

Master Plan for Roseau Botanic Gardens, Dominica

SECOND INTERIM REPORT

Institutional Development Plan

Prepared by

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1.0 INTRODUCTION

This Report is prepared in partial fulfillment of the Service Contract dated March 6th 2006 between the Ministry of Tourism, Industry and Private Sector Relations, represented by the Programme Management Unit of the Eco-Tourism Development Programme and Scribal Consultancy Services & Historical Tours, requiring the submission of a Second Interim Report before the end of the eight (8th) week of the consultancy. This report has been delayed due to delays in responses on the first interim report. The study is being funded by the European Commission.

This document represents a draft analysis of institutional arrangements required for the Botanical Gardens of Roseau, Dominica. It comprise five broad sections including **1) An Introduction 2) An Institutional Framework; 3) A Marketing Strategy; 4) Public Awareness Campaign 5) A Financial Operations Plan, 6) Business Opportunities; and 7) A Policy on Ecotourism Development.**

This second interim report is broken into seven parts including the current introductory section. The second section attempts to describe the institutional arrangements for the effective management of the Roseau Botanical Gardens. It includes an analysis of the capacity of various institutions related to the management and operations of the RBG and attempts to highlight respective strengths and weaknesses as they relate to requirements for management.

The third section is the Marketing strategy which emerges out of a review of the current international market conditions, an analysis of the visitor market to Dominica, as well as the general public, the role of local tour operators and an implementation strategy.

The fourth section is related to the third and provides a Public Awareness plan that is targeted largely at the Dominica public.

The fifth section provides a financial assessment of the operations of the RBG, includes cost estimates for the physical development and enhancement components, as well as for staff training. It also provides a budget and calendar for executing the marketing and public awareness strategy.

The sixth section explores business opportunities associated with the RBG, and proposes a strategy for greater distribution of economic benefits for local small and medium size entrepreneurs.

The seventh section offers a context within which the Botanical Gardens will be expected to operate successfully. It describes two principal schools of thought on tourism development options for Dominica, analyses the perspectives based on a literature review of case studies, and proposes a policy on ecotourism development as requested in the terms of reference.

2.0 INSTITUTIONAL FRAMEWORK

2.1 Introduction

The capacity of national institutions to champion the implementation and administration of the RBG as a national asset must be ascertained regardless of the management regime. An assessment of this situation is presented against the backdrop of a management plan which has already been described in the First Interim Report.

2.2 Analysis of the capacity of national institutions and implications for the Roseau Botanical Gardens Project.

Despite moves towards economic liberalization and more accountable forms of state organization, many developing countries continue to be dogged by dependency, conflict and poverty. The roots of these problems are complex and the common response has been to emphasize good governance practice and effective development management. However, very little attention is paid to the institutional and human resource capacity required to implement development interventions.

The common experience of small island states in dealing with the effects of modernization, dependency and continuous conflicts over unevenly distributed and scarce resources provide an appropriate forum for assessing context-specific capacity of institutions. These assessments need to be structured in a way which determines gaps, risks and possible mitigative and other support requirements. A framework for facilitating the on-going support and sustainability of such initiatives must be premised on common experience but provide sufficient space for changing circumstances and realities.

Capacity is understood in different ways ranging from economic capability to institutional performance to individual competence. Capacity is required at all these levels and that capacity development is a long-term investment in the sustainability of the initiative and the economy.

This is the context in which the capacities of national institutions in Dominica were assessed to determine first of all the gaps in the capability to effectively manage the restructured RBG.

An integrated (contextual) understanding of capacity outlined in the table below implies a focus on three areas.

- mission and fit: aligning the goals and ambition of the RBG project with those of the institution;
- institutional capacity: ability to design or availability of supporting effective structures, systems and procedures for delivering effective service; and
- People: skilled managers, professionals, and their competencies and providing support.

Component	Description
Context	Understanding the context of development is critical to understanding the capacity challenge. Context comprises the political, economic and social frameworks that define capacity development initiatives. It also requires an understanding of the key stakeholders and other factors that determine needs and challenges.
Competence	The right skills, knowledge and ability to achieve what is required to be done in specific contexts and organizational settings.
Mission and Fit	Mission jump starts motivation and initiative. Fit implies a shorter learning curve and compatibility with pre-existing mandate.
Institutional Structures and Systems	These are the appropriate structures and systems to support growth and development. The institutional context comprises those elements which determine the capacity of the institution to perform - to fulfill its mission in its own context. Strategic direction, human resources, financial resources, infrastructure and linkages.

The Department of Forestry functions in a supervisory capacity at the RBG. This function is not authorized by statute and appears to have emerged from expediency and an appreciation of sustainable resource management. An assessment of seven (7) entities (*one of which - the National Parks Authority which is not currently in existence*) did not expose a more appropriate or capable institution to provide the required stewardship. That notwithstanding the contribution of the NDC and the Ministry of Tourism would be pivotal in defining a relationship with the cruise sector which would allow for the charging and collecting of fees for cruise visitors to the RBG and for feedback and partnering with the sector.

1.1 Matrix showing the comparative strengths and weakness of various institutions.

Sector	Name of Institution or Programme	Programmes and Functions (Context)	Current Activities and Capacities (Mission & Fit)	Assessing Competence based on Discussion and Observations	Implications for institution with respect to the Project
Economic and development planning, and integrated rural development	Ministry of Finance and Planning (GOV)	Economic and social development programmes Budgeting Development cooperation Poverty reduction Physical planning and development control	Responding to the PSIP and allocating resources to the relevant ministries	Leadership role in development planning, link between macro-economic policy and local development processes and activities	Monitor policy issues and responding to requirements arising from the Project Provide policy guidance on spatial development strategy Facilitate inter-agency communication and collaboration

Sector	Name of Institution or Programme	Programmes and Functions (Context)	Current Activities and Capacities (Mission & Fit)	Assessing Competence based on Discussion and Observations	Implications for institution with respect to the Project
Agriculture and natural resource management	Ministry of Agriculture, Forestry and Fisheries (Agriculture) (Gov)	<p>Planning, leadership, conservation and extension delivery</p> <p>Irrigation</p> <p>Agricultural diversification programme</p> <p>Support services to agriculture enterprises</p> <p>Good agricultural practices, reforestation and management with local community in reforestation, soil erosion control, watershed management</p>	<p>National Parks Management</p> <p>Management of Forests, Nature Reserves</p> <p>Department of forestry responsible for the nature conservancy and management of national parks and other state-owned sites and attractions</p>	<p>Partnership approaches with communities is needed but the most challenging endeavour for communities and the Ministry's staff.</p>	<p>Play a central role in Project design and implementation, allocate specific human and financial resources to strengthen capacity for park and site management services to support conservation and biodiversity management work in RBG</p>

