

## **PART IV TOURISM VISION AND FRAMEWORK FOR DEVELOPMENT**

## 19. TOURISM VISION AND GUIDING PRINCIPLES

### 19.1 FORMULATION OF VISION

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

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

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

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

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

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

### 19.2 TOURISM VISION

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

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

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

### VISION FOR DOMINICA TOURISM 2022

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

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

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

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

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

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

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

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

\* Dr. Maria Bellot, Tourism Master Plan, 1997

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

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

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

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

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

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

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

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

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

government plans and infrastructure programmes within the framework of the overall National Physical Plan.

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

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

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

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

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



### 19.3 REALISING THE TOURISM VISION

#### 19.3.1 Guiding Principles

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

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

#### 19.3.2 National Tourism Policy

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

## COMMONWEALTH OF DOMINICA MINISTRY OF TOURISM AND LEGAL AFFAIRS



### NATIONAL TOURISM POLICY 2020

## 20. TOURISM DEVELOPMENT STRUCTURE PLAN

### 20.1 TOURISM DEVELOPMENT CONCEPT

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

#### Planning Framework

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

#### (i) Tourism Development Areas (TDA)

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

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

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

#### (ii) Tourism Centres

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

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

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

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

Map 20.1: Tourism Development Areas and Centres





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

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

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

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

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

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

## 20.2 ROSEAU TOURISM DEVELOPMENT AREA

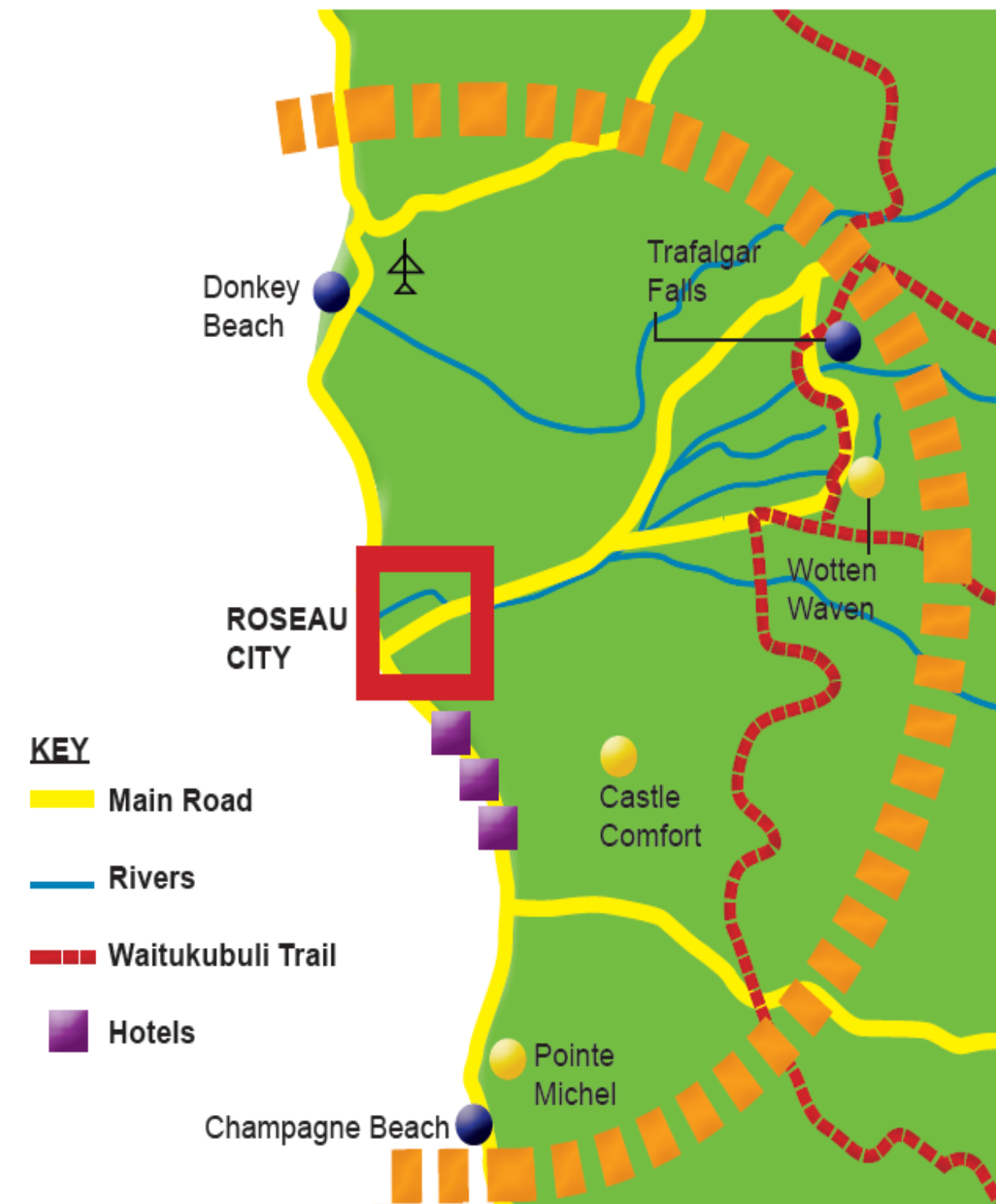
As shown on the accompanying map, the Roseau TDA stretches along the coast from Donkey Beach to Champagne Beach and inland to encompass the Roseau Valley area as far as Wotten Waven. The tourism product of this TDA is characterized by:

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

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

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

Map 20.2: Roseau Tourism Development Area



### 20.2.1 Roseau City

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

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

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

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

#### Roseau River Corridor Regeneration

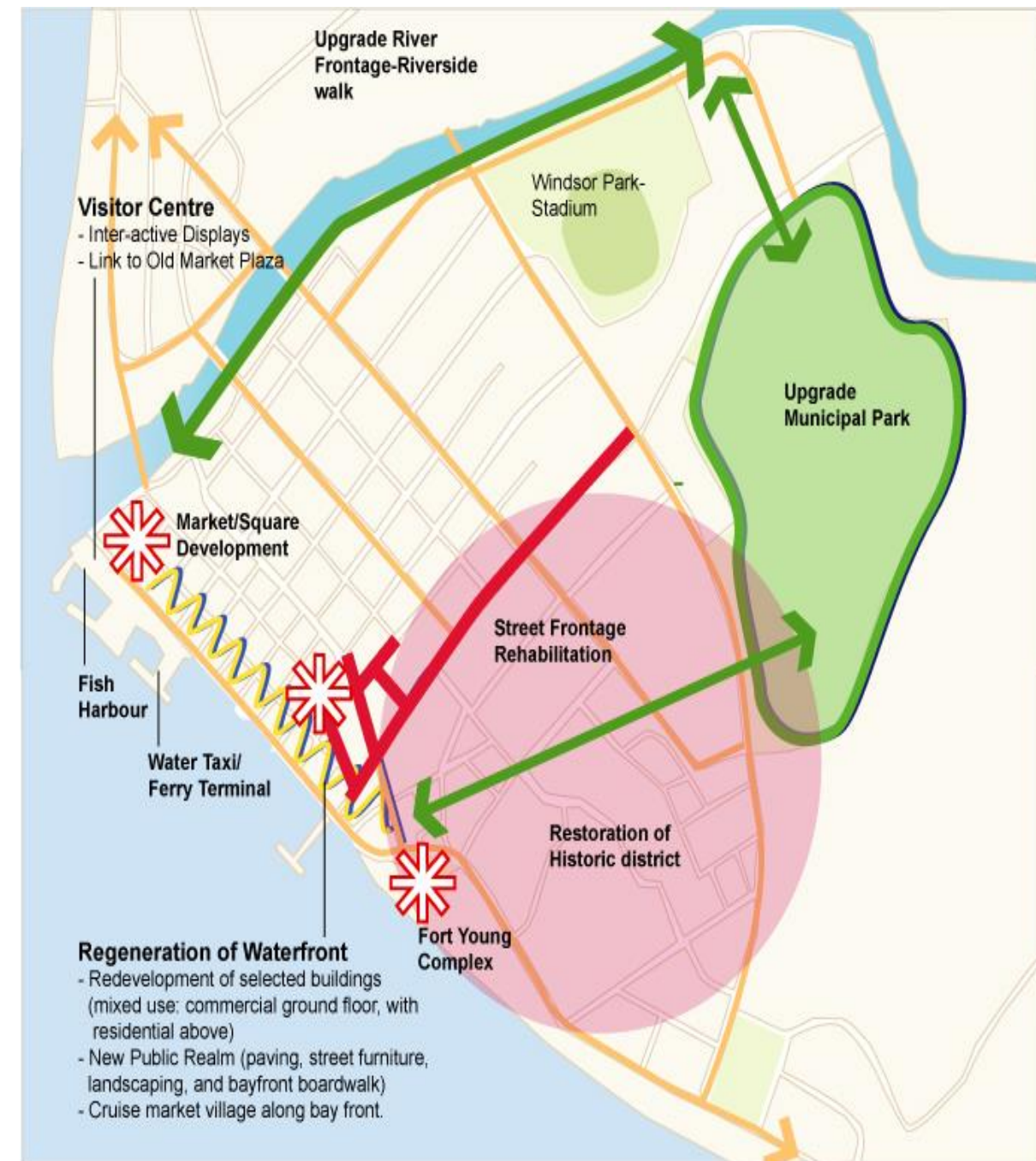
The concept is to:

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



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

Map 20.3: Roseau River and Waterfront Regeneration



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

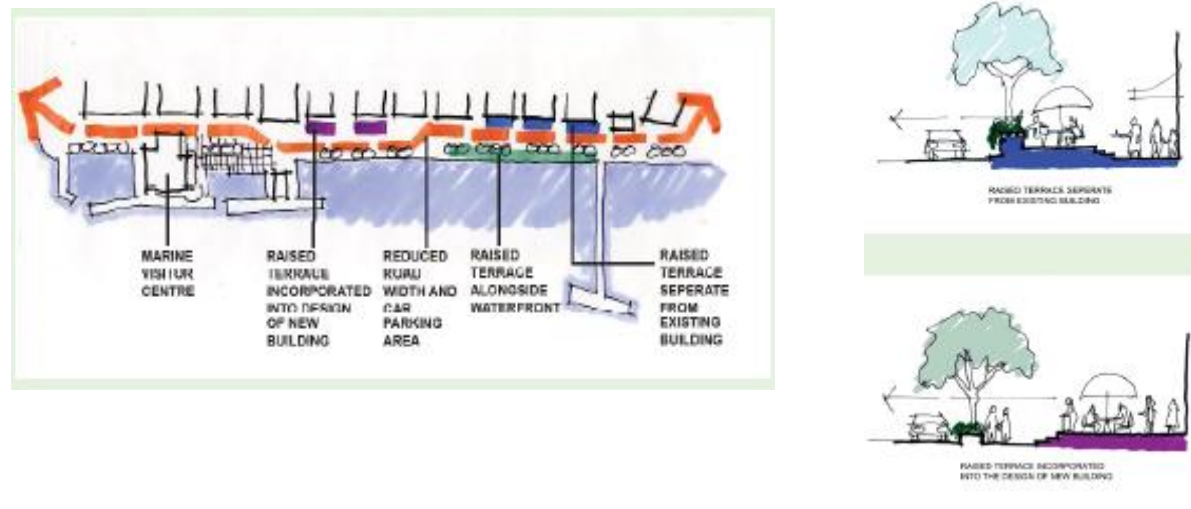


### Regeneration of the Waterfront

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

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

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



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

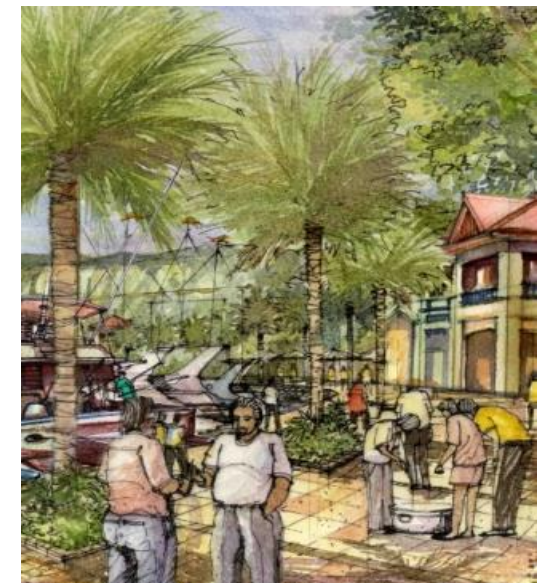
### Old Market Square to become a Plaza

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

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

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

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





**Beautification of Roseau**

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

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

Streets with sidewalk cafes with identity and promote social interaction.



