



# COMMONWEALTH OF DOMINICA

## MINISTRY OF TOURISM AND LEGAL AFFAIRS

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### TOURISM MASTER PLAN 2012 - 2022

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- Final Report -

7th June, 2013

## **DOMINICA TOURISM MASTER PLAN 2012 – 2022**

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CHL Consulting Co. Ltd  
7<sup>th</sup> 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 overnighing 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 reconstruction, 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.

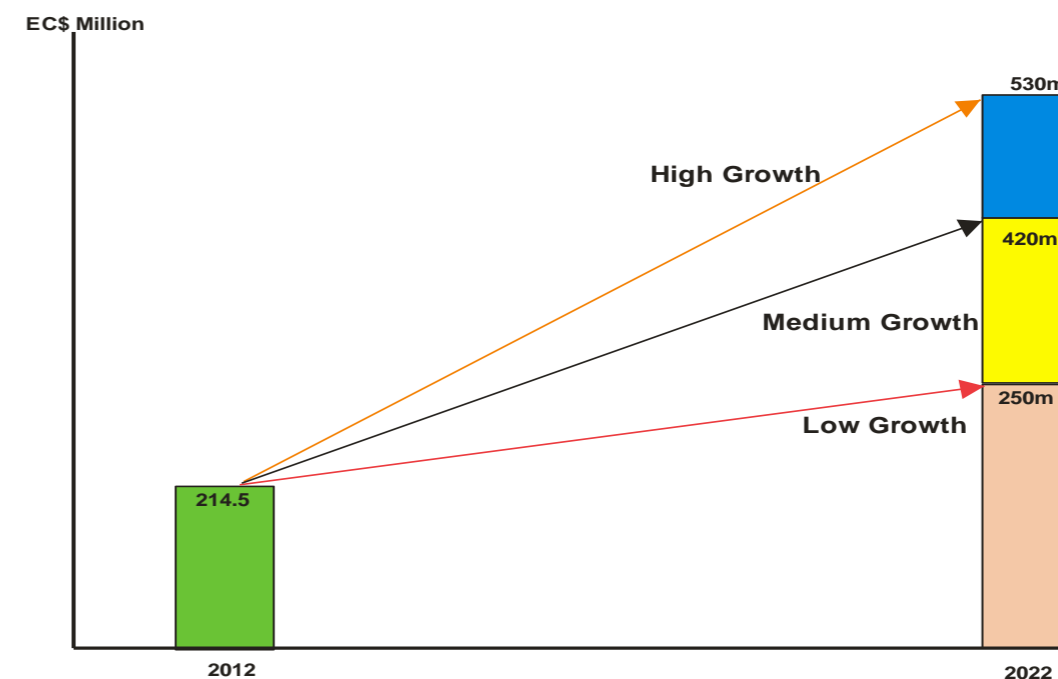
Under this scenario, tourism maintains its share of GDP at the present level implying total expenditure by all visitors (including the Ross University students) increasing from an estimated EC\$ 214.5 million in 2012 to just over EC\$ 250 million in 2022 in terms of constant 2012 money values. This represents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