Feasibility Study Report No. 6

THE WAITUKUBULI NATIONAL TRAIL: MARKET PROFILE AND MARKETING STRATEGIC ANALYSIS

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Roseau, Dominica

January 2002

CANARI Technical Report No. 302

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.

This is CANARI Technical Report #302

Also in this series

Edwards, M.J. 2001. The Waitukubuli National Trail: definition of a pre-product and identification of environmental issues. Waitukubuli Ecological Foundation, Roseau, Dominica, Feasibility Study Report No. 4. CANARI Technical Report No. 299: 23pp.

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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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SUMMARY OF FINDINGS AND CONCLUSIONS

Visitors to Dominica have always been seduced by its rippling mountain ranges, dazzling greenness, sulphur springs, its Boiling Lake, waterfalls and rivers - a volcanic island dominated by magnificent rainforest with small settlements scattered on isolated ridges or coastal niches. The idea of the Waitukubuli National Trail, a long-distance hiking trail from north to south of the island, offers the potential to link Dominica's many natural attractions while creating economic rewards for its people.

There are hiking trails all over the world offering spectacle, escape and exploration to hundreds of thousands of people. But what makes a successful trail? The research undertaken for this report suggests that what Dominica has to offer matches what the market (an eclectic one at that) is seeking: a range of physical challenges and a mixture of high-quality natural and, to a lesser extent, community/cultural attractions. Responses from consumers and specialist tour operators show that the National Trail has the potential to attract a cross-section of a significant and fast-growing segment of the international tourism market. These segments could, crudely, be described as follows – at one end of the spectrum is the "hairy" committed hiker while, at the other, is the gentle day-walker keen, perhaps, to walk just one part of the trail just to experience the forest and hear the cry of the mountain whistler. More formally, these consumers represent the hard core and soft core adventure/nature tourists; of these the soft-core is of the greater interest to Dominica.

Our research shows that there was, however, an almost unanimous verdict that the National Trail would be an important – but not the sole – reason to visit Dominica. Only a hard core – a small minority of the target audience - would hike the trail and depart. The soft core – more akin to Dominica's established tourist profile – would use the trail in conjunction with other island activities, such as whale-watching. This finding does not diminish the interest in the trail; indeed, it makes it all the more significant.

The soft-core market also addresses a key function of the trail – the bringing of economic benefits to rural communities. The driving force behind the trail has always been to "reach the little people" who – to date – rarely see a tourist except one packed into a mini-bus on the way to, say, the Carib Territory. While both the trade and the consumer "wings" of our research emphasised the need for "landscapes-to-die-for", there was also considerable interest attached to interaction with communities. Nearly all the consumer respondents would buy local produce along the way and a large majority would buy crafts. The tour operators emphasised that the accommodation – whatever its definition – needed to be small, friendly, "full of character", providing fresh, "local" food. No one wanted conventional "resort" accommodation.

Those solicited in our research represent elements of the fastest growth areas in international tourism: nature tourism and adventure tourism. While the events of September 11 might currently cloud statistics, there is still good reason to believe in a doubling of market demand before the end of this decade. Our own research, too, in various countries of the south suggests that the consumer demand for tourism based around natural and cultural features will continue to expand faster than mainstream holiday demand. All this bodes well for Dominica's National Trail.

Who, then, is this target audience, these nature and adventure tourists of the 21st century? In many respects, they represent the top-end of Dominica's traditional visitor: well-educated, relatively affluent, well-travelled. Many of them are also increasingly concerned about environmental policies and the role of local people in the tourism product; they will want to make sure that their budget is well-spent. These consumers will either book through specialist tour operators or book "independently" through their own website research or word-of-mouth recommendation.

While all research points to a growing market of these target consumers, Dominica will have to fight for custom in a highly-competitive, world-wide market against better-established and more high-profile trails. With such a scenario, target volumes are hard to forecast. There is the further complication that neither the route nor the organisational arrangements for it are known; and marketing strategies are also unclear. However, we can give some very tentative suggestions of additional numbers of tourists attracted to Dominica by the development of the Trail: a total of 1,200 for year one, increasing to 3,000 in year five and 6,250 in year ten.

How is Dominica placed to respond to this potential demand, this known enthusiasm for a long-distance hiking trail by a growing number of discerning tourists? The evolution of the National Trail has been a slow process and the lack of a route and a clear organisational structure has had some negative impacts, both internally and externally. Dominica's tourism product is also patchy in delivering high-quality service while its people need training in a range of tourism skills. Over and above this, there is the weakness in Dominica's marketing effort, which results in continuing low international awareness of the island and its attractions.

Yet marketing is central to the National Trail's success – or failure. Whatever institutional model is adopted, the trail must become a key feature of the island's marketing programme; it must be run by those with commercial skills. Dominica's marketing strategy must increase awareness of the island and its National Trail. It must target the key market segments, must work both through specialist tour operators while also encouraging direct booking; it must develop its promotional literature. The Waitukubuli National Trail agency, government and the private sector must make the most efficient use of limited resources.

If these – and other – appropriate strategies are followed, the National Trail could have a beneficial impact on the island and its people. Conversely, an inadequate marketing programme will result in a trail that remains little-known: standing empty as the forest closes in on it.

The constraints and weaknesses should not create despondency. For despite these major challenges, this report concludes that the Waitukubuli National Trail has the potential to become like the best trails, both a physical challenge and one that "excites the imagination". With the trail at the heart of Dominica's tourism product comes the opportunity to reshape the image of the island into the true Nature Island, not just because it's a catchy slogan but because environmental sustainability is good practice and it's exactly what the target market wants. Add to that an enticing image, people will seek out the National Trail, aspiring to qualify for its own badge of honour, "I walked the Waitukubuli Trail".

INTRODUCTION

Dominica is increasingly looking towards tourism to generate economic growth following the decline in the banana industry. Its topography and absence of direct air services from main metropolitan markets dictate that Dominica competes on the margins of the international discretionary travel market, catering for non-mainstream tourists. The focus of the island's tourism strategy is rural, nature-based tourism, targeting the **ecotourism** and **adventure tourism** market segments. It uses the marketing slogan of **Nature Island of the Caribbean.**

One product concept, which has been identified to realise this strategy and attract the appropriate target segments, is a long distance walking trail - the **Waitukubuli National Trail** (hereinafter referred to in this report as "the Trail"). Such a development would also enable the small, rural communities situated along or close by the route of the Trail to share in the economic contribution from tourism through the provision of charged-for facilities and services.

The concept of the Trail, as developed by the Waitukubuli Ecological Foundation, was endorsed at a multi-stakeholder workshop in December 1998. A second workshop in June 2000 developed the framework and inputs required for a full feasibility study to be commissioned through financial assistance from the UK Government's Department for International Development (DfID). This feasibility study is being co-ordinated by the non-governmental organisation - the Caribbean Natural Resources Institute (CANARI). Inputs from six specialists have been separately commissioned: marketing, financial analysis, mapping, environmental assessment, socio-economic impacts, and policy and institutional analysis.

This document represents the report relating to the marketing component of the feasibility study. It is in fulfilment of the contract dated 19 October 2001 between Caribbean Natural Resources Institute (CANARI) and Robert Cleverdon Associates (RCA) for the preparation of a Market Profile and Marketing Strategic Analysis in respect of the Trail.

The primary objective of the study was to assess - from a marketing standpoint - whether the proposed trail can be developed in such a way that it will attract significant volumes of tourists from major metropolitan source markets, with some indication of spending levels and patterns for use by the financial analyst as input to the assessment of the viability of the Trail. To reach this point, it was necessary to address the secondary objective of identifying and assessing the attitudes, motives and behavioural patterns of prospective tourists attracted by a long distance walking trail, especially in respect of:

- their exposure and receptivity towards different types of media available for marketing;
- their ranking in terms of attraction, of elements of the Trail, eg natural features, flora, fauna, birds, the way-of-life of local communities and so on;
- their requirement for, and likely use of, facilities and services along the Trail;
- their spending levels, by category of spending;
- their pattern of use of the Trail eg proportions of walkers who would cover the whole trail or take only a portion of it.

In line with this objective, the central tasks built into the study were to assess and identify:

- potential and targets;
- estimates of volumes likely to be attracted by the product;
- specificity of this product, as compared to related products which exist or may be developed in Dominica;
- demand for related services and products;
- main approaches to, and techniques of, marketing;
- characteristics, expectations and behaviour of target clienteles.

Additional requirements were specified as:

- marketing information on marketing channels, including agents in likely countries of origin and associations of users of trails;
- identification of the optimal marketing strategy for the Trail, focusing on the image to be created, targeting and coordination with the national promotion of Dominica;
- assessment on the main requirements for product development.

This research did not explore in any detail the market potentials and requirements of the neighbouring islands of Guadeloupe and Martinique, as this is being covered elsewhere in the feasibility study process.

The study was conducted by Robert Cleverdon Associates' personnel, Robert Cleverdon and Polly Pattullo, who acknowledge and thank Mr Yves Renard, CANARI, and all the many tourism Dominican stakeholders and industry representatives who so willingly and helpfully contributed their time and expertise to assist us in our research programme. Their ideas, views and enthusiasm for the Trail were highly valued and are reflected in our report though, of course, Robert Cleverdon Associates take full responsibility for all findings, conclusions and recommendations contained in this document.

PART A THE WAITUKUBULI NATIONAL WALKING TRAIL

A.1 Waiting for the Trail

The lack of a known route for the Waitukubuli National Trail has a number of implications for the research programme, for the present study and for the marketing of the Trail: some negative, some positive.

Among the negative implications are:

- tour operators and other interested parties have found it difficult to assess the merits of the Trail and its attractions without knowing its exact path. This means that their ability to evaluate the Trail has been limited. They have been able to speculate rather than predict;
- Dominican stakeholders have in some instances become sceptical and frustrated by the lack of decision-making on the route;
- credibility both among local operators and the international travel trade is being damaged and local planning/action is on hold until a route is determined;
- expectations raised over the years of discussion about the development of the Trail may be dashed when the route is announced. Inevitably, there will be those who may be disappointed because the route does not pass through their community. The longer the wait, the worse the letdown.

There are also some prospective benefits resulting from the failure to finalise the route:

- there is some advantage in not having an established route until this marketing report has been completed. The route will be expensive and time-consuming to create; once the route has been "cut", there will be few opportunities to change it;
- lessons can be learned in planning the route, studying the problems experienced by other, inadequately-planned, long distance walking trails;
- tour operators and specialists in walking trails (ie clubs/associations, magazines, gear suppliers) have a clear perspective on the needs of their clientele and their reactions to Dominica's attractions. There is no point, for example, in creating a trail emulating a Himalayan mountaineering challenge, if the majority of visitors and potential visitors to Dominica would only be interested in a 15-minute stroll through a rainforest glade. While the above example is theoretical, the National Trail Steering Committee would do well to take note of the findings of this report in terms of the requirements of tour operators etc;
- further needs of the trail users, such as accommodation (see section B.4.3), should be taken into account when planning the Trail.

A.2 Rating of the Trail

An assessment is presented below of the potential strength of the Waitukubuli National Trail. This draws on the two elements of primary research conducted for this study: the **trade survey** with European and North American tour operators and walking clubs/associations, using a combination of personal, phone and email interviews; and the **consumer survey** through a website survey using two list servers. (Details are given in Appendix 2.)

The results of the research suggest that the Trail could become an internationally known trail of significant status and interest for a range of visitors to Dominica. While Dominica has a poor international awareness rating and can not claim a “unique selling point” of the calibre of, say, the treks around Mount Everest in the Himalayas or Peru’s Inca Trail to Machu Picchu, there is a high degree of interest from specialist tour operators and the “informed” consumer in the idea of the Trail, and enthusiasm for its creation. The potential is identified for the Trail to attract both the challenging “hard core” adventurer and the more “soft core” walker/trekker market segment.

A number of characteristics which combine to make up a successful trail are identified:

i. natural features
The natural features of a trail are seen as its most important characteristics. This echoes the reasons for the success of the world’s best known trails – spectacular natural phenomena backed by a known literature/mystique. In Nepal, for example, the most “successful” treks are those associated with Mount Everest and/or the "hippie" trail. A sense of solitude and isolation, untouched landscape, and a range of distinctive natural attractions are examples of some of the essential ingredients required by potential users of the Trail.

ii. management/accommodation/cultural attractions
Other characteristics, such as effective management and appropriate accommodation, have a slightly lower “demand” rating, especially among consumers, but among those with a professional interest in the Trail there is an insistence on both these characteristics. Tour operators would not take the risk of featuring the Trail in their programme unless it satisfied these aspects.

A somewhat lower interest in the cultural attractions of the route was detected among trade respondents although the consumers were certainly interested in cultural and community contacts: half rated visiting local communities as “highly important”, with a minority rating it as “of some importance” and a small minority of “little or no importance” (as indicated below in section B.4.5)

There is a willing acceptance both among trade and consumer respondents to use village b & b or guesthouse facilities as accommodation (see section B.4.3). Some but by no means all of the tour operators prefer a small, local hotel – but no one is looking for resort-type accommodation. There is an interest in camping from the consumer group but little from the trade, who mostly seek a modicum of comfort for their clients.

iii. interpretation of natural and cultural features
What also emerges as important – locked into the issues around successful management – is interpretation along the route. The need for the interpretation of natural features by well-informed and sensitive guides, printed route guides and maps and on site information is rated highly, especially by consumer respondents. The interpretation of cultural features along the Trail is not seen as quite as important, but nonetheless it scores highly. This echoes the slightly lower interest in cultural/community contacts (see above).

iv. range of challenges: soft core and hard core
The most successful trails are those which offer a range of challenges and a mixture of attractions. There is clear interest from both "sides" of the hiking market - “hard core” (characterised by intensive, focused and arduous usage) and “soft core” (using the trail as part of a range of recreational activities in the destination). The greatest volume (and probably spending) potential rests with the soft core group. This appears to be

particularly the case for Dominica and is explored in more detail in section B2.

The requirements for a “mixed” route – offering natural history and community features, relaxation and some physical challenge – suggests that the travel trade is more likely to feature the soft core. However, while there is overall agreement that it should not be “too physically” challenging, there is a belief, too, that hikers like a challenge and that the existence of a long-distance trail “excites the imagination” (in the words of the editor of the US hiking magazine, The Hiker). While only a minority of people will hike it end to end, everyone will want to walk sections of the Trail because it is “famous” – and the dream is to complete it (like the pilgrimage route to Santiago de Compostela). This would also contribute to the sense of mystique for the Trail, both for locals and visitors.

Reflecting the soft core prominence, there is almost unanimous agreement among respondents to both surveys that the use of the Trail would be combined with other aspects of a visit to Dominica or (less popularly) as part of a two-centre holiday. This does not imply disinterest in the Trail but an understanding that Dominica has other attractions to offer, over and above the Trail; only the hard core would just want to walk the Trail and then leave the island without experiencing other attractions.

Overall assessment
The two surveys drew these findings together by asking respondents their assessment of the overall attraction of the Waitukubuli National Trail. The results are strongly positive with almost all respondents rating the Trail highly. While the enthusiasm of the consumers might be self-serving, the trade is particularly enthusiastic about the attractions of the Trail. There is a positive sense that the Trail would add to their ability to sell existing holidays to Dominica and for those who do not feature Dominica, it is seen as a significant extra selling point which might persuade them to start a programme to the island.

Can the Trail match the needs of the market?

“Dominica is blessed with the very assets which are being sought currently by an ever increasing number of visitors. Those assets are in short supply in other countries within the region so that it is well placed competitively to exploit this growing market.” (Peter Evans, biologist and consultant, Caribbean Ecotourism Conference, Dominica 1997). These "assets" are examined individually below:

a. natural features
Dominica is known as the “Nature Island of the Caribbean”. This is a slogan that has been used since the 1970s to promote the island. The slogan is supported by the reality: Dominica has the best rainforest in the Caribbean; it is a place of volcanoes, sulphur springs, mountains, rivers and waterfalls. The Smithsonian Institution called it a “living plant laboratory unchanged for 10,000 years”. Its most dramatic feature is the Boiling Lake, the second largest in the world. It requires a 3-hour walk to reach it. The Boiling Lake is inside the Morne Trois Pitons National Park, an UNESCO World Heritage Site. Most of the interior is uninhabited.

While Dominica perhaps cannot offer the heights of the Himalayas or the magnitude of the Australian outback, its natural profile offers a powerful setting for the island-long trail. It offers an antidote to the classic Caribbean tourism product.

b. institutional arrangements for, and management of, the Trail
A range of alternative institutional arrangements for the Trail is still under review. The consultant offers comments and suggestions in section C.2 to assist in this consideration.

Given the absence of a decision on the institutional status of the organisation which will manage and operate the Trail, its management structure is also similarly unknown. The needs of the market suggest that management should be streamlined, efficient and responsive to the needs of the hikers. For example, the quality of guiding, which will be an essential aspect of trail life, needs to be high. Dominica's tour guides vary from the highest quality to be found anywhere to inadequate. Organisation of the guides and their training needs to be a priority. Though no decision has yet been made as to the agency that will run the Trail, it should be noted that visitors like simple, non-bureaucratic processes. They do not respond kindly to "user unfriendly" situations which prompt questions such as "Why is the rum shop which sells the site pass so far from the entrance to the site?"

c. accommodation
As in respect of guides, there is a range of quality of accommodation on the island. There is no star-system in place (a CTO/OAS project , STEP, for small tourism businesses is in hand but is hardly relevant for the purposes of the Trail). Much of the accommodation is concentrated in and around Roseau and in the south of the island; this area also has the best established and best quality accommodation. To accommodate hikers, there is need for a planned development of accommodation in village communities, which to date have little or no experience of providing such a service. The need, therefore, is twofold: the development of appropriate facilities, and the training of the operators in dealing with tourists.

For Trail users who are walking the whole route, there are large sections of the island at present without accommodation of any kind. However, for the soft adventurers, it would be possible to be based in one or two guesthouses, going out and returning to the same base each night. This is particularly true of the southern/central part of the island where the best known natural attractions are concentrated.

d. cultural/community attractions
This aspect is of less importance than the natural features but, combined together, the two provide an attractive package. The Carib Territory, for example, remains a "key" selling point – an indigenous people with a strong craft tradition. Dominica can also offer a sense of traditional, agricultural life – villagers drying coffee, cutting vertiver, harvesting bananas, bay-oil production and so on. The route of the Trail needs to accommodate the community/cultural offerings of Dominica to satisfy these aspects of the market's needs.

e. the mixed market
There is a distinct leaning towards a more soft core approach to the Trail. This means that only a small minority of the clients will want to walk the whole Trail. The fact that many of the natural star attractions of Dominica remain accessible (with the exception perhaps of the Boiling Lake, Morne Diablotin and Morne Trois Pitons) to the mainstream market suggests that a mix-and-match approach could be developed. Visitors can walk part of the Trail or they can visit the "attraction" separately. For example, a visit to the Emerald Pool (15 minute stroll) could be a separate attraction or could be one feature along one leg of the Trail (for example, Pont Casse – Emerald Pool – Castle Bruce on the old Carib trail).

The "soft core" segment represents a more natural "fit" with Dominica's established tourist profile and our research certainly reinforces this thinking. Dominican stakeholders also indicated to the consultants that a large majority of current (predominantly soft core) stay-over tourists would be interested in using part (a few all) of the Trail.

The soft core market also addresses a key function of the Trail - the bringing of economic benefits to rural communities. The driving force behind the Trail has always been to "reach the little people". The poor experience of the long-distance trails on Martinique and Guadeloupe - physically demanding and isolated from communities - suggests that the Trail should not be physically too difficult.

Traditionally, the "hard core" walking/hiking segment has not been particularly attracted to Dominica. This is partly because the backpack adventurer has never been encouraged (no camping, and high costs). It is worth considering whether that market represents a "good match" for the island. Since the terrain of Dominica and the possible route of the Trail could well accommodate the needs of the hard core sector, and the marketing costs of stimulating this segment are small, it is suggested that this should be a target for Dominica, albeit secondary to that of the top end of the soft core segment.

In 1990, Dominica's tourism sector plan defined Dominica's visitor profile as being interested in: specialist and general nature activities, hiking, and diving. There was a mixture of up market high spending tourists wanting exclusive accommodation in unspoilt locations, adventurous upmarket tourists using simple accommodation, and cruise ship passengers wanting to visit nature sites. Little change in the profile of the potential market has occurred over the past decade: the difference is that there are many more consumers in these market segments because, as illustrated in section B.1 below these are among the segments recording (and with prospects for) significantly faster-than-average growth.

Key action points arising from the surveys
Drawing together the many strands of our trade and consumer research surveys, a schedule has been drawn up of key actions which the operators of the Trail should take and others which they should avoid - the "do's" and "don'ts".

Essential strategic actions

1. strategic marketing focus to raise awareness in international source markets of Dominica as a destination for non-mainstream forms of discretionary tourism;
2. clear strategy for the development of the Trail, with this being integrated into the island's overall tourism development strategy - something which it is recognised does not presently exist and is a pressing need if Dominica as a whole and the Trail as a major component of its tourism product are to develop a significant and enduring tourism sector;
3. focus on development of the Trail as a "challenge" - both internally and externally;
4. focus on marketing of the Trail to create a strong aspirational, "cult" status;
5. apply the lessons from the experience of other long distance walking trails in its development and marketing; develop and market the Trail to a wide range of prospective market segments eg the over 50s as well as the "hard core";

6. use the history of the existing trails on the island in the marketing strategy and materials for the