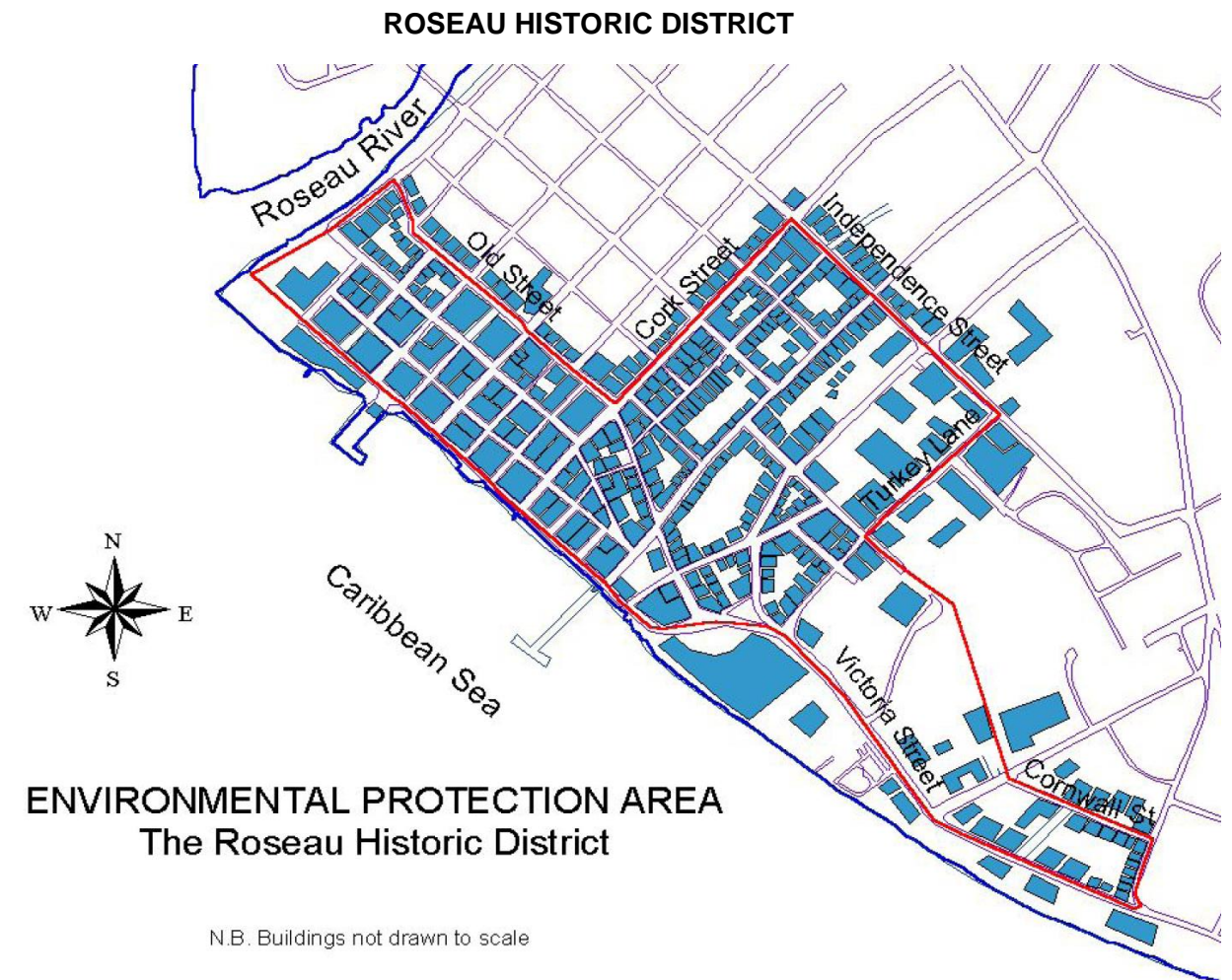
**Restoration of Historic/Heritage District**

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

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

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

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





**Botanic Gardens to become a Municipal Park**

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

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

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



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



### 20.2.2 Donkey Beach/Canefield

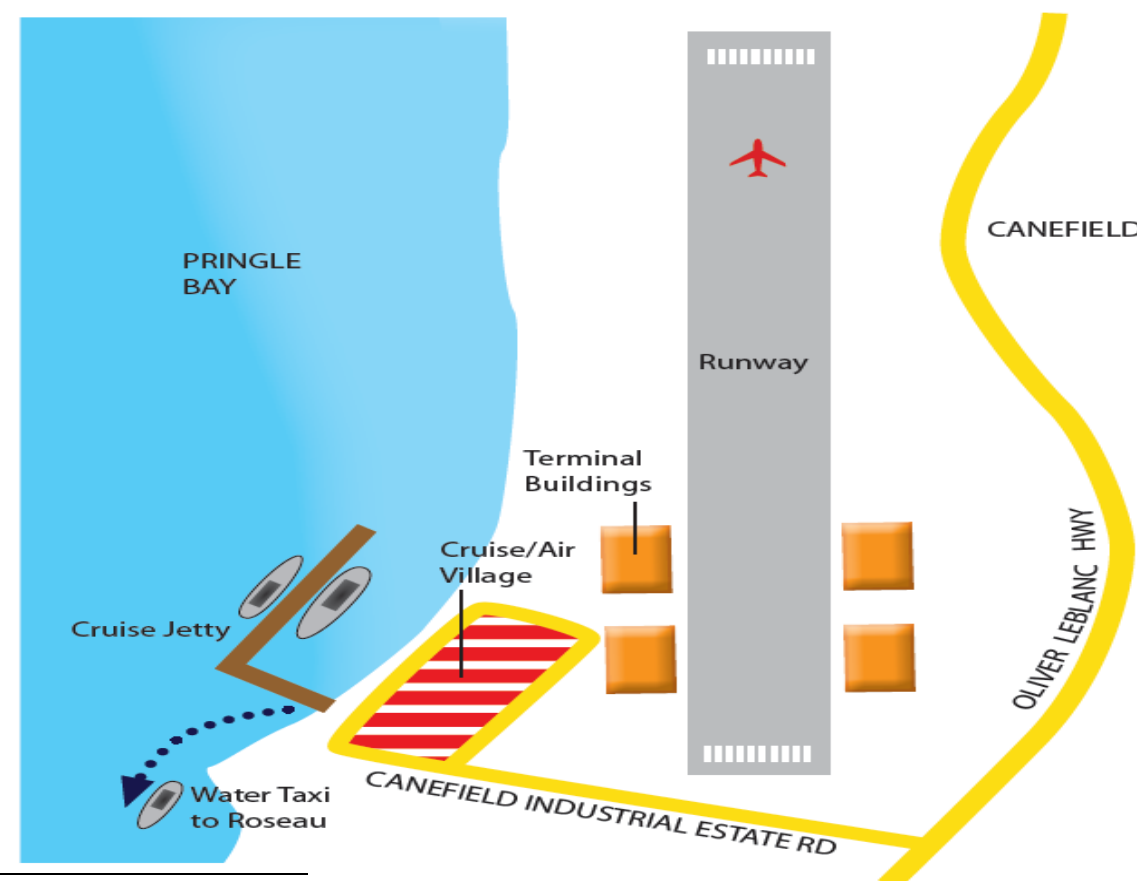
With ever increasing size of cruise ships, Dominica's ability to maintain and even strengthen its position on cruise ship itineraries will depend not only on site attractions, but also on the capability of the system to handle these larger ships and to disburse the increased number of passengers disembarking.

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

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

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

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



\* Woodbridge Cruise Ship Berth, Gee Jenson, 2005

### 20.2.3 Roseau Valley/Wotten Waven

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

#### (i) Nature Sites:

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

#### (ii) Hiking Trails

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

#### (iii) Facilities

- Thermal spring facilities in Wotten Waven
- Hotels, restaurants

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



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

### 20.2.4 South of Roseau

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

## WEST COAST TDA

**KEY:**

-  DIVE SITES
-  BEACHES



### 20.3 WEST COAST TOURISM DEVELOPMENT AREA

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

**(i) Resort Hotels/Restaurants**

- Tamarind Tree
- Sunset Bay

**(ii) Attractions**

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

**(iii) Amenities**

- Batalie Beach
- Mero Beach
- Layou River Valley

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

The key product development recommendations for this zone include:

➤ **Development of residential tourism**

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

➤ **Mero tourism facility and beach improvement**

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



## 20.4 NORTH WEST COAST TOURISM DEVELOPMENT AREA

The North West Coast TDA contains four tourism centres, viz

- Cabrits
- Portsmouth
- Indian River
- Vieille Case

### NORTH WEST COAST TDA

KEY:

- |  |   |
|--|---|
|  DIVE SITES |  WAITUKUBULI TRAIL |
|  BEACHES    |  PORTSMOUTH TOWN   |
|  ROAD       |   |



### 20.4.1 Cabrits

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

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

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

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





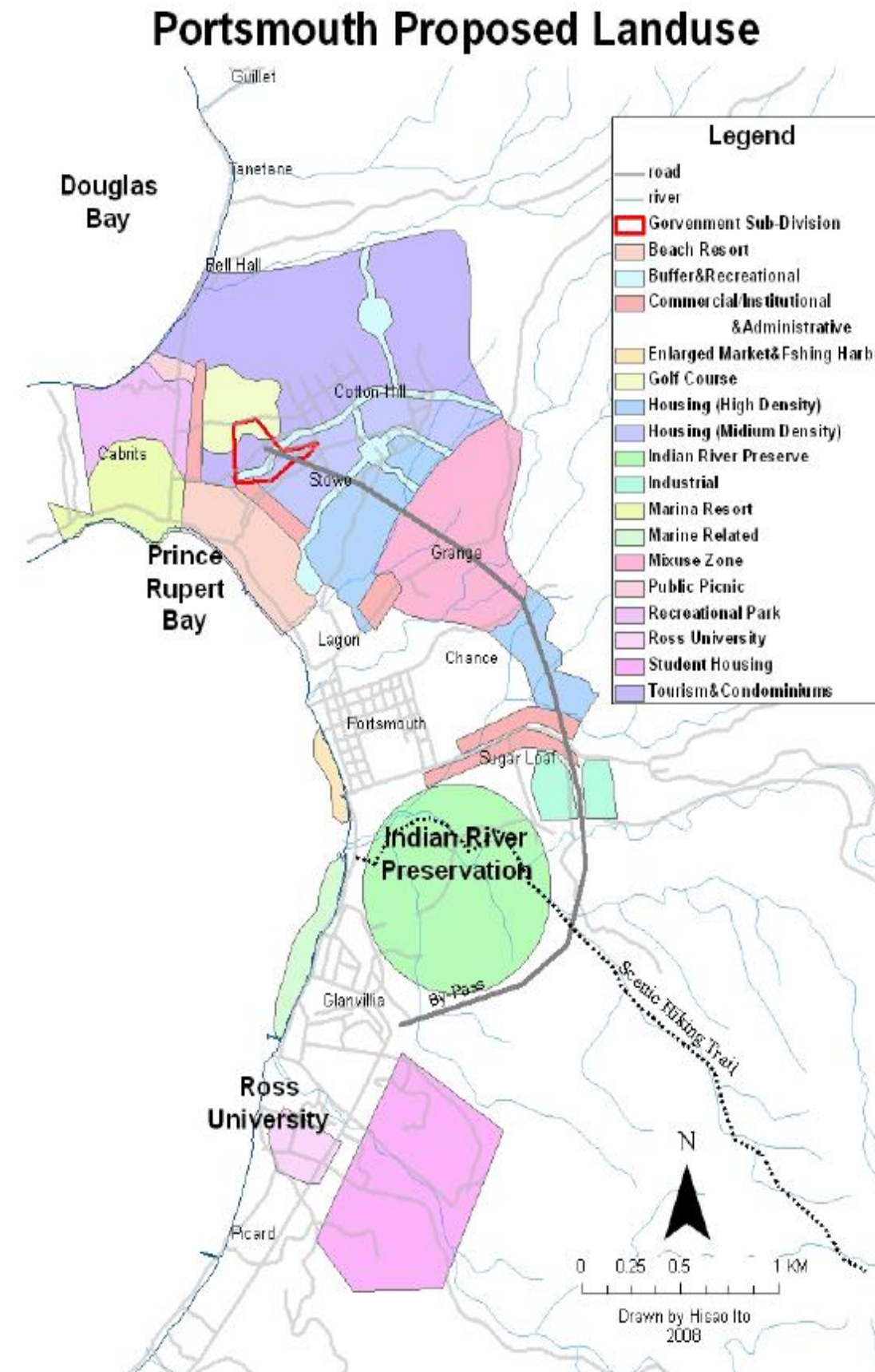
### 20.4.2 Portsmouth

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

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

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

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



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



### 20.4.3 Indian River

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

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

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

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

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



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

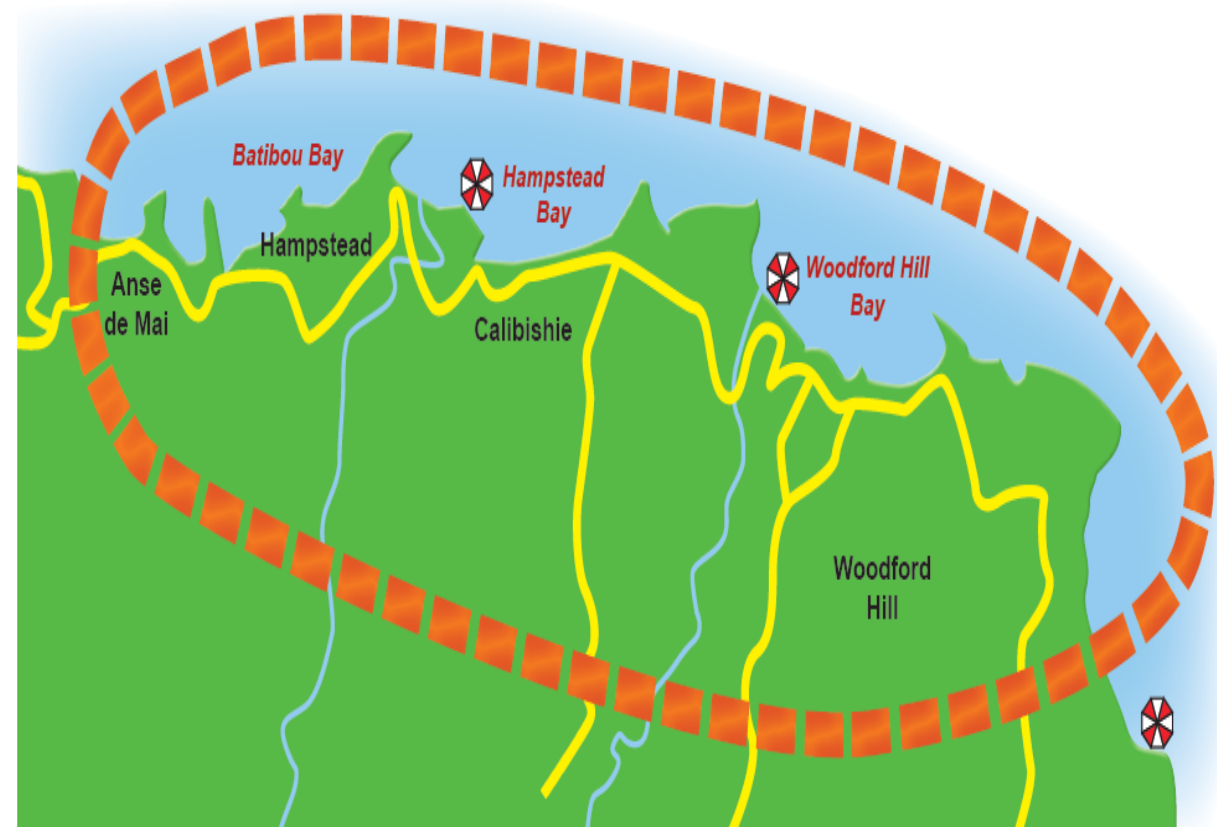
### 20.4.4 Vieille Case

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

## NORTH EAST COAST TDA

KEY:

 BEACHES

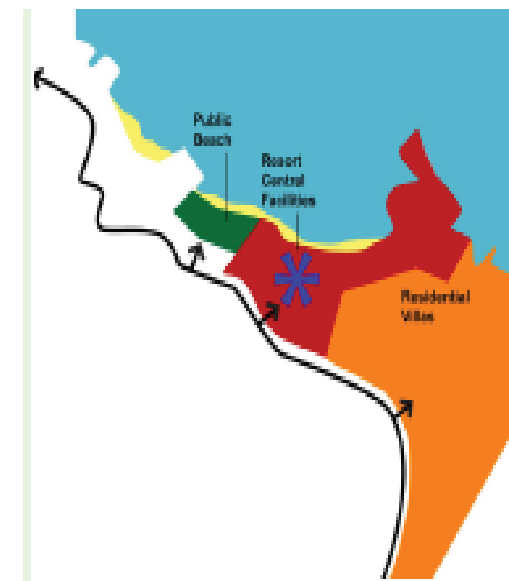


The beachfront hotel will have the guest’s facilities and bedrooms in the main building, as well as a restaurant, bar/lounge with entertainment area, pool bar, fitness and wellness area, large infinity outdoor pool, shops etc.

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

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

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



### 20.5 NORTH EAST COAST TOURISM DEVELOPMENT AREA

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

#### 20.5.1 Woodford Hill

The concept is for an integrated hotel/villa development on approximately 50 acres of land with beach frontage at Woodford Hill. Under the current proposal, this would comprise a total of 112 accommodation units (32 cottages; 16 townhouses; and 64 villas) with 329 rooms plus central facilities including bars; restaurants; wellness spa; and beach club.

#### 20.5.2 Calibishie





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

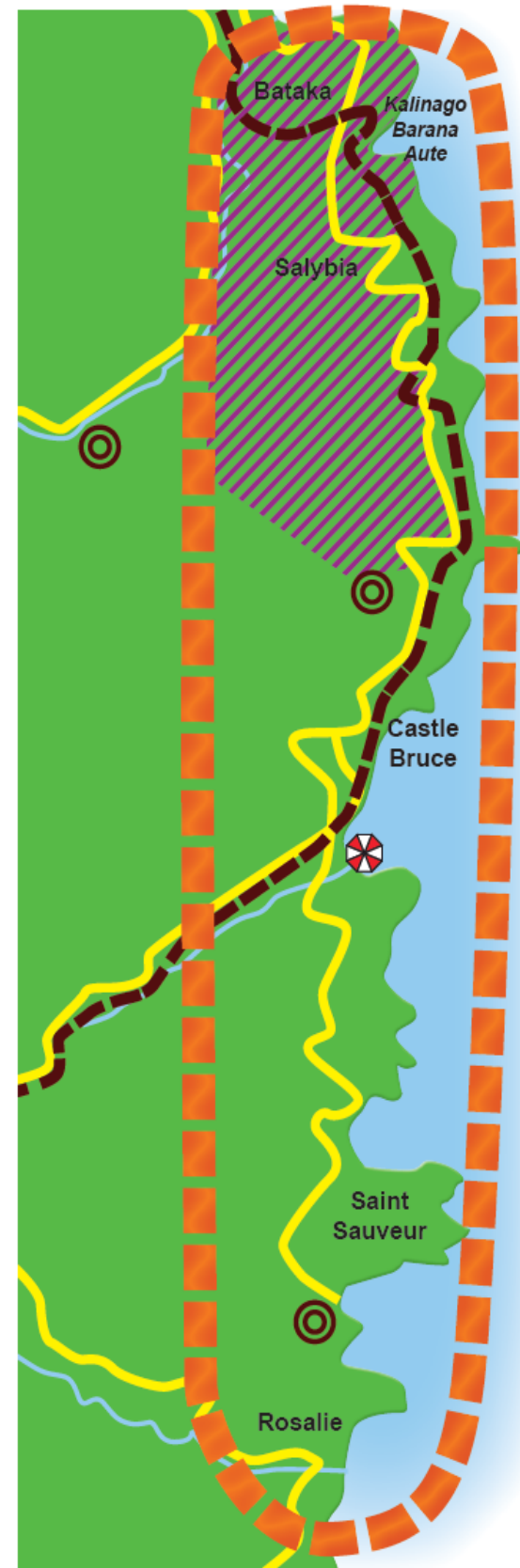




## EAST COAST TDA

### KEY:

-  BEACHES
-  HIKERS
-  WAITUKUBULI TRAIL
-  CARIB TERRITORY



## 20.6 EAST COAST TOURISM DEVELOPMENT AREA

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

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

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

### 20.6.1 Kalinago Territory

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

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

### 20.6.2 Castle Bruce

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

### 20.6.3 Rosalie

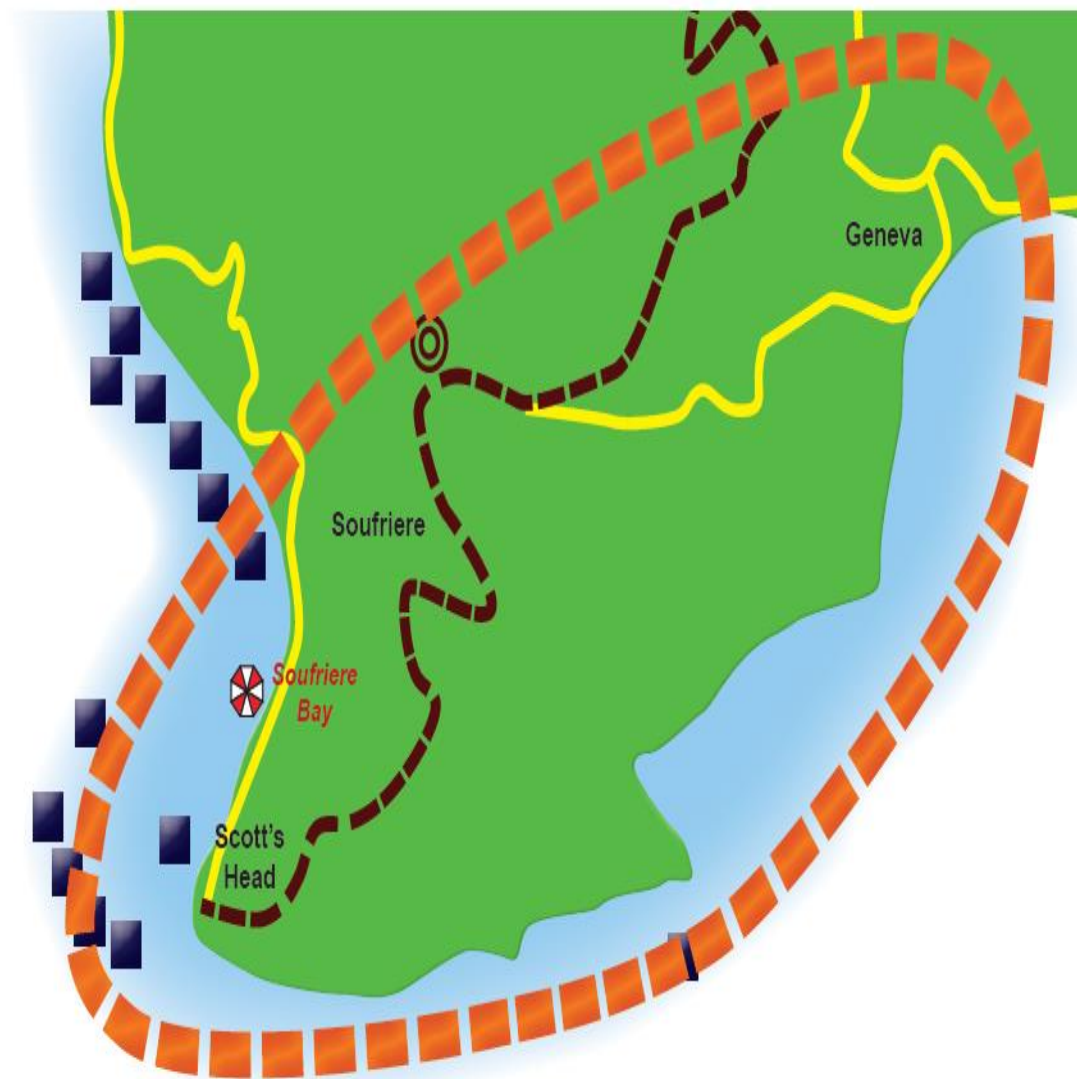
Although not in itself a centre of population apart from the adjacent small village of Grand Fond (where there are a few shops), Rosalie has a number of hotels and lodges, including the Rosalie Bay Resort and the Rosalie Forest 3 Rivers Eco-Lodge. The beach is a protected area for sea turtles and this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

