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Feasibility Study Report No. 1

THE WAITUKUBULI NATIONAL TRAIL: ITS MARKET POSITION AND POTENTIAL

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Roseau, Dominica**

July 2001

The feasibility study

A feasibility study of the proposed Waitukubuli National Trail in Dominica is being undertaken by the Caribbean Natural Resources Institute (CANARI) on behalf of the Waitukubuli Ecological Foundation (WEF). This report has been prepared for CANARI and forms part of the feasibility study.

This document is an output from a project funded by the UK Department for International Development (DFID) for the benefit of developing countries. The views expressed are not necessarily those of DFID.

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This is CANARI Technical Report #288

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PREFACE

This report looks at aspects of the international market potential of, and the detailed market requirements for, a National Trail on the island of Dominica. It notes the origins of the concept of trails as recreational and tourism assets generally and in Dominica. It sets out the changes in the world tourism market that have led to ecotourism becoming a viable and growing market niche. It explains how a National Trail could become part of the palette of ecotourism products offered by Dominica, and the overall market requirements for such ventures to be successful. It gives the results of a tour operator's workshop held in London, followed by other enquiries and researches, which show the detailed issues that must be considered and acted upon if a National Trail is to be a success.

The report concludes that the trail's viability will depend on its fulfilling market requirements, which in turn will depend on the choice of suitable route(s) for the trail, and the infrastructure put in place. Capacity building at public sector, private sector and community levels appear to be essential ingredients in the creation of effective trail infrastructure. A routeway alone would fail to be a market success.

This report has only been possible through the help and co-operation of many people and organisations. These include:

- The Department for International Development (DFID) and their agents, the Caribbean Natural Resources Institute (CANARI). The contribution of CANARI's Yves Renard has been especially valuable.
- Travelcare, the largest independent Travel Agency in the UK, part of the CWS group, who assisted the author to travel to Dominica in July 2000.
- Members of the Waitukubuli Ecological Foundation, who assisted in the London Tour Operators workshop.
- The Dominican High Commissioner in London, George Williams, and his staff.
- The many tour operators who gave their time and expertise.
- Researchers and practitioners in ecotourism and in trail development and management who also gave their time and experience to the production of this report.
- So many Dominicans on island, who answered questions and helped the author in many other practical ways, in July 2000.

INTRODUCTION

Trails have become a growing feature of tourism product development and management in many situations. The trail concept, of a semi-formal cross-country routeway, distinct from a formal highway, stretches far back into antiquity. The pioneers of the American West gave the term rejuvenated and meaningful life as traders and settlers crossed the New World. Ever since, trails have been romanticised in celluloid by a thousand Hollywood epics based on trail life and adventure. The word "trail" holds a special fascination for both public and planners alike.

The growing demand for rural and "soft adventure" holidays has given real-time new life to the old concept of the trail. For over half a century in most of the developed countries of the world, small bands of enthusiasts have been working to create long distance walking trails. Classic examples include the USA's Appalachian Way, the UK's Pennine Way, and the many *sentiers de grande randonnée* that cross France. More recently, trails have been linked to tourism management and to the emerging paradigms of sustainable tourism. They are seen as both marketing tools and as a tool for economic regeneration – attracting specific visitor types to new areas, visitors who bring with them spending power, channelled by the physical location of the trail. The trail concept's emphasis on pedestrian and / or cycle or canoe traffic enables them to be especially environmentally and community friendly. The physical effort required to use them makes them relatively unattractive to the mass market, and, therefore, typically non-polluting and low impact. That same physical effort makes them especially attractive to the better educated and better off visitor, many of whom seek an alternative, health giving, non mass-market holiday.

The trail concept has meanwhile been developed and become more sophisticated. Short and medium length trails have joined the long distance trail as valuable assets in the sustainable tourism development and management toolbox. Circular trails, or loops off a main trail, have been devised. Themed trails have been discussed and widely developed. Multi-use and specialist trails have appeared. The trail concept has widened to take in the idea of activity corridors - linear areas with spine trails, loop trails, linked transport connections, accommodation, heritage and other attractions grouped along the activity corridor, with active management and marketing applied to the corridor. The Greenway idea is closely related.

Over the last few years, the Waitukubuli Ecological Foundation has discussed and promoted the concept of a national walking trail on the island of Dominica. It foresees the creation of the trail as a national asset to encourage pride in, and knowledge of, the natural and physical beauties of the island. Its inland, cross-country route could help bind the nation together, acting as a kind of inland balance to the otherwise largely coastal settlement pattern. The trail could also be a national challenge route for younger people, encouraging physical prowess as well as pride in the nation's environment. Those ideas are modelled on similar major trails in other countries, and especially on the UK's youth challenge, the Dartmoor Ten Tors annual expedition (<http://zsplash.8m.com/TenTors>).

The Foundation sees the trail primarily as a key item in the island's bid to gain recognition and success as an international niche market ecotourism destination – part of a sustainable product development strategy. It goes on to claim that a trail would not just be a tourism asset: it could encourage small scale, locally based enterprise development on the island, diversify the island's economy, and be a vehicle for capacity building in both business and community development.

