PART III PRODUCT AUDIT AND TOURISM SECTOR REVIEW

8. SUSTAINABLE TOURISM DEVELOPMENT

8.1 DEFINING SUSTAINABLE TOURISM DEVELOPMENT

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

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

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

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

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

Figure 8.1: Relationship of the Three Pillars of Sustainability

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

8.2 DOMINICA'S TOURISM PRODUCT

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

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

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

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

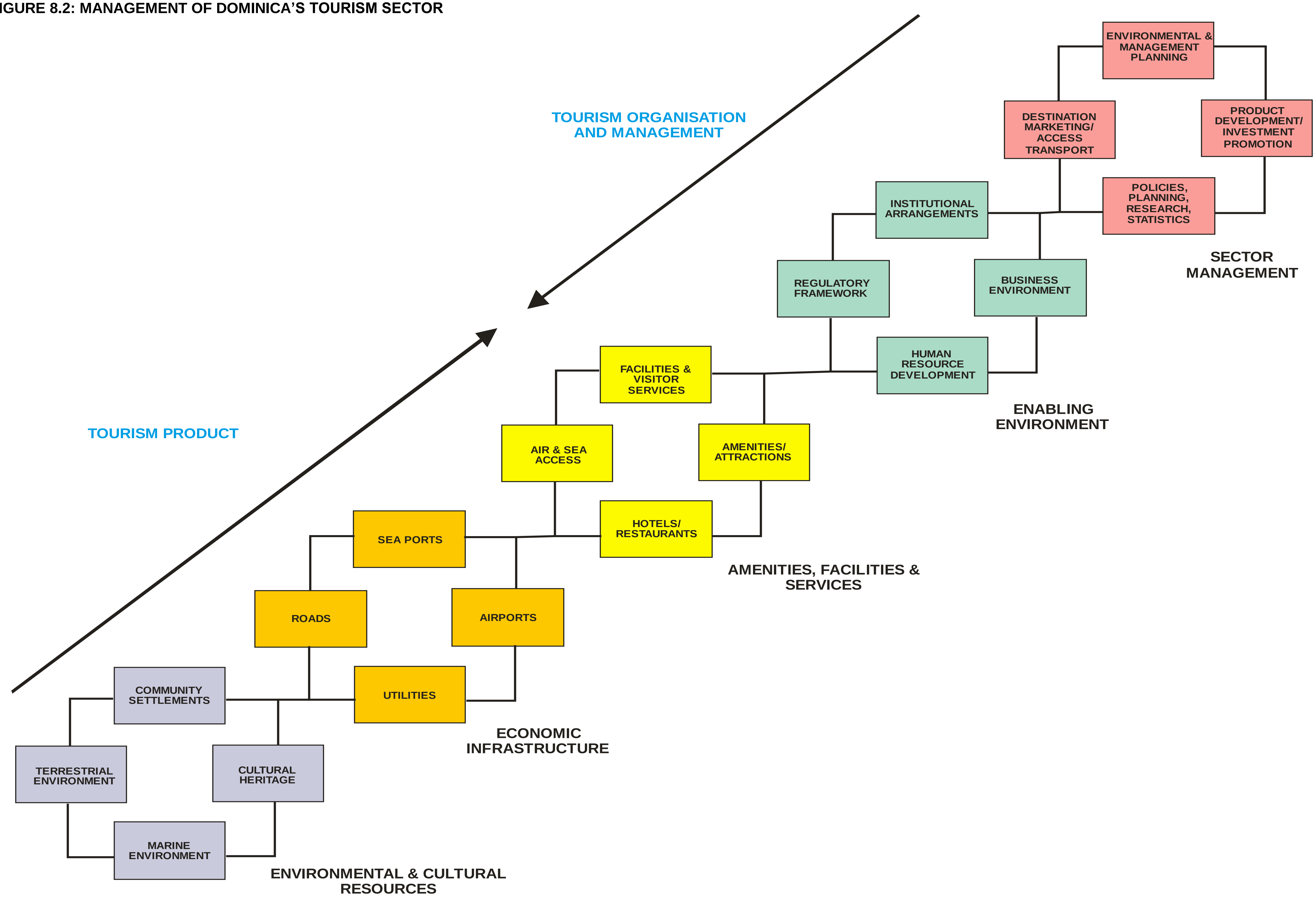
(ii) Conversely, the primary attractions can effectively attract tourism only if the necessary economic infrastructure is in place and there are adequate supporting facilities and services available.