Sector	Name of Institution or Programme	Programmes and Functions (Context)	Current Activities and Capacities (Mission & Fit)	Assessing Competence based on Discussion and Observations	Implications for institution with respect to the Project
	Forestry Division (Gov)	Forest management biodiversity management Watershed management Wildlife conservation and management Ecotourism	Management of public forests Management of forests, nature reserves, world heritage sites, parks and Botanical Gardens	This department is located within the DBG and has responsibility for maintenance of the gardens	Best Fit: However new organisation structure to include short and recurrent interventions. RBG requires a curator, botanist,
	National Parks Authority (STA?)	legislation being drafted to provide management and leadership on the conservation of natural heritage sites	Protected areas (national and heritage parks) Botanical Gardens, Emerald, Middleham and Trafalgar waterfalls	Legislation is being drafted by the Ministry of Legal Affairs in consultation with the Ministry of Agriculture.	May institute a structure for the management of all sites under the purview of national parks and may allocate resources according to need.
Tourism	National Development Corporation (STA)	Responsible for marketing, product development and management of the tourism sector	Investment promotion and facilitation for industry and tourism Marketing and tourism product development	Sees the DBG as a facility for locals with limited revenue generating potential	It appears that the Gov would be reluctant to allocate resources to the NDC for the development/management of the DBG

Sector	Name of Institution or Programme	Programmes and Functions (Context)	Current Activities and Capacities (Mission & Fit)	Assessing Competence based on Discussion and Observations	Implications for institution with respect to the Project
	Ministry of Tourism (Gov)	Embarking on changing its management structure via: The development of the legislative framework for the establishment of a National Tourism Authority;	Regulates, and creates the enabling environment for the development of tourism in Dominica Provides some support in product development	High interactivity with the Department of Forestry and the Ministry of Agriculture	Play a critical role in executing the Master Plan of the Botanical Gardens project, strengthen capacity for the facilitation of tourism initiatives, and serve as a link between the Project and all stakeholders in the tourism sector
Heritage and Conservation	SHAPE - Society for Historic Architectural Preservation & Enhancement	Public Awareness Campaign for Preservation of Historic District in Roseau to protect Roseau's special Architectural and Historic interest.	Demonstrated interest in the restitution of the Gardens to its former glory Operators of guided tours	Lobbyists, high interactivity with the Dominica Hotel and Tourism Association. Preservation and built environment focus	Good support for quality assurance and marketing of tours. No site management experience.

GOV: Governmental agency; STA: Statutory agency; NGO: Non-governmental organisation

2.3 Institutional Plan

It is recommended that a proper management structure be instituted. This should comprise an agency created by statute, with an independent Board of Directors, comprising representative agencies like National Development Corporation (NDC), Ministry of Tourism, Ministry of Agriculture, as well as local NGO's like Society for Historic Architectural Preservation and Education (SHAPE), Dominica Hotel and Tourism Association (DHTA), Society for the Improvement of the Botanical Gardens, etc.; with ultimate responsibility residing in the Ministry of Agriculture. A Site Management Team, staffed as below, should be given the responsibility for the day-to-day operations of the site. The Curator/General manager should also be an ex-officio member of the Board of Directors.

In view of the consideration by the Government of the Commonwealth of Dominica to establish a National Parks Authority, it is recommended that this creature of statute become the management organ for the Roseau Botanical Gardens, as well as other similar parks and sites of attraction like Trafalgar Falls, Emerald Pool, etc.

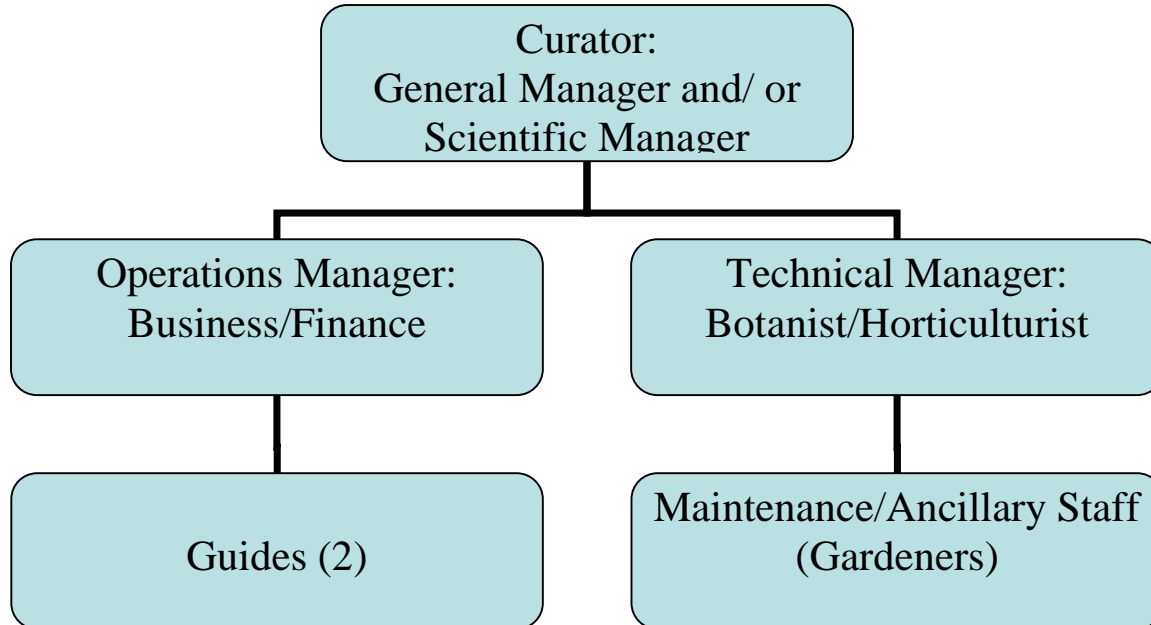
2.4 Staffing:

The upgrading of the activities at Roseau Botanical Gardens will necessitate appropriate personnel to manage and operate the facilities.

Although the present staff arrangement seems minimal even in light of the current level of activity, it generally will suffice due to the direct input of National Parks Unit Forestry, Wildlife and Parks Division staff.

The preferred total complement of staff envisaged for the short term is 8 including 2 top managers. However, given resource limitations, it is recommended that the Curator perform the role of both Scientific and General Manager. An Operations Manager should also be recruited, who should handle the business management components, overall financial accounts and some related human resource matters.

Finally on the list of managers, should be a Technical Manager to handle botany and horticultural matters.



There will be additional persons directly employed at the site handling the various concessions including, souvenir/gift shops and snack bar. Indirect employment will also be generated by the Botanical gardens such as a florist, videographic and photographic services for weddings, suppliers of food and beverage products, transportation services and craft producers.

3.0 MARKETING STRATEGY

3.1 Market Analysis

An analysis of the Dominica tourism market is important to understand the market environment within which the RBG must anticipate business. As indicated in the Financial Operations section, the RBG is perceived as a merit good, and consultation with various stakeholders has indicated that most nationals may be reluctant to pay an entrance fee for use of the Gardens. As such, in the short to medium term, paid patronage of the RBG will come largely from visitors to the island either as stayover or as cruise visitors.