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

## SOUTH COAST TDA

**KEY:**

- |  |   |
|--|---|
|  DIVE SITES |  HIKERS            |
|  BEACHES    |  WAITUKUBULI TRAIL |



### 20.7 SOUTH COAST TOURISM DEVELOPMENT AREA

The South Coast TDA has two centres;

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

#### 20.7.1 Geneva/Grand Bay

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

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

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



#### 20.7.2 Scott's Head/Soufriere

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

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



## 20.8 HEART OF DOMINICA TOURISM DEVELOPMENT AREA

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




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

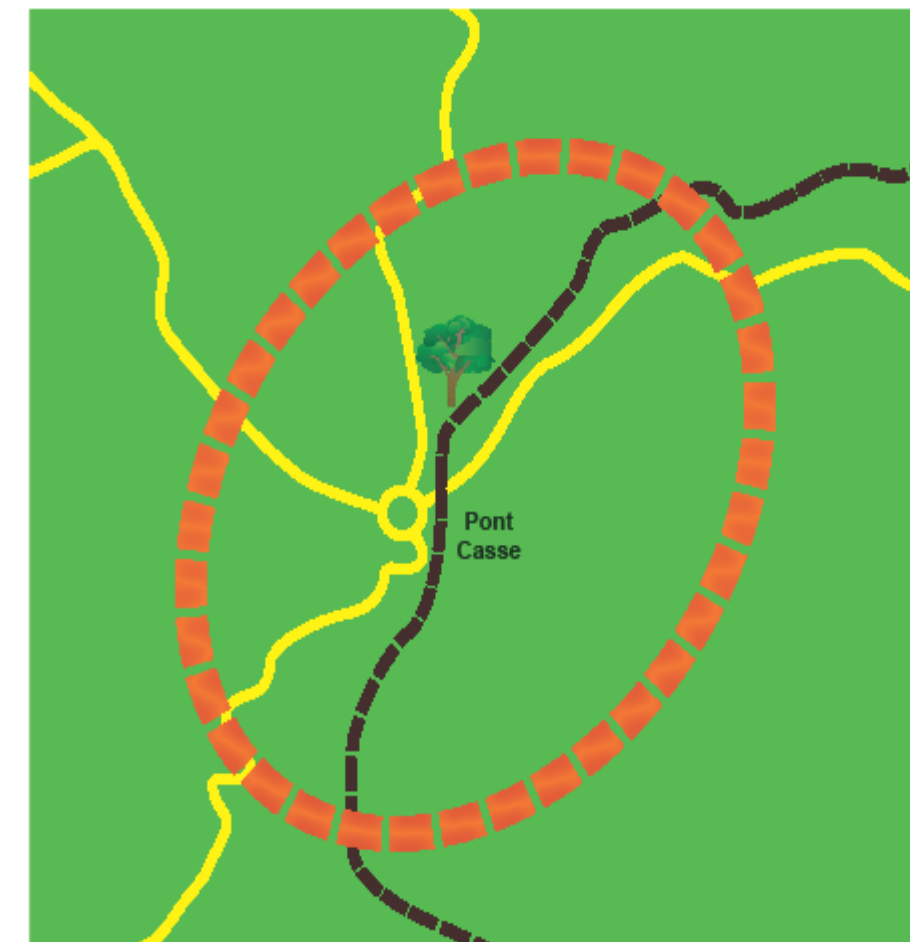
Other attractions include over 13 waterfalls at the Emerald Pool, Jaco (Hibiscus) Falls, Spanny Twin Falls, Salton/Soultan 9-Diamond Falls, and Middleham Falls, all within or on the foothills of the Morne Trois Pitons National Park and World Heritage Site. Important historic maroon sites include Bala Caves and Jacko Steps (site of maroon camp under African-born chief Jacko). Organic farm experiences, farm stays, and agro-processing tours are also a feature in this agricultural belt, as well as the opportunity to visit art studios, purchase locally produced art and crafts, sample organic fruits and vegetables, and other local produce. The cross-roads at Pont Casse also provide access to the four coasts and many of the island's other major attractions, including the Kalinago Territory, within 20-45 minutes.

Accommodation is available in a range of villas, apartments, cottages homestays and camp sites, while there are a number of local restaurants and bars. Certified trail & tour guides are available locally.

### HEART OF DOMINICA TDA

KEY:

-  WAITUKUBULI TRAIL
-  ROAD
-  ORGANIC AGRO FARMS



➤ **BioPark**

It is recommended that the proposed BioPark (see section 24.4.3 below) should be located in the vicinity of Pond Casse in the Heart of Dominica TDA, close to the headquarters of the Waitukubulii Trail Management Unit.

Capitalising on Dominica's major strength – its nature resource – the BioPark would showcase the island's flora and fauna. Uniquely because of its rainforest, range of plants, etc., Dominica is one of the few islands in the Caribbean that could develop an authentic BioPark.

The BioPark concept has been assessed by The Development Institute\* and the findings indicate the proposal to be environmentally, economically and financially feasible.

The BioPark product would be a major attraction and not just for stay-over tourists. It would be instrumental in:

- reviving the excursionist market
- developing the short-stay / long weekend market
- extending business / vacation stays
- reinforcing Dominica's position on cruise ship itineraries as it would be a uniquely new attraction for cruise visitors.

Its location in the central Pond Cassé area will have the effect of attracting visitors (stay-over, excursionists and cruise passengers) southwards from Cabrits / Portsmouth/North East Tourism Development Area and northwards from Roseau. As the BioPark will be a major attraction for cruise passengers, it will not just increase Dominica's capacity to handle greater numbers, but also relieve pressure on Trafalgar Falls, Emerald Pool and Roseau city itself.



\* Layout BioPark, the Development Institute (Williams & Lugay), 2010

**20.9 NATIONAL PARKS AND NATURE SITES**

**20.9.1 National Parks**

The national parks and reserves are central to Dominica's tourism product and must be preserved at all costs. This will include:

- designation of buffer zones around the protected areas to check future development;
- environmental and social impact assessments undertaken as part of the tourism development process so that appropriate levels of acceptable change are established and incorporated in the management plans;
- ensuring that environmentally sensitive design principles are applied in any form of development within the protected areas and buffer zones;
- working in conjunction with park managers to jointly present, interpret and market potential tourist resources and sites; and
- assisting with the establishment of baseline data and on-going monitoring of visitor use and impacts, and to vary management systems accordingly.

**20.8.2 Nature Sites**

As nature sites are the focal points of the sightseeing, touring, walking/hiking products, their on-going maintenance and improvement is essential.

It is acknowledged that the needs of eco/nature tourists differ from those of cruise passengers. Care is therefore required to ensure that the needs of one group do not conflict with those of another. The Tourism Master Plan recommendation is therefore to develop a wider range of nature and heritage sites for stay-over tourists, while confining cruise ship and excursionists to selected intensive use sites.

Within this context, certain principles are important to note in guiding investment in site maintenance, upgrading and development. These (which are listed below) are essential to maintain the integrity of the resource while offering quality experiences to cruise, day trip and stay-over visitors:

- from a tourism perspective, the site should be designed and developed to offer an 'experience'. It is not just a matter of developing a tourism product or attraction; the most important design consideration is the quality of the experience offered;
- the experience offered must not compromise the integrity of the resource and must impart a sense of respect for the resource through site treatment and interpretation activities;
- the experience must also consider the needs of the visitor for facilities, again without compromising the integrity of the resource; and
- development on the site to create the experience must follow internationally accepted practices and standards for resource management and protection and clearly demonstrate resource sustainability.

Sites should therefore be developed in a low key manner and in keeping with the setting of the area. The findings of market surveys undertaken by Ecosystems\* in 1997 are still valid today. Both cruise and stay-over visitors surveyed favour minimal development of facilities.

\* Integrating Conservation with Ecotourism in Dominica, Eco systems, 1997



They do not want to see concrete buildings and paths within the rainforest, but small-scale rustic structures with information, site signage, and litter bins with minimal visual impact. Based on the current and projected number of visits, the sites requiring attention are as follows on Table 20.1:

**Table 20.1: Visits to Nature Sites, 2011**

Site	Jan – Dec	Peak Month	Busiest Day	Proposed Designation
(i) Trafalgar Falls	87,700	Jan: 16,600	2,000	Intensive use
(ii) Emerald Pool	56,000	Dec: 11,300	1,600	
(iii) Indian River	14,300	Mar: 2,100	n/a	
(iv) Cabrits	17,000	Aug: 1,900	n/a	
(v) Soufriere Hot Springs	8,200	Apr: 1,200		Non-intensive use
(vi) Freshwater Lake	10,300	Mar: 1,400		
(vii) Middleham Falls	5,400	Apr: 800		
(viii) Boiling Lake	4,500	Feb: 600		

Source: Forestry Division \*Figures rounded

**Non-Intensive Use Nature Sites**

At the non-intensive use sites, Soufriere Hot Springs, Freshwater Lake, Middleham Falls and Boiling Lake, only minimal development should be undertaken.