This report discusses several key questions posed by the Foundation's ideas:

- Is there an international tourism market for a trail product on Dominica?
- What are the characteristics of that market?
- What are the requirements of the market?
- What size is the market likely to be?
- Is it really important to have a national trail, or could shorter and perhaps cheaper regional or local trails be just as effective?
- Does the trail concept fit the island's ecotourism strategy? Is there synergy with that strategy – or is it simply another product?
- What are the implications of the market's needs for the design of the trail and the design of its human, socio-economic and physical infrastructure?
- Can any lessons be learned from other trails that could be built into the design of a national trail if it was felt to have market potential?

A range of methods were used to try to answer the above questions:

- A special seminar / workshop was held with tour operators at the Dominican High Commission in London in September 2000, and continued by post and interview since that date.
- A further series of telephone interviews were held with tour operators by phone in July 2001.
- A review was made of the literature on ecotourism and trail tourism research.
- The author's experience of working in major and minor ways with over twenty trails was used, supplemented by discussions held with trail groups and trail managers.

The report does not cover the technical and legal questions involved in creating a trail, the costs of creating a trail, nor the detailed economics of a trail programme. It does not assess the current extent or condition of rights of way on the island. It does not seek to determine the specific route of any trail. All of those issues are the province of other consultants, and of local experts.

RURAL TOURISM, ECOTOURISM AND NICHE MARKETS: THE MARKET BACKGROUND TO THE DOMINICAN CASE STUDY

This part of the report puts the tourism potential of the trail in a global context. It explains from published evidence why and how the tourism industry has changed and grown to make it possible for a small remote island to consider dreams of a national trail as a tool for socio-economic development. It also considers the trail's relationship with Dominica's ecotourism industry, and with plans and strategies for Dominican development over the last 30 years.

Tourism has been one of the post war world's great growth industries. From its nineteenth century origins, tourism has grown in volume, geographical spread and reach, and also in its range of activities. In 1950, the classic measure of worldwide tourism, the number of annual international arrivals around the whole world, was 25 millions. For 2000, the World Tourism Organisation reported a preliminary figure of 698 million international arrivals. No country in the world is now exempt from tourism traffic. Virtually every region, or even small town receives some tourism visitation. Remoteness is no bar to a tourism industry: it may even be a spur to some types of traveller (OECD, 1999).

Within the overall growth and spread of the tourism industry two features stand out. The first is the emergence of tourism without a resort. Tourism began as a specialist resort based activity. Resorts still function and new resorts are regularly founded. But, from the 1960s onwards, increasing numbers of travellers sought to break free from resorts to visit "authentic" towns, cities and open countryside. Countries and regions wishing to partake in tourism no longer needed to have resorts to be successful. City tourism and rural tourism were born. Secondly, tourism has added a new activity dimension to its traditional sun, sea, sand, spa and relaxation approaches. The activity holiday manifests itself in many ways: in cultural holidays, in physical activities such as skiing, walking, trekking, climbing and sailing, and in nature study based activities.

The full range of the changes outlined above, and their implications, are summed up in two publications. In 1991, the American market researcher Stanley Plog published *Leisure Travel*. Plog divided the travel market into a growing and adventurous group – the allocentrists, trendsetters for the future – who seek non resort based activities, and a shrinking and anxious group – the psychocentrists – low spenders who seek the security of the resort. In 1992, Australians Betty Weiler and Michael Hall edited *Special Interest Tourism*, a book that spelled out for the first time the growing complexity of tourism's product development trends.

One of the new phenomena to emerge from the above changes has been that of ecotourism, tourism to natural areas to enjoy natural rather than resort experiences. A full review of that phenomenon, its origins and implications, is given in Boo (1990), Lindberg & Hawkins (1993), and Lindberg, Epler Wood & Engeldrum (1998). Closely associated with the rise of ecotourism has been the concept of sustainable tourism, a

collection of development and management paradigms designed to reduce and redirect the pressures associated with tourism development (Bramwell & Lane, 1993).

All of the tendencies above have been in Dominica's favour – and support, *in theory*, the creation of the National Trail. The number of mildly adventurous travellers is growing. Isolation has been broken down by telecommunications, by frequent airline links and by global media reach. Education has boosted interest in special interest holidays. The travel media promote the high fashion status of holidays to places that retain authenticity. While the conventional package tour and mass tourism market continues to grow, there are new types of speciality package, and rising numbers of free and independent travellers.

Dominica has recognised the potential of the ecotourism market for many years since the rejection of the 1971 Shankland Cox Plan for mass tourism development. That potential was enshrined in the National Structure Plans of 1976 and 1985, and was endorsed by the EU funded Dominica Tourism Sector Plan of 1991. (See Wilkinson, 1997, for a full review of these plans and their associated politics.) It will be explained below that the National Trail Concept can be seen as an integral part of Dominica's ecotourism strategy. But as Wilkinson points out, that strategy does not face an easy market opportunity.

What is the global market for ecotourism?

The definition of ecotourism is – like most definitions – subject to academic debate. For the purposes of this report the International Ecotourism Society's definition is used:

“Responsible travel to natural areas, which conserves the environment and improves the welfare of local people” (Lindberg & Hawkins, 1993).

The creation of the term ecotourism is attributed to Mexican architect and environmentalist Héctor Ceballos Lascuráin in 1983. In a review of the term written in 1998, he puts the subject in context. It is part of the wider concept of Sustainable Tourism. He goes on to make the wise comment that both adventure tourism and nature-based tourism may or may not be ecotourism, because they may not be carried out in ways that are sustainable for hosts or habitats (Ceballos Lascuráin, 1998).