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

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

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

FIGURE 8.2: MANAGEMENT OF DOMINICA'S TOURISM SECTOR



8.3 COMPETITIVENESS KEY TO SUSTAINABILITY

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

Measures of Competitiveness

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

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

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

Table 8.1: WTTC International Tourism Competitiveness Monitor: Component Indices

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

[*] WTTC Travel & Tourism Competitiveness Index, 2009

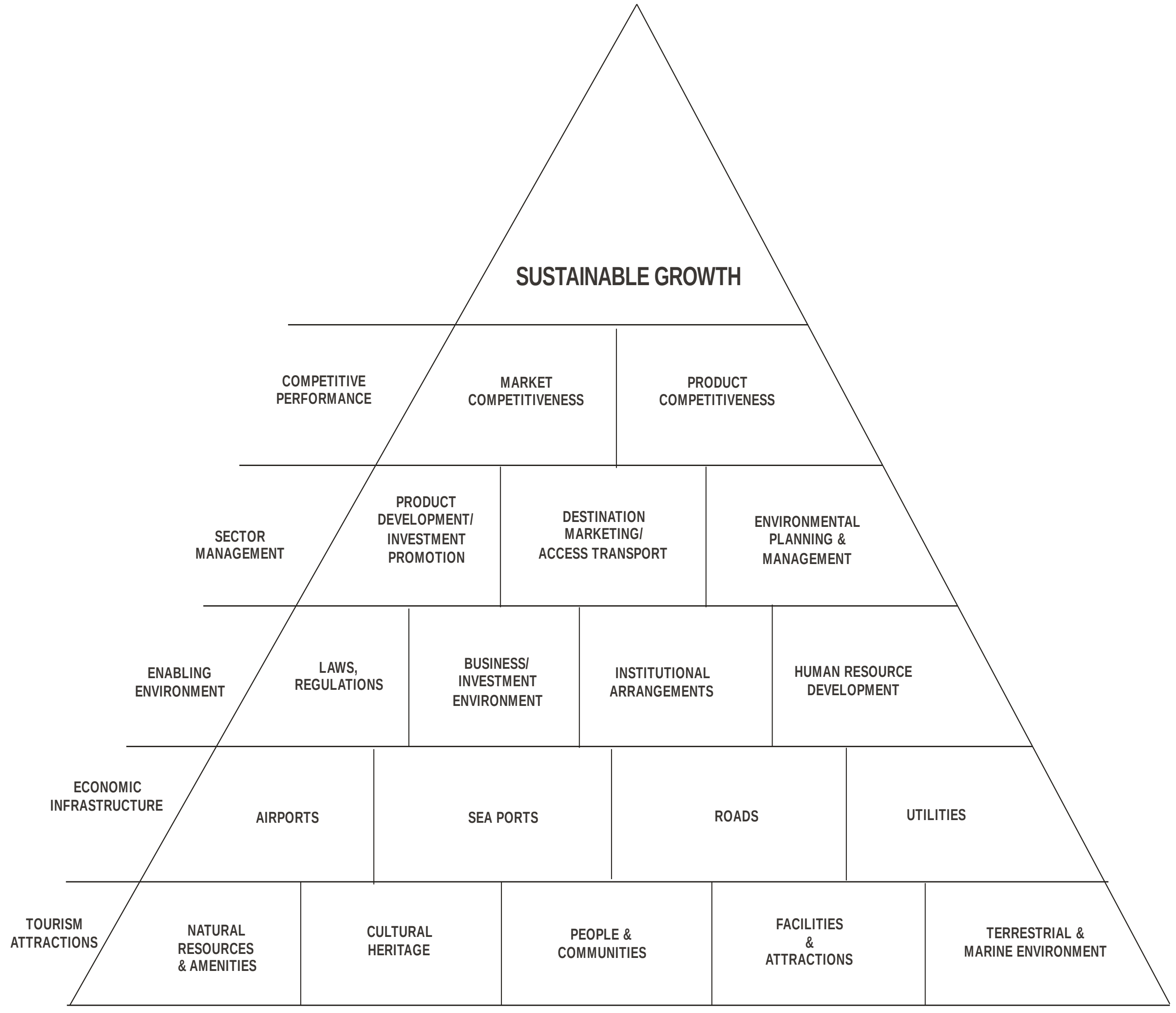
A Competitive Model for Dominica Tourism