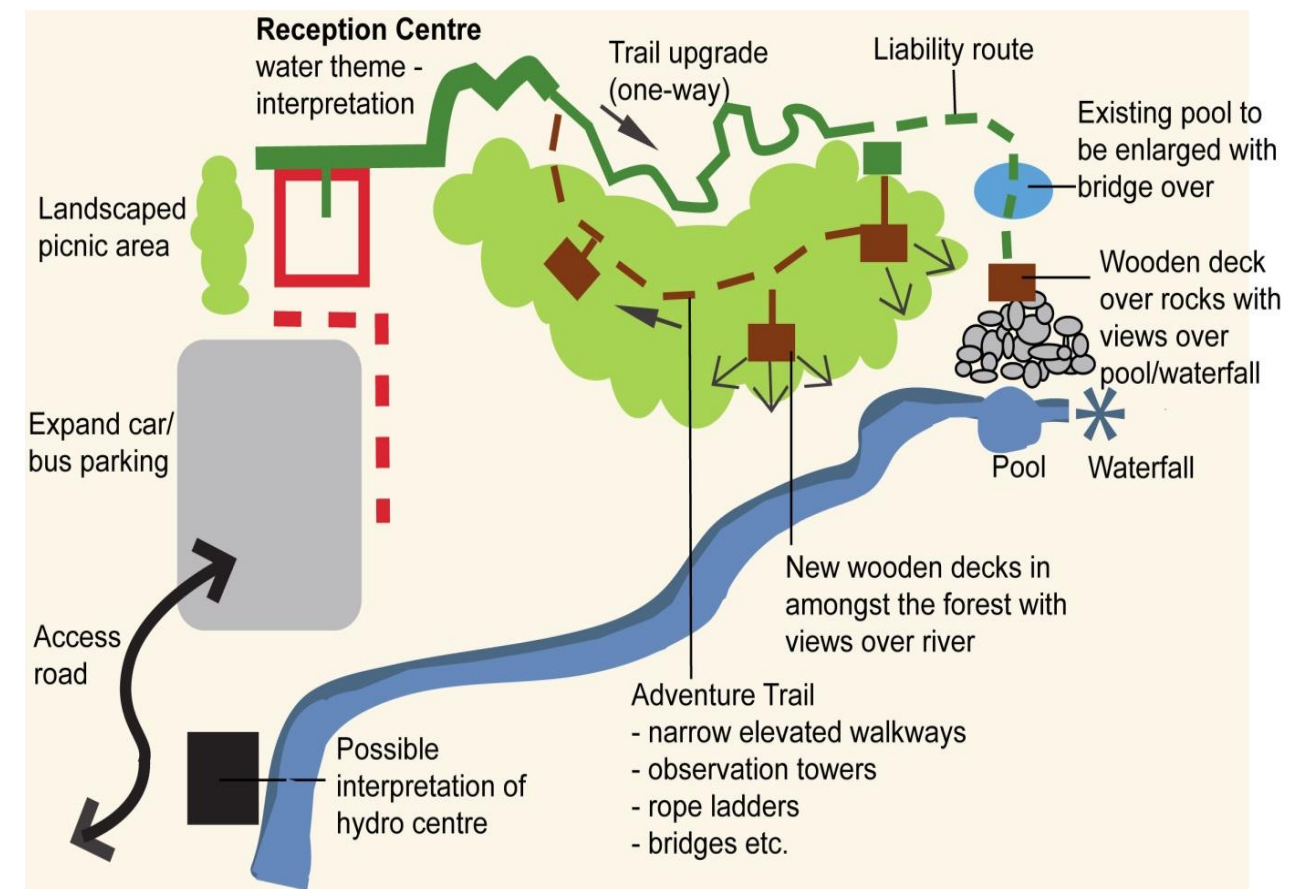


**Intensive Use Nature Sites**

The proposed intensive sites are the popular locations where investment has already taken place - Trafalgar Falls, Emerald Pool, Indian River and Cabrits. At Trafalgar Falls and Emerald Pool, the Forestry Division is examining the possibility of increasing their respective carrying capacities by establishing new trails (board walks above ground and in tree tops), one way traffic systems, providing more things-to-see-and-do and visitor education and environmental awareness. These sites will be targeted towards the cruise passenger and also provide a recreational resource for local residents, with Trafalgar Falls maintaining its present 'premium site' status.

**Trafalgar Falls Development**

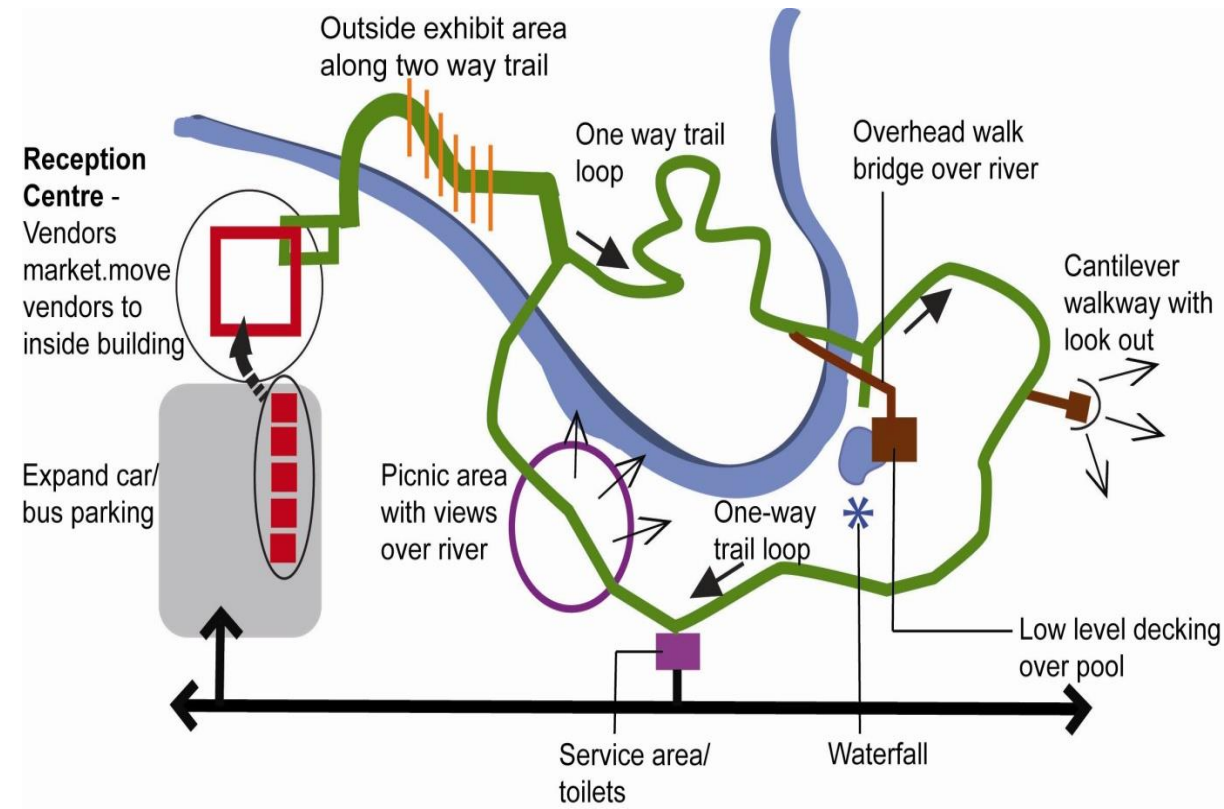
To cater for the projected increase in cruise visitors, Trafalgar Falls will need to have its carrying capacity increased. A development concept is shown as follows, though there are other possible variations.





**Emerald Pool Development**

Similarly, Emerald Pool will need to be developed to expand its carrying capacity. A development concept is shown as follows, although again there are other possible variations.





## 20.10 GENERAL TOURING PRODUCT

The improved road network, as outlined in Ch. 11, opens up the possibility of developing a **touring product**, which can be either chauffeur driven (mini-bus) or 'go-as-you-please' car rental. This latter product is particularly popular in destinations such as Barbados and Tobago, and benefits both the visitor and host communities.

### For the visitor

- enriches the experience of visiting Dominica
  - creates feeling 'I've really been to Dominica'
  - better understanding of Dominica, the heritage, natural resources, people and communities
- makes visitors want to 'discover' more

### For host communities

- dispersal of visitor spending on island related to
  - accommodation
  - facilities & services
- creates business opportunities
  - sale of refreshments
  - local art & crafts galleries

Development of the touring product requires the designation of routes, signage, lay-bys for scenic viewing, picnic sites, road map and touring brochure indicating points of interest, describing local communities and local history. The routes would also act as foci for the establishment of small scale recreational facilities including viewpoints, car parks and picnic areas, and for the development of local enterprises involved in the sale of refreshments, and local arts and crafts, and in the promotion of touring and guiding services. The following routes would constitute the primary network.

- **Melville Hall – Roseau**
  - with interpretation, rest-stops, lay-bys, viewing stops
- **The Northern Discovery Route** (one/two days depending on stops)
  - Roseau, Syndicate/Morne Diablotin, Cabrits National Park, Cold Soufriere, Carib Territory, Emerald Pool, Roseau.
- **The Southern Discovery Route** (one day)
  - Roseau, The Old Mill, Emerald Pool, Sari-Sari Falls, Victoria Falls, White River, Grand Bay, Roseau.
- **The Trafalgar Falls Discovery Route** (full or half day)
  - Freshwater Lake, Boeri Lake, Trafalgar Falls, Sulphur Springs.
- **The Wild Coast Route**
  - Roseau, Bellevue-Chopin, Soufriere, Scott's Head Grand Bay, Carib Village, Roseau...
- **'Ring of Dominica' Scenic Coastal Route**
  - circumnavigating the island (including completion of the 'missing link' between Rosalie and Petit Soufriere)

Map 20.1: Touring Routes



## 21. MARKET AND PRODUCT DEVELOPMENT OPPORTUNITIES

### 21.1 DEMAND TRENDS FOR STAY-OVER ARRIVALS

Between 2003 and 2012, international travel to the Caribbean increased from 17.3 million to 21 million tourist arrivals, representing an average growth rate of just under 2.2% yearly. However, this growth was unevenly spread across the region, with Cuba and the Dominican Republic being the high growth destinations. Excluding these two countries, growth to the traditional Caribbean destinations has been averaging about 1.5% yearly.

### 21.2 'NEW' GEOGRAPHIC MARKET OPPORTUNITIES

As described in Ch. 17, Dominica's marketing strategy to date has been to target the following source markets:

- North America: US and Canada.
- Europe: UK; France and German speaking markets.
- Caribbean: French West Indies.

#### **'New' Market' Opportunities in Europe**

**Western Europe:** there are few 'new' market possibilities for Dominica in Western Europe. At first sight, the Western Europe market (with 3.7 million stay-over arrivals to the Caribbean annually) suggests considerable potential for Dominica as currently the country receives a less than 1% market share. However, the reality is different for a variety of cultural, historical and structural reasons.

Firstly, for the most part, the French travel to the French islands, the Dutch to the Dutch islands, the Spanish to the Hispanic islands and the British to the English-speaking islands.

Secondly, if the French islands are excluded, about 80% of European travel is to five destinations – Dominican Republic, Cuba, Cancun, Barbados and Jamaica.

Thirdly, direct air access, whether by scheduled or charter flights, determines tourist flows.

However, one 'new' European market which offers considerable potential for Dominica is The Netherlands. Nature tourism, hiking, diving appeal to a significant number of Dutch holiday makers, many of whom travel to Saba and St. Eustatius. There is a direct service from Amsterdam to St. Maarten, and it is possible to make a same day connection from St. Maarten to Dominica. This routing can also be used by visitors living in north-western Germany, opening up another large potential growth market.

**Eastern Europe:** Hungary, Poland, Baltic States, Russia, Balkans, etc – these do represent 'new' market possibilities, but only in the longer term. Currently, tourists from these markets are 'discovering' Western Europe, US and Canada, South-East Asia. Except for relatively few (and those mostly the rich) the Caribbean is not yet on their holiday destination 'radar', particularly for the less well known islands.

#### **'New' Market' Opportunities in South America**

**South America:** the two more important South American source markets are Brazil and Venezuela.

Although the Brazilian outbound travel market is the largest in South America and there are direct flights from San Paulo to St. Maarten, and Puerto Rico, we are of the opinion that Dominica has limited appeal for Brazilians. In general, Brazilian holidaymakers like colourful destinations – sun and beach, music and entertainment, active leisure activities, shopping and different culture. They also like:

- High quality hotels in urbanized centres where shopping, restaurants, discos etc., are located.
- Casinos – as gambling is prohibited in Brazil.
- Duty free shopping – particularly for branded goods.

Currently, Dominica cannot meet these needs. Moreover, language would be an additional barrier.

For the most part, Venezuelans take short break vacations in Caribbean destinations and are looking for good beaches, shopping and entertainment. Importantly, the holiday break is associated with relaxation and tranquillity rather than cultural/educational or soft/hard adventure. The type, quality and location of accommodation is also important – with preference for the 4\* and 5\* larger hotel in urbanized centres where the shopping, casinos, discos and restaurants are located.