In a review for the International Ecotourism Society, the Canadian, Paul Eagles, and the American, Bryan Higgins, both experts in the subject, discuss the size and nature of the market for ecotourism (Eagles & Higgins, 1998). They note that accurate and detailed information about the size of the ecotourism market is lacking. A range of commentators has pitched it as between 10% and 30% of total tourism demand. But Eagles & Higgins show that it is clearly growing in size and significance: they note that reliable surveys of, for example, just seven major US and Canadian metropolitan areas identified a market of over 13 million potential customers. They list most OECD countries as having important ecotourism market potential.

Three reasons are given for the growing interest in ecotourism. The first is the increasing recognition of the values to mankind of natural environments. The second is the impact of environmental education in primary, secondary and tertiary education. The third is the development and influence of environmental issues and values in the mass media. To these three must be added Plog's recognition of an increasingly maturing tourism market that seeks different and mildly adventurous tourism destinations. A standard holiday is no longer enough.

Eagles & Higgins and Palacio & McCool (1997) also discuss a key feature of the ecotourism market: it is a complex of many niche markets, rather than one homogenous large group. The market can be segmented in many different ways. There are markets which require different types of ecotourism – general contact with nature, specific types of nature, independent travel, guided tours, entertainment, cultural activities etc. And there are considerable differences in specific national requirements. James Higham, reviewing differing nationalities requirements for wilderness experiences, for example, noted that while Australians and British tourists sought total solitude and primitive conditions, Asians sought group experiences with some evening comforts (Higham, 1998). Americans and non-UK Europeans had requirements mid-way between the Australians and the Asians.

Overall, the literature has one other overriding message. The ecotourism market is a demanding one. It is composed of well-educated, well-travelled people, with high standards and often very specific requirements. They may have relatively high levels of expenditure, but they seek, and expect to get, a quality, consumer orientated and fashion aware product.

Implications for Dominica

From this discussion it emerges that Dominica has, potentially, a large and growing market for an ecotourism product. But, the market is complex and not easy to satisfy; careful and informed market segmentation techniques must be used at both the planning and marketing stages of any venture. Wilkinson (1997) has also noted that Dominica has found the operational, "on the ground", development of ecotourism difficult. There is a further central issue to be borne in mind. Almost every rural area in the world – from Ukraine to Chile to Australia and Alaska – is seeking to woo the ecotourism market. A walk around any international tourism trade fair will illustrate the range and scale of the supply of ecotourism products. Dominica must produce a very good, effectively market related product if it is to succeed.

What is the market for soft adventure trails?

Trails tourism forms a specific niche market within the overall ecotourism market. It has certain characteristics. It has a physical fitness /health aspect – though fitness comes in a range of abilities. Within the trails market there are challenge trails of various levels, trails of various lengths, and some trails that require special physical skills. Trail tourism also has experiential aspects: there are solitude trails, educational/cultural trails, group

experience trails and many others. The market for trails is also perceived to be growing: the mildly adventurous connotation of the term trail appears to be important as does its linkages to health and fitness. (See Lane & McGarry, 1997; Lane & Lumsdon, forthcoming.)

As in ecotourism generally, the trails market is a demanding one. Trails users, especially non-local users, tend to be above average in educational attainment and in income level, and have specialist recreational interests. They are also often extremely fashion conscious in their choice of holiday, and in choice of trail. There are many trails to choose from on the market.

Useful information on trails and tourism is contained in the trails theme issue of *Current Issues in Tourism* (1999), though its market discussion is weak (see Hugo, 1999). A recent European Union publication also contains valuable ideas (Kouchner & Lyard, 2001) although it must be read with the knowledge that Dominica has significant differences to most European regions in terms of environment, market and local awareness / enterprise possibilities.

Implications for Dominica

The implications of the discussion above are similar to those for ecotourism in general. If Dominica is to be successful it must develop an effective, competitive and professional product. But Dominica has one great advantage in planning a new trail. Most existing trails have been planned by walking enthusiasts with little interest in, or knowledge of, the requirements of tourism in general or of specific niche markets. Dominica has the opportunity to plan any new trails with the tourism market and its requirements at the forefront of the decision making process. It also has the opportunity – as will be seen below – to integrate rural tourism development to fit a new trail system.

MARKET RESPONSES TO A NATIONAL TRAIL PROPOSAL: TOUR OPERATORS' REACTIONS

A global view of a growing ecotourism and trails market shows that globally and *in theory* a Dominican National trail should be viable if well planned and well implemented. It was felt necessary, however, to check that in practice the market would actually respond should a trail be put in place. And, given that the market place is a crowded and fiercely competitive one, it was also felt necessary to research the detailed requirements of potential users.

The quickest and most economical way to do that was to arrange a focus group of tour operators who regularly take clients on ecotourism and trail holidays, both to the Caribbean and elsewhere. This had other advantages. While individual holidaymakers make final holiday purchase decisions, they tend to compile naïve wish lists in focus group situations. Tour operators tend to be experienced, even hard-bitten, people with a very sure eye for market requirements. They are also professionally aware of regulatory and technical requirements.

A half-day intensive workshop was, therefore, convened and held on September 2000 in London. It was undertaken with the assistance of UK-based members of the Waitukubuli Foundation. The Dominican High Commissioner in London, Mr. George Williams, kindly made the High Commission's premises in London available for the workshop.