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

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

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

Figure 8.3: Tourism Competitiveness Pyramid



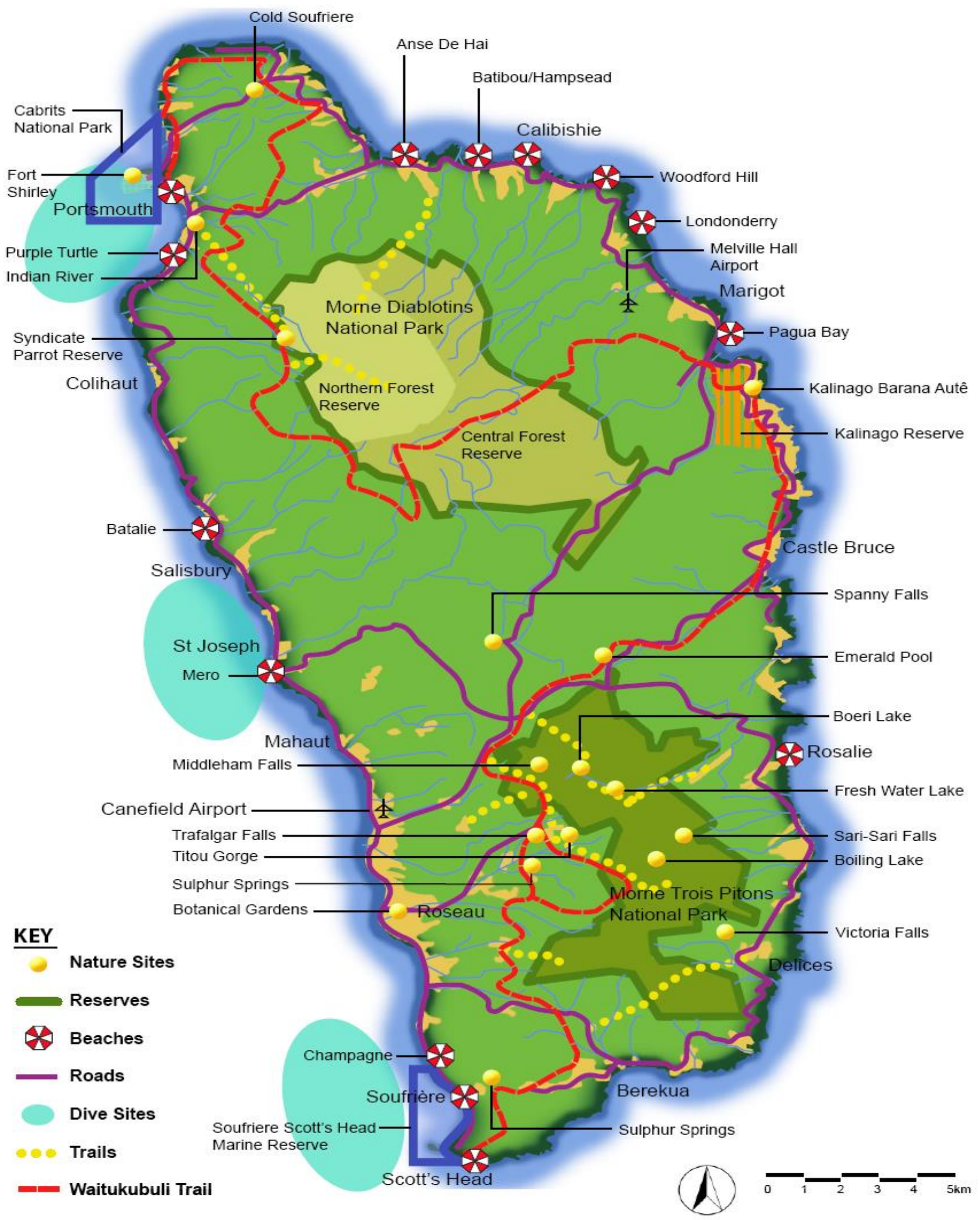
9. ENVIRONMENT AND CULTURAL HERITAGE

9.1 Natural Environment

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

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

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



9.1.1 National Parks and Reserves

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

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

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

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

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

9.1.2 Nature Sites

Dominica has some 18 nature sites, the more popular being Trafalgar Falls and Emerald Pool, as shown on Table 9.1. Together, Trafalgar Falls (87,730 visitors) and Emerald Pool (55,975 visitors) accounted for approximately 70 percent of the total number of visitors in 2011, with the highest levels of visitation occurring in the period December to April. In total, some 206,000 visitors were recorded at the main nature sites during 2011, the great majority of whom were foreign.

Table 9.1: Visitors to Nature Sites, 2011

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

Source: *Forestry Division*

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

Currently, key issues include the continuing need for maintenance of pathways and steps, interpretation material which is old or not done to international standards, lack of other things to do, and, at the least-visited sites, inadequate visitor facilities (e.g. snackettes) which remain closed except by special advance arrangements for groups, and inadequate car parking facilities.

Capacity issues only arise on cruise ship days when numbers visiting Trafalgar Falls and Emerald Pool can be of the order of 1,700 and 1,500 visitors, respectively. To address this issue, Government has declared Trafalgar Falls to be a "premium site" which (on cruise ship days) is reserved until 12.00am for those passengers on pre-booked tours sold aboard ship. After midday the sites are open to all. After some initial dissatisfaction, this new arrangement appears to have been accepted by most tour and taxi operators.

9.1.3. Waitukubuli National Trail

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

9.1.4 Beaches

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

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

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

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

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

9.2 URBAN AND BUILT ENVIRONMENT

9.2.1 Roseau City – Historic Quarter and Old Market

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

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

9.2.2 Roseau River

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

9.2.3 Bay/Waterfront

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

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

9.2.4 Portsmouth

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

9.3 HERITAGE ASSETS

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

9.3.1 Anthropological and Archaeological Sites

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

9.3.2 Indigenous Heritage

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

(i) Kalinago Barana Autê

The Carib cultural village (Kalinago Barana Autê) was opened in 2006. It offers visitors cultural group performances, demonstration of Kalinago crafts, the local architecture, an interpretation centre along with local catering for individuals and groups. This is a multi-faceted project offering natural attractions, including well designed trails, views of the Atlantic coastline and a waterfall. However, from its inception the KBA has been operating at a loss, with visitor numbers 6,277 visitor per annum – 1,287 national and 4,990 non-nationals – representing less than one-sixth of the 37,500 visitors originally projected to visit the village. Recommended financial input and staffing have not been realised. A recent report[*] identified problems with management, product development, maintenance and marketing, and recommended, inter alia, that marketing activities should not be given priority over product development and enhancement since this could create a negative effect on visitation. The report's findings and recommendations were discussed at a meeting held at the KBA in October 2012.