Moreover, the Venezuelan market is a volatile market, due to a 'roller-coaster' economy, driven by oil prices and political interference. Adding to the volatility of the Venezuelan market is the fact that the market is very much driven by charters due to very high seasonal patterns of travel demand.

Dominica unlikely to appeal to the Venezuelans.

### 21.3 CUSTOMER TRENDS

International tourism and its markets are facing unprecedented change because of increasing affluence, demographic shifts, changing lifestyle values and rapidly evolving technologies. This changing profile of customers makes it difficult to determine the pattern of future tastes and preferences. The complexity of the market makes the concept of the typical or average tourist of little practical use for tourism planning purposes.

Dominica's 2006 Marketing Strategy/Plan document identified some characteristics of tomorrow's customer which can provide pointers for Dominica as to their needs:

- They are older, more physically and mentally active
  - activities and interests increasingly determine choice of destination
  - greater range and depth of niche market customer segments.
- They are increasingly using the Internet to get information on destinations and make bookings, rather than the traditional retail travel agent
  - looking for value-for-money and transparent cost structures.
  - Women make more holiday decisions than their male partners, and account for 70% of the travel guide purchasers.



- They also use the Internet to voice dissatisfaction: disappointed customers are quick to report their dissatisfaction, and the Internet gives a huge international reach to their negative comments. This greatly increases the premium to be placed on customer satisfaction and rapid response to complaints.
- They are better educated, more discerning and look for fulfilling experiences as well as relaxation
  - The traditional division of vacation demand into concepts of nature v beach holiday; touring v resort holiday is now obsolete. It is the capacity of a destination to provide a range of fulfilling experiences that is determining choice. Consumers may seek out a selection of differing experiences during the course of their holiday.
- Key customer needs which tourism and leisure activities should seek to satisfy including delivering:
  - authenticity, reward, rejuvenation, relaxation, fun, self-actualisation (mental stimulation/learning), discovery, energising experiences, freedom, safety and healing. The set of needs and emphasis on particular ones varies from customer to customer. Good destinations respond to a wide range of needs; individual products may focus on just one, but need to ensure clarity of communication of their content and deliver to a high standard.
- More and more tourists, especially in older age groups, seek authenticity, and the values they seek in destinations and products include:
  - ethnical, natural, honest, simple, beautiful, rooted and human.

The brand promise of a destination needs to embody trust, safety and quality assurance.

#### 21.4 PRODUCT - MARKET MATCHING

In planning for the realization of the plan’s growth objectives, a major issue is the extent to which the supply of Dominica’s tourism product can be expanded and diversified.

An assessment of what the market wants, linked to Dominica’s ability to supply the required tourism products is shown on the following matrix. Correlating what the market wants with what Dominica can realistically supply indicates how the island’s tourism product can be expanded and diversified and what is necessary to achieve this in terms of product development which is consistent with the sustainable tourism vision for Dominica.

As the complexity of the market makes the concept of the typical or average tourist of little practical use for tourism planning or indeed marketing purposes, the required approach is to match the product offer to motivational characteristics of the customer segment. This includes positively exploiting from a PR and marketing standpoint the country’s environmental and other policies (e.g. the marketing opportunity arising from the GOCM’s decision to abstain from supporting commercial whaling and the proclamation to be carbon negative by 2020/25 which have won the support of both regional and international environmental groups).

#### 21.5 RANGE OF PRODUCT DEVELOPMENT OPPORTUNITIES

Dominica’s existing and potential tourism products comprise:

- **Primary Products:** diving; hiking; whale watching; natural spas and wellness; festivals and events; Heritage/Culture, Kalinago Experience; Education Tourism; and Sporting Events.

- **Secondary Products:** Beach/Eco Lodges; Yachting; Community Tourism; Meetings & Conferences.
- **Other Products:** Golf; Residential Tourism; Soft Adventure/Extreme Sports; Sea Fishing; Bird Watching; and General Touring.

Cruise tourism is discussed separately in Chapter 27.

**Table 21.1: Dominica’s Tourism Products – Existing and Potential**

Primary Products	Secondary Products	Product Opportunities
Hiking	Beach/Eco Lodges	Golf
Diving	Yachting	Residential Tourism
Whale Watching	Community Tourism	Soft Adventure/Extreme Sports
Natural Spas & Wellness	Meetings & Conferences	Sea Fishing
Festivities		Bird Watching
Heritage/Culture		General Touring
Kalinago Experience		
Education Tourism		
Sporting Events		

Source: DDA/Consultant

Broadening the product involves moving from an offer of essentially of nature, dive and cruise tourism to a wider product offering which includes the above secondary and other potential products, targeting both the general leisure market (Nature Enthusiasts, Hikers, Divers, Romance Seekers, Cultural and Heritage Explorers) and the second generation VFR market (more international in outlook but still Dominican). But the product offer must be carefully matched with what these markets want.

The potential of each of the existing and potential product attractors is discussed in the following paragraphs.

## 21.6 PRIMARY PRODUCTS

DDA will focus investment on a product mix that generates Caribbean experiences unique to Dominica. The product offering will be based on the destination’s natural resources and their core attributes:

**Table 21.2: Dominica’s Primary Tourism Products**

Tourism Product	Core Attributes
Diving	Crystal clear waters, high visibility, healthy dive sites, vibrant and colourful reefs
Hiking	Diverse terrain, wide range of flora and fauna, oceanic rainforest, No known poisonous/dangerous species of snakes
Whale Watching	Year round sightings, diversity in species, and longevity leading to generational families
Natural Spas and Wellness	Natural springs; purity of water, clean air, natural fresh foods
Festivals & Events	Creole culture, unique music festivals – Creole music enthusiasts
Heritage/Culture	Roseau Historic District, Fort Shirley, etc.
Kalinago Experience	Last and largest population of the region’s indigenous Carib population and their cultures
Education Tourism	Nature education and research programmes as part of Dominica’s sustainable product offering Education, business and conference markets in health, wellness and environment. Ross University: will occupy prime attention both as an education tourist segment and as a lead in generating interest in the island’s range of tourism products.
Sporting Events	Sporting events with particular focus on Cricket & Football. Sports events and activities – clubs and groups in the Caribbean.

Source: DDA presentation at Air Access workshop, September 2012.

### (i) Diving

With an industry estimate of fewer than 3,000 dive visitors per year at present, there is considerable growth potential. In 2007, it was estimated that around 2.7 million divers took a diving holiday, of whom approximately 400,000 visited Caribbean destinations such as Aruba, the Cayman Islands, Bonaire and Curacao. Added to this is the growing number of resort-based tourists who take a one-off diving lesson as part of their overall holiday experience.

Carrying capacity in terms of number of divers and/or of dives is not a constraint and industry representatives believe that the island could accommodate a threefold increase in the number of visiting divers, without overcrowding. Presently, businesses are operating at about one-third of capacity in terms of boats, equipment, etc. Air access (connectivity and price), rather than demand, plus the lack of space for dive equipment on airlines using small aircraft, are seen as the main constraints holding back the further development of this key sector.

### (ii) Hiking

Dominica offers a wide range of hiking experiences, with most of the trails connecting with, or in close proximity to, the Waitukubuli National Trail. For the most part, the trails are well-maintained and in good condition. While there is now an *Users’ Guide* to the Trail describing the various segments of the trail (including location, maps, distances, places to stay, etc.), less information is available in respect of the other trails.

Other needs are more training of tour guides (including in French and other foreign languages); the provision of technical assistance to help with raising standards in the accommodation and cuisine available in guest houses and home stays at the end of each WNT segment. The goal is to meet, and then exceed, visitors’ expectations and thereby encouraging repeat visits.

### (iii) Whale Watching

Whale watching tourism has grown substantially since the mid-1980s. A 2009 study, prepared for IFAW estimated that 13 million people went whale watching globally in 2008, up from 9 million ten years earlier. Commercial whale watching operations were found in 119 countries, including a large number in the Caribbean.

The deep sheltered bays along Dominica’s western coast provide a haven for the Sperm Whale to breed and calve. Although possible all year long, sightings are most common between November and March. From small beginnings in 1988, there are now four operators offering whale watching tours from Dominica, which together attract over 5,000 whale and dolphin watchers (including some cruise visitors).

Coastal communities have started to profit directly from the whale watching tourism, significantly adding to popular support for the protection of these animals from commercial whaling. **Most importantly**, in Dominica, whale watching has been put on a positive footing in terms of education and science, partly due to international workshops. The challenge now will be to grow sensibly, to manage any boat traffic problems that develop, and to continue to invest more and more in education which will entertain the visitor and improve the business while at the same time benefiting the whales.\*

### (iv) Natural Spas and Wellness

The Health and Wellness market has been identified both in the 2005 TMP and the DDA Marketing Strategy as an important niche market for Dominica which can contribute significantly to the growth in visitor arrivals. Dominica can develop a unique and competitive health and wellness package based on the variety of products that it has to offer. This would allow resort spas to cooperate with hot springs operators; local herbalists and organic specialists; and alternative medicine practitioners (listed in a DDA’s Health & Wellness Directory).

At present, this market is relatively underdeveloped in Dominica compared with competing destinations in neighbouring islands in the Caribbean. There is a need to encourage investment in ‘flagship’ resort spas to act as a catalyst for the further development of this sector. Industry trends are indicating that, rather than being an ‘amenity’ offered at hotels and resorts, spas will increasingly be the deciding factor or the primary motivation in choosing a vacation. In addition, improvements are needed to the physical infrastructure at some of the existing natural spa facilities to enable them to meet international standards

Reflection the 2005 TMP recommendation, a planned resort development at Woodford Hill, providing a total of 112 accommodation units, would include a high quality wellness spa under the management of Six Senses/Evasion or some other luxury spa group.

\* See Hoyt, E: *The Potential of Whale Watching in the Caribbean: 1999+*. (Whale and Dolphin Society, 1999)



### **(v) Festivals and Events**

Festivals and events include Carnival, World Creole Music Festival, Jazz 'n Creole, Independence and other celebrations. Currently, they attract some six percent of total stay-over tourists. However, the majority of these events are primarily focused on resident and non-resident Dominicans and the intra-Caribbean market (especially the French West Indies). Whilst these are interesting attractions for North American and European visitors who happen to be on the island at the time, they have not in themselves been a reason for such persons to visit Dominica. If the numbers and spending are to increase, the product must be made more attractive for residents of these markets too.

### **(vi) Heritage/Culture**

Heritage and cultural tourism is of increasing importance globally, including the Caribbean (e.g. Barbados, Curacao, Nevis). This includes both visits of monuments or sites as well as experiences and interaction with local people. It is estimated that 35%-40% of tourist trips worldwide incorporate some form of cultural heritage or historical activity, but this is reduced to about 10%-15% if it includes only those that specifically go on holiday to visit a cultural, heritage site or historical attraction. In the Caribbean, the proportions are probably lower.

Cultural tourists are an attractive market segment, tending to be mid- to upper-income earners, good spenders, well educated, frequent travellers, and mostly independent tourists. Key drivers are cultural attractions, museums, historic architecture, scenery, and experiencing music and the arts. However, they are also very discriminating, seek authenticity in cultural interpretation, and desire quality in all aspects of the product.

Dominica has much to offer in this respect. It has the only dedicated Carib (Kalinago) territory in the Caribbean, while both the Roseau Historic District, Fort Shirley (within the Cabrits National Park), the 18<sup>th</sup> century Bois Cotlette Estate in Soufriere (which is the best representation of a plantation house in Dominica, with much of its remains still intact) and the 'Massa Quarters' of the old Geneva Estate at Grand Bay are significant heritage sites. In addition, there are several important maroon sites and numerous events and festivals (including Carnival and the World Creole Festival) which promote local culture and heritage.

Thus, the essential platform of cultural heritage attractions already exists in Dominica, but at present, apart from Fort Shirley and some of the major festivals, they are not a stand-alone reason for visiting Dominica. They need more enrichment and development, including integration of attractions more fully with national interpretative and promotional strategies; and enhancement of the quality of ambience, exhibition, performance, access and interpretation.

