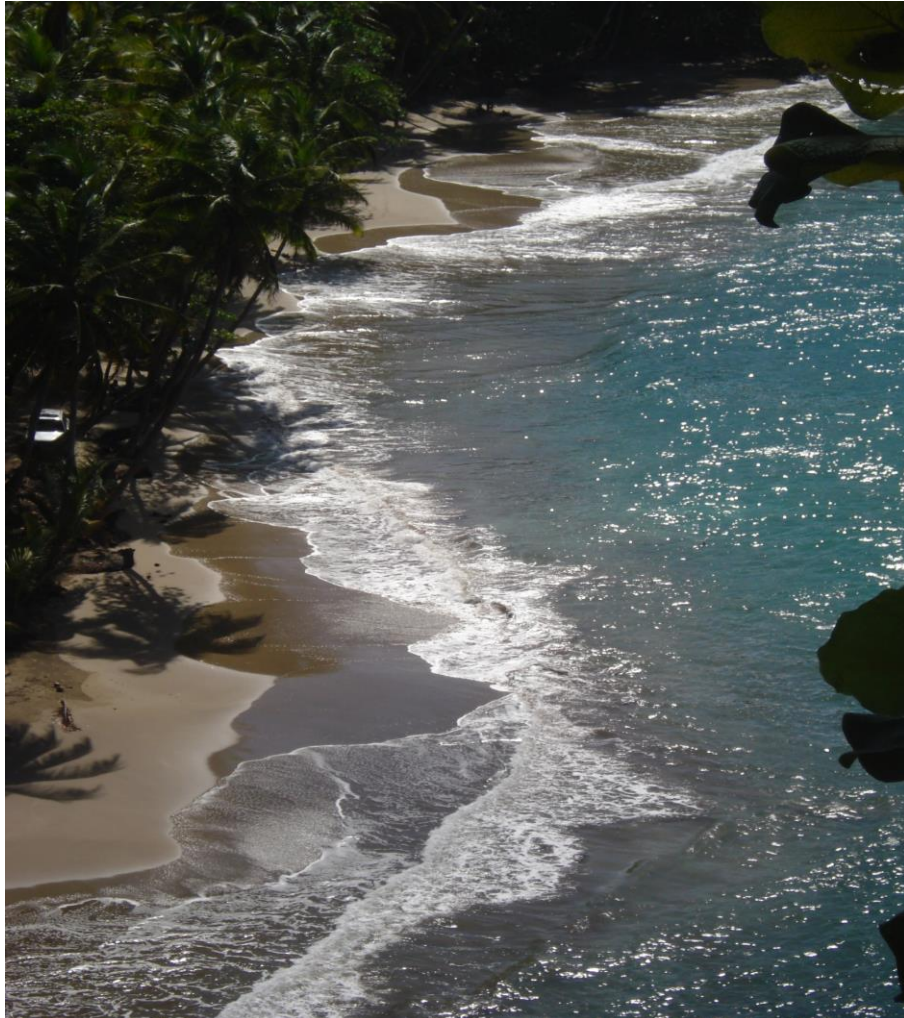


**COMMONWEALTH OF DOMINICA
MINISTRY OF TOURISM AND LEGAL AFFAIRS**



NATIONAL TOURISM POLICY 2020

7th June, 2013

NATIONAL TOURISM POLICY 2020

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CHL Consulting Co. Ltd

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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
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

PART I

1. INTRODUCTION

1.1 THE NEED FOR A NATIONAL TOURISM POLICY

A national tourism policy is essential to define the vision for tourism and the direction in which the country believes its tourism sector should grow. The benefits of a national tourism policy for Dominica are extensive, including:

- greater clarity for industry and government on the priorities for tourism and the desired focus for the country to grow its tourism sector in the short, medium and long term;
- greater clarity for the donor and international financial institution community, thus helping to inform the development of projects and funding programmes consistent with the country's aspirations for tourism; and
- a clear signal to the regional and international tourism industry that Dominica has established tourism as a priority and is serious about its commitment to the tourism sector.

The Government has been pursuing tourism as an effective means of economic diversification from the traditional reliance on agriculture, with the result that the tourism sector is now the most important sector in Dominica. Government has encouraged the development of tourism-related services and businesses through the implementation of several programmes including the Eco-Tourism Development Programme, Tourism Sector Development Programme, Upgrading of Eco-tourism Sites Project and the establishment of the Discover Dominica Authority. There are no on-going programmes within the tourism sector at this time.

The Third Medium-Term Growth and Social Protection Strategy (GSPS) 2012 – 2014 articulates the medium-term strategy for growth and poverty reduction for Dominica over a three year period, providing the overarching strategy that will inform the medium term public investment programme and the annual budgets presented to Parliament. Growth strategies are set for out for the main economic sectors, including tourism.

The Tourism Policy (and the updated Tourism Master Plan) will both inform and form the basis for the tourism section of future iterations of the GSPS, providing information on the policies which will guide the tourism sector over the medium term, and its development as one of the mainstays of the national economy (including its linkages to other economic sectors).

1.2 TOURISM POLICY FORMULATION

The formulation of the updated Tourism Policy is the result of a participatory process characterised by extensive consultation with stakeholders, involving key leaders, organizations and entities in the public and private sector; community tourism representatives, focus group discussions and interviews with various other stakeholders in the tourism industry; and market surveys undertaken in the main source markets (US, Canada, UK, France, Germany, and the French West Indies).

The aim was to elicit inputs, ideas, opinions and recommendations on the vision, goals and objectives, strategies, policies and programmes for the formulation of the Policy. The policy formulation process also draws on the Tourism 2010 Policy (dated January 2005) which was prepared with the assistance of a CIDA-funded Tourism Specialist and a Working Group comprising both public and private sector representatives which worked alongside the external adviser.

The Tourism 2010 Policy and subsequent Tourism Master Plan 2005-2015 set ambitious growth targets for the tourism sector. However, a review of the recent performance of the sector indicates that the country is not yet on track to achieve the projected growth targets. Due largely to the deteriorating worldwide economic climate (which affected tourism demand), Government found itself severely constrained in its attempts to fully execute the Policy and Plan.

Thus, the Tourism 2010 Policy needed to be reviewed and updated with a view to making such adjustments as were necessary in the light of the many changes and challenges which have impacted on the tourism sector since the policy was first drafted in 2005, including, on the plus side, the improved road infrastructure, the completion of the Waitukubuli National Trail, the implementation of several EU-funded community tourism projects, and the increased investment in the tourist accommodation sector; and, on the minus side, the lack of demand, poor air connectivity and high fares, insufficient 'market ready' accommodation, crime and security concerns, and disinvestment in some major tourism products (including the Aerial Tram).

The updated Policy has informed the revision of the TMP 2012-2022 contributing to an updated strategic and operational plan for the accelerated growth of the tourism sector.

