodation, including local	• important potential • product enhancement • wider promotion • enhanced road, etc. infrastructure • community 'buy-in'
E. Cruise Visits			
• small to medium size cruise ships • large and mega cruise ships	• high volume • very short stay • high environmental impact • seasonal demand	• interesting things-to-see & do • attractive/accessible nature and historic sites • cultural/heritage experiences • shopping • ambience • safety and security	• significant potential • targeted marketing to cruise lines • tour bus/taxi organisation • carrying capacity at premium sites • conversion to stay-over tourists
F. Eco-resorts			
• beach/interior/ mountain nature resorts • health and wellness/spas • sulphur springs	• high spend • high use of tourist plant • all year demand • high growth	• small scale hotels and lodges • high quality facilities • secluded settings • nature walks, trails, things-to-see-and-do • professional therapists, dieticians • medical support facilities	• significant potential but on small scale • need for international spa resort 'brand' such as Banyan Tree, Six Senses, etc. • wellness treatment by professionals – high quality clinical equipment • high standards at natural hot springs/sulphur baths
G. Residential/Long Stay			
• retirees • villa rentals • fractional ownership at resorts/boutique hotels	• villa/town houses, condos (ownership rentals) • holiday homes with long, frequent visits • high spend • high growth	• seamless access from regional hubs, esp. Antigua • reassurance about safety and services • things-to-do e.g. golf • regulatory framework • medical support facilities	• significant potential • large and small scale resorts • competitive tax and other incentives
H. Sports			
• sporting events • training	• groupings of participants, fans & other spectators • high use of tourist plant • short 2 – 4 days • moderate growth	• good and appropriate sporting facilities • range of accommodation • good local food • entertainment/local ambience	• Significant potential at Windsor Park Stadium • Enhanced marketing and promotion
I. Scuba Diving			
• diving • snorkelling	• 1 week average stay • high use of tourism plant • high spend • seasonal • low environmental impact	• range of dive sites • dive shops/dive masters • medical support facilities • range of accommodation • things to-see and do for non-dive companions	• Major potential with sites fully identified and mapped • Improved air and sea access • better site maintenance • range of facilities and accommodation • 'wreck' diving to be developed to expand product appeal

J. Yachting			
• yachting	• short stay • low use of tourism plant • moderate to high spend • low to medium environmental impact	• jetties/moorings/marina • on-shore facilities – showers, laundry • things to see and do • shopping/provisioning • fuel/water supplies	• major potential • streamlined customs and immigration clearance • provision of marina/moorings/pontoons • shore facilities • facilities for water/fuel uplift • improved information on yachting in Dominica
K. Short Breaks			
(weekends/mid-week) • general holiday maker	• 2 to 3 night stay • medium to high spend • high use of tourism plant • off-season • low repeat • intra-Caribbean/FWI mainly	• small scale facilities • things-to-see-and-do • good food • entertainment/local ambiance • interesting attractions • competitive car rental tariffs • events/festivals	• significant potential • tourism product needs development • better range of evening entertainment • better quality restaurants required with regular opening hours • product needs to be packaged
L. Excursionists			
• day visitors - one-day stay	• low use of tourism plant • low spend	• competitive access transport • organised tours • things to see/interpretation • shopping	• significant potential from Antigua and FWI • affordable, reliable air/sea access • streamlined customs and immigration clearance • high standards of taxi/tours
M. Weddings & Honeymoon Stays			
• niche market	• high spend • 4-7 night stay • high use of tourist plant • low environmental impact • all year demand	• attractive church/location for ceremony • attractive location for photography • wedding venues – accommodation with room for reception • wedding planners • clear legal situation	• significant potential • more venues • clearer and more streamlined regulations • improved range of accommodation
N. Festivals/Events			
• Carnival • World Creole Music Festival Jazz 'n Creole • Independence Celebrations, Carnival, etc.	• returning nationals and intra-Caribbean • short stay • high use of tourist plant • low environmental impact • seasonal demand • high repeat	• unique festivals and events • particular timing to avoid clashing with other regional events • things-to-see-and-do • good local food • entertainment/local ambience • safety and security	• important potential • to be more widely promoted and developed outside high season • improved range of accommodation • ease of air and sea access
O. Business Meetings			
• small companies • regional organisations e.g. OECS, CARICOM, etc.		• meeting facilities • up-scale accommodation • restaurants • entertainment • things-to-see-and-do • safety and security • spouse/partner/family programmes and attractions	• important potential • convention/meetings organisational expertise required • better air and sea access • appropriately sized conference and convention facilities • entertainment/things to do
P. General Touring			•
• stay-over tourists • excursionists • yacht and cruise visitors	• high use of tourist plant • low to medium environmental impact • year round demand • high repeat	• range of designated touring routes, with maps, brochures, etc. • high quality road network and signage • things-to-see-and-do • safety and security	• important potential • road improvements on Wild • Coast • Stopping places, with range of amenities • better signage and maps • increased promotion

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 Hewannora, 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.

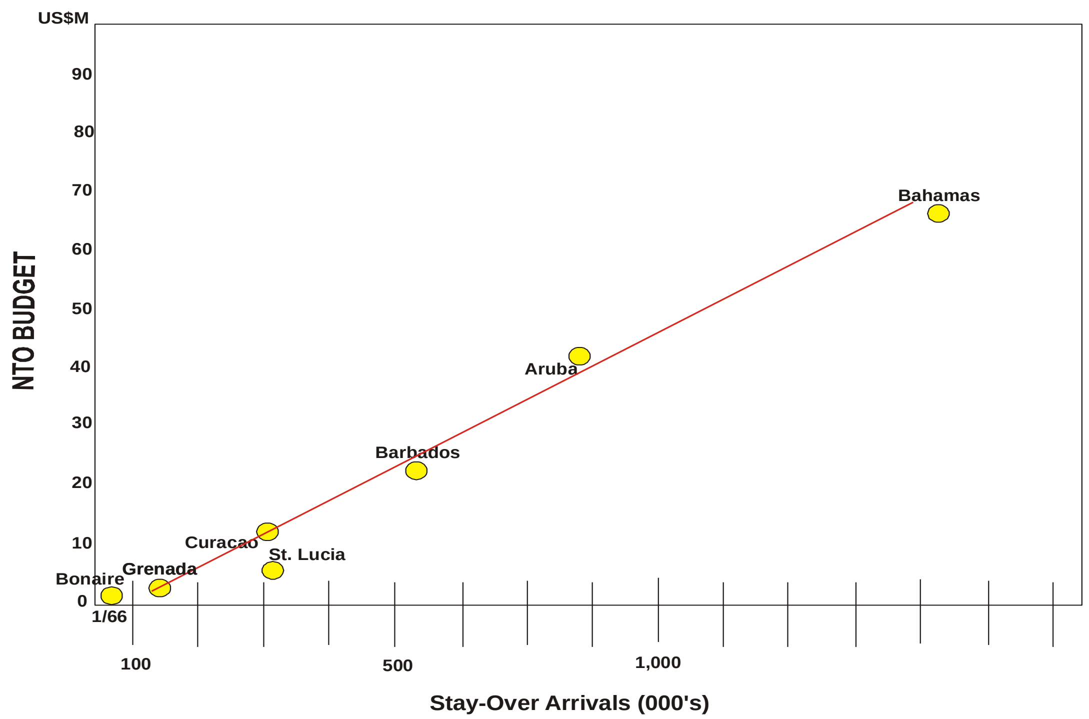
23.2 INCREASED DESTINATION MARKETING RESOURCES

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 yachties 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 <u>Roseau</u>

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;

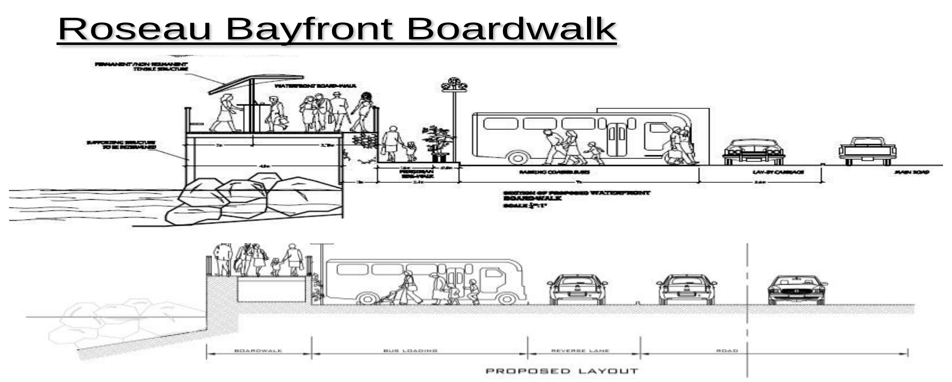
- Designation of heritage trails, with appropriate signage and detailed route maps/brochures;
- Repair of pavements, gutters and roads as part of a wider Roads Reinstatement Rehabilitation project for the entire urban area;
- Declaration of a pedestrian-only and no parking zone between the hours of 7.00am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

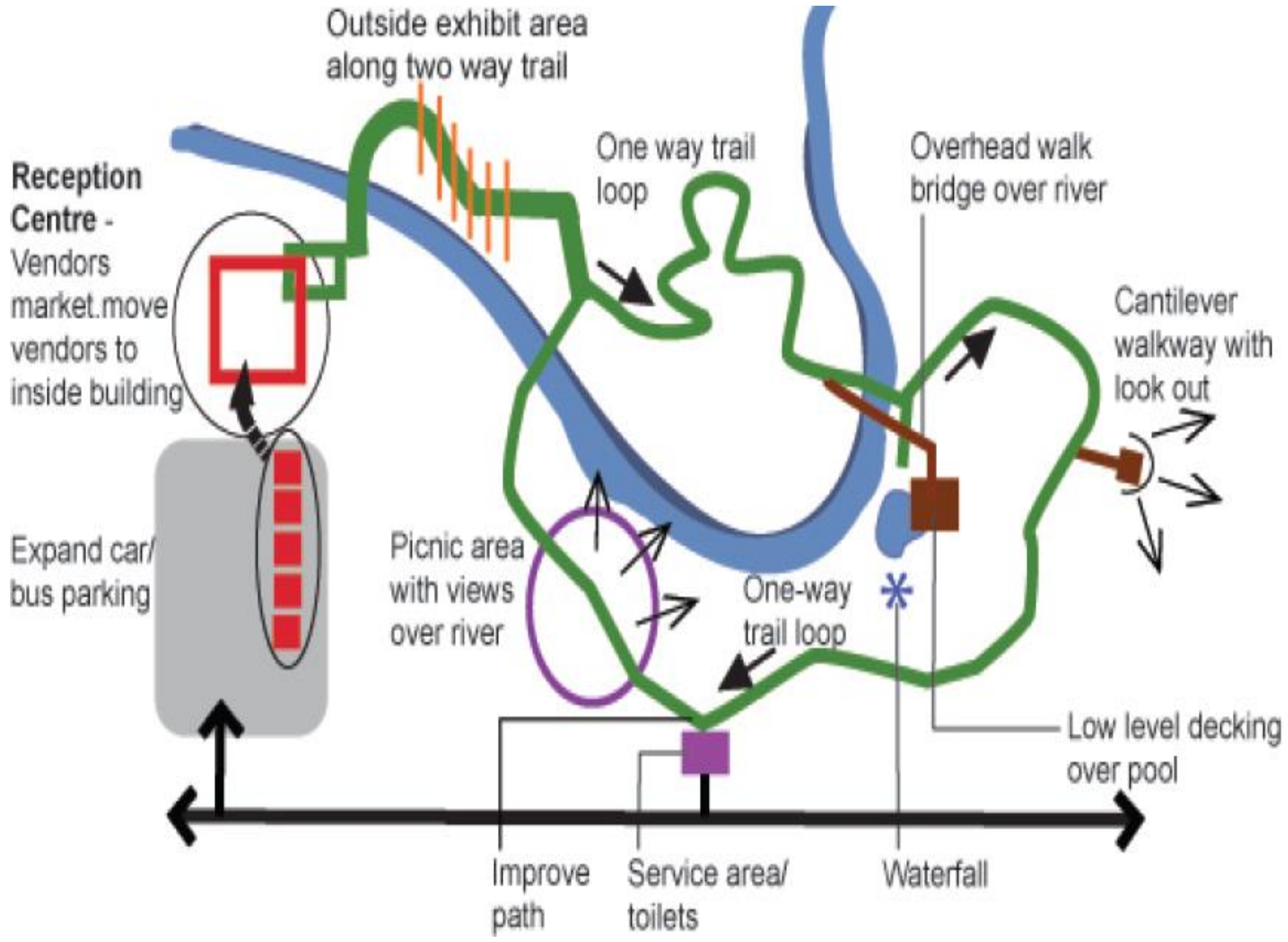
Content

The main proposals are:

(i) Trafalgar Falls

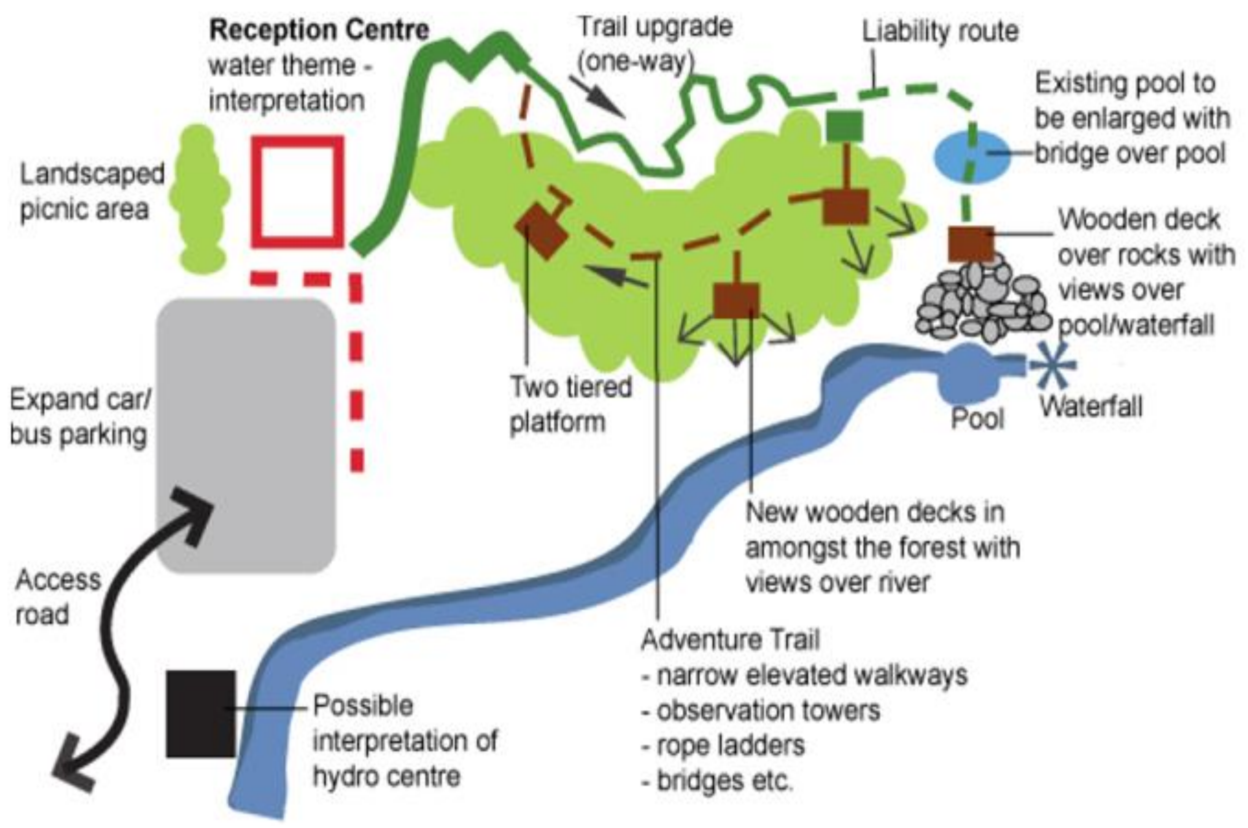
- Expand car/bus parking area;
- Landscaped picnic area;
- Interpretation centre with water theme upgrade;
- Enlarge wooden deck two storey with views over pool/waterfall;
- New wooden decks in amongst the forest with views over river;
- Adventure Trail with narrow elevated walkways, observation tours, 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

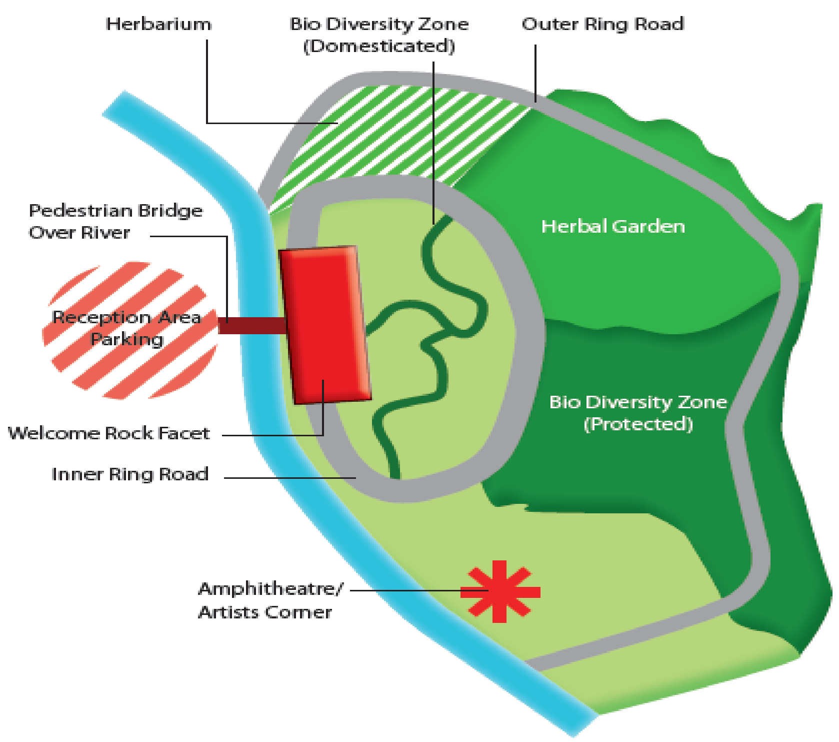
As outlined in the Plan, the development concept for the BioPark, which would require a site of about 10 acres (4 hectares), would include:

- 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.

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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 Lugay, 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.

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

(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.

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 Norrh 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 tears
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 disbursal 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 <u>Prepare Land Use and Physical Master Plan</u>

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 <u>Prepare TDA Action Plans</u>

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.

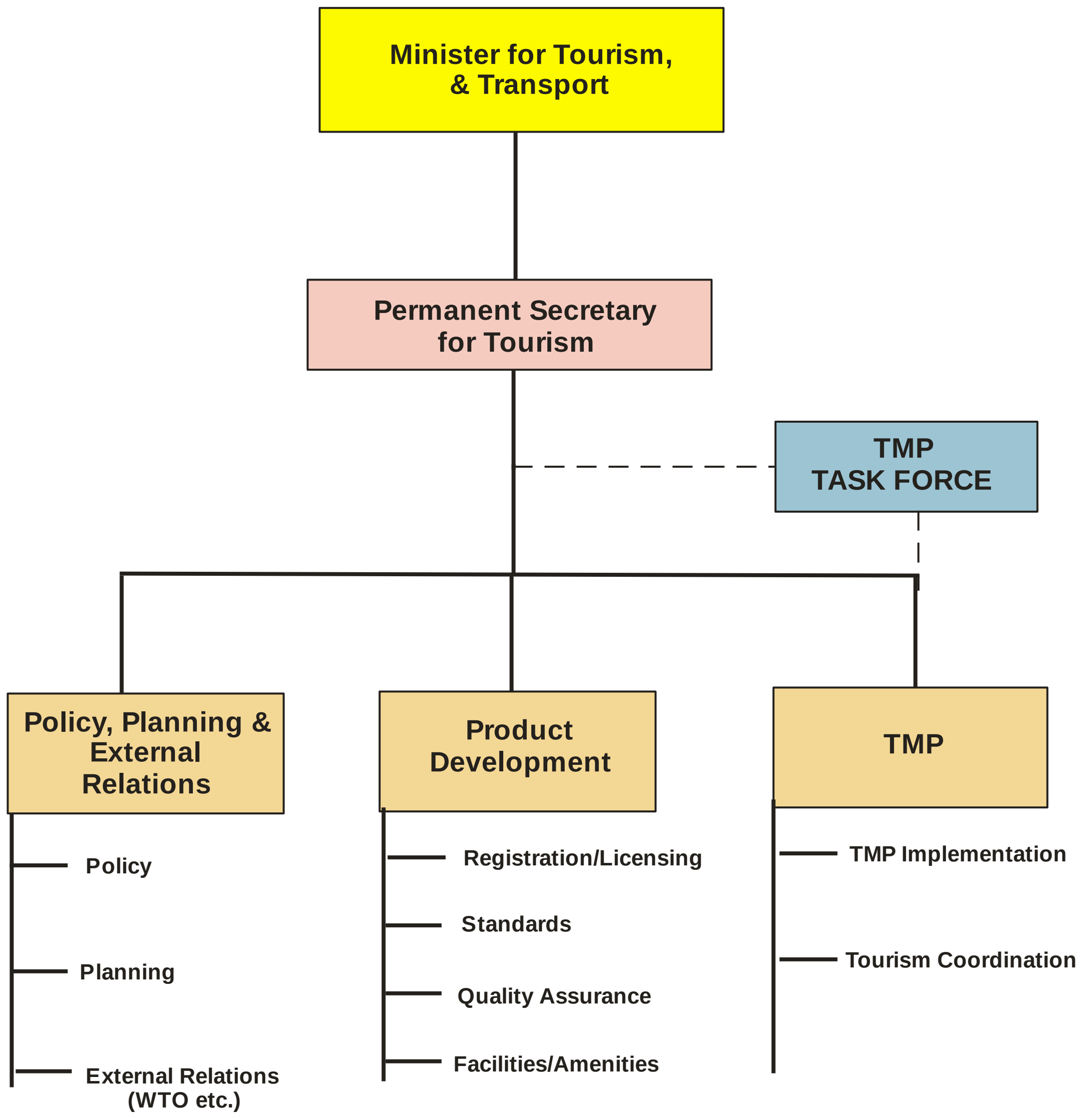
30.3 FOCUSED MANDATE FOR THE DDA

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.

PART VI TMP IMPLEMENTATION

31. ORGANISING FOR TMP IMPLEMENTATION

The development of Dominica's tourism will not simply happen. It has to be stimulated and directed, and the activities of the various tourism and tourism- related organisations coordinated.

Three elements are necessary – a champion, a task force and a project management unit.

31.1.2 Champion

To get 'buy-in' by all stakeholders, the TMP needs to be championed. The TMP vision, the strategy and the benefits from development need to be constantly articulated and elaborated, and its implementation encouraged by a senior figure in authority.

31.1.3 TMP Task Force

As described in Ch. 14 earlier, there are many organisations in both the public and private sectors with responsibilities and active participation in tourism. The many actions that have been identified in this TMP will involve a large number of these organisations in their implementation. In order to ensure that the implementation process is conducted in a coordinated and timely manner, and to ensure that key actions actually are implemented, it is recommended that a special purpose body be created – **the TMP Task Force**. This should be a high-level body working to a tight terms of reference and within a defined life span with the overall goal of promoting, energizing, monitoring and the implementation process.

Terms of Reference

The following is a draft terms of reference for the TMP Task Force.

The overall goal is to drive forward and give best effect to the implementation of the TMP and the actions that form part of it. In this context, the specific brief of the TMP Task Force will be as follows:

- To advise Government on the implementation of the TMP.
- To publish a report on its work and on progress with the implementation of the TMP at six monthly intervals.
- To ensure that the TMP Action Plan is seen as an integrated set of actions requiring a coordinated and partnership approach across ministries, departments, agencies and the private sector.
- To discuss with lead actors their operational plans for, and commitments to, the implementation of actions falling within their remit including key indicators against which performance will be measured.
- To highlight any constraints to progress and recommend how these might be addressed and by whom.
- To monitor progress and to recommend any changes that should be made to the TMP Action Plan in the light of experience and evolving circumstances as it is rolled out.

Structure

The Task Force must be an authoritative body and therefore its membership should comprise top-level representatives of the public and private sectors. The Task Force would incorporate the existing Tourism Coordinating Committee.

The Task Force will not need its own organisation structure but should be serviced by the Tourism Division (meetings, report drafting, secretarial services, etc.). It should meet on a monthly basis and may set up its own sub-groups to focus on particular issues and to meet with representatives of individual bodies and organisations critical to the development of tourism both at Government and industry levels. It is expected that the Task Force, in fulfilling its remit, will consult widely and regularly with key representative groups and enterprises associated with tourism in Dominica, and with ministries, government departments and agencies whose policies and actions have a significant impact on the development of tourism.

The Task Force should have an initial life of three years at which time its own composition and brief might be reviewed and renewed. The cost will not be significant, as no staff or other overheads are envisaged.

31.1.4 TMP Project Management Unit

Recognizing that the members of the Task Force will be senior officers/representatives having other responsibilities, we recommend the setting up of an TMP Project Management Unit with responsibility to initiate, guide and coordinate TMP implementation.

The principal functions of the TMP PMU would be:

- Preparation of detailed work plans, budgets and responsibilities.
- Advising private sector groups and communities on programmes and project implementation.
- Preparation of policy and research papers on various tourism issues such as air access, etc.
- Liaison with relevant government ministries, departments and agencies involved in action plan implementation.
- Coordination and administration of all TMP technical inputs and work elements.
- Resource coordination with donor agencies regarding support for specific components of the TMP, including preparation and submission of project proposals.
- Act as a secretariat to the Task Force.

31.2 TECHNICAL ASSISTANCE

A technical advisor is required for a period of 3 years to provide support and capacity building to the PMU.

32. IMPLEMENTATION FRAMEWORK

32.1 LESSONS LEARNED FROM TMP 2005 – 2015

The salient lessons arising from the experience since 2005 appear to be:

a) The need for direct, safe, reliable, easy and competitive access to be in place. The main conclusion of the Access Strategy Study, coupled with the feedback from stakeholders, is that inadequate connectivity (particularly with the North American markets) and relatively high air fares, together with unsatisfactory access by sea, have been the major constraints to the development of Dominica's tourism sector.

b) The need for adequate resources for destination marketing. The DDA is severely under resourced. Although the reason (Government financially constrained) is understandable, there is no escaping the fact that to attract tourists in a crowded, competitive market, sufficient monies must be available for promotional activities.

c) The time span between planning and implementation is longer now than in the latter half of the last decade. Prior to the global financial and economic crisis, it was easier to attract capital investment and there was a shorter time span in getting projects 'off the ground'. The situation is now radically different ………difficult to attract investors, capital in short supply……all of which means a longer implementation period.

d) The institutional arrangements for TMP implementation were not put in place. Certainly, the Government recognized and supported the TMP 2005 – 2015, as evidenced by the publication and distribution of the TMP 'glossy' brochure. However, the institutional set-up to organize/coordinate the implementation of the recommended projects was not established. Thus, a TMP Project Management Unit was not established nor a 'Champion' appointed to lead the implementation process.

e) The need for tourism product development to come on-stream. For Dominica, this means that the expansion of the tourism product must be in step with the destination marketing plans. There is no point in generating market awareness and interest in vacationing in Dominica if there is sufficient accommodation and things to-see-and-do.

f) Lack of resources to support the proposed TMP PMU was a major (and understandable) reason for the limited progress.

g) Some of the community projects supported by the EC programmes were not sufficiently focused on the actual (as opposed to the perceived) needs and market opportunities of the communities in question, resulting in a less than optimum utilization of resources. A review of communities' involvement in tourism and how best they can benefit is required to guide future support in this area.

32.2 FINDING TMP INITIATIVES

Funding is crucial, and the sources include:

- Bilateral aid programmes – UK, Peoples Republic of China, France, Mexico (for BioPark) USAID, CIDA, etc.
- Multi-lateral aid programmes, European Union, OAS, etc.
- Development Banks – Caribbean Development Bank, Investment Finance Corporation.
- Private Foreign Investment (including private sector foundations).
- Private local (Dominica) Investment.
- Public funds (Dominica).

Resource Mobilization

Dominica should adopt a more pro-active approach to mobilizing resources for the recommended TMP initiatives.

We recommend the designation of a Ministry official within the Prime Minister's office to work with the PMU to actively seek out and mobilize resources from a wide range of donor agencies – national, multi-national, private sector foundations etc. A small budget to cover costs in respect of travel to the headquarters of these agencies would be necessary.

32.3 SCHEDULING THE TMP ACTION PROGRAMMES

Government must first decide which development scenario to pursue. The immediate priority for the Tourism Task Force is then the scheduling of the recommended action plans, in terms of their sequencing. Should the tourism product be expanded and standards improved prior to, or after, the establishment of a marketing campaign? Should capacity building and human resource development precede product development and marketing? The greatest consensus appears to be to do all at once. This is not as simplistic as it appears at first sight. Because all the action programmes are so interlinked, trying to identify the best sequence is not a realistic approach. No single measure can bring much benefit without at least some progress in respect of the other actions. In this sense, it is more instructive to view the development of the tourism sector as a process rather than as a sequence of activities.

In this context, the recommended action plans for implementable activities in the short term (2015) that can drive economic growth is outline on Table 32.1.

Table 32.1: TMP Action Plan 2013 – 2015

A. ARRANGEMENTS FOR TMP IMPLEMENTATION	➢ GOCD approval of TMP ➢ publication plan on Ministry's website ➢ consensus & support of stakeholders ➢ set-up TMP Task Force ➢ set-up TMP Project Management Unit ➢ designation of 'champion' ➢ set-up unit to coordinate source funding for TMP ➢ seek technical assistance for TMP-PMU
B. REORGANISE AND STRENGTHEN INSTITUTIONAL ARRANGEMENTS	➢ reorganisation & strengthening Tourism Division within Ministry - management of sites to be transferred to Forestry Wildlife Division ➢ set-up Environmental Protection Agency ➢ set-up National Parks Service Agency ➢ set-up National Heritage Trust ➢ reorganise DDA - more focused mandate - registration/licensing and Quality Assurance Unit to be transferred to Tourism Division - films transferred to IDA - festivals & events transferred to Ministry of Culture - internal reorganisation of functions within DDA
C. DESTINATION MARKETING & RESEARCH	➢ prepare 1 – 3 year rolling marketing plan ➢ new strategic approach with greater emphasis on e-marketing ➢ significantly improve website ➢ improve quality of statistical data base - more extensive visitor exit survey - yacht survey
D. IMPROVE AIR AND SEA CONNECTIVITY	➢ support for airlines to improve connectivity/ services from selected hubs ➢ work with L'Express des Iles to improve connectivity/ services from Guadeloupe ➢ work with regional hubs to improve in-transit facilities for Dominica connecting travellers ➢ appoint person in DDA to dive access strategy
E. ENHANCE URBAN ENVIRONMENT	➢ Roseau River Corridor re-generation ➢ restoration of the Historic/Heritage District ➢ Botanic Gardens to become a multi-use Municipal Park ➢ regeneration of the Roseau Bayfront ➢ Old Market Square Plaza re-generation
F. IMPROVE TOURISM ECONOMIC INFRASTRUCTURE	➢ repair of pavements, gutters and road surface on Victoria Street, Roseau ➢ provision of improved signage, particularly in Roseau, and lay-bys on main roads ➢ upgrading of airport departure/arrival facilities at Melville Hall ➢ upgrading of airport departure/arrival facilities at Canefield ➢ upgrading of ferry terminal facilities at Roseau ➢ Feasibility/technical studies for possible new cruise terminal at Canefield (Donkey Beach)
G. MAINTAIN AND ENHANCE QUALITY OF NATURAL ENVIRONMENT	➢ establish Indian River Protected Area ➢ improve quality of beach facilities at Indian River ➢ establish BioPark ➢ maintain quality of hiking trails
H. STRENGTHEN COMMUNITY INVOLVEMENT AND SECTOR LINKAGES	➢ survey among hotels, resorts, B&B, etc. to determine extent to which they purchase goods and services from local communities ➢ survey among communities to determine extent to which they benefit from tourism ➢ need to streamline marketing and reservation arrangements re. Waitukubuli Trail
I. IMPROVE HRD FOR TOURISM SECTOR	➢ technical and financial support for Tourism & Hospitality Dept. of the DSC ➢ suitable new accommodation to be provided for the Tourism & Hospitality Dept. ➢ improve training in French language for guides
J. BETTER SECTOR MANAGEMENT	➢ undertake Physical Master Plan ➢ prepare Tourism Development Area plans ➢ address crime and harassment issues ➢ establish competitive business environment ➢ establish tourism development fund ➢ establish monitoring and control system for sector ➢ improve tourism environmental awareness ➢ promote Green Globe, EarthCheck and similar Benchmarking
K. UPGRADE, DIVESIFY AND EXPAND PRODUCT	➢ improve the quality of the cruise product ➢ encourage investment in new tourist facilities - Woodford Hill Resort - Cabrits Marina ➢ undertake feasibility study for golf course ➢ improve capacity at Trafalgar Falls and Emerald Pool ➢ improve the Kalinago Barana Aute product ➢ improve the Geneva Heritage Park/Arts & Crafts Centre

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