(ii) Touna Kalinago Heritage Village

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

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

(iii) Other

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

9.3.3 Historical Buildings

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

9.3.4 Plantation and Maroon Heritage

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

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

9.3.5 Agro-Heritage Tourism

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

9.3.6 Festivals and Events

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

9.3.7 Arts and Crafts

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

9.3.8 Other

Related other attractions include:

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

10. COMMUNITY TOURISM

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

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

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

Community Projects

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

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

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

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

Further details are given in Table 10.1.

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

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

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

Community Tourism Association

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

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

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

Table 10.1: Community Tourism Projects

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

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

11. ECONOMIC INFRASTRUCTURE

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

11.1 AIRPORTS

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

11.1.1 Melville Hall

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

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

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

11.1.2 Canefield

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

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

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

Map 11.1: Infrastructure

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

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

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

11.2 SEA PORTS, TERMINALS AND HARBOURS

11.2.1 Cruise Ship Berths

(i) Roseau Cruise Ship Berth (RCSB)

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

Roseau

Cabrits

(ii) Woodbridge Bay Berth

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

(iii) Cabrits Berth

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

11.2.2 Passenger Ferry Terminal

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

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

11.2.3 Harbours

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

11.3 ROADS

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

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

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

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

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

11.3.1 <u>Directional Signposting</u>

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

11.4 UTILITIES – POWER, WATER, SANITATION, TELECOMMUNICATIONS

11.4.1 <u>Power</u>

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

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

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

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

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

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

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

11.4.2 <u>Geothermal Energy</u>

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

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

11.4.3 Water Supply

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

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

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

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

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

11.4.4 Sanitation

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

11.4.5 Solid Waste

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

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

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

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

11.4.6 Telecommunications

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

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

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

12. AMENITIES, ACTIVITIES, FACILITIES AND SERVICES

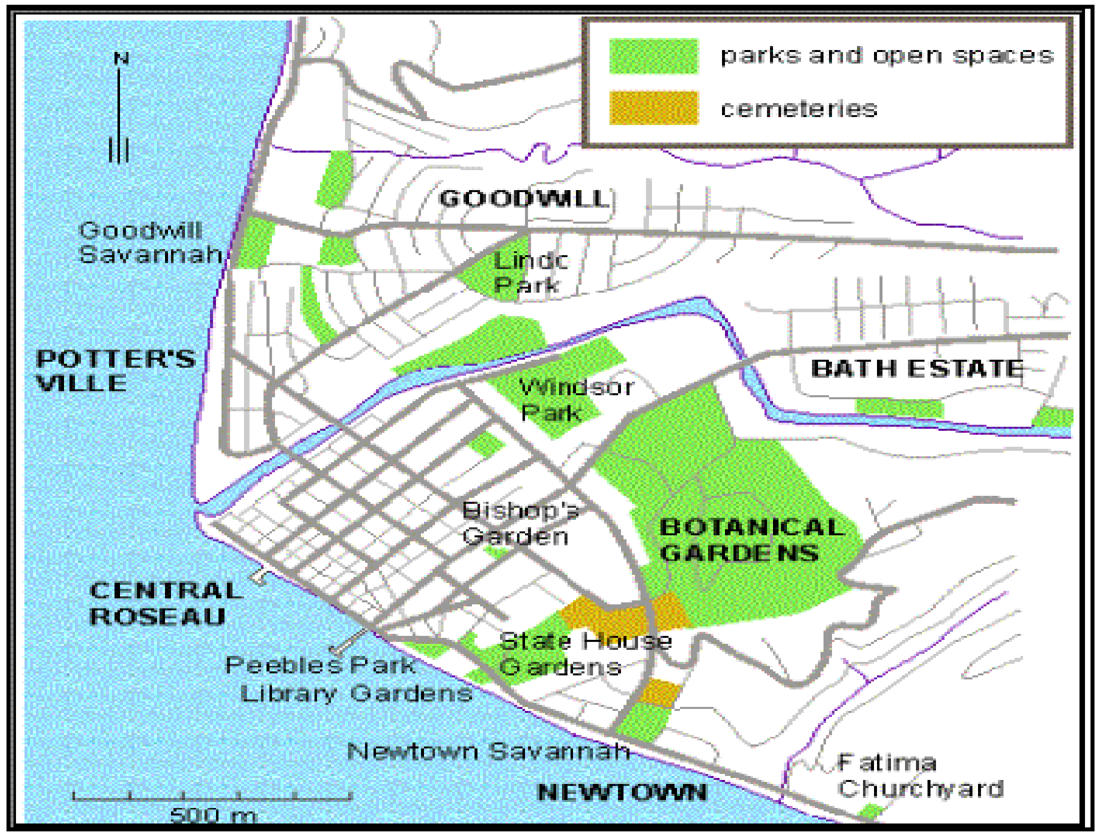
12.1 AMENITIES

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

12.1.1 Botanic Gardens

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

Map 12.1: Location of Botanic Gardens



Adapted from Kim Thurlow – RBG and Peripheral Link Project

The Gardens are home to over 50 types of indigenous plants and imported trees as well as the Sisserou Parrot. In addition there are a number of buildings (including a school), a cricket pitch and an agricultural research station.