3.1.1 Stayover Visitors

Table 1.2 Stayover tourist arrivals by source markets (1998-2002)

Market Country of Residence	Numbers					
	1998	1999	2000	2001	2002	% Share 2002
USA	14,121	15,613	15,078	14,493	15,464	22.4%
Canada	1904	2158	2176	1870	2039	2.9%
United Kingdom	5577	6633	6140	5967	5652	8.2%
France	3674	3011	2902	2662	2353	3.4%
Other Europe	2459	2357	2105	2196	2126	3.1%
OECS	6591	7087	8781	9090	11059	16%
Other CARICOM	4370	6327	4844	5408	4835	7.0%
French WI	18,488	20,214	18,900	16,873	16,926	24.5%
Other Countries	8317	10106	8672	7834	8730	12.6%
TOTAL	65,501	73,506	69,598	66,393	69,184	100%

Source: Caribbean Tourism Organization

Table 1.3 Stayover tourist arrivals by source markets (1999-2005)

Market	Numbers					
	1999	2001	2002	2003*	2004*	2005*
United States	15,600	14,500	15,500	14,900	16,500	18,400
Europe	12,000	10,800	10,100	10,300	9,600	9,500
Caribbean	42,600	37,800	40,300	41,400	46,400	43,800
French W.1^						
Other Markets						
Total	73,500	66,400	69,200	69,800	75,200	74,900

Source: Central Statistical Office. Dominica

*Provisional

^Included in Caribbean

Dominica enjoys a relatively well balanced visitor market, with the USA, the Caribbean (CARICOM and OECS) and the French Caribbean all accounting for approximately 25% of the visitor market, respectively. The other 25% is shared between Europe, Canada and the Rest of the World, with the United Kingdom enjoying the largest sub-share.

Based on the statistics above (Table 1.3), the visitation from the French Caribbean market is not delineated for the period 2003-2005. However, given that traditional tourism statistics (Table 1.2) indicate that the French market accounts for approximately 25% of the visitors to Dominica, it can be surmised that this trend continued during that period. This is an important market for the RBG as it comprise persons who stay with friends and family as well as student groups (S. Pascal, pers.comm), who can be easily targeted through local advertising.

3.1.2 Cruise Visitors

Table 1.4 Cruise Visitors by year (1999 - 2005)

Year	1999	2001	2002	2003	2004	2005
Cruise Pax (000s)	202	208	137	177	384	301
Cruise Ship calls	263	231	187	206	299	234
Average	770	900	730	860	1,280	1,280

Source: Central Statistical Office. Dominica

Cruise passengers provide the largest number of visitors to the nature sites of Dominica including the Roseau Botanical Gardens. Whilst the number of landed visitors are not counted in Dominica, local Tour Operators estimate that approximately 50% of cruise passengers disembark the ship and take tours. Of that number they further estimate that 40% of their tours make a stop at the RBG.

Although the cruise ship market has continued to expand, tour operators and ground handlers have noted that fewer passengers are taking local tours as “specialty restaurants, sales of products and goods, expensive wines and the mark up for tours sold on-board ships is now taking much of the disposable spend from cruise passengers” (CHL Group, 2006). This has lead to a reduction in spending by cruise passengers in Caribbean destinations including Dominica.

Table 1.5 Cruise visitors taking tours

Year	2003	2004	2005	
Cruise Pax (,000)	177	384	301	
No. of Tours (,000)	25	49	41	
% taking tours	14.1%	12.7%	13.6%	

Source: Selected Tour Operator

Further, the cruise market is a very fickle market, and Caribbean destinations must be careful not to become too over-dependent on this market. Already cruise visits experienced a decline in 2005, and preliminary estimates for 2006, suggest a further decline, despite general trends that the cruise market is expanding in the Caribbean. Dominica must continue to provide a range of high quality tour products, of which the RBG presents an excellent opportunity to continue to attract as many cruise ship visitors whether on an organized tour or on a self-guided tour of Roseau. The proximity of the RBG to the cruise port provides an opportunity for the RBG to market itself as a “must-see, easily accessible site” on any visit to Dominica. In the short to medium term, the cruise sector is expected to continue to be the dominant market.

3.2 Marketing Plan: Appropriate and Sustained Marketing

The ensuing plan is designed to provide an effective structure and road map to launch the upgraded Roseau Botanical Gardens, leading to its success and growth. It provides the overall direction for maintaining customer contact and feedback and discusses the marketing objectives, target audience, distribution channels, marketing strategy and implementation tools.

3.2.1 Marketing Goal

The marketing goal is for Roseau Botanical Gardens to be the central pillar which would drive tourism development in Roseau by attracting day visitors from hotels, cruise ships and residents to tour the city and the gardens.

3.2.2 Marketing Objectives

- Position Roseau Botanical Gardens as a “must do” tour for every visitor and local resident.
- Promote Roseau Botanical Gardens as the heritage product providing the most

comprehensive interpretation experience covering both Dominica's agricultural history, and the natural environment.

- Position Roseau Botanical Gardens as a national venue for cultural activities.
- Generate interest and demand from the various target groups.
- Generate a return of 10% on the capital investment within two years.

3.3 Tourist Segment

3.3.1 Target Audience:

Botanical Gardens should focus on international groups of visitors who are interested in horticulture, floriculture and ethno-archeology. These groups should include:

- Stay over visitors at all hotels, guest houses and villa apartments. Special attention must be paid to the French West Indian and United Kingdom visitors.
- Visiting press, travel agents and tour operators
- Cruise passengers
- Yacht persons

3.3.2 Distribution Channels

The following lists of visitor trade intermediaries are the ones who should be marketed to, in order to reach the desired clientele.

- Destination Management/Ground Operating Companies
- Hotels
- National Development Corporation for journalists and other trade

3.4 Marketing Strategy

A prerequisite to the success of the marketing strategy is the need for the Botanical Gardens to differentiate itself from other heritage sites, not only on the basis of the product offered, but also on the service quality. This could be achieved through having knowledgeable and reliable guides, well interpreted and attractive displays, and an entertaining tour. This would require the necessary training of the guides and

an appropriately organized tour. The key to success would be to clearly enunciate the product and marketing positioning.

The Botanical Gardens should be marketed to groups and individuals. To groups, the gardens will be a part of a joint tour. To individuals, this should be part of a walking tour of Roseau. However, this component should only be considered once the tour has been established in the minds of the targeted publics.

The marketing strategy should focus primarily on the trade/travel intermediaries, with two major objectives being:

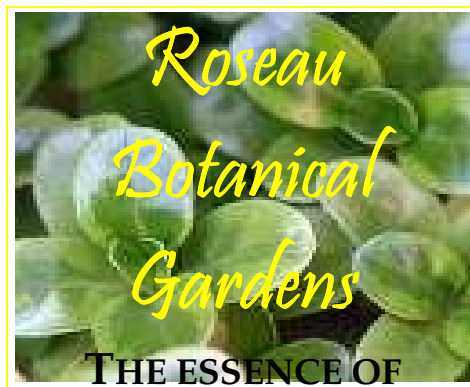
- Obtaining the confidence and endorsement of the product
- Providing information on the tour product for dissemination to targeted clientele, to generate visitation.

The secondary strategy should be that of direct marketing using a distinctive brand name and positioning statement, which reflects the unique product.

“Roseau Botanical Gardens - The Essence of Dominica”

This slogan speaks to local use for gatherings, cultural use (cricket, Kweyol in the Park, etc.), the Dominican Rainforest and other forest environments in a nutshell.