### **(vii) Kalinago Heritage**

The Carib cultural village (Kalinago Barana Autê) offers visitors cultural group performances, demonstration of Kalinago crafts, the local architecture, an interpretation centre along with local catering for individuals and groups. However, from its inception the KBA has been operating at a loss, with visitor numbers less than one-sixth of the projected figures. Recommended financial input and staffing have not been realized. A recent report\* identified problems with management, product development, maintenance and marketing. The report's findings and recommendations need to be implemented. The Touna Kalinago

Heritage Village, near Concord, offers a different opportunity for visitors to appreciate the lifestyles of the Kalinago people and feel part of a present day indigenous community. This can be facilitated through the Kalinago Homestay Programme.

### **(viii) Education Tourism**

The growing demand for 'alternative' touristic experiences increasingly includes a number of educational and learning elements designed to provide a distinctive visitor experience which is both educational and entertaining. This potential growth market is frequently characterised as one where people have a relatively high tendency to travel as well as the time to visit destinations and attractions. The definition of education tourism also includes those wishing to carry out academic research where the potential beneficiaries include universities and colleges, schools, language centres and training institutes. The focus can also include course work for non-graduates and graduates.

In Dominica, the Archbold Centre at Springfield provides classrooms, laboratories and dormitories for students and professors wishing to undertake environmental research. The educational experience is enhanced by actively working with community groups or NGO's on specific projects. In Portsmouth, Ross University has a similar role with regard to those wishing to carry out medical research, as well as more broadly generating interest in the island's tourism products.

Nature education and research programmes can become an even more important part of Dominica's sustainable product. However, there is need for more research into the various educational tourism market segments and a clearer understanding of the consumer needs and travel requirements of education tourists.

### **(ix) Sporting Events**

In other Eastern Caribbean destinations, there is a wide range of sporting events and competitions that attract considerable numbers of participants, fans and other spectators, including some from outside the region. In some cases, training facilities are provided for overseas clubs and colleges (e.g. tennis in Anguilla, football in Montserrat, and swimming in Barbados).

In Dominica, the focus appears to be exclusively on Cricket and, to a lesser extent, Football played at the 12,000-seat Windsor Park Stadium (which also serves as the venue for national activities such as the World Creole Music Festival, the finals of the annual Calypso Competition and the Miss Dominica pageant among others). The Stadium is presently operating at a significant loss.

Suitable facilities for other sporting events are either non-existent (e.g. golf, and tennis) or not actively organized or promoted. For example, there are no significant swimming, sailing, fishing or cycling events or competitions - not even a cycling *Tour de la Dominique* to rival similar events in Guadeloupe and Martinique or an annual Sailing Regatta like that in Anguilla.

## **21.7 SECONDARY PRODUCTS**

The potential of each of these attractors is discussed in the following paragraphs:

### **(i) Beach Resorts and Eco-Lodges**

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

For the most part lacking the traditional white sand beaches associated with the Caribbean, Dominica is not promoted by DDA or tour operators as a beach destination. This undersells the island which does in fact have several outstanding and unspoiled gold or honey-coloured beaches and secluded coves (which are especially appealing for honeymoon couples and others not looking for long expanses of sand crowded with hotels). It is significant that many (but not all) recent investors are choosing beach locations for their new developments in Dominica.

Dominica should continue along this path, encouraging the development of a mix of accommodation types that appeal to a variety of market segments (as reflected in responses to the market research questionnaires). However, a major emphasis should be on up-market boutique hotels or eco-lodges that can command high prices.

### **(ii) Yachting**

Conveniently located in the middle of the chain of eastern Caribbean islands, Dominica is an ideal halt for sailing vessels cruising the Caribbean. It is strategically situated between two large nearby yachting centres, Guadeloupe and Martinique, making it an attractive destination for French charter vessels in particular. The most popular anchorage at Prince Rupert Bay, Portsmouth can often have over 100 yachts at one time. However, compared with competing destinations such as Antigua, St. Bart's, St. Lucia and the BVI, Dominica has been slow to exploit the full potential of the yachting market.

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

Marinas and ancillary facilities are most often developed as part of mixed ventures, such as hotels or resort communities which largely depend upon tourism demand rather than yachtsmen to be successful. In recent years, a number of such projects have been considered for Dominica but, for various reasons, have not gone ahead. However, it is understood that a marina with up to 200 slips, haul-out yard, restaurants, bars, shops, offices, condominiums, hillside villas and a 40-bedroom hotel extension is now under active consideration at Cabrits at a site and on a scale previously identified in the TMP 2005-2015. Whether or not this will form part of the Cabrits Hotel & Spa, which is presently being constructed, is unclear.

### **(iv) Community Tourism**

Sustainable tourism development cannot function solely on its own. Instead, it should become an integrated part of the local community.

One of the recommendations of the TMP 2005-2015 was the strengthening of the linkages between communities and the tourism sector, the aim being to increase the benefits of tourism to the communities on the one hand and, on the other, to enhance the experience of visitors to Dominica. Subsequently, the EDF-funded community support programme was established and implemented in two phases under which over twenty small and medium sized community projects received support for the provision of physical infrastructure (such as visitor centres), but also, particularly under the second phase, for human resource development; business planning; package and tour development; and marketing.

There are mixed views as to the extent to which the communities affected have actually benefited – at least until now – from these programmes. Some argue that the existence

of commercial enterprises (e.g. hotel development) close to a community, or vice versa, is the best way to provide real benefits for communities through employment generation and purchases from local suppliers, as happens already.

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

### **(v) Meetings and Conferences**

The MICE (Meetings, Incentives, Conventions, Exhibitions) market is mostly business-oriented, involving obligatory or non-discretionary travel. However, the incentives segment tends to be more leisure-based as it is usually offered to employees or dealers/distributors as a reward for exceptional performance. In the Caribbean (e.g. Aruba), this is a growing market whose potential has hardly begun to be exploited by Dominica.

Dominica can also be promoted as an attractive venue for regional meetings and smaller conferences not only because of its expanding accommodation base but also for its range of attractions and reputation for safety and security (which can be promoted as one of the island's stronger selling points).

However, at present, it lacks the capacity to host large conferences. Currently, the largest conference facilities are at the Garraway Hotel (with seating capacity for 175 persons) and the Fort Young Hotel (for 120 persons). Other hotels have smaller facilities that are suitable for board meetings and retreats. Additional conference facilities will be provided in new hotels under construction at Cabrits and Anse de Mai, and perhaps in a proposed 120-room hotel in Roseau. The renovated State House in Roseau will also include new meetings facilities.

## **21.8 OTHER PRODUCT OPPORTUNITIES**

### **(i) Golf**

Golf has been identified as a niche product having good potential for Dominica which presently is one of the few Caribbean destinations - apart from the very smallest - that does not have a golf course. Golf is the sort of product that can appeal to both stay-over tourists and cruise visitors, as well as local residents, both Dominican and non-Dominican.

The TMP 2005-2015 provided for an 18-hole golf course at the privately-owned Hampstead estate and a 9-hole course on government-owned land at Cabrits, with associated hotel and real estate developments. There is need to re-assess the suitability of these and other potential sites for golf course development. Nearly always, golf projects are linked to accompanying real estate developments which help to finance the design and construction of the golf course.

It is essential to establish from the outset whether the project is feasible. This will be determined by the carrying out of site suitability, and economic and financial feasibility, studies. An Environmental Impact Assessment will also be needed to address environmental issues which can be extremely important and even contentious. Once the feasibility of the project has been determined, the next step would be to develop a master plan covering golf course layout, locations of clubhouse and maintenance facilities, road and infrastructure layout, and approximate construction programmes and budgets. The developer, rather than Government, should bear the cost of such studies.



However, to enable Dominica to be marketed as a destination for golf enthusiasts, rather than just a place where a round or two of golf might be played whilst on vacation, at least a second championship course would be necessary.

### **(ii) Residential Tourism**

Residential tourism has long been an important part of the tourism industry in a number of countries in the Caribbean region (e.g. in pre-volcano Montserrat which had over 200 villas many of which were available for renting when not being used by their mostly-expatriate owners). For destinations, the benefits of residential tourism are that the spending by owners or renters impacts more directly on the local economy as they shop locally, eat locally and employ builders, gardeners, pool and maintenance workers, security guards, and domestic helpers. This product also includes fractional (or partial) ownership of a property, which is becoming extremely popular as an easy and economical way to own a share of a vacation property which can be placed in a resort rental pool when not being used by the owner(s).

Many countries in the Caribbean are seeking to capitalize on this growing niche market by offering various incentives to beneficiaries, including residence status and tax concessions for approved investments, particularly in property. While Dominica has many of the attributes that would be of interest to certain segments of the residential and retiree market, including an unspoilt environment with a relatively good record for security and safety; and friendly people, this needs to be backed up by a deliberate policy to promote the destination to the target market segment. This should include a competitive incentives package vis-à-vis those that obtain (and in some cases are currently more attractive) in other Caribbean countries such as Barbados and St. Lucia. This needs to be kept under review on a regular basis.

Now that Government has approved the recommendations of the White Paper on Proposals for Residence Tourism Policy for Dominica (October 2006), the most important remaining next step is the inclusion of a new clause under 25 (1) (h) of the Income Tax Act to exempt “any income accrued from a source outside Dominica to a Beneficiary under the Residence Tourism programme, whether the persons resides in Dominica, or not”.

Further development will also depend on the availability of suitable land at attractive prices and/or the quality of new projects such as the planned Woodford Hill Resort (with a total of 112 accommodation units) and other real estate developments either under construction or planned in the La Plaine (Citrus Creek/Taberi Estate) and Castle Bruce areas.

The programme should be accommodated in designated areas where adequate infrastructure exists; where services can be properly delivered; and where any issues of safety and security can be addressed. This would also enable Government to better manage possible spill-over impacts of escalating land prices on local residents.

### **(iii) Soft Adventure/Extreme Sports**

Soft adventure comprises the range of outdoor activities in which tourists frequently engage as part of their holiday. All are accessible to, and can be enjoyed by, non-specialists. Examples of such activities include: walking, cycling, horse-riding, angling, adventure centres and water sports (kayaking, sailing, windsurfing, etc.). on the other hand, extreme sports tend to have a higher level of inherent risk, especially for non-specialists.

Dominica offers a variety of soft adventure products to visitors. These include hiking, cycling, horse riding and water sports. Until forced to close after the severe flooding in the Layou River Valley caused by the collapse of the Matthieu Dam in July 2011, Wacky Rollers offered varied activities including river tubing, kayak tours, zip lining, aerial rope bridges walks, and

is now seeking to relocate the river tubing activity to the river at Coulibistrie. The Aerial Tram Company (which was only the second such aerial tramway of its kind in the Caribbean region after Costa Rica), and also incorporated an 840-foot long zip line suspended over the 350-foot drop to the Breakfast River Gorge, announced its closure in June 2012. The Dominica government has indicated that it is examining the situation to see what can be done about salvaging the tram service and the jobs of the affected employees.

Canyoning (also known as rappelling) and other extreme sports are also available in Dominica. These activities often involve a high level of physical exertion, and highly specialized gear.

The availability of good quality, accessible facilities for these pursuits greatly enhances the tourism product by providing visitors with a range of experiences which enriches their holiday.

There is potential to continue to develop these and other adventure sports, and promote them more actively. This will make them more accessible and that a policy of continuous product improvement is in place. Product quality standards and staff training are also inherent elements of this strategy.

### **(iv) Sea Fishing**

While the seas have provided the people of Dominica with food and nutrition since earliest times, the recreational aspects of fishing are so far considerably underdeveloped. Although not specifically promoted on the DDA website, sea fishing is reported to be excellent offering a variety of catches, including tarpon, marlin, dorado, tuna, sailfish, wahoo, mackerel, and barracuda.