An ongoing consultative process and mechanism is outlined in Chapter 14 for the continued update of the Tourism Policy and the sectoral strategies in view of developments affecting the industry. A communications strategy is also set out to further inform, advocate and disseminate information on the Policy, as well as identification of possible funding sources to implement the policy.

2. TOURISM POLICY CONTEXT

2.1 TOURISM'S ECONOMIC CONTRIBUTION

Government recognizes the importance of tourism and has established tourism as a high priority sector. It is committed to developing the tourism sector as a driver of national economic activity and diversification. Tourism offers a comparative advantage given the relatively limited opportunities that may be available in other economic sectors. The strategic objective for the 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.

While Dominica has the natural and cultural resources base upon which to develop a sustainable tourism industry, the number of stay-over tourists has remained more or less stagnant over the past decade. As a result, the targeted growth rate for the sector has been scaled down from 10 percent per annum as given in the Tourism 2010 Policy statement to what is considered to be a 'must achieve' growth rate of 7 percent per annum into the medium term and beyond. Achievement of this target growth rate would raise tourism's contribution to GDP from its current gross share of 16.5% to 23% by 2022. This remains a formidable challenge for the sector, but one that is necessary if the expansion in the industry is to be sustained. This will require a focused commitment to tourism in order to confront the challenges facing the sector and to produce the desired contribution to Dominica's economy and social and cultural fabric.

2.2 TRENDS SHAPING TOURISM POLICY

2.2.1 Market Trends

Tourism has been forecasted by the World Travel and Tourism Council (WTTC) to grow at 4.5% annually through to 2014. This forecast presents both opportunities and challenges for Dominica. Market trends include an increasingly significant component of the market seeking "experiential" tourism. This is regarded by such organizations as the World Tourism Organization (WTO) as one of the fastest growing segments for the foreseeable future, with some segments of the experiential tourism market; nature, culture and soft adventure, forecast to increase by up to 20% per year over the next several years. Dominica has as an excellent opportunity to grow its tourism sector in light of these positive forecasts. Its niche product of nature, heritage/cultural and soft adventure tourism resources is well positioned to meet the demands from those seeking "experiential" tourism products in the nature, adventure and culture areas. In addition, Dominica can realistically market itself as one of the few culturally 'authentic' destinations in the Caribbean.

All of this is positive news for Dominica. However, its products also need to be globally competitive. Nature-based and adventure tourism travellers require and expect a well-managed destination that pursues sustainable development and practises environmental responsibility as well as protecting its heritage and cultural resources. The destinations that are up to the challenge of providing such high quality experiences will prevail. This will require adoption of a new investment-driven product strategy.

2.2.2 Investment-Driven Strategy

The reason that Dominica currently attracts relatively few stay-over tourists is partly because the tourism industry is mostly dependent on its natural attractions as the motivation for tourists to visit which, though unique in many ways, are not sufficiently strong in their current form to attract the numbers required to support a significant tourism sector. They are characterized by limited investment, insufficient accommodation and medium to low quality product. The required strategy for Dominica (as well as for many destinations which do not have world-class or market-ready nature and cultural attractions) is to invest heavily in the product. To move on to the next stage of development requires an *investment-driven strategy*, with sustained investment in all aspects of the industry – urban environment, infrastructure, access transport, amenities and attractions, accommodation, destination marketing, human resource development, etc.

2.2.3 Raising Product Quality Standards

Product quality concerns should be of paramount importance for all destinations competing for global tourism markets. The adoption of market-driven standards by destinations, as well as the development of rating systems by consumer organizations, all point to market demand for information on the quality of the experience and service that visitors can expect. This trend is now moving rapidly to encompass nature, adventure, culture and heritage experiences, including emerging international standards for such product segments as eco-tourism. Destinations that embrace product quality standards will meet with success in the marketplace.

2.2.4 Adoption of New Technology

The increasing interest in experiential tourism in recent years has been facilitated by the technology now available to customers, the tourism industry and destinations. Differentiated product for specific market segments can now be offered through the Internet in ways that were never before possible. Destinations can target specific interest groups matched to their resource base and provide web portal access to assist these customers in trip planning and fulfilment. This trend is evident in the development of new promotional techniques through web portals with reservation capabilities. However having a modern, state-of-the-art website, is not enough. National tourism agencies in competitor destinations are also constantly increasing their destination marketing budgets to maintain or attempt to grow market share. Thus, in addition to the requirement to deliver information for customers on a differentiated basis to special interest market segments, destinations must also consider the scale of expenditures they must make in order to remain competitive.

2.2.5 Destination Management

Destination management involves a partnership between the public and private sectors. As markets express more interest in exploring new destinations, leadership from the public sector becomes increasingly important. This now includes the application by many national tourism organizations globally of business models to destination management in response to competitive pressures. Destinations are now actively implementing the concept of 'market- ready' policies to define what is required on the part of their industry to do business internationally and to signal to the international travel trade what businesses in their destinations will deliver an internationally-recognized quality product.

3. TOURISM VISION AND GUIDING PRINCIPLES

3.1 NATIONAL TOURISM POLICY 2020

The National Tourism Policy 2020 provides the framework and strategic direction for stakeholders in the tourism industry to address issues such as, but not limited to, accessibility (transportation and infrastructure), marketing, product development, investment and human resources development, that impact upon the tourism sector.

The starting point for the formulation of the National Tourism Policy 2020 is the **Vision for Tourism**. The current vision needs to be reviewed and re-affirmed (if appropriate) to ensure it still reflects the aspirations of Government, and the wider community, going forward.

The second step is the elaboration of a set of **Guiding Principles and Objectives** which will shape how tourism is developed and managed to achieve the Vision for tourism.

The final steps are the elaboration of a policy position in respect of each of the various sectors playing a key role in the development of the tourism industry.

3.2 FORMULATION OF VISION

The revised Vision for Tourism builds on the vision recommended in the Tourism 2010 Policy (originally prepared in 2005 and re-articulated in GSPS 2008 and again in GSPS 2012-14). This has been refined to reflect the feedback from the stakeholder meetings, supported by the findings of surveys in the main markets, which indicated 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; and
- authenticity, with a distinctive patrimony.

These are Dominica's core strengths which must be maintained and enhanced. Any future tourism development must be in harmony with, and enhance, these core strengths.

3.3 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 2012 - 2022. Its implementation will result in a vibrant tourism industry, as described in the snapshot of what Dominica's tourism sector might look like in 2022 contained in Annex A of this document.

3.4 REALISING THE TOURISM VISION

3.4.1 Tourism Sector Objectives

The new "Dominica Tourism 2020" policy is predicated on how best tourism can contribute to meeting Dominica's social and economic; heritage and cultural; and environmental management objectives, and the broader aspirations of the nation.