Forty-three tour operators were invited to the event. They were drawn from several sources. The Association of Independent Tour Operators (AITO) comprises over 150 smaller tour operators, adhering loosely to a code of environmental conduct, and offering a range of specialist holiday opportunities. Their lists were scoured for operators with experience in either Caribbean or relevant ecotourism / soft adventure markets. MKI, the newly appointed marketing agents for Dominica in the UK, supplied other potential candidates. Polly Pattullo, former tour operator, writer and author of the renowned Caribbean tourism text *Last Resorts*, also supplied contacts.

Of the 43 operators invited to the event, 10 took part. Another 9 supplied completed questionnaires, and a further 3 asked to be kept in touch with any development of the national trail because they were interested in Dominica as a destination given suitable facilities. In addition, informal discussions were held in December 2000 and January 2001 with two American specialist tour operators, together with two German and one Swiss operator. They very largely confirmed the views expressed by the UK operators.

The full text of the questionnaire used to guide workshop discussions, and used by post and phone later, is given at the end of this report as Appendix One.

Following the workshop it was requested by CANARI in July 2001 that special enquiries be made to discuss how important the creation of a national trail would be when compared to a series of local trails on Dominica. Of the twenty-two operators with whom discussions had been held thirteen replied to a telephone questionnaire. The

questionnaire was administered only to those who had taken part in person in the earlier discussions: to have opened it to others who had no knowledge of the background to the Trail would have put the reliability of the results at risk.

The September 2000 London workshop

After an opening description of Dominica as a destination, and the aims of the national trail project, the group worked through the following discussion. The comments given include remarks submitted by post later.

Do you already feature Dominica as a destination? What sort of holidays do you offer there?

About half of the participants / respondents offered, or have offered, tours to Dominica. Typically they were tailor made holidays, some walking / touring holidays, cultural or nature study based – notably botanical.

If you do not feature Dominica, are there any specific reasons why not?

Of those who did not feature Dominica, the most common response was that they had not got around to taking in such a small destination. Some had found it difficult to find “technical/trade” information about the island in the past. High costs and low value problems were cited. But many felt that they would like to work with Dominica in the future, if, as a destination, it worked with them to provide effective infrastructure and back up. Of operators who had taken tours there in the past, but had ceased to do so, there were several reasons quoted for pulling out. Difficult airline connections (usually at Antigua) were one. Unprofessional back up on the island was also mentioned: other destinations made a tour operator’s life easier. Poor quality/high cost accommodation and service had also been a problem.

Would the existence of a 100-mile long walking trail in Dominica be an attraction to your operation?

All but two operators felt that a trail would be attractive (if it was an attractive and well planned trail) and that it would interest clients. To some extent the group was inevitably interested in a trail experience – otherwise they would not have filled in the questionnaire or attended the workshop – but the high response rate to the questionnaire does show considerable general interest in the trail concept on Dominica.

What sort of "trail" experience do you have as a tour operator and where?

The majority of tour operators involved had had experience of trail-based holidays in many parts of the world. They had also had experience of a wide variety of trails – with varying themes, and with various modes – walking, horse and mountain bike. And they had experience of both self-guided and guided trails. The keys to success that they mentioned were several. Perhaps effective trail management and accommodation were

the most vital. Trails had to be interesting, not too well used, with good accommodation. Local accommodation could be quite simple but it had to be well maintained, clean, comfortable and well serviced. Specific issues included toilets: “toilet facilities in a fragile environment are a perpetual problem in some places”. The need for accommodation with character was also mentioned. Issues connected with the overcrowding of trails in human terms, together with consequent trail degradation, was quoted by five operators – “some trails are victims of their own success”. Perfect trails appeared to be rare. Some trails had problems with long or difficult access arrangements.

What sort of trail would you like to see created on Dominica?

Answers to this question ranged across numerous requirements.

Length of route (in time terms, for a person of average fitness): most – but by no means all – felt that a 6-day route would be ideal. Several sought longer routes; two sought shorter routes. The majority, however, qualified their call for a specific length of time by asking that the route be devised in sections so that many different lengths could be achieved. Different lengths of route could then be sold to different markets. The Ramblers Association sought c. 12 miles per day in cross-country conditions. Others felt that 4 to 6 hours walking per day was sufficient, and that sections should be determined according to time and not distance, depending on terrain.

Type of route: this also received a series of complex responses. The central call was for a route with variety and interest. Relaxing routes were not popular, and neither were routes that emphasised contact with communities en route. But some community contact always added interest. Wildlife rich, interesting and challenging / reasonably challenging routes attracted most interest. But variety seemed to be the keynote. Loops and options were felt to be useful.

Guiding requirements were similarly varied. While most wanted the option of guides, some had clients who preferred self-guiding as an option at least in some sections “middle class, eco-friendly clients like to think that they are ‘exploring’”. Others felt that they would like to have the option of their own guides, especially for specialist subjects. But a system of trained local guides was very much thought to be a plus by many respondents: they must, however, know what to say and how to say it. Guides were felt to be especially useful in maintaining – and limiting where necessary – contact with local communities.

Would you prefer a trail that has a user fee or free access?