There are several fishing boats for hire and a number of small operators offering deep sea fishing charters, including three in the Roseau area and one in Portsmouth. Boats range from traditional fishing boats to fully-equipped 10 or more metre vessels. The boats tend to be smaller than those used in neighbouring islands such as Antigua and Guadeloupe, but they nevertheless offer a good level of comfort with (in some cases) air conditioning, fridge, ice machine, TV, microwave, coffee maker, marine head and a ‘fighting chair’. Use of fish attracting devices (FAD) moored in deep water means that fishing can be enjoyed year round.

Shore fishing is possible at several locations. There is also scope for developing freshwater fishing in the island’s many lakes and rivers (e.g. Freshwater Lake), but at present river fishing is restricted to residents.

### **(v) Bird Watching**

Bird watching has the potential to become a significant niche market for Dominica. An estimated three million international trips are taken each year for the main purpose of bird watching. However, for many more, bird watching is often a secondary purpose of a holiday visit.

The most famous birds of Dominica are the Sisserou (Imperial) and the Jaco (Red Necked) parrots which are found mainly in the northern part of the island and are protected. A breeding programme at the Parrot Research Centre located in the Botanic Gardens has been in place for several years and has helped the populations to recover. Parrots are now spreading further south. Bird-Watching Tours are offered by several hotels and by certified tour guides: Dominica also offers ‘twitchers’ the exciting prospect of finding species that are new for the country.

**(vi) General Touring**

Recent and on-going improvements to the road network open up the possibility of developing a general touring product in Dominica, which can be either in chauffeur-driven mini-buses or in self-drive rented vehicles. This product can produce benefits for both the visitor (stay-over and cruise) and host communities as follows:

*Visitors:* it adds to the visitor's experience by providing a better understanding of the island's natural attractions, people and culture;

*Host Communities:* it helps to spread visitor spending more widely throughout the island, creating business opportunities for provision of accommodation, sale of snacks and drinks, and indigenous arts and crafts.

In order to further develop this product, the main needs are (i) designation of touring routes; and (ii) provision of improved road signage, lay-bys for scenic viewing, picnic sites, and a better road map and touring brochure (indicating points of interest, tourist facilities and amenities, and other useful information). In time, small scale recreational facilities, including viewpoints, car parks and picnic areas, and refreshment stalls, could be provided along the touring routes. The routes that would constitute the primary general touring network are set out in the 2005 TMP. They include the 'Ring of Dominica' Scenic Coastal Route circumnavigating the island.

Priority projects for enhancement of this product are the rehabilitation and upgrading of the scenic 'Wild Coast' route from Grand Bay to Petite Savanne and Delices; and construction of a new road between Rosalie and Petit Soufrière (which is now the only 'missing link' on the proposed *Ring of Dominica* touring route. To which should be added the importance of improved signage, particularly in Roseau, provision of lay-bys on main roads and construction a possible Portsmouth by-pass.



**Table 21.3: Product - Market Potential for Expansion and Diversification**

Market Segment	Characteristics	Requirements	Development Potential and Actions
<b>A. Nature Tourism</b> • bird watching • botanical • natural history • whale watching	• moderate use of tourism plant • high spend • seasonal • moderate growth rate	• nature reserves/parks • guides & ground tour arrangements • range of accommodation • good interpretation	• Important potential, but • interpretation lacking, • need for biodiversity tours • need for foreign language skills e.g. French-speaking guides
<b>B. Activity Tourism</b> • hiking • mountain biking • kayaking, river tubing • zip-lining • extreme sports (canyoning, etc.)	• moderate use of tourism plant • moderate spend • seasonal • moderate growth rate	• nature reserves/parks • marked trails • activity centres • range of accommodation	• major potential of Waitukubuli National Trail • increased on-going maintenance of trails • activity centres needed
<b>C. Community Tourism</b> • community projects • agro-tours • culture and heritage	• short stay • low rate use of tourism plant • moderate spend	• active community support • accessibility • good interpretation and tour guiding • B&B, home stays	• significant potential • improved accommodation and cuisine standards • enhanced interpretation and tour guiding • maps and other information • strengthen linkages with hotel sector
<b>D. Culture/Heritage</b> • Kalinago experience • Roseau Historic District • Geneva Heritage Centre • Cabrits	• Diaspora, regional and international • short stay • moderate use of tourist plant • low environmental impact • high repeat	• high presentation and maintenance standards • cultural and heritage displays and experiences • entertainment/local ambience • range of accommodation, including local	• important potential • product enhancement • wider promotion • enhanced road, etc. infrastructure • community 'buy-in'
<b>E. Cruise Visits</b> • small to medium size cruise ships • large and mega cruise ships	• high volume • very short stay • high environmental impact • seasonal demand	• interesting things-to-see & do • attractive/accessible nature and historic sites • cultural/heritage experiences • shopping • ambience • safety and security	• significant potential • targeted marketing to cruise lines • tour bus/taxi organisation • carrying capacity at premium sites • conversion to stay-over tourists
<b>F. Eco-resorts</b> • beach/interior/ mountain nature resorts • health and wellness/spas • sulphur springs	• high spend • high use of tourist plant • all year demand • high growth	• small scale hotels and lodges • high quality facilities • secluded settings • nature walks, trails, things-to-see-and-do • professional therapists, dieticians • medical support facilities	• significant potential but on small scale • need for international spa resort 'brand' such as Banyan Tree, Six Senses, etc. • wellness treatment by professionals – high quality clinical equipment • high standards at natural hot springs/sulphur baths
<b>G. Residential/Long Stay</b> • retirees • villa rentals • fractional ownership at resorts/boutique hotels	• villa/town houses, condos (ownership rentals) • holiday homes with long, frequent visits • high spend • high growth	• seamless access from regional hubs, esp. Antigua • reassurance about safety and services • things-to-do e.g. golf • regulatory framework • medical support facilities	• significant potential • large and small scale resorts • competitive tax and other incentives
<b>H. Sports</b> • sporting events • training	• groupings of participants, fans & other spectators • high use of tourist plant • short 2 – 4 days • moderate growth	• good and appropriate sporting facilities • range of accommodation • good local food • entertainment/local ambience	• Significant potential at Windsor Park Stadium • Enhanced marketing and promotion
<b>I. Scuba Diving</b> • diving • snorkelling	• 1 week average stay • high use of tourism plant • high spend • seasonal • low environmental impact	• range of dive sites • dive shops/dive masters • medical support facilities • range of accommodation • things to-see and do for non-dive companions	• Major potential with sites fully identified and mapped • Improved air and sea access • better site maintenance • range of facilities and accommodation • 'wreck' diving to be developed to expand product appeal

<p><b>J. Yachting</b></p> <ul style="list-style-type: none"> <li>• yachting</li> </ul>	<ul style="list-style-type: none"> <li>• short stay</li> <li>• low use of tourism plant</li> <li>• moderate to high spend</li> <li>• low to medium environmental impact</li> </ul>	<ul style="list-style-type: none"> <li>• jetties/moorings/marina</li> <li>• on-shore facilities – showers, laundry</li> <li>• things to see and do</li> <li>• shopping/provisioning</li> <li>• fuel/water supplies</li> </ul>	<ul style="list-style-type: none"> <li>• major potential</li> <li>• streamlined customs and immigration clearance</li> <li>• provision of marina/moorings/pontoons</li> <li>• shore facilities</li> <li>• facilities for water/fuel uplift</li> <li>• improved information on yachting in Dominica</li> </ul>
<p><b>K. Short Breaks (weekends/mid-week)</b></p> <ul style="list-style-type: none"> <li>• general holiday maker</li> </ul>	<ul style="list-style-type: none"> <li>• 2 to 3 night stay</li> <li>• medium to high spend</li> <li>• high use of tourism plant</li> <li>• off-season</li> <li>• low repeat</li> <li>• intra-Caribbean/FWI mainly</li> </ul>	<ul style="list-style-type: none"> <li>• small scale facilities</li> <li>• things-to-see-and-do</li> <li>• good food</li> <li>• entertainment/local ambience</li> <li>• interesting attractions</li> <li>• competitive car rental tariffs</li> <li>• events/festivals</li> </ul>	<ul style="list-style-type: none"> <li>• significant potential</li> <li>• tourism product needs development</li> <li>• better range of evening entertainment</li> <li>• better quality restaurants required with regular opening hours</li> <li>• product needs to be packaged</li> </ul>
<p><b>L. Excursionists</b></p> <ul style="list-style-type: none"> <li>• day visitors - one-day stay</li> </ul>	<ul style="list-style-type: none"> <li>• low use of tourism plant</li> <li>• low spend</li> </ul>	<ul style="list-style-type: none"> <li>• competitive access transport</li> <li>• organised tours</li> <li>• things to see/interpretation</li> <li>• shopping</li> </ul>	<ul style="list-style-type: none"> <li>• significant potential from Antigua and FWI</li> <li>• affordable, reliable air/sea access</li> <li>• streamlined customs and immigration clearance</li> <li>• high standards of taxi/tours</li> </ul>
<p><b>M. Weddings &amp; Honeymoon Stays</b></p> <ul style="list-style-type: none"> <li>• niche market</li> </ul>	<ul style="list-style-type: none"> <li>• high spend</li> <li>• 4-7 night stay</li> <li>• high use of tourist plant</li> <li>• low environmental impact</li> <li>• all year demand</li> </ul>	<ul style="list-style-type: none"> <li>• attractive church/location for ceremony</li> <li>• attractive location for photography</li> <li>• wedding venues – accommodation with room for reception</li> <li>• wedding planners</li> <li>• clear legal situation</li> </ul>	<ul style="list-style-type: none"> <li>• significant potential</li> <li>• more venues</li> <li>• clearer and more streamlined regulations</li> <li>• improved range of accommodation</li> </ul>
<p><b>N. Festivals/Events</b></p> <ul style="list-style-type: none"> <li>• Carnival</li> <li>• World Creole Music Festival</li> <li>• Jazz 'n Creole</li> <li>• Independence Celebrations, Carnival, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• returning nationals and intra-Caribbean</li> <li>• short stay</li> <li>• high use of tourist plant</li> <li>• low environmental impact</li> <li>• seasonal demand</li> <li>• high repeat</li> </ul>	<ul style="list-style-type: none"> <li>• unique festivals and events</li> <li>• particular timing to avoid clashing with other regional events</li> <li>• things-to-see-and-do</li> <li>• good local food</li> <li>• entertainment/local ambience</li> <li>• safety and security</li> </ul>	<ul style="list-style-type: none"> <li>• important potential</li> <li>• to be more widely promoted and developed outside high season</li> <li>• improved range of accommodation</li> <li>• ease of air and sea access</li> </ul>
<p><b>O. Business Meetings</b></p> <ul style="list-style-type: none"> <li>• small companies</li> <li>• regional organisations e.g. OECS, CARICOM, etc.</li> </ul>		<ul style="list-style-type: none"> <li>• meeting facilities</li> <li>• up-scale accommodation</li> <li>• restaurants</li> <li>• entertainment</li> <li>• things-to-see-and-do</li> <li>• safety and security</li> <li>• spouse/partner/family programmes and attractions</li> </ul>	<ul style="list-style-type: none"> <li>• important potential</li> <li>• convention/meetings organisational expertise required</li> <li>• better air and sea access</li> <li>• appropriately sized conference and convention facilities</li> <li>• entertainment/things to do</li> </ul>
<p><b>P. General Touring</b></p> <ul style="list-style-type: none"> <li>• stay-over tourists</li> <li>• excursionists</li> <li>• yacht and cruise visitors</li> </ul>	<ul style="list-style-type: none"> <li>• high use of tourist plant</li> <li>• low to medium environmental impact</li> <li>• year round demand</li> <li>• high repeat</li> </ul>	<ul style="list-style-type: none"> <li>• range of designated touring routes, with maps, brochures, etc.</li> <li>• high quality road network and signage</li> <li>• things-to-see-and-do</li> <li>• safety and security</li> </ul>	<ul style="list-style-type: none"> <li>• important potential</li> <li>• road improvements on Wild Coast</li> <li>• Stopping places, with range of amenities</li> <li>• better signage and maps</li> <li>• increased promotion</li> </ul>