In the absence of data on the economic impact of tourism, the tourism sector *Economic and Social Growth Objectives* are expressed in terms of increases in direct expenditures by visitors. One of the key targets for tourism under a medium growth scenario is direct expenditures by all visitors of EC\$ 420 million (at constant prices) in 2022 compared with EC\$ 214.5 million in 2012. In light of the robust market outlook, a relatively small tourism base (particularly the market-ready component), improvements in air & sea access, rejuvenation of the urban environment and the continuing improvements in air and road infrastructure, a target of almost doubling expenditures by all visitors is realistic. Realization of this growth target will lead to the creation of job and business opportunities in tourism, and through enhanced linkages, in agriculture, arts and crafts, entertainment and music, and services sectors; generation of increased foreign exchange and Government revenues; widespread involvement of communities in the tourism sector; and creation of career paths for Dominica's youth to enter the tourism sector.

The principal *Heritage and Cultural Objectives* include protection and development of heritage and cultural resources throughout Dominica with particular attention on community-based resources; incorporation of heritage interpretative programmes into the tourism product mix; (including the scenic road routes); and the fostering of pride in, and support for, Dominica's culture. The main *Environmental Management Objectives* are enhanced commitment to Dominica's nature resources including completion of the Green Globe and other environmental certification programmes; and land use policies that protect Dominica's environment, important vistas, scenic corridors and the intimate/authentic feel of the destination.

*Dr. Maria Bellot, Tourism Master Plan, 1997

These objectives are reflected in the principles that will guide and inform the Tourism Policy.

3.4.2 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:

- (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.

3.4.3 Critical Issues

Achieving the above objectives requires the implementation of the following strategic policy initiatives to deal with the critical issues confronting Dominica's tourism sector:

- Enhance environmental management and physical planning;
- Improve air and sea access services;
- Increase resources for destination marketing;
- Expand and diversify the tourism product;
- Improve infrastructure;
- Further develop cruise tourism;
- Strengthen linkages with communities;
- Enhance Human Resource Development and standards;
- Better sector management; and
- Reorganise and strengthen institutional and organisational arrangements.

The following chapters elaborate a policy position in respect of each of the above strategic policy initiatives and associated issues which influence the performance of the tourism sector. These policies and associated strategic initiatives are reflected in the specific actions included in the Tourism Master Plan 2012-2022.

PART II SECTORAL POLICIES

4. ENVIRONMENTAL AND PLANNING POLICY

4.1 NATURAL ENVIRONMENT

Dominica's primary tourism attractions are composed mainly of environment-based natural attractions, facilities, amenities, services and supporting infrastructure. If the primary attractions become severely impaired by environmental damage, overuse or neglect – the *raison d'être* for tourism disappears.

The successful and sustained development of the tourism industry, and consequently the social and economic development of Dominica, is therefore critically dependent upon the care and conservation of the natural environment. This will be achieved by Government and the private sector working together towards the promotion of balanced and environmentally sustainable tourism practices. In turn, the revenues from sustainable tourism will help pay for conservation and improvement of the natural environment, including the island's nature trails, national parks and reserves, etc., which might otherwise suffer deterioration through lack of resources.

The main objective of Government policy is therefore to promote sustainable tourism development through the protection, conservation and development of the natural environment within its carrying capacity. This will be achieved through:

- Implementation of land use policies that protect Dominica's environment, important vistas, scenic corridors and the authentic feel of the destination;
- Development and implementation of mechanisms to determine the carrying capacity and economic valuation of the natural resource base, sites and supporting infrastructure;
- Formulation of appropriate legislation, regulatory framework and incentives to support an optimal level of development;
- Collaboration between the PPD and other relevant agencies to promote the designation of specific areas, including conservation areas, for the development of tourism;
- Development of scenic vista protection policies for coastline routes;
- Enforcement of relevant legislation and regulations that are already on the statute books regarding environmental issues such as coastal erosion, pollution of rivers and beaches, agricultural practices, mining, waste disposal, sewage, habitat depletion;
- Establishment of an Environmental Protection Agency, incorporating the existing Environmental Coordinating Unit, with powers of enforcement of environmental legislation and regulations;
- Coordination of the maintenance, development and management of the national parks, nature sites and trails by a new National Parks Service; and
- Encouragement of wider participation in Green Globe, EarthCheck and similar certification programmes;

4.2 BUILT ENVIRONMENT

The built environment refers to the man-made structures that provide the setting for human activity, ranging in scale from buildings and roads to archaeological sites and historic monuments, etc. Some elements of the built environment are already a significant component of the tourism product offering to both tourists and cruise ship passengers (e.g. Kalinago Barana Autê, Fort Shirley, the Roseau Historic District and Bay Front).

To encourage the management and development of the built environment whilst ensuring its preservation and enhancement, Government will take or encourage the following measures:

- Development of appropriate direct and indirect incentives to facilitate the preservation of the architectural heritage, including listed buildings;
- Encouragement of the use of indigenous materials and products in new and renovated buildings;
- Preparation of an updated inventory of the island's historic buildings, sites, conservation areas and archaeologically significant areas;
- Strengthening of physical planning legislation to incorporate conservation areas; and
- Significantly increased penalties for the demolition of buildings and other structures of architectural or historical significance.

4.3 PHYSICAL PLANNING FRAMEWORK

The physical planning framework will be based on the designation of seven Tourism Development Areas (TDAs) and a number of Tourism Centres within each TDA. This will provide for a concentration of visitor facilities and services that will be anchored and linked by products such as general touring and the Waitukubuli National Trail.

Within this broad framework, Dominica will concentrate development on existing and new tourism activities in:

- (i) the greater Roseau area, including the Roseau Valley the Roseau Historic District, the West Coast north of Roseau (centred on Mero Beach and the Layou River Valley) ; and the 'Champagne Coast' (extending from south of Roseau to Scott's Head); and
- (ii) the greater Portsmouth area, with its excellent tourism potential (beaches, resort accommodation, yachting, the Cabrits national park, etc. and easy access to the N and NE coasts.). Portsmouth itself will take on a new role as a tourist centre and service provider.

Development will also be encouraged in the other TDAs, including the East Coast and Heart of Dominica TDAs, but on a smaller scale. The proposed BioPark (see below) will be located at Pond Cassé within the Heart of Dominica TDA.



5. AIR AND SEA ACCESS POLICY

5.1 ACCESS ISSUES

Access issues, particularly air access, is one of most pressing constraints to tourism sector growth, and a source of concern for both local and external investors. Dominica must rationalize its current air access situation and maximize potential from existing facilities. In addition to air and road service, quality sea access and sea services are also important infrastructure considerations for the tourism sector.

5.2 POLICY OBJECTIVES

The overall policy objective is to secure regular, sustainable access that will minimize the portal to portal time for travellers while ensuring a satisfactory level of service at an affordable cost. This objective implies that service by providers must be viable to ensure sustainable access.

Government will continue to ensure adequate infrastructure for air and sea transportation, including passenger facilities priced to allow for safe, secure, effective operations and maintenance, on the one hand, and sustainable service by users on the other.

While recognizing the necessity of having an international airport capable of handling larger aircraft, Government will take due cognizance of the cost of construction and the burden it would place on future generations. Also to be considered is the annual cost of operating an international airport inclusive of maintenance and regular upgrades.