The majority of respondents accepted with no qualms at all the concept of paying a fee for trail access. But there were important caveats. Having paid a fee it was expected that the trail surface, signing, etc. would be good and well maintained. And it was felt to be essential that the fee was used for the trail, and seen to be used for the trail – it should not be spirited away into general government coffers. Only one respondent indicated the

scale of fee they were prepared to pay – between \$50 and \$100. Indirect collection was also indicated as a preference for groups.

What sort of accommodation along the route (or close by) would your clients require?

The questionnaire gave the options of village B&B, guesthouse, or hotel. In many cases respondents indicated that a mixture of accommodation types was both acceptable and useful: it allowed for different types of market. But cleanliness, friendliness, character and comfort were all important. One operator said that he would be happy with the occasional quality tent. However, some operators had more distinctive requirements. En suite facilities were a must for several. Hotel type accommodation was a must for some, especially at the beginning and end of a trip. American visitors were felt to be more demanding; Germans were felt to be marginally less demanding, though cleanliness and eco-aware accommodation was essential for them.

Accommodation units capable of taking up to 20 people were regularly specified, with some single rooms. In a perfect scenario, the accommodation units would have some ecological features, e.g. solar panels, local construction etc. Whatever, there must be no “Miami boxes” – a reference to standard motel type accommodation of the Double 6 or Days Inn franchise variety. One operator who had clearly had more than his fair share of problems wrote on the form: “accommodation suppliers must be reliable and contract abiding”. Other operators will fully understand those sentiments !

What sort of eating facilities would your clients prefer?

Virtually every respondent indicated that food would be a vital part of the experience. Many stated that variety would be important but above all local cooking was absolutely essential. That had to include fresh fish, fruit and vegetables. Four operators felt that their clients would be keen to see farms, and to learn about local food preparation. A vegetarian alternative was always a requirement. And hygiene standards should be good: food safety is now an important issue for British, Continental and US clients.

While cafes were welcome for lunches, some operators hoped for restaurants at some points along the route and especially at the beginning and end of the tour.

What information would clients like before their visit or along the route?

Quality information sources, like local cuisine, were felt by all to be an absolute must. Every single operator required good maps, and useful information sheets. Many – but not all – felt that points or occasionally, interpretation centres along the route would be good too. Closer interrogation of some respondents revealed that this meant not typical specialised visitor centres of the kind erected by UK or US National Parks, but interesting ad hoc places. Specialist requirements included bird lists, and local bird trails. The case was also made for improving the museum in Roseau to offer a national source point. Local guides were also felt to be important.

Entertainment requirements split respondents evenly. Many wanted none. Others sought authentic, genuine or ad hoc entertainment only; some welcomed local music. Interestingly, virtually no one sought a web site: that may not be the case if the operators' clients were questioned, and may reflect a wish to offer information from or via the company. Fauna, flora, history, and culture were all requested.

Do you have any reservations about security en route – and if so what is of concern to your clients: wild animals / insects? theft? health? Lack of rescue facilities far from urban areas? Getting lost? Any comments on best practice emergency procedures?

This question was felt by many respondents to be of central importance to the usage of a trail by their clients. It had to be safe. To achieve this, there were key requirements, which included:

- An evacuation plan with tested procedures
- Known ways of contacting the emergency services
- Known medical facilities, medical posts and procedures
- Mobile phones to rent
- Avoidance of unsafe areas
- Local guides, with training in emergency procedures, first aid etc.
- Helicopter availability if necessary

Would you envisage the trail as being the:

- (a) *Centrepiece of the holiday?*
- (b) *Part of a longer holiday in Dominica?*
- (c) *Part of a two-island/centre holiday?*

There was a varied response to this question: it was felt by some that a pattern would emerge eventually in practice, and that much depended on the quality of the trail and how quickly it established a reputation. Options (a) and (b) scored better than option (c) but (c) did allow some travellers additional and valuable alternatives, especially in travel patterns.

What ground support systems would you require?:

- (a) *Transfers at start and end of the trail?*
- (b) *Access to a trail manager?*
- (c) *Access to a central trail booking system?*

Of this list, it was not surprising that every operator required (a) – transfers from point of entry into the island to the trail and later return. In technical terms, an effective and reliable ground handling system was felt to be essential. In Dominica ground handling could be no simple matter. The main airport on the island, Melville Hall, is at least an hour's drive from the capital, Roseau – a place many would wish to visit. The trail's end points are however, likely to be at least some distance from Roseau. And because the trail is required to be available in sections, to allow for different groups of people to do different lengths of trail, additional complications will be involved. However, Dominica

is a small island. Traffic delays are not those of London. And most drivers know most places well.

Quite a number of operators did not feel they needed a full time trail manager, but they did need some central point with which to make contact. Others felt that there had to be a person who was responsible for the trail: even on a small island the mountainous nature of the terrain, the complex weather patterns, the need to ensure quality provision, and the fact that tourism would be a new business for many of the communities which the trail traversed – all these issues pointed up the need for an accessible, knowledgeable and practical trail manager. It may or may not need to be a full time post.

Booking issues raised little discussion. It was not felt to require major input given the likely usage levels in the early years. But there had to be simple and non-bureaucratic provision.

What about the lack of direct flights to Dominica from the UK – is that a plus, a minus or a mixed blessing?