However, having lost a large number and variety of plants following Hurricane David (1979) that were not replaced, the RBG as presently arranged look more like a municipal park rather than a botanical garden *per se.* Even then, it lacks the amenities, such as children's playground, tennis or basketball courts, normally found in such a park. The Gardens (which have been the subject of a number of consultancies regarding their future use and development) do not showcase Dominica's biodiversity in terms of range of exotic plants, trees, etc.

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

12.2 ACTIVITIES

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

12.2.1 Hiking

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

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

Table 12.1: Hiking Trails

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

Source: *DDA /Forestry Division*

Map 12.1: Trails and Dive Sites

12.2.2 Diving

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

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

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

Eight dive operators are listed on the DDA website:

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

of which only two are DDA-certified.

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

12.2.3 Thermal Springs

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

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

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

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

12.2.4 Other Activities

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

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

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

12.3 TOURIST FACILITIES AND SERVICES

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

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

Table 12.2: Tourist Facilities and Services, 2011/12

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

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

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

12.3.1 Accommodation

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

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

Table 12.3: Tourist Accommodation, 1995 – 2011

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

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

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

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

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

Table 12.4: Tourist Accommodation by Area, 2011

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

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

Room Occupancy Rates

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

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

New Developments

Hotel/resort developments currently under construction include:

- Cabrits Hotel & Spa (68 rooms and suites) being constructed with financing from the Government of Morocco. The details of the management and operation of the hotel have yet to be finalised;
- Atlantique View Resort & Spa, Anse de Mai, (40 rooms). As a member of the Ascend Collection (Choice Hotels) group, this high-rise development will be Dominica's first "branded" hotel property;
- Petit Coulibri Resort (near Soufriere): 20 Rooms;
- Kwani Eco Lodge (Castle Bruce): 12 rooms; and
- Sunrise Farms (Castle Bruce): 10 cottages.

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

Planned (or contemplated) developments, but not yet under construction include:

- Woodford Hill Resort which will comprise a total of 112 accommodation units (32 cottages; 16 townhouses; and 64 villas) with 329 rooms plus central facilities including bars; restaurants; wellness spa; and beach club; and
- Cabrits Marina: On the 100-acre site, the Government proposes a marina village of up to 200 slips, haul-out yard, restaurants, bars, shops, offices, condominiums, hillside villas and a 40-bedroom hotel extension.

Another project (comprising some 75 villas plus hotel) in the vicinity of Springfield Plantation is understood to be under active consideration, while Government has announced its intention to commission designs for a 120-room hotel on a site owned by the Public Works Corporation in Roseau. In their present form, plans submitted by the developers for this (and another hotel to be constructed across the Roseau River) are likely to be rejected by the Physical Planning Division.. Government is also considering a way forward with the presently-abandoned Layou River Hotel Project. There is continuing private sector interest (but as yet nothing definite) in the redevelopment of the now derelict Castaways Hotel on Mero beach.

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

12.3.2 <u>Conference Facilities</u>

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

12.3.3 <u>Other Tourist Facilities and Services</u>

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

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

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

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

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

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

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

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

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

12.4 PUBLIC SAFETY AND SECURITY

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

13. CRUISE TOURISM IN DOMINICA

13.1 OVERVIEW

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

13.2 RECENT PERFORMANCE

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

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

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

Source: *DDA and DASPA*

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

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

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

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

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

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

Carnival Cruise Lines

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

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

13.3 CRUISE PORT FACILITIES

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

13.4 CRUISE PASSENGER EXPENDITURE

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

13.5 SHORE EXCURSIONS

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

Further details for Dominica are given below:

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

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

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

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

Source: *FCCA/BREA*

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

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

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

13.6 CRUISE PASSENGER SATISFACTION

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

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

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

Source: *FCCA/BREA*

The main results were as follows:

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

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

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

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

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

13.7 LIKELIHOOD OF RETURNING FOR A LAND-BASED VACATION

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

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

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

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

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

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

Source: *FCCA/BREA*

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

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

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

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

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

14. INSTITUTIONAL ARRANGEMENTS AND LEGAL FRAMEWORK

14.1 INSTITUTIONAL ARRANGEMENTS

14.1.1 Central Government

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

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

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

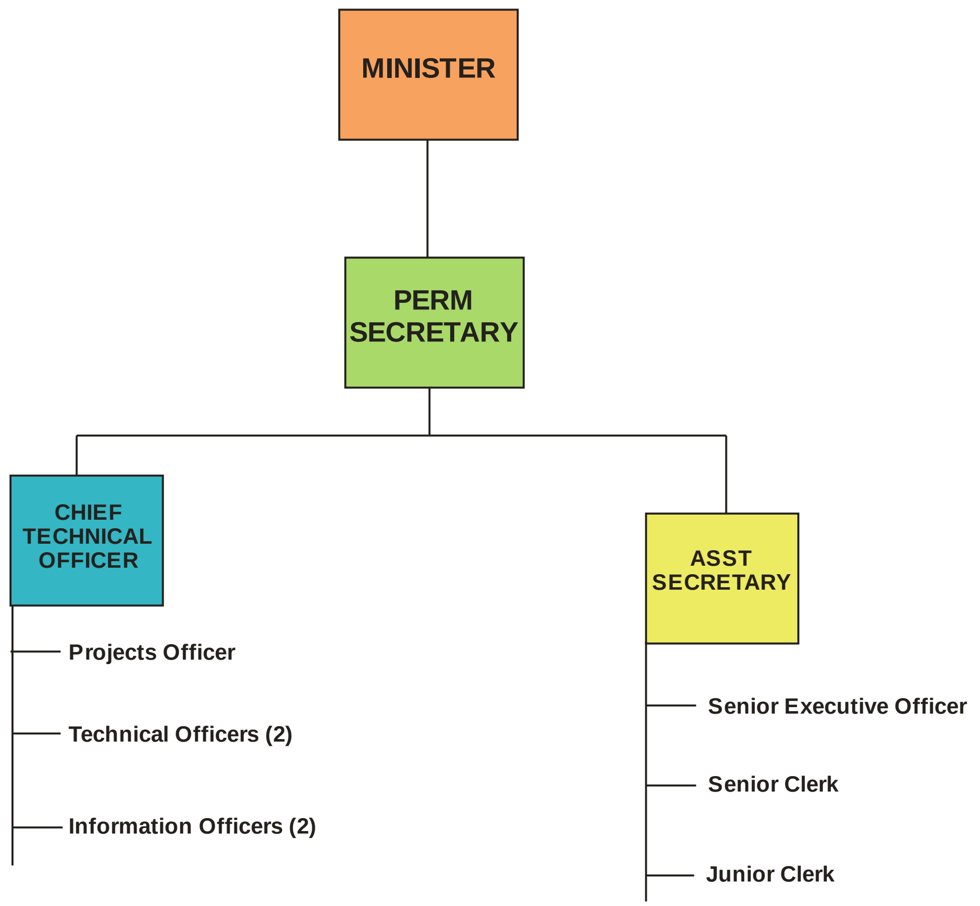
Source: *Government of Dominica website, November 2012*

(i) Tourism Division

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

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

Diagram 14.1: Tourism Division Organigram



The main functions of the Tourism Division are:

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

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

Tourism Coordinating Committee

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

(ii) Forestry & Wildlife Division

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

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

(iii) Environmental Coordinating Unit

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

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

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

(iv) Human Resource Development (HRD)

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

14.1.2 Local Government and Community Affairs

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

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

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

14.1.3 State Owned Enterprises and Organisation

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

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

14.1.4 Discover Dominica Authority (DDA)

(i) Statutory Functions

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

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

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

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

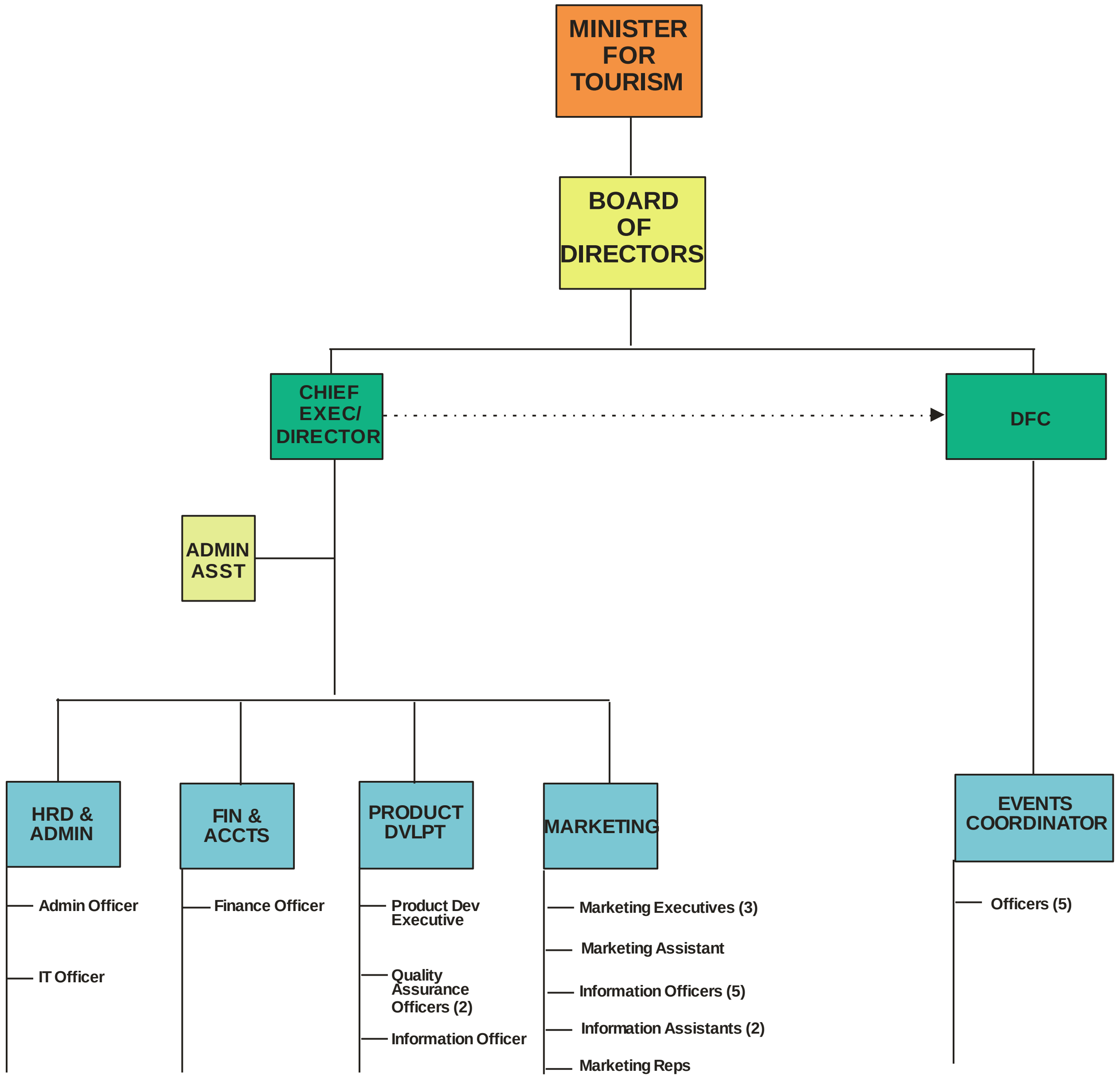
- destination marketing
- product development
- training
- market research
- tourism awareness
- tourist information offices
- licensing of operators
- quality standards
- promotion of festivals/events
- promotion of Dominica as a location for film productions.