In the more immediate time frame, Government will continue to place great emphasis on improving the existing infrastructure at Melville Hall Airport to facilitate an increase in the number of flights serving Dominica. Alongside Melville Hall, Government will also upgrade the infrastructure at Canefield given that the latter has the potential to effectively serve a catchment area distinct from that of Melville Hall (i.e. mainly those parts of Dominica that are closer to Canefield than to Melville Hall, including Roseau).

As it pursues these developments/upgrades at both Melville Hall and Canefield, Government will aggressively market the facilities to attract airlines, thereby improving the ROI as well as the long term viability of the airports.

As a shareholder of LIAT (which carried some 69% of passenger arrivals by air in 2010, including a high percent of tourist arrivals), Government has representation on the airline's Board of Directors which will allow it to influence decisions that will support the efficient operations of the airline and consequently help to secure adequate airlift to Dominica (as exemplified in the new LIAT service from San Juan to Dominica).

Government will continue to pursue strategies to provide effective access for persons outside the region travelling to/from Dominica. In this regard, it will support the provisions of the OECS Common Tourism Policy (July 2011), particularly with regard to the liberalization of air transport within, and to/from, the region.

5.3 AIR ACCESS

Government will approve and support the implementation the recommended Access and Marketing Strategy 2012-2015* particularly in respect of:

- recognition of, and working more closely with, nearer regional hubs and 2nd and 3rd tier regional carriers;
- provision of easy and convenient in-transit facilities at these regional hubs;
- selection and implementation of cost-effective distribution systems appropriate to small islands and small airlines that will provide potential visitors with easy booking access to Dominica;
- promotion of more efficient connections to international flight banks at the main regional hubs serving Dominica; and
- working closely with the managements of nearer regional hubs and their related tourism authorities in joint marketing and passenger facilitation programmes to increase international service to the hubs.

5.4 SEA ACCESS

Government will:

- work to maintain regular and sustainable sea access to/from Dominica and in particular the French West Indies, on a regular basis at affordable rates;
- continue to liaise closely with the existing ferry operator, while at the same time encouraging new ferry operations on selected routes;
- conduct joint marketing programmes with the ferry operators to promote multi-destination tourism;
- work with the cruise lines to ensure that a fair share of visitor expenditure accrues to its land-based operators; and
- encourage year-round cruise ship and yachting visitors.

Policy with regard to air and sea transport infrastructure is set out in Chapter 9 below.

* Dominica Access and Marketing Strategy, 2012 – 2015, El Perial Management Services

6. DESTINATION MARKETING POLICY

6.1 GROWTH TARGETS

In 2012, Dominica received a total of some 79,000 stay-over tourists. There is a spread of source markets. US and Canadian stay-over arrivals number about 22,000. This figure includes Ross University students who account for some 5,000 visits annually. European tourist arrivals are estimated to be 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.

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

Table 6.1: Visitor Numbers and Receipts, 2012- 2022

Visitor Category	Numbers			Receipts (EC\$000s)		
	2012	2017	2022	2012	2017	2022
Stay-over Arrivals	79,000	100,000	132,000	187,700	256,000	346,000
Yacht visitors	11,800	13,000	16,000	2,350	3,000	4,000
Cruise visitors	266,200	350,000	450,000	23,750	40,000	67,500
Excursionists	1,500	2,750	5,000	400	1,000	2,500
TOTAL VISITORS	358,500	465,750	602,000	214,500	300,000	420,000

6.2 MARKETING FOCUS

While Dominica's long term vision should be to become a 'top-end' destination on a par with the likes of St. Barths, Mustique, Canouan, and parts of Barbados, in the short/medium term the focus will be on achieving a 'higher' (rather than 'top' end) product concept, offering

"An exclusive private hideaway – a place where time stands still. Luxury accommodation would be provided in villas, and a range of 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, whale watching, yachting, golf with the emphasis on 'refined' relaxation. Roseau, particularly the historic 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.

The main competitors will be destinations such as Guadeloupe/Martinique, St. Lucia, Nevis, Grenada, and Saba.

6.3 RE-POSITION DOMINICA

The "nature island" destination positioning is limited. It is necessary to introduce more activities catering to the growing 'experiential' market and to highlight the culture of Dominica as a welcoming, hospitable and diverse Caribbean culture that will enhance the customer experience. Dominica will therefore re-position its tourism sector to expand market positioning from that of a nature destination to one that encompasses culture and heritage, beach resorts, yachting, golf, health and wellness and a range of interesting things to do and see.

6.4 STRATEGIC APPROACH

With support where possible or appropriate from the private sector, the Government (acting through DDA) will have the main responsibility for implementation of Dominica's overall destination marketing strategy which will be based on the following fundamental approaches:

- (i) targeted promotions within designated markets;
- (ii) minimization of overheads and other administrative costs;
- (iii) reinforcement of Dominica's 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 through its distinct cultural heritage;
- (iv) main focus of destination marketing around the island's market-ready products (accommodation, tours, attractions) combined with government-sponsored programmes to assist businesses to become market-ready as quickly as possible to ensure their participation in destination marketing;
- (v) allocation of increased resources for destination marketing, including e-marketing, data base/market research and an enhanced tourism information management system;
- (vi) leveraging the DDA's promotional budget by engaging in joint advertising campaigns with market intermediaries (traditional and on-line tour operators, airlines, DHTA, etc.);
- (vii) capitalizing on the market knowledge and marketing skills within Dominica's tourism sector (e.g. the ground tour operator sector) to spearhead the development of non-traditional and niche markets;
- (viii) Promoting a high standard of air and sea connectivity (essential for an off-line destination); and
- (ix) Active participation in, and maximizing benefits from, regional tourism marketing activities (CTO, CHTA, OECS, etc.).

6.5 MARKETING RESOURCES

To achieve the targeted increase in tourist arrivals and receipts, increased resources will be directed to destination marketing. Based on the norm for Caribbean destinations of a marketing budget representing between 2% and 3% of total visitor spending, the DDA's marketing budget will be increased to between EC\$8.5million and EC\$12.5 million in terms of constant 2012 money values by 2022.

7. PRODUCT DEVELOPMENT POLICY

7.1 TOURISM PRODUCT

Dominica's tourism product is composed of environment-based natural attractions, facilities, amenities, services and supporting economic infrastructure. The primary tourism attractions are mostly nature-based, but there other products that can be developed, as shown below:

Primary Products: nature; hiking, diving, whale watching; heritage/culture (including the Kalinago Experience); health and wellness; festivals and events; and yachting.

Secondary Products: Sporting Events, Soft Adventure/Extreme Sports; Sea and Lake Fishing; Bird Watching; Education Tourism; Meetings & Conferences.

Product Opportunities: Beach/Eco Lodges; Residence Tourism; Golf; and General Touring.

7.2 IMPROVE, EXPAND AND DIVERSIFY THE PRODUCT

7.2.1 Main Focus

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, experiential tourists), and the second generation VFR market (which is more international in outlook, but still Dominican).