Most of the operators with Caribbean experience acknowledged that a change of plane is a fact of life for many small island operations. Direct flights would be “nice” but were not likely to materialise: neither of the island’s airports are physically capable of accepting transatlantic aircraft, and the cost of runway extension / improvement would never be justified. Several went so far as to say that the need to change aircraft ensured exclusivity, and protected the island from the impacts of mass tourism. The key to success is good, same day connections.

Could you estimate – very approximately and tentatively - the size of the market for the trail from your company in Years One and Two of the trail’s operation?

This was a difficult question for any tour operator to answer. They pointed out that so much would depend on the quality of the trail, and the way in which it was promoted and marketed. Some felt that so far Dominica had not been very effective at promotion. However, of those who did make estimates (13 operators) numbers ranged from 10 to 40. The average was 23. One operator with considerable experience felt that a good trail could attract up to 100 passengers from his company after about 3 years: but it must be good. There would also be FITs – independent travellers.

What factors would make the trail more "sellable" from your point of view?

Several points were mentioned. Number One in importance was that Dominica had to establish an image for itself generally, and had to raise its marketing profile. In addition, the trail had to establish a name for itself, as a fashionable, safe, exclusive, slightly exotic route – adventurous but with at least most sections acceptable to the 50+ market. It had to have interesting and accessible fauna and flora. It had to have good and reliable accommodation. It must not price itself too highly. And if too many operators sold the product, that could be a problem.

What factors would make the trail less "sellable"?

Most replies were mirror images of the previous question. Mass-market use of the trail could be a problem. Bad weather periods must be known about and avoided. Poor quality food, accommodation and guides could all be problems.

There was some discussion about cloud cover problems. Rain was common but the climate usually warm enough to prevent problems. July, August and September should be avoided. January to April was the best period.

Would your clients be likely to pay a return visit to Dominica, join a Friends of the Dominica Trail - or are they people who move on to other destinations without developing powerful "place" loyalties?

The majority of operators felt that their clients tended to move on from one destination to another. They were essentially "explorers". Some might return; the return could be 5 years on and be to explore a different aspect. One or two operators were involved in Friends schemes, such as the successful Friends of the Ionians. But that market was different, and it was much closer to the UK. Almost all operators, however, stressed that word of mouth recommendation was common amongst their clients, and follow-up marketing had to understand and use that fact.

Any other points you would like to make about Dominica as a destination?

The most important replies here stressed the need to conserve the island's unspoilt nature, while presenting a more efficient service. Tourism had to be taken seriously while not losing the Caribbean's reputation as a laid back, charming and relaxing destination. Food returned to the forefront in this discussion. Several operators liked the idea of a pro-organic agriculture policy, especially the Europeans. "My clients are *very* organic".

Finally several respondents noted how little they and others knew about Dominica. They felt that tour operators needed to be educated about the island.

How important would the creation of a National Trail be?

There are already trails on Dominica. In July 2001, the question was posed – how important is the concept of National Trail? Could local trails – perhaps improved – be a substitute?

A telephone poll of the original 22 tour operators who had expressed interest or attended the London meeting was quickly carried out. The poll was restricted to the people within those organisations with whom discussions had already been had, or who had attended the London workshop. This was felt to be essential to ensure the answers had some degree of validity from prior knowledge of the National Trail proposals. Thirteen responses were obtained.

The following questions were posed: (i) how important would it be to your company that a trail on Dominica be a National Trail - very important, important, slightly unimportant, totally unimportant? (ii) would you be interested in Dominica as a trail destination if there were only local trails- very interested, interested, slightly uninterested, totally uninterested? (iii) why would a National Trail be important to you?

The sample was small and the questions unsophisticated, largely because of the need to obtain rapid results. But the overwhelming degree of agreement amongst operators should be noted.

Eleven operators felt that the concept of National Trail, rather than a series of local trails, was very important. Two felt that it was important. Three operators felt that they might be still interested in Dominica if there were only local trails, but they qualified their remarks: much would depend on the nature of the local trails. The others expressed disinterest.

The importance of a National Trail was explained in a number of ways. All the operators mentioned the importance of a National Trail as a marketing plus. It was explained that the National status of the trail, if it was a well designed and managed product, would give it greater status in the eyes of the market. It would mark it out as something special in a huge oversupply of shorter trails. It would help the trail both in its early years – and could help it achieve long term “must try” or cult status. But many operators also stressed that the trail would have to be good and very special to achieve that status, and the term National Trail would not be enough to achieve success.

Behind those statements lie some of the fundamental market truths known to all successful tourism entrepreneurs. Tourism enterprises must understand and fulfil the special needs of their markets. But tourism markets are not totally logical. Tourism fulfils dreams rather than satisfies objective requirements for relaxation and recreation (Krippendorf, 1984). And the tourism industry is essentially a fashion industry: success comes from catching the fashion aspirations of the target markets. The target markets for a trail on Dominica have high regard for fashion labels. National status is one of those labels. Long haul holiday purchases are not chance activities: they express a range of complex aspirations, clearly revealed in the London workshop proceedings.

CONCLUSIONS

The trail and its potential

The Dominica National Trail's tourism potential was acknowledged by the discussions held with tour operators. They show that there would be real market demand for the trail. They also show the importance to the market of the national status of the trail. But those positive remarks must be hedged by many other points to emerge which tell much about the detailed requirements the trail must fulfil, and which the island must create beyond the immediate requirements of the trail itself.

Is there a viable market? How big is that market?