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

(ii) Organisational Structure and Staffing

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

Diagram 14.2: DDA Organigram



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

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

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

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

These recommendations are elaborated in the DDA Corporate Strategy Document.

(iii) Disposition of the DDA Budget

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

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

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

Source: *DDA * figures rounded.*

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

14.1.5 Dominica Air and Sea Ports Authority

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

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

14.1.6 Invest Dominica Authority

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

14.1.7 Non-Governmental Organisations/Councils

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

14.1.8 Private Sector Associations

The major ones include:

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

14.2 LEGISLATIVE AND REGULATORY FRAMEWORK

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

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

14.2.1 Legislation in Relation to a National Tourism Organisation

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

14.2.2 Regulations for the Industry

The purpose of regulatory legislation is to:

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

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

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

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

The tourism services listed in the Act include:

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

The accommodation classification schedule specifies the following categories:

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

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

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

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

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

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

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

14.2.3 Environmental Legislation

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

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

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

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

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

15. AIR AND SEA ACCESS

15.1 PASSENGER TRAFFIC

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

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

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

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

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

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

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

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

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

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

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

15.2 REGIONAL AIR ACCESS SERVICES

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

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

Table 15.2: Regional Air Services to Dominica

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

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

*note: American Eagle ceased operating in March 2013

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

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

15.3 INTERNATIONAL CONNECTIVITY TO MAJOR REGIONAL AIRPORTS

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

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

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

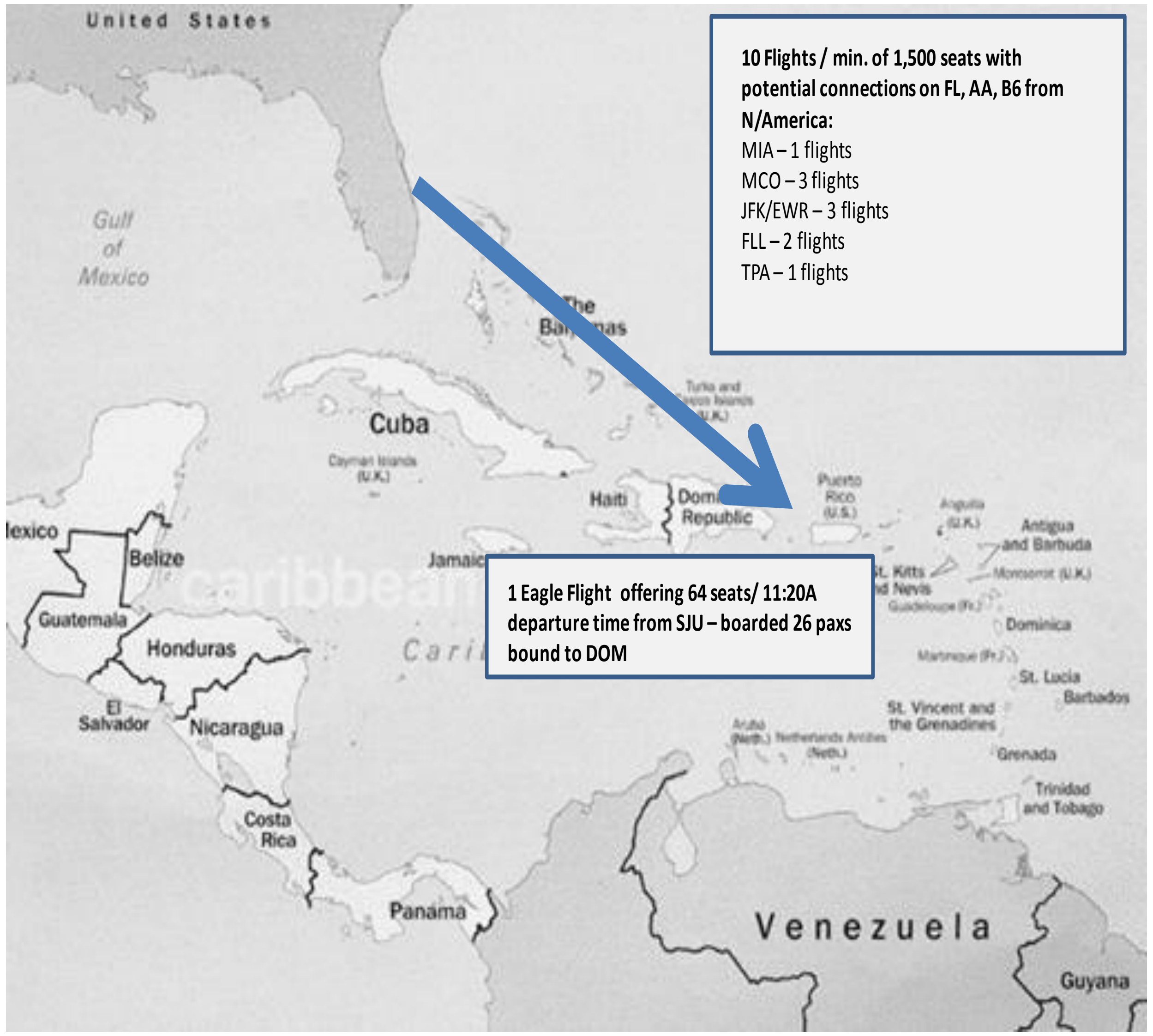
- The Grantley Adams, International Airport, Barbados, 181 nautical miles south of Dominica, is an important LIAT hub and continues to have a greater density and spread of service than Antigua, inclusive of service from the United Kingdom and Canada.
- All three hubs at present have non-stop Global Distribution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

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

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

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

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



15.4 AIR FARES AND CONNECTIVITY

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

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

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

15.5 SEA ACCESS

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

L'Express Schedule

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

**departure/arrival times vary*

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

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

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

15.6 AIR AND SEA CONNECTIVITY – THE MARKET VIEW

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

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

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

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

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

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

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

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

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

16. HUMAN RESOURCE DEVELOPMENT AND STANDARDS

16.1 HUMAN RESOURCE DEVELOPMENT

16.1.1 Sector Employment

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

Table 16.1: Breakdown of Employment in Tourism

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

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

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

16.1.2 Skill Levels and Service Standards

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

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