Marketing focus should target the largest groups to keep marketing costs to a minimum – cruise and other tourists, tour operators, schools, Dominican public.



3.5 Implementation Tools

In order to operationalize the marketing strategy, the following promotional tools are recommended:

3.5.1 Familiarization tours

In order to launch the upgraded product to the trade intermediaries, a familiarization tour should be organized, and opportunities for feedback provided. This can assist in improving the product. Familiarization tours should also be done on an ongoing basis in order to cater for employee turnover, exposure to product innovations and ongoing feedback.

3.5.2 Brochures/Flyers

The creation of full-colour brochures using actual photography with information on the historical, aesthetic and ecological nature of the tour; the length, the quality, products and a positioning statement (who the product will cater to). This picture brochure should be used for dissemination at sales presentations to travel intermediaries and as primary tool to expose the RBG tour to potential clients.

3.5.3 Website

The growing FIT market will be well served by a well designed, user friendly website, and should be the primary marketing tool targeted at consumers. It should be attractive, interactive and entertaining, while providing the most comprehensive access to information on Roseau Botanical Gardens and its amenities. The existing website provides useful information on the botanical gardens, but is not an effective marketing tool. It was not designed for this purpose, and should be revamped. The RBG needs a strong marketing website.

To maintain new and existing repeat visitors to the botanical gardens, it is important for the visitors to stay abreast of changes. This could be done by updating the webpage. The website would be a cost effective and a reliable way to receive feedback and maintain ongoing communication.

The Website can eventually facilitate online bookings. The site can be linked with tour operators and hotels to ensure maximum effectiveness. The web site address

should be available in all, brochure, business cards and letterheads, posters and ads etc.

3.5.4 Posters

Glossy, full colour advertising that could be positioned in prominent locations like hotels and tour operators' offices. They could be used to announce new activities or present different aspects of the botanical gardens.

It is also recommended that renowned artists both local and foreign be commissioned to paint posters on the various aspects of the botanical gardens. These posters can be reproduced in restricted quantities and used to form part of the exhibits as well as be available for sale, either in postcard form or as prints.

3.5.5 Souvenirs

Mementos of the botanical gardens could be put on sale in the gift shops and used as "give-aways" to help promote the botanical gardens. Souvenir items at the Gardens should be restricted to images of the flora, fauna and historical figures of Dominica. Every effort should be made to avoid generic Caribbean images like the "irie" or "red, green and gold" symbols, which have become a part of almost every Caribbean island's souvenir inventory. Unique and indigenous symbols for craft items should be encouraged among local craftpersons, who can be contracted to supply the souvenir shop regularly.

3.5.6 Group Marketing

The botanical gardens can profit from joint marketing with similar heritage sites. It can especially benefit from the National Development Corporation NDC exposure to foreign journalists and overseas tour operators. The NDC participates regularly in international trade shows like ITB (Berlin) and WTM (London,) as well as specialist trade shows like DEMA (USA). Collateral material from the RBG must be made available to the NDC team for display at each of these trade shows in order to keep the RBG fresh in the minds of tour operators. Special presentations to NDC trade team should be made before every promotional outing overseas.

4.0 PUBLIC AWARENESS CAMPAIGN

The overarching goal of the public awareness campaign is to point the local population to a resource, which provides substantial information on Dominica's natural and economic history. The underlying objective is that of:

- enhancing awareness of cultural and heritage values
- engendering pride and interest in the history, traditions and flora and fauna of Dominica.
- encouraging visitation to the RBG

4.1 Target Markets

For the local population, the main target audience for the botanical gardens should be that of persons interested in hosting low impact events and those interested in the displays including:

- Organized groups such as youth clubs, community groups including mothers and fathers groups, charitable organizations, cultural, historical and folk organizations
- School teachers and students
- Individuals conducting research
- General public

4.2 Strategy

Similar to the tourist population, the strategy should be that of ensuring maximum exposure and attraction to the botanical gardens. It therefore requires a comprehensive and sustained public education campaign using a myriad of tools and media.

4.2.1 Public Education Tools and Media

The public education activities most effective in attracting attention and visitation to the Roseau Botanical Gardens are:

- Brochures/flyers
- Website
- Posters
- Information sheets
- Labels
- Promotions
- Famous Posters Series

4.2.1 Brochures/Flyers

The brochures discussed under the marketing campaign for tourists can be utilized for the local population. Dissemination to the various clubs and associations as well as the media and schools, should be done through direct mail and during presentations/lectures.

4.2.2 Famous Posters Series

The -botanical gardens should have an ongoing programme of production of colourful and inventive posters depicting elements of the island's agricultural history. Outstanding local and foreign artists should be commissioned to produce Roseau Botanical Gardens posters, which capture the wide range of tastes and styles of the artists.

The posters should form a special part of the exhibits at the botanical gardens museum. Limited autographed reproductions of these posters can be sold.

4.2.3 Video

An 8-minute video highlighting all the features of the botanical gardens should be produced using rare archival material and current footage. The video can be presented to the media for airing during national holidays. Copies of the video should also be made available for sale.

4.2.4 Information sheets

Information sheets about particular plants, animal life, and buildings, which supply more in-depth facts and information, should be printed and made available for distribution.

4.2.5 Website

The website should be utilised as a way to not only provide detailed information which cannot be captured on a tour. In addition it should be the primary communication tool for persons who have already toured the botanical gardens, or persons who have visited the website.

Announcements can be posted to attract visitation to special events and programmes.

The site should be monitored to obtain visitation patterns, purpose of visit, feedback on the website and the botanical gardens itself. This can inform future innovations and marketing activities.

4.2.6 Posters

Posters developed under the marketing campaign can be used for distribution to schools and other clubs and association.

4.2.7 Special Events

Once established, the -botanical gardens can undertake special events to cater to specific niches as well as to generate additional revenue. Themed events and exhibitions featuring many different aspects of the botanical gardens and the collections should be mounted catering to many different audiences, from the visiting public to enthusiastic historians, professional scientists and research students. The following is a potential list of activities:

4.2.8 Courses and study days

A series of short courses and individual study days covering a variety of topics on Dominica including Amerindian history, agriculture, flora and fauna, island ecosystems, etc.

4.2.9 Seasonal lectures

A summer lecture series covering a themed programme of evening lectures running July to September.

4.2.10 Cultural Events

Each month, a major cultural event should be staged at the gardens. It should feature popular folk, music, drama, dance, popular theatre and other cultural groups from throughout the island.

4.2.12 Other Public Awareness Activities

In addition to the above promotional strategies and tools, the following activities would assist in obtaining high interest and visitation as well as maintaining ongoing interest in the botanical gardens.

4.2.13 Guest History Systems

The botanical gardens should keep organized groups and school groups records in a database to facilitate follow-up and to solicit repeat business. This should be managed by a simple computerized system.

5.0 FINANCIAL OPERATIONS PLAN

5.1 Introduction

The expansion and upgrading of the Roseau Botanical Gardens is one of the major projects which can be implemented in the short term with the ability to significantly catalyze tourism enterprise growth in Roseau.