There is a potentially viable market for trail tourism on Dominica. But it is small. And so much depends on achieving the complex design and infrastructure requirements of the trail.

Taking the guesstimates given at the London meeting, and extrapolating out to Europe, would give a possible take up of c.1500 tourists coming to use the trail in Year One of completion. That would suggest c. 10,000 bed nights. With an average spend on island of £70 (US\$100) per night gross revenue could be £700,000 (US\$1,000,000). The majority of that would remain on island – the percentage would depend on how effectively island agriculture and other suppliers were organised. Year two could, given promotion in North America, boost figures to 3,000 tourists and 20,000 bed nights, with an income approaching £1.5 million. Further growth would be dependent on effective promotion, and achievement of minor cult status as a speciality trail.

(The figures above assume that approximately 50 tour companies in Europe would be interested in sending 20 people per year in Year One. [See earlier estimates by tour operators.] That figure would be made up of 20 companies from UK, 10 from Germany, and 5 each from the Netherlands, Switzerland, Spain and France. The remaining 500 walkers would be independent travellers. The average spend figures are typical for the region, and include on island services and purchases of all kinds. They are derived from personal and confidential communications with tour operators and from published survey figures in the UK and the USA. The bed nights figure assumes an average 7 nights stay. It will be appreciated that these figures must at this stage be very tentative, given no known route, and no assessment of the marketing arrangements likely to be in place. But they are in line with trail usage in other places. Much will depend on the skill and investment put into the trail.)

What are the infrastructure requirements of the trail?

Experience with over twenty trails suggests that trail failure usually comes from inability to match trail design and trail infrastructure to the requirements of the market. Dominica's ecotourism industry has already suffered from problems with infrastructure provision (see Boo, 1991; Wilkinson, 1997). These writers, and many others quoted by

Wilkinson, suggest that for Dominica, ecotourism success requires better operational skills in product development. The trail could be a part of the island's tourism product development. They go on to suggest that enterprise and skill capacity building will be a key element in any step forward. It would appear that capacity building is necessary – in fact essential - at private sector, public sector and community levels.

Wider Issues to emerge from tour operator discussions

- The need for better tourism administration, direction and promotion.
- The need for better telecommunications infrastructures.
- The importance of training and assistance for local enterprise development.
- The need for guidance towards grass roots rural development linked directly and indirectly to tourism markets to create quality accommodation, hospitality, interpretation and guide provision (the latter issues were especially noted by Boo ten years ago – see Ham, 1992; Ham & Weiller, 2002).
- Security procedures on the trail are also important: solutions to this issue could bring useful benefits to islanders living on or near the trail as well as for tourists.
- There is no strong case for a new / larger airport on the island – an idea regularly put forward (see also Wilkinson, 1997). Tour operators did not see it as a key issue, especially when compared to other requirements.
- It would be useful to involve potential tour operators and other tourism facilitators in a dialogue from the outset: many tour operators expressed willingness to be involved.
- External aid funds will be necessary to create the trail and ensure its successful launch. There are many funding opportunities available but accessing them requires skills and time.
- There is an over-riding requirement to conserve the cultural and natural assets of the island. Successive island tourism and conservation policies have recognised that. Trail management techniques are available to ensure sustainable development. The positioning of this point as the last item in this list does not in any way imply lack of importance – rather it should act as a reminder before any action is taken that conservation is an essential ingredient to trail development both ethically *and commercially*.

One other practical issue is, however, central. The existing location and condition of trails on Dominica are not yet known. Rapid mapping of the situation is essential. And before the trail route is finalized, possible routes must be walked to confirm their safety, attractiveness, degree of difficulty, and ability to fulfil the market's requirements.

Equally the legal status of the rights of way on the island needs to be clarified, and if necessary modified. This is an issue of importance far beyond tourism: it is a basic conservation and development tool. It may be necessary to introduce new legislation to secure the legal status of the national trail (and others) in Dominica, and to remove issues such as injury claims compensation by users against landowners on the trail route. There have been precedents for such changes in both English and Irish law.

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Appendix One
The Text of the Questionnaire

DOMINICA'S NATIONAL TRAIL
A QUESTIONNAIRE FOR TOUR OPERATORS TO ASSIST ITS DESIGN AND
SUSTAINABLE DEVELOPMENT

The contents of individual questionnaires will be kept confidential: individual companies will not be identified in any publication or communication

Please Tick where you are given a choice of responses, and add any comments below the responses if you wish.

1. Do you already feature Dominica as a destination? YES / NO
What sort of holidays do you offer there?
2. If you do not feature Dominica, are there any specific reasons why not?
3. Would the existence of a 100-mile long walking trail in Dominica be an attraction to your operation? YES / NO
4. What sort of "trail" experience do you have as a tour operator?
Where?
Any specific successes or problems to date?
5. What sort of trail would you like to see created on Dominica?
 - (a) a 6-day route?
 - (b) less than 6 days?
 - (c) more than 6 days
6. Would you like to have:
 - (a) a system of local guides
 - (b) a self guided system
 - (c) both the above
 - (d) use your own reps
7. Would you like to have:
 - (a) a challenge / adventure route?
 - (b) a relaxing route?
 - (c) a natural history/discovery route?
 - (d) community route?
 - (e) more than one type of route - i.e. loops of different types off a main route
8. Would you prefer a trail
 - (a) passing through communities?
 - (b) passing through "wilderness"?
 - (c) or a mixture of both?