DDA will focus investment on a product mix that generates Caribbean experiences unique to Dominica. It will

- Build on the success of the dive, whale watching, adventure and nature niche markets and fostering their expansion;
- Enhance the development of adventure tourism products throughout Dominica;
- Enhance cultural tourism including festivals, villages feasts, and local cuisine experiences;
- Develop the health and wellness tourism potential, including spa and wellness facilities;
- Develop the yachting product, both at Portsmouth and the south of Roseau areas;
- Pursue the potential for golf/real estate development in the Portsmouth area;
- Strengthen and develop the product as regards sports tourism, education tourism, sea and lake fishing, meetings and conferences, and residence ; and
- , in order to be competitive in the marketplace, that the products offered on the international market meet the requirements for doing business with the international travel trade and international customers, and
- Develop a vibrant community tourism and cruise tourism product (details are given in Chapters 10 and 11 below).

7.2.2 Priority Projects and Product Opportunities

(i) Nature-based Attractions

Government will:

- work in partnership with parks management to manage and plan for the sustainable use of the national parks, nature sites and the other protected areas in a way that maintains the integrity of the resource while offering quality experiences to cruise, day trip and stay-over visitors;
- take measures to address the need for improved access and increased carrying capacity at both Trafalgar Falls and Emerald Pool (which, in addition to Trafalgar Falls, will also be declared a “premium site” reserved for cruise visitors on pre-booked tours sold aboard ship);
- pursue energetically the development of a *BioPark* in the Pont Cassé area; and
- contribute sufficient resources for the efficient and successful operation of the Waitukubuli National Trail, including support for raising standards in the guest houses and home stays at the end of each WNT segment.

(ii) Heritage and Culture

Dominica has much to offer in area of heritage and cultural tourism. As a priority, Government will:

- foster the re-development of Roseau, particularly the Old French Quarter and the Old Public Market as a significant tourism experience
- Implement recent recommendations for the enhancement and financing of the Kalinago Barana Autê on a sustainable basis;
- seek funding for the development of a new Arts, Crafts and Heritage Complex on the grounds of the Geneva Estate at Grand Bay; and
- Support proposals for enhancing the urban environment in Portsmouth, including Borough Square.

(iii) Health and Wellness

Acting through IDA, Government will encourage investment in one or more ‘flagship’ resort spas to act as a catalyst for the further development of this sector and provide linkages with local hot springs operators, herbalists and alternative medicine practitioners.

(iv) Beach Resorts and Eco-lodges

Government will, encourage the development of a mix of accommodation types centred on the islands outstanding and unspoiled beaches, especially around the north-western and north-eastern coasts, that will appeal to a variety of market segments. However, the main emphasis will be on a range of up-market boutique hotels or eco-lodges that can command high prices.

(v) Residence Tourism

Government will adopt a Residence Tourism strategy that will also include Fractional Ownership, or partial ownership of a vacation property. The tax and other incentives set out in the *Residence Tourism Policy* for persons qualifying under this programme will be kept under review by IDA on a regular basis to ensure that they remain competitive vis-à-vis those in other Caribbean countries, such as Barbados and St. Lucia.

(vii) General Touring

In order to broaden and deepen the visitor experience and to disperse visitor spending more widely across the country, Government will support the development of a general touring product (using taxis or rented vehicles) across the island, taking advantage of the improved road network. Primary routes will include the 'Ring of Dominica' scenic route circumnavigating the island; the Wild Coast Route from Grand Bay (via Rosalie) to the Carib Territory; and the Roseau to Melville Hall Parkway.

(vii) Golf

The development of a 18-hole golf course will be encouraged, not as a standalone magnet or attractor, but as a facility to be enjoyed, and an integral part, of resort and residential tourism. An Environmental Impact Assessment will be mandatory to address environmental issues.

7.3 PRODUCT/MARKET MATCHING

Government (through DDA and the Ministry of Tourism) will:

- carry out an on-going assessment of what the market wants, linked to Dominica's ability to supply the required tourism products;
- design and implement a programme to help upgrade existing accommodation and other products to attain market-ready status; and.
- allocate adequate resources to strengthen and upgrade the work of the Quality Assurance Unit regarding certification; compliance and quality assurance support mechanisms to assist operators to improve their competitiveness.

8. BUSINESS ENVIRONMENT POLICY

Government will ensure that the climate for doing tourism-related business in Dominica is competitive with that in competing destinations.

In particular, it will:

- re-design the current incentives packages to make them more effective compared those offered by competing destinations in the Caribbean;
- move to a low corporate tax regime and a simplified, less complicated incentives regime in the long run;
- enact a new Tourism Development Bill that will make for a comprehensive and investment-conducive set of arrangements for facilitating development in the tourism sector;
- provide support for a pro-active, well-targeted investment campaign by Invest Dominica Authority;
- offer tax concessions for staff training;
- provide competitive incentives to encourage residence tourism, including fractional ownership in resort properties.

9. ECONOMIC INFRASTRUCTURE POLICY

The state of Dominica's infrastructure – particularly air and sea access and the road system – is a key determinant of the potential for growth in the tourism sector. In this regard, there have been significant improvements in recent years, with further investment underway. Government will place priority on continually improving air and sea access and on transforming the country's road systems into touring opportunities to strengthen Dominica's tourism product.

Government will continue to ensure that the capacity of the infrastructure, including air and seaport facilities, roads, water supply, energy supply, waste management and telecommunications, keeps pace with the needs of the expanding tourism sector

9.1 AIR TRANSPORTATION

Government will provide adequate infrastructure for air transportation, including passenger facilities priced to allow for safe, secure, effective operations and maintenance, on the one hand, and sustainable service by users on the other.

Government will continue to place great emphasis on improving the existing infrastructure at Melville Hall Airport to facilitate an increase in the number of flights serving Dominica, and also at Canefield (which has the potential to effectively serve a distinct catchment area comprising Roseau and other adjacent areas).

9.2 SEA TRANSPORTATION

Dominica will seek to capitalize on the tourism potential of its strategic location vis-à-vis Guadeloupe and Martinique by upgrading sea access facilities, including the creation of a more welcoming arrival facility at the Roseau ferry terminal that meets international market expectations, particularly at peak travel periods (e.g. during Carnival). This will require improvements in Customs & Immigration facilities and service, and allocation of adequate human resources.

In the Portsmouth area, Government will work with the private sector to develop enhanced sea infrastructure facilities to support existing sea tourism activities and the further development of the yachting sector.

9.3 CRUISE PORT FACILITIES

Government will:

- 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;
- enhance/upgrade the attractiveness of the under-utilized Cabrits docking facility, particularly for smaller 'boutique' cruise vessels and ferry operations; and
- 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. DDA/DASPA will prepare terms of reference and secure funding for the necessary site suitability, and economic and financial feasibility studies, including how the project might impact on operations at Canefield airport.