16.1.3 Training Needs

The CTO carried out a Dominica tourism training needs assessment in 2000-2004 which identified a number of areas where skills improvements are required. These are:

- management/supervisory skills;
- train-the-trainer;
- front office;
- customer care;
- cookery and food preparation;
- foreign languages (especially French);
- bar tending;
- housekeeping;
- tour guiding; and
- waitering skills.

16.1.4 HRD Interventions

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

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

Training Courses

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

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

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

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

16.1.5 HRD Facilities

Dominica State College

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

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

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

Tourism and Hospitality Department

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

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

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

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

Continuing Education

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

OECS Centre for Excellence in Tourism Training

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

16.2 QUALITY STANDARDS

16.2.1 Standards

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

16.2.2 Quality Assurance

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

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

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

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

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

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

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

17. DESTINATION MARKETING

17.1 MARKETING BUDGET

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

17.2 COMPARATIVE BUDGETS OF CARIBBEAN NATIONAL TOURISM ORGANIZATIONS (NTOS)

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

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

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

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

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

17.3 AWARENESS OF DOMINICA IN THE MARKET PLACE

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

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

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

17.4 MARKETING STRATEGY AND PLAN

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

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

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

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

17.4.1 Structure of the Marketing Plan

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

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

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

- Indicators of performance.

17.5 RESEARCH AND STATISTICS

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

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

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

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

18. COMPETITIVENESS PERFORMANCE

18.1 MARKET COMPETITIVENESS

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

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

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

18.1.1 Caribbean Region

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

18.1.2 Competitor Group Market

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

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

Table 18.1: Dominica's Competitors

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

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

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

Table 18.2: Dominica's Share of Competitor Set

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

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

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

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

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

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

18.1.3 US Market

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

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

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

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

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

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

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

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

18.1.4 Canadian Market

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

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

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

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

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

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

18.1.5 UK Market

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

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

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

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

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

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

18.2 DOMINICA'S MARKET PLACE POSITION

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

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

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

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

Table 18.6: Major Weaknesses of Dominica's Tourism Product

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

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

18.3 FIRST VS REPEAT VISITS

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

Table 18.7: Previous Visits

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

Source: *CSO, Visitor Exit Survey.*

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