9. Would you prefer a trail that has a user fee or free access?
10. What sort of accommodation along the route (or close by) would your clients require?
- (a) village bed and breakfast?
 - (b) guest-house?
 - (c) small hotel?
 - (d) a mixture?
- Any comments on accommodation types and requirements?
11. What sort of eating facilities would your clients prefer?
- (a) Local cafes?
 - (b) Restaurants?
 - (c) "European" cuisine?
 - (d) "Local" cooking?
 - (e) All the above during a trip?
- Any comments on food types and requirements?
12. What information would clients like before their visit or along the route?
- (a) interpretation material/centres at points along trail explaining fauna, flora, history, culture?
 - (b) maps, information sheets / booklets etc.?
 - (c) Entertainment at overnight stops?
 - (d) A website?
13. Do you have any reservations about security en route – and if so what is of concern to your clients: wild animals / insects? theft? health? Lack of rescue facilities far from urban areas? Getting lost? Any comments on best practice emergency procedures?
14. Would you envisage the trail as being the:
- Centrepiece of the holiday?
 - Part of a longer holiday in Dominica?
 - Part of a two-island/centre holiday?
15. What ground support systems would you require?:
- Transfers at start and end of the trail /
 - Access to a trail manager?
 - Access to a central trail booking system?
16. What about the lack of direct flights to Dominica from the UK – is that a plus, a minus or a mixed blessing? ** (see below for flight information)

17. Could you estimate – very approximately and tentatively - the size of the market for the trail from your company in Years One and Two of the trail's operation?
18. What factors would make the Trail more "sellable" from your point of view?
19. What factors would make the Trail less "sellable"?
20. Would your clients be likely to pay a return visit to Dominica, join a Friends of the Dominica Trail - or are they people who move on to other destinations without developing powerful "place" loyalties?
21. Any other points you would like to make about Dominica as a destination?

THANK YOU VERY MUCH FOR YOUR HELP. WE WILL KEEP YOU IN TOUCH WITH DEVELOPMENTS ON DOMINICA AS THEY TAKE PLACE

* At present air travel from UK to Dominica requires a change of aircraft at Antigua or St. Lucia. There is also a regular service from St. Juan in Puerto Rico. Runway facilities at Melville Hall Airport, Dominica, can only accommodate Dash 8 and ATR-42/72 aircraft – both restricted to a maximum of 70 passengers. (in practice 40/50 seat aircraft are currently used) It may be found possible to land regional jets – such as the HS 146 / RJ 70/80 etc in the near future. They have capacities from 80 to 122 passengers.

Please return this questionnaire as soon as possible in the envelope provided to:

Bernard Lane
Rural Tourism Unit
Centre for the Historic Environment
University of Bristol
43 Woodland Road
BRISTOL BS8 1UU

Any questions? You can contact me on 0117 954 6073 or by E-mail:
Bernard.Lane@Bristol.ac.uk

The Waitukubuli Ecological Foundation (WEF)

(economic development through environmental conservation)

The Waitukubuli Ecological Foundation (WEF) was established as a charity under the laws of England and Wales by Dominicans and friends of Dominica resident in London in 1996. In 1999 it was registered as a Non-Profit Organisation under the Companies Act of the Commonwealth of Dominica.

The Foundation aims to contribute to the holistic development of Dominica by developing, discussing and disseminating through public education and practice the approach that the development of the economy and the conservation of the environment should be conceived of together as an interconnected whole, a concept which should apply in all our strategic planning and thinking. It recognizes as a fact of reality that the effective conservation of the environment can only be achieved with public support which itself will depend on effectively addressing the people's concerns for their livelihood. The effort to conserve Dominica's God-given, wonderful natural environment should proceed by identifying those projects and areas that are simultaneously income generators as well as conservation measures.

One of the WEF's objectives is to do just that. The national trail is a case in point, for not only will it establish a key facility for the development of the tourism sector of the economy – ecotourism, but it will also be a significant conservation measure since it would create a benign conservation logic in giving the people a vested interest in maintaining the natural beauty and integrity of the environment in order to attract visitors to the trail for the economic benefits they would bring to rural communities and the island as a whole.

The choice of the words "ecological" and "Waitukubuli" in the name of the Foundation connotes the concept of environmental conservation as embracing more than just the natural environment, but includes all aspects of human socio-economic and historical-cultural activity. The WEF is therefore particularly interested in those areas where history, economics and environment converge. Such a juncture is provided by a project aimed at the discovery and restoration of the many Maroon ruins and caves around the island, which would not only create new and more interesting tourist attractions, but would also greatly enhance public appreciation of the island's history and heritage which would impact on the effort of nation building as well as of environmental conservation.

But perhaps the most significant project along these themes is the advocacy and promotion of the gradual transformation of the island's agriculture from its present reliance on artificial chemicals and poisons to a wholly or mostly organic culture. Organic agriculture would not only be the single greatest environmental conservation measure, but would also provide the basis for the revival and recovery of the island's agricultural economy. By these means we hope to contribute to the creation of a happier, healthier and more humane society within one of the most wonderful natural environments available anywhere in the modern world in the 21st century.

Membership to the WEF is open to Dominicans and friends of Dominica at home and abroad on subscription both to the finances and philosophy of the Foundation. For more information contact Bernard Wiltshire at the address below:

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