9.4 ROADS

The main objective of the **National Roads Policy** is to provide an accessible road network (viz. to get and maintain the road network in good condition) so as to ensure the safety, efficiency and comfort of road travel; contribute towards economic growth; and reduce vehicle wear and tear.

While good progress has been, and is continuing to be, made in respect of main roads (including the major works on the West Coast Road and on the Pond Cassé to Melville Hall Parkway) there is some catching up to be done in respect of the secondary and feeder roads, and traffic and parking in Roseau (are major issues when cruise ships are in port). In addition, the road system is not well signed, particularly where there are one-way systems, and there is very limited and inconsistent signage for tourist attractions.

For tourism needs, the priority road improvement projects are:

- rehabilitation and upgrading of the scenic Wild Coast route from Grand Bay via Petite Savanne and Delices to La Plaine and Rosalie;
- repair of pavements, gutters and road surface on Victoria Street, Roseau (which, for such an important tourist area, need and will receive urgent attention;
- provision of comprehensive directional and themed signage, particularly in Roseau; and
- development of lay-bys at selected viewing points on the main touring circuits.

9.5 UTILITIES

(i) Energy: Government's objectives for the energy sector are:

- to keep the cost of energy down to a minimum;
- to encourage energy conservation and to diversify energy sources; and
- to reduce the reliance on fossil fuels by facilitating the use of alternative energy through import duty exemptions on equipment for the use in solar and wind energy generation.

The use of geothermal energy from the proven resource in the Roseau Valley will be used exclusively to augment the domestic supply, leading to a possible reduction, or at least no further increases, in average electricity costs.

Implementation of these measures will provide significant benefits for tourism, as well as other sectors.

(ii) Water Supply: Government strategy for water supply is to continue to work with, and through, DOWASCO to ensure future provision of sustainable water supply services to residents and business establishments as well as supporting the renewed thrust towards tourism development. This will include the development, in collaboration with other agencies, of an Integrated Water Resources Management Plan for the management of the country's water resources.

Water tariffs in Dominica will continue to be among the lowest in the Caribbean.

(iii) Sanitation: In addition to the existing Roseau water and sanitation system, including wastewater treatment and disposal (serving about 60% of the total urban area), Government will ensure that adequate sewage collection and treatment systems are extended to other parts of the island, including sewage treatment plants to eliminate the dumping of raw sewage into the sea. As a first step, Government will provide funding for the implementation of a sewage and water filtration system for Portsmouth.

(iv) Solid Waste: 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. This is in addition to the existing Fond Cole Sanitary Landfill (which has been designed to accept waste until around 2020 when alternative arrangements will need to be in place).. In addition, measures will continue to be taken, both by Government and DSWMC, to raise and maintain standards on environmental awareness, including street litter and recycling.

(v) Telecommunications: The quality of both the telephone and internet services is rated highly by members of the business community. Government will continue to work with the regional and national telecommunications regulators towards continued improvement in the quality of service and further cost reductions, including improving the availability of wireless access across the island.

10. CRUISE TOURISM POLICY

10.1 CRUISE INDUSTRY TRENDS

Over the past decade, the cruise industry has consistently outperformed the national economy and the travel and tourism sector in particular, with CLIA member ships sailing at 100+ percent occupancies throughout the recession period. With the expansion of the cruise fleet, passenger numbers are expected to continue to grow, driven in part by increased supply as more ships enter the market each year and more berths need to be filled, and the continuing trend towards ever larger 'mega-ships' with 4,000+ passengers.

Demand for Caribbean cruises is expected by FCCA (as stated in *Cruise Industry Overview 2012*) to remain buoyant over the next few years. For Dominica, this is reflected in a healthier booking schedule for the 2013/14 season, with Carnival planning to make a crucial return visit in December 2013. While in general highly positive, the 2010/11 FCCA/BREA survey shows less-than-high satisfaction levels amongst cruise passengers with their onshore experiences in Dominica. This relates particularly to the overall shopping position (including variety of shops and prices) for which Dominica was placed last in comparison with eight other eastern Caribbean destinations, as it was for the 'friendliness of its people' (which undoubtedly reflects the growing instances of harassment on the Bay Front by vagrants and other such persons).

10.2 ENHANCEMENT OF CRUISE TERMINAL AND PASSENGER FACILITIES

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. Alternatively, these facilities might in the longer term be located at Donkey Beach (see Chapter 9).

10.3 FURTHER DEVELOP CRUISE TOURISM

As well as provision of enhanced port facilities, Government will adopt the following policies for further developing cruise tourism:

- (i) Maximize the benefits of cruise tourism for the Government and people of Dominica;
- (ii) Enhance the quality of the experience at nature sites for cruise (as well as other) visitors, without compromising the integrity of the resource e.g. through implementation of existing proposals for increasing carrying capacity and other measures at Trafalgar Falls and Emerald Pool;
- (iii) Review the management of the cruise passenger experience on land in Dominica to determine where it can be improved while encouraging increased on-shore spending (e.g. through sale/provision of authentic local products and services);
- (iv) Address some of the stated less-than-high satisfaction levels amongst cruise passengers with their onshore experiences in Dominica by eliminating as a matter of priority the harassment of visitors by vagrants and other persistent offenders;
- (v) Ensure that Dominica remains a competitive cruise destination;

- (vi) Foster a cruise market that is matched as closely as possible to Dominica's product strengths, and a market that is encouraged to visit Dominica in the future as stay-over customers;
- (vii) Implement the proposal for development of a BioPark (see Chapter 7 above) that will offer visitors, especially cruise visitors who will constitute its principal target market, an interactive experience with nature; and
- (viii) Canvas support from cruise lines for contributions towards the cost of new port facilities.



11. COMMUNITY TOURISM POLICY

11.1 POLICY GUIDELINES

The promotion of community tourism is a high priority for Government because of its potential as both a significant tourism product in itself and as a means of community empowerment. Community tourism fosters benefits for communities when implemented in a sensitive and inclusive manner. It is also consistent with the vision and aspirations of Dominican citizens for their tourism sector.

The community tourism policy incorporates the views and discussions with representatives of the Dominica Community Tourism Association and consists of the following measures to be undertaken or supported by Government:

- 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.

11.2 STRENGTHENING LINKAGES AND COMMUNITIES

Two approaches will be adopted to maximize the benefits of community tourism development. One approach will be to continue to support particular community initiatives (as pursued under the EU-funded ETDP and SFA programmes); the other will be to encourage both new and existing hotels and other tourism developments to support (as some are already doing) various community projects such as 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.

Government will encourage the location of commercial enterprises (e.g. hotel development) close to a community which can benefit from supplying goods and services to the operation as well as the direct and indirect employment generated. New developments will also be encouraged to connect with any community tourism products that may exist in the area. It will also ensure that relevant training and on-going professional development is available at all levels within communities where tourism developments are being planned, or are already taking place.

To guide any future support for community tourism projects, DDA will establish benchmarks in respect to the optimum modalities for achieving a better integration between tourism and the communities through the conduct of special surveys of (i) community linkages amongst existing hotels, restaurants and other tourism operations; and (ii) of community representatives (to determine the extent to which they consider that they benefit from tourism).