This project has the potential to directly impact on the employment situation, and produce multiplier effects in the other economic areas such as agriculture, craft, services, etc. These will be discussed in greater detail in the subsequent section. It is proposed that the RBG Board seek financing in the amount of EC\$403,700.00 for execution of this investment project.

5.2 The User Fee System - To access selected eco-tourism sites

Dominica Department of Forestry manages a series of natural tours and attractions, which is well patronized by the cruise tourism sector. These include:

- Trafalgar Falls
- Emerald Pool
- Cabrits National Gardens
- Indian River
- Soufrier Sulphur Springs
- Middleham Falls
- Fresh Water/ Boeri Lake
- Boiling Lake
- Syndicate

Table 1 presents a summary of revenue generated at those sites as a proxy for their attractiveness and competitiveness.

Table 2.1: Summary of Revenue Generated at sites operated by the National Parks Unit

Name of Eco-Site	Estimated Income -EC\$	% of Total Revenue	Rank
Trafalgar Falls	516,140.91	47.57	1st
Emerald Pool	413,679.03	38.13	2 nd
Cabrits National Gardens	26,591.76	2.45	3 rd
Indian River	52,696.24	4.86	4 th
Soufrier Sulphur Springs	22,374.95	2.06	5 th
Middleham Falls	15,248.75	1.41	6 th
Fresh Water/ Boeri Lake	15,633.00	1.44	7 th
Boiling Lake	17,766.25	1.64	8 th
Syndicate	4,928.67	.45	9 th
Total	1,085,059.56	100	

The Botanical Gardens receive approximately 87,000 visitors and it is estimated that 38% of all tours visit the Botanical Gardens. Even though it is one of the most visited sites in Dominica, there is currently no entry fee for the Botanical Gardens. Tour guides take advantage of the gardens at no additional cost, as it allows them to provide visitors with a second or bonus stop on their tour.

The Botanical Gardens is not set up for, nor has its revenue generating potential been afforded due consideration as a means of generating a surplus or recovering the cost of maintenance. The Ministry of Agriculture has indicated that any increased allocation of funds to the National Parks Unit of the Forestry, Wildlife and Parks Division will be at the expense of other stretched initiatives a prospect, which is not viewed upon favourably.

Section 6.0 examines revenue generating opportunities which may be suitable for the RBG. These activities need to be planned, assigned to the most appropriate

personnel, and a time frame for commencement and execution be agreed upon. Management must recognize the factors critical to the successful implementation of such initiatives as well as the human, technical and financial resources needed for execution.

5.3 Budgets

This budget was derived from the various project development estimates.

1. Marketing and Public Awareness
2. Human Resource Development and Training
3. Physical Development and Enhancement of RBG

5.3.1 Marketing and Public Awareness budget

The marketing and public awareness budget to launch the Roseau Botanical Gardens is as follows:

Table 2.2: The Marketing and Public Awareness Budget for Launching the RBG

Marketing Plan	Initial Costs	Recurrent Costs
10,000 Brochures/flyers	\$8,000.00	\$8,000.00
Website Development	\$5,000.00	-
Website Maintenance	-	\$1,200.00
Sales Presentations	\$1,000.00	\$1,000.00
Souvenir/guide books x 1000@\$8	\$8,000.00	--
Posters x 500	\$2,500.00	\$1,000.00
Promotional DVD	\$10,000.00	--
Public Awareness		
Information Sheets x 5 x1000 @\$1.50	\$7,500.00	\$7,500.00
Sales Presentations	\$1,000.00	\$1,000.00
Familiarization Tours	\$1,000.00	\$1,000.00
Promotions	\$1,000.00	\$1,000.00
TOTAL	\$44,500.00	\$21,700.00

Note that there is a need to provide administration services to coordinate the marketing and public awareness campaigns, including the preparation and dissemination of press releases and articles. It is recommended that an additional 10% of the budget be allocated for this.

5.3.2 Human Resource Development and Training

The training plan is designed to provide existing and potential staff, as well as contractors of ancillary services with the requisite attitude and skills to operate the gardens to international standards. The details of the plan are as follows:

Table 2.3(a): Training Plan for Existing and Potential Staff

A. Target Areas RBG Staff	Duration	Cost
Management & Supervision	2 Weeks	\$ 5,500
Visitor Services	3 weeks	\$ 4,200
Park Services	2 Weeks	\$ 5,000
<ul style="list-style-type: none"> • Operations • Basic curator skills • Audio visual operations & maintenance 		
Tour guiding	2 Weeks (x2)	\$8,000
<ul style="list-style-type: none"> • Introduction to tourism • Tour guiding skills • Specific tour areas (bananas, bird watching, history, general flora and fauna, herbal garden, etc) 		
Maintenance	2 Weeks	\$ 3,000
Security	1 Week	\$ 1,000
Engineering Technicians	2 Weeks	\$ 5,000
Customer Relations	1 Week	\$ 1,500
First Aid & Emergency Services	4 Weeks (x2)	\$ 8,000
Environment Management	3 Days	\$ 750
Public Education	1 week (x3)	\$ 12,000
<ul style="list-style-type: none"> • Awareness Campaign • Train the trainer programmes 		
Sub Total		\$39,250

Table 2.3(b): Training Plan for Ancillary Services

B. Target Area for Ancillary Services	Duration	Cost
Visitor Services	3 weeks	\$4,200
Customer Relations	4 Weeks	\$ 4,000
First Aid & Emergency Services	3 Days	\$750
Craft Production	1 Week	\$ 5,000
Sub Total		\$13,950
Grand Total		\$ 53,200

5.3.3 Physical Development and Enhancement of RBG

The Physical development and enhancement plan will be developed to address *inter alia*, the following:

- establishment and management of the lake /pond in the gardens
- solid and liquid waste disposal, including waste originating on site
- flora and fauna within the gardens
- carrying capacity
- site layout for multiple use

	INITIATIVE	PRIORITY	ESTIMATED COST
1	Creation of pond and water course	4	20,000
2	Shoring of trails with strengthened borders and retaining walls	2	40,000
3	Establishment of Control points and roadside verges	1	70,000
4	Redesign of the Arboretum	3	25,000
5	Public Conveniences & light cafeteria	2	70,000
6	Signage System	1	13,000
7	Installation of urban garden appurtenances and railings	2	28,000
8	Redevelopment of the Garden Nursery	3	30,000
	TOTAL		296,000

Included in the plan will be strategies to respond to the above issues through such instruments as public education and awareness building, environmental monitoring, introduction of appropriate technology, procedures, and signage.

5.4 Financing

Due to the nature of the project it is expected that financing can be obtained through a combination of, equity and grant financing in order to secure the required amount. There are some donor-funding agencies such as Caribbean Regional Environmental Project (CREP) as well as residual funds from the Eco-Tourism Development Programme, from which the proposed RBG restoration would qualify for such funding.

The ensuing financial analysis is based on the assumption of a mixed financing arrangement including equity and grant funding. It is expected that efforts will be made to increase the proportion of grant funding obtained so as to reduce reliance on the Government of Dominica.

Table 2.4: Proposed Financing Sources

Source of Financing		
Capital Requirement	100%	\$403,700.00
<i>Caribbean Regional Environmental Programme</i>	26%	\$107,700.00
<i>Eco-Tourism Development Programme</i>	37%	\$150,000.00
<i>Private Sector Sponsorship</i>	37%	\$146,000.00

Table 2.5: Assumption of a Mixed Financing Arrangement

Assumptions	
Grant Funding:	
1. CREP	
Marketing Plan implementation	\$44,500.00
Interpretative Signage	\$10,000.00
Training Plan Implementation	\$53,200.00
2. ETDP/Cable & Wireless/Other sponsors	
Gardens Restoration	\$296,000.00
TOTAL	\$403,700.00

5.5 Income Statements and Financial projections

Tables 2.7 and 2.8 present the projected Income Statement and Balance Sheet for Roseau Botanical Gardens for the next five years. Tables 2.7 (a) and (b) represent expected income from the cruise sector at an entrance fee of US\$2.00; where as tables 2.8 (a) and (b) reflect an entrance fee of US\$3.00. These financial projections are based on a 15% annual projected increase in visitation to the Gardens (see Table 2.6) as well as increased operational expenses. The analysis also assumes a half-year implementation period for the capital works and other improvements, so that the full effect on visitation/revenue is catered for in year 3.

The drop in visitation in the first year reflects the expenditure effect of implementing a user fee for the RBG. However, with public awareness of its purpose, this effect is expected to be short lived.

Table 2.6: Projected Visitation

Visitors	2006	2007	2008	2009	2010
Local and Stayover	15,400	17,710	20,367	23,421	26,935
Foreign (Cruise)	41,703	47,958	55,152	63,425	72,939
Total	57,103	65,668	75,519	86,847	99,874
% change	-22%	15%	15%	15%	15%

Based on the assumptions, the financial analysis for the expansion and modernization of the RBG shows that the proposed investment should generate positive returns. However, the projections based on a US\$2.00 entrance fee indicate net losses throughout the period under review (See tables 2.7 and 2.8).

Table 2.7(a): Revenue Projections (at US\$2.00)

Sources of Revenue	YEAR				
	2006	2007	2008	2009	2010
1. Entry Fees (Cruise sector)	114,206	131,336	151,038	173,694	199,748
2. World Creole Music Festival	10,000	11,500	13,225	15,209	17,490
3. Other Cultural events	5,000	5,750	6,613	7,604	8,745
4. Concessions	7,200	7,200	7,200	7,200	7,200
5. Other					
TOTAL	136,406	155,786	178,076	203,707	233,183

Table 2.7(b) INCOME STATEMENT (Years 1 - 5)

<i>Income</i>	% of Total					% of Total
	Year 1	Year 2	Year 3	Year 4	Year 5	
Total Revenue	136,406	155,786	178,076	203,707	233,183	100.00%
Operating Expenses						
Sales & Marketing	21,700	21,700	21,700	21,700	21,700	10.65%
Training	1,110	1,221	2,904	3,194	3,513	1.57%
General & Administration (without Depreciation)	240,000	240,000	240,000	276,000	317,400	135.49%
Total Operating Expenses	262,810	262,921	264,604	300,894	342,613	147.71%
Income From Operations	(126,404)	(107,135)	(86,529)	(97,187)	(109,430)	-47.71%
Net Income	(126,404)	(107,135)	(86,529)	(97,187)	(109,430)	-46.93%

However, if the entrance fee is established at US\$3.00, the RBG could experience net financial gains, just from the cruise sector alone [see tables 2.8(a) and (b)]. This will negate the requirement to charge user fees for locals, which has logistical problems with collection and manning of gates, not to mention the potential social and political consequences. Arrangements with local tour operators for payment of tour groups should be more easily managed.

Table 2.8(a): Revenue Projections (at US\$3.00)

Sources of Revenue	Year				
	2006	2007	2008	2009	2010
1. Entry Fees (cruise sector)	339,909	390,891	449,527	516,958	594,504
2. World Creole Music Festival	10,000	11,500	13,225	15,209	17,490
3. Other Cultural events	5,000	5,750	6,613	7,604	8,745
4. Concessions	7,200	7,200	7,200	7,200	7,200
5. Other					
TOTAL	362,109	415,341	476,565	546,971	627,939

Table 2.8(b) INCOME STATEMENT (Years 1 - 5)

<i>Income</i>	Year 1		Year 2		Year 3		Year 4		Year 5		% of Total	
		Sales		Sales		Sales		Sales		Sales		% of Total
Total Revenue	362,109	100.00%	415,341	100.00%	476,565	100.00%	546,971	100.00%	627,939	100.00%		
Operating Expenses												
Sales & Marketing	21,700	4.55%	21,700	4.55%	21,700	4.55%	21,700	3.97%	21,700	3.46%		
Training	1,110	0.61%	1,221	0.61%	2,904	0.61%	3,194	0.58%	3,513	0.56%		
G & A (without Depreciation)	240,000	50.36%	240,000	50.36%	240,000	50.36%	276,000	50.46%	317,400	50.55%		
Total Operating Expenses												
Income From Operations	262,810	55.52%	262,921	55.52%	264,604	55.52%	300,894	55.01%	342,613	54.56%		
Depreciation	99,299	44.48%	152,420	44.48%	211,961	44.48%	246,077	44.99%	285,326	45.44%		
Net Income	59,200	12.42%	59,200	12.42%	59,200	12.42%	59,200	10.82%	59,200	9.43%		
	40,099	32.05%	93,220	32.05%	152,761	32.05%	186,877	34.17%	226,126	36.01%		

5.6 Depreciation

The cost of maintenance of public amenities is significant and the useful life is relatively short. For this reason a five-year useful life was estimated for the RBG Capital Assets and used as a basis for the recommendation that 12.5% of revenue be placed in a maintenance reserve fund to finance the upkeep of facilities.

5.7 Pricing:

Revenue from entrance fees is the primary source of earnings for the RBG. The fees recorded and projected above are based on the current \$2.00 entrance fee for all parks in Dominica. It is recognized that the introduction of a user-fee for the RBG will have social and political consequences, as well as financial implications in the first year. However, if the RBG is to operate as a financially viable entity, a pricing structure for the use of the gardens will need to be developed.

In many countries including the Caribbean, nature parks and recreational gardens have dual pricing arrangements for locals and visitors. Given the traditional perception of such parks and gardens as merit goods, the introduction of a user fee for locals may have to be phased in. But the determination that such amenities require funds for their continued management and development will need to be introduced into the public psyche.

6.0 BUSINESS OPPORTUNITIES

6.1 Revenue Generating Opportunities

6.1.1 Institute and Increase User Fees

Whilst the introduction of user fees for the RBG is likely to be both contentious and have a negative demand effect, it is imperative for cost recovery. This should be implemented primarily for visitors, and can be collected from tour operators for packaged tours, in the first instance. The overall fee system which is operated by the Department of Forestry for eco-tourism sites should be reviewed upwards. Raising the site pass to US\$3.00 - \$3.50 per site pass should be considered.

6.1.2 Concessions

Opportunities exist for concessionaires at the RBG.

These include:

- Cold beverages/ice cream
- Hot food/sandwiches/burgers/wraps/rotis
- Snacks

Such concession stands may offer refreshments for sale to the public using such areas and services therein upon such terms and under such regulations as the RBG management may prescribe. The concessionaires will be charged a fee at a rate to be determined.

Because of the seasonal nature of the market and the restriction of access to locals, perambulating (mobile) concessions are recommended. These can respond physically to changes in demand patterns and move accordingly. Fixed concession stands at the gardens increase the security responsibility and may introduce opportunity for rodent and vermin infestation.

6.1.3 Advertisement

A policy on advertisement (e.g. advertising panels on cricket pitch fences) should be formulated to guide consideration of sponsorship or requests for the erection of

advertisement panels/billboard.

6.1.4 Sponsorship.

With the goal of the partnership/sponsorship program to develop an ongoing revenue stream to support the maintenance and operations of the RBG the approach for generating revenue is to look to long-term contracts that provide fixed revenue streams that will enable the Forestry Dept to budget for the RBG operations.

Corporate Sponsorship Categories considered feasible for implementation at the RBG are:

- Banner advertising on six light poles
- Entry monument sign
- Information kiosks
- Shade shelter signage
- Vending machines/concessions
- Trash receptacle advertising

6.1.5 Developing Partnerships

- i. Revenue generating ideas should be pursued by outsourcing programs to for-profit and non-profit groups.
- ii. Friends of RBG memberships should be encouraged.
- iii. Encourage creation of support societies with annual or membership fee

6.1.6 Event Management

- i. Fees collected from events using RBG facilities should be directed to the Park Maintenance or General Fund.
- ii. Three-day weekend galas/ festivals should be hosted by RBG.
- iii. Help of fundraisers and party planners should be solicited.
- iv. Host tourist-oriented events and use them for sale of shirts/ other items with park logos and names printed on them.
- v. Secure percentage of revenue collected from Bay to Breakers.

- vi. Increase fees for special events like weddings.
- vii. Charge fees to host the “Kwéyòl in the Park”.
- viii. Host a national Frisbee/kite-flying/ lawn bowling competition (or similar low impact sport) and charge for admission.
- ix. Run annual jazz concert series to raise money.

7.0 A POLICY ON ECOTOURISM DEVELOPMENT

7.1 Introduction

Dominica describes itself as an ecotourism destination; however this market has not provided its primary source of business. Cruise tourism has generated tremendous economic activity and the potential for assessing this market for the botanic gardens will need to be assessed as a primary source, at least in the short to medium term. But this does not negate other potential markets which will include stayover visitors, local students, regular locals, overseas research students and senior researchers.

A fundamental error made in many developments including tourism, is the erroneous dictum of “build and the visitors will come”. This error has led to many poor investments by governments as well as private entrepreneurs. A detailed market analysis is critical in determining the market sources for the botanic gardens. This will have implications for the financial analysis in determining returns on the investment. This section will examine the potential market size and character of visitors to the gardens; tour suppliers; as well as pricing.

7.2 Background

The tourism development strategy of the 1970's identified “beach-based tourism” as important to incorporate into the tourism development strategy of Dominica (Shankland Cox & Associates, 1971). The Caribbean was emerging as an important winter vacation destination, and Dominica was simply trying to fit itself into that mold.

However, since the early 1990s Dominica has opted to market itself as an “ecotourism” destination, in recognition of its limited availability of white sand beaches, as well as its comparative advantage in providing a distinctly “green tourism product” in the Caribbean. This new developmental strategy was in response to the fast growing ecotourism market, and was viewed not as a complementary product but as an alternative (Esprit, 1994). This strategy emerged out of a National Search Conference on Nature Tourism held in 1992.

By 1997 it was clear that Dominica had made a clear market-image shift and was “not a traditional sun, sea and sand destination”. The Dominica product has been promoted largely on its natural assets of mountainous terrain, lush vegetation, rivers, waterfalls and natural attractions. The country had decided to opt for nature-based tourism as its own special niche.

In 1999, the European Development Fund Project Management Unit, in collaboration with the National Development Corporation, commenced an Ecotourism Development Programme, further confirming this “niche-tourism” development thrust.

However, the reality for Dominica is that it has not been able to capture the market that could transform its tourism into real economic and social progress for its people. The diversity of natural attractions has not been able to sustain the level of tourism development anticipated. Product quality, airlift, limited marketing budgets have all been blamed for the inadequate performance.

7.3 National Tourism Development Strategies

7.3.1 Diversified Tourism Development Strategy

A Team contracted to develop a Tourism Master Plan for Dominica, are suggesting that the exclusive eco/nature tourism focus is not generating the type of expansion critical for an emerging destination as Dominica, (Henegan/Robinson; CHL, pers.comm.). The preliminary findings suggest that the Dominica brand is outdated and has not resulted in the level of tourism development that would adequately address the economic problems of Dominica even marginally.

“...nature tourism alone will not provide the dynamic to ‘grow’ the industry in a substantial way in terms of foreign exchange earnings, jobs, incomes and tax revenues to Government.” (CHL Group, 2006)

It is further argued that there are no destinations in this hemisphere, with the exception of Costa Rica, which has adopted an exclusive eco-tourism development approach and have experienced sustained growth, as a result. Even the successes of Costa Rica, in terms of real economic benefits to the country, have been described as minimal.

“There has been... a sharp rise in the number of tourists who arrive on prepaid packages, charter flights, and cruises, from which Costa Ricans receive only minimal benefits.” (Honey, 1999: 173)

Moreover, Dominica is situated within a larger Caribbean market which is promoted for its warm weather, sunny skies and beaches. Based on analysis and feedback from overseas tour operators, Dominica’s competitor grouping is seen as the emerging market destinations in the Caribbean that include Saint Lucia, St. Vincent, Belize, Grenada, Guyana, Surinam and Saba (CHL, 2006: Sec. 3. pp7). The characteristics of these competitor destinations are obvious. Belize, Guyana and Surinam for the ecotourism image; Saba, and Saint Lucia to a lesser extent, for the dive market; and Grenada, St. Vincent and Saint Lucia as warm weather, medium developed destinations, still relatively exotic and with friendly people, etc.

Consequently, it is argued that a more diverse product/market approach that focuses on the diversity of attractions of Dominica might provide a greater opportunity for Dominica to position itself more effectively in the global tourism market.

7.3.2 Eco Tourism Development Strategy

However, another study running almost concurrently, whilst agreeing that the brand might be out-date, has re-confirmed the nature based tourism direction for Dominica. They argue that there is a growing global frustration, among tourists, with overdevelopment, especially in the Caribbean; and that these visitors are increasingly seeking authentic experiences, *not McDonalds*; avoid crowds; and research thoroughly, especially online. They surmise that herein lies an opportunity for Dominica to reposition itself in the marketplace through a strategic campaign that re-brands the destination and addresses the following:

- *Define and gain a deep understanding of Target Audience*

- *Shift the mindset to think of Dominica NOT as a Caribbean destination, but as a Nature destination that happens to be in the Caribbean*
- *Position Dominica as a destination of lush, unspoiled natural beauty and unique cultural assets*
- *Create a fully integrated communications campaign*
- *Create communications tools (maps, etc.) that highlight attractions across the entire island*
- *Use partnerships*
- *Turn visitors into Ambassadors via database*

(GreenTeam, 2006)

7.3.3 Assessment of Tourism Development Strategies

It is not within the purview of this assignment to argue the merits or demerits of the various positions. However, the description of the strategies above is intended to present the challenges that policy makers will face in providing the best environment for the sustainability of the Roseau Botanical Gardens both financially, aesthetically and culturally.

In this regard our review of the literature on destination sustainability suggests that the extent to which tour operators and other industry entrepreneurs influence destination demand is an important consideration. An examination of the top thirty UK tour operators in the United Kingdom, offering a mixture of short and long haul vacation products across the globe, concluded that “*mass tour operators do not have strong loyalty to, nor an interest in, the long term balanced tourism development of destinations*” Carey et al (1997:427). The study further recognised that specialist market share is considerably small, and therefore impossible to sustain the whole tourism industry.

Firth & Hing, (1999:253-54) questioned the widely held assumption that small local tourism businesses are the desired product offering if sustainable tourism is to be achieved and maintained. In their study of backpacker hostels and guests, it was revealed that both accommodation properties and their guests demonstrated less than desirable environmentally friendly behaviours. Further, in a study of thirty hotels in

Australia, it was concluded that larger hotels tend to implement more environmentally friendly practices in their operations than their smaller competitors (East, 1994 in Firth & Hing, 1999).

Another widespread assumption about nature-based tourism or ecotourism, is that it is the undisputed engine of tourism development by which environmental conservation and host community benefits can be achieved. Whilst some countries have opted to go headlong in that direction (Australia, Costa Rica, Ecuador, and of course, Dominica), the economics of investing in a viable enterprise has not been sufficiently investigated. Tisdell (1995) explains that both social and economic costs must be factored into the decision to invest in nature-based tourism as they have overlapping implications for viability and desirability. He identifies the following key problems associated with investing in such enterprises.

- 1. Public subsidising of parks and protected areas for rich foreign visitors and the corollary of imposing user fees that deprive locals of access. This latter problem can be exacerbated if locals are not compensated with employment opportunities.*
- 2. The reduction in returns on the investment as a result of transaction costs associated with collecting user fees.*
- 3. The possibilities of monopoly pricing consequent to the application of the user pay principle.*
- 4. Locating accommodation facilities outside rather than within protected areas in order to protect the environmental integrity of the site may reduce the ecotourism value thereby reducing investment returns.*

Whilst there are possible solutions to mitigate these negative social and economic impacts, it is important to “counteract emotional approaches to ecotourism which see it as a profitable nature conservation mechanism...and to stress limitations to the application of the user pays principle as a financing mechanism for investment in tourism” (Tisdell, 1995:386)

7.3.4 Roseau Botanical Gardens and a tourism development strategy for Dominica

Dominica suffers from the following product deficiencies which significantly influences its marketability and by extension, the ability of the RBG to attract visitors and to become viable.

- Limited accommodation stock and air access making it difficult for tour operators to include Dominica in their programmes
- Unreliable and poor product quality particularly among restaurants, accommodation and beaches.
- Misperception that “ecotourism” does not demand comfort and high levels of product and service.
- Product does not cater to the discerning traveler with high discretionary income.

But Dominica also has advantages which can make it competitive and allow for greater access of business for the RBG.

- Relatively high number of visitors staying in private homes
- Sympathy for Dominica among high level Tour Operators especially in the UK
- Small but growing interest among specialist niche market tour operators
- A growing cruise visitor market, with local ground handlers seeking quality sites and attractions to add to the tour mix
- Increasing number of “Free and Independent Travelers” (FITs) who seek destination information from websites
- Increasing average length of stay, thereby providing more time to patronize more Dominica products
- Dominica has a small population and does not require large volumes of mass visitors to bring the level of economic activity necessary for the effective multiplier effects of the tourism dollar

7.4 Policy Guidelines

The tourism development and marketing policy should address the following approaches, which are not trapped by philosophy, but which will provide an enabling environment to enhance the local tourism product and support the RBG.

7.4.1 Product

Dominica should endeavour to diversify its product offering even though maintaining its characteristic slogan of “nature isle” of the Caribbean. However, this product should provide value for money and strive to attain highest standards of product quality and service. Moreover, it must be recognized that that ecotourism brand demands comfort and high levels of product and service.

7.4.2 Institutional Arrangements

The establishment of a an independent National Parks Authority to manage all parks and attractions in Dominica, with a staff of qualified experts to ensure proper monitoring of standards; ensure that environmental management systems are in place and functioning; ensure regular financial reporting from sites and to be forwarded on a regular basis to the Ministry of Agriculture; and provide regular supervisory support to all management teams at various sites and attractions. These financial statements should be tabled in the Parliament, at least once a year, thereby providing accountability to the Government and people of the Commonwealth of Dominica.

7.4.3 Marketing

Recognizing that the current ecotourism marketing policy has not translated to adequate growth for the Dominica tourism industry, Dominica should attempt to diversify its product image, more in keeping with a high value, nature experience, and develop targeted marketing strategies as it has done for the dive market.

7.4.4 Finance and Investment

Investment policy needs to be more prescriptive and less reactive. Dominica has a market image, which suffers from poor visitor satisfaction particularly at the levels of service and accommodation. But the natural attractions continue to score high marks among visitors. Investment must be attracted speedily to enhance the accommodation sector, not necessarily with well-known large hotel chains, but with high value, boutique-type resorts.

7.4.5 Collaboration

Inter-Ministerial collaboration must be encouraged in support of tourism development, as this is the primary economic development sector, for which foreign exchange earnings will contribute towards the development of infrastructure, social amenities, and job creation. A training policy should be developed in collaboration with the Ministries of Education and Tourism, and Tourism Training Institute created in order to prepare Dominicans to be competitive in the tourism service industry.

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INTERVIEWS

	NAME	ORGANISATION/ASSOCIATION/INTEREST
	Gerry Aird	H.H.V. Whitchurch & Co., Ltd
	Elsie Agard	Society for Historic and Architectural Preservation & Enhancement (SHAPE)
	Nicholas Bruno	Director of Financial Services
	Val "Young Bull" Cuffy	Chair - Festival Commission, NDC
	Claudia Bellot	Permanent Secretary, Ministry of Agriculture, Forestry, Wildlife and Parks.
	Ken George Dill	Individual
	Michael Fadelle	General Manager (Ag), NDC
	Betty Perry-Fingal	Eco-Tourism Association of Dominica
	Philip Henegan	CHL Consulting Group
	Arlington James	Department of Forestry
	Paulette Joseph	Funsun Tours
	Eric Hippolyte	Chief Forestry Officer (Ag)
	Lennox Honychurch	Historian
	Rhoda Letang	Director of Industry, NDC
	Athie Martin	Dominica Hotel and Tourism Association
	Emmanuel Nathan	Individual
	Sharon Pascal	Director Tourism, NDC
	John Robinson	CHL Consulting Group
	Francis Severin	UWI, School of Continuing Studies
	Grace Stephen	Ass. Industry Officer, NDC
	Esther Thomas	Chief Technical Officer, Ministry of Tourism, Industry and Private Sector Relations
	David Williams	Curator (Ag) of RBG