11.3 WAITUKUBULI NATIONAL TRAIL

The Waitukubuli National Trail ranks amongst the premier walking trails of the world, and is attracting a growing number of users. The provision of accommodation and other services along, or adjacent to, the Trail will give the rural communities a vested interest in its success. The majority of the accommodation providers are classified as home stays, and the remainder as guest houses.

Government will support the following measures to ensure that communities can reap the maximum benefits from the Trail:

- Provision of assistance to accommodation providers to attain the quality standards that have been approved for home stay accommodation, guest houses and other types of visitor accommodation so as to meet the need for good quality accommodation and food at the end of each trail segment;
- Provision of soft loans (or grants) through a special Tourism Development Fund to help accommodation providers to upgrade their accommodation;
- Streamlining of marketing and reservation arrangements through a central bookings facility in addition to systems maintained by individual tour operators; and
- Engagement of local 'neighbourhood watch' monitors to help to 'nip firmly in the bud' any evidence or tendency towards harassment of users of the Trail.

Trail users shall be encouraged, through all marketing channels, to utilize certified guides, products and service providers. A system will be put in place to monitor trail users, guide their experiences, encourage them to exercise normal caution and vigilance and to use community services where possible and relevant.

LOCATION OF LOCAL MUNICIPALITIES/VILLAGE COUNCILS AND COMMUNITY TOURISM PROJECTS



12. HUMAN RESOURCE DEVELOPMENT POLICY

12.1 UPGRADING SERVICE SKILLS AND STANDARDS

12.1.1 Training Needs

The coming on-stream of the planned hotel and other investments will create up to 1,300 new job opportunities in the tourism sector over the next ten years. It will be necessary 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 may lack adequate skills to perform their jobs in a satisfactory manner.

The policy objective is to establish a system for formal, certified training in all skill areas that will be required by the expanding tourism sector, including

- vocational craft skill (table waiting, bar service, cooking, food preparations and presentation, housekeeping);
- supervisory and middle management;
- senior management/entrepreneurial levels;
- 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, for all staff categories; and
- tuition in foreign languages (especially French, Spanish, German).

12.1.2 Quality Standards

All persons wishing to offer tourism services in the 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 - particularly hotel - staff have the required certification.

Government is targeting that all hotel staff will have the required certification within the next couple of years.

12.1.3 Training Delivery

Dominica will develop a comprehensive menu of training programmes, and the delivery of skills training for the tourism industry, consistent with the product development and destination management priorities of this National Tourism Policy. This forms part of the on-going effort to provide an internationally competitive tourism product.

The Dominica State College (DSC) will, as has been mandated, assume responsibility for the delivery of all tourism training through the Tourism and Hospitality Department, and through the Department for Continuing Education for short ad hoc courses such as training for tour guides. 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.

12.2 POLICY MEASURES

Government will:

- Make the necessary funds available for the provision of both formal (Associate Degree) and informal (ad hoc) hospitality training at the Dominica State College;
- Allocate the necessary funds (of which some EC\$1.6 million from EU funds has already been allocated) for the construction and equipping of suitable new accommodation to house the Tourism & Hospitality Department;
- Seek funding and technical assistance for specific HRD programmes from donors such as CIDA, OAS, etc. as well as programmes organized via regional agencies (CTO, CHTA, OECS);
- Liaise with the hospitality sector leaders to provide the practical skills that the sector is demanding;
- Establish a Tourism Human Resources Development Committee to oversee the delivery of tourism training and to act in an advisory capacity; and
- Support the general concept for the establishment of an OECS Centre for Excellence in Tourism Training in Antigua which will coordinate linkages to other islands (including Dominica) specializing in designated study areas.

13. SECTOR MANAGEMENT POLICY

13.1 POLICY MEASURES

Government will take, or support, the following measures to ensure better management of the tourism sector:

- Improved performance monitoring and control systems e.g. through construction and use of an easy-to-use statistical model which will have the capability of simulating different tourism growth scenarios as the sector develops, showing their implications for marketing, access transport, accommodation supply, labour supply, and economic infrastructure. The model will also assist in the regular updating of the TMP;
- Creation of a soft loan facility (or Tourism Development Fund) within one of Dominica's commercial banks or credit unions for disbursement at reduced borrowing rates for worthwhile projects in the tourism sector. The TDF will also be important for tourism operators who require re-financing of existing loans for upgrades/renovations, staff training, technology upgrades, and on-going development of resources, products and services;
- Provision of adequate human and financial resources for the PPD to substantially strengthen the development process in respect of the preparation of a National Land Use and Physical Master Plan (that will also examine the issue of 'carrying capacity' for identified tourism areas and sites); Action Plans for designated tourism development areas; and outline development guidelines for prospective investors;
- Ensure that all new developments conform to the image that Dominica wishes to project as, inter alia, *Nature Island of the Caribbean* by meeting both the PPD's own eco-tourism guidelines and the eco-tourism performance standards set by 'Green Globe' and other sustainable tourism certification programmes; and
- Support for a broad tourism and environmental awareness programme which, in addition to legislation and regulations, will generate an appreciation for, and positive interaction with, the environment and the role of tourism.

13.2 CRIME AND HARASSMENT

Any evidence of an increasing incidence of crime would have a serious negative effect on tourism sector growth potential and could jeopardize private sector investments in the sector. Government will develop and implement measures to address this issue, including both short-term actions and a longer-term sustainable approach to crime reduction.

In so doing, Government will:

- Foster a partnership of all stakeholders in the industry, as well as communities, the police and the judiciary, to develop effective initiatives for crime reduction;
- Work to enhance visitor security at key tourism attractions through partnership with the police force and programmes such as "local community watches"; and
- Develop (through DDA) a public relations programme for responses in key markets to crime incidents involving visitors to the island.

Particular attention will be paid to the issue of harassment of cruise and other visitors at the Bay Front (and other places frequented by tourists) by vagrants and similar persons. This has contributed to the rise in negative ratings of Dominica by cruise visitors and stay-over tourists in terms of how they enjoyed their visit, the perceived friendliness of the people and whether or not they would recommend Dominica to others.

As a matter of urgency, this growing threat to the viability of the tourism industry will be addressed through the following measures:

- tourist police presence on bay front on cruise days;
- rehabilitation programme for 'paros' and other vagrants;
- neighbourhood watch at isolated beaches;
- community monitoring of WNT hikers; and
- balanced reporting of crime incidents.

14. TOURISM POLICY IMPLEMENTATION

14.1 ROLE OF STAKEHOLDERS

Government recognizes the critical importance of putting in place mechanisms for the effective implementation of the National Tourism Policy and Plan. Effective implementation will require the productive engagement of a variety of stakeholders including the Ministry of Tourism, DDA, the tourism private sector, local government and communities, other ministries and agencies of government, non-governmental agencies and civil society, and the media. This also requires an organizational structure that builds appropriate coordination mechanisms across all sectors of government and society. It will be Government's responsibility to ensure that all stakeholders have a voice in the challenge involved in growing the tourism sector.

14.1.1 Role of the Public Sector

The public sector is responsible for ensuring that an enabling environment and conducive business climate exists to support private sector activity, investment and growth. Public sector agencies, such as DDA, also form part of the institutional framework within which the destination is managed. Together with Government Ministries, these agencies play the following critical roles:

- Acting as leaders with the private sector in developing the tourism industry;
- Providing a regulatory framework for the industry's expansion through the development of policy, legislation and standards;
- Facilitating improved air and sea access;
- Marketing the destination internationally;
- Facilitating investment in the tourism sector;
- Providing infrastructure for the development of the sector;
- Providing education, training and awareness for nationals of Dominica to ensure the highest standards of service;
- Providing information about, and awareness of, the destination for citizens to promote understanding of the industry and its development; and
- Protecting the destination's natural and social environment as the industry grows.

14.1.2 Role of the Private Sector

The private sector is the engine of growth of the tourism industry. As such, it is required to fulfil a number of inter-related roles, including:

- Leaders, with the public sector, in the growth and development of tourism;
- Committed investors in the tourism industry, including creating new and innovative products that keep the industry competitive;
- Generating sustainable employment opportunities;
- Generating tax and other revenues for Government;
- Partnering with the Government in the protection of the island's natural and social environment;
- Acting as responsible ambassadors of the destination both local and internationally

- Providing a check and balance for Government on tourism issues and regulator among its own membership; and
- Generator of employment and other benefits for communities.

Further details on the respective roles of these and other stakeholders in implementing tourism policy are given in the following table:

Table 14.1: Roles of Stakeholders in Implementing the National Tourism Policy

Stakeholder	Stakeholder
Ministry of Tourism/DDA	<ul style="list-style-type: none"> • Tourism policy and planning • Providing an appropriate enabling environment for tourism including legislation, regulations • Destination marketing • Tourism product standards • Coordination and integration with government processes including economic policy development and planning, capital budgeting, land use planning, resource protection, cultural protection • Liaise/consult and coordinate actions with the private sector in a timely manner
Tourism Private Sector	<ul style="list-style-type: none"> • Invest in the tourism sector. • Operate and manage plant efficiently and profitably • Advertise and promote • Upgrade skills of workforce • Continuously refurbish plant/equipment • Satisfy customer needs • Collaborate with the government in planning, promotion & marketing • Involve local communities • Operate according to appropriate standards
Local Government, Communities	<ul style="list-style-type: none"> • Organize to take advantage of tourism opportunities • Work with national government and the private sector to develop tourism products • Respond to tourism in a way that enhances quality of life within the community and ensures that there are direct benefits to the community • Develop roles in tourism activities that do not compromise the heritage and culture of the community • Adopt environmental management practices
Non-Tourism Government Agencies	<ul style="list-style-type: none"> • Incorporate and reflect the vision for tourism, tourism sector objectives and the national tourism policy in the plans and activities of agencies • Participate in coordinating activities with the Ministry of Tourism and the DDA • Ensure that the tourism interest is addressed in policy and planning.
NGOs/Civil Society	<ul style="list-style-type: none"> • Including special interest groups (e.g. heritage, environment), labour, women, youth • Mobilization • Awareness building • Asset identification • Information sharing • Facilitating partnerships
Media	<ul style="list-style-type: none"> • Awareness building • Fostering positive attitude towards tourism and positive image of destination • Professional approach to tourism sector issues, incidents • Information sharing

14.2 INSTITUTIONAL STRUCTURE TO IMPLEMENT THE TOURISM POLICY

In order to make the current institutional arrangements more appropriate for the future development of tourism in Dominica, Government will establish

- A Ministry of Tourism & International Transport with a strengthened Tourism Division;
- A National Parks Services Agency to be responsible for the maintenance, development and management of all publicly-owned protected areas;
- A focused mandate for the DDA that will focus on the functions of destination marketing; air and sea access; product promotions (including cruise); and market research and statistics;
- A new Environmental Protection Agency incorporating the existing Environmental Coordination Unit; and
- A National Heritage Trust to be responsible for the conservation and preservation of Dominica's patrimony.

14.3 ORGANIZING FOR POLICY IMPLEMENTATION

Government will earmark and allocate sufficient resources to ensure that the following four elements required to lead the implementation process are put in place as soon as possible:

Champion: To get 'buy-in' by all stakeholders, a senior figure in authority will be appointed to constantly articulate, elaborate and encourage implementation of both the Tourism Policy and Vision, and the TMP.

Task Force: A special purpose body, or Task Force, will be created in order to ensure that the implementation process is conducted in a coordinated and timely manner, and that key decisions actually are acted upon. This will be a high-level body comprising top-level representatives of the public and private sectors with the overall goal of monitoring, promoting and energising the implementation process. The Task Force will have the option of establishing sub-committees from time to time to provide input on specific tourism policy implementation areas.

Tourism Action Plan: A detailed Action Plan to implement the Policy and Plan will be developed by the Task Force which will also submit an annual progress report to Cabinet, which will also provide for the continued update of the Tourism Policy in the light of developments affecting the industry.

Project Management Unit: A Tourism Policy and TMP Project Management Unit (PMU) will be established to act as a secretariat to the Task Force in carrying out its mandate. Funding will be sourced to recruit a Technical Adviser for a period of three years to provide support and capacity building to the PMU.

14.4. NEXT STEPS

14.4.1 Communications Strategy

In order to 'inform, advocate and disseminate information on the Policy', the Draft was presented to key leaders, organizations and entities in the public and private sector for their consideration at a Tourism Summit held in Roseau in March 2013.

Wider dissemination and feedback will be achieved by placing the Policy on the Ministry's website; distribution of copies of the report for display to Village Councils, public libraries, schools and other entities; and discussion on radio and television 'call-in' programmes.. The PMU will be responsible for keeping a record of, and evaluating, all comments received both from this extended public consultation for the Policy's future updating.

14.4.2 Updating

The Task Force will submit an annual progress report to Cabinet which will also identify any revision or updating that needs to be made to the Policy and also provide the basis for the continued update of the Tourism Policy. A customized statistical model will also assist in the monitoring and regular updating of both the policy and the TMP.

14.4.3 Funding

The recommend funding sources to implement the Policy and Plan include

- Bilateral aid programmes – UK, Peoples Republic of China, France, Mexico, 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; and
- Public funds (Dominica).

Government itself will adopt a more pro-active approach to mobilizing resources for the recommended Policy and TMP initiatives, including the designation of an official within the Prime Minister's Office to actively seek out and mobilize resources from a wide range of donor agencies – national, multi-national, private sector foundations, etc.

ANNEX A: VISION FOR DOMINICA TOURISM IN 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 Cassé (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, gazebo, prohibition of vehicular through traffic and the re-location of the agricultural research station to Pond Cassé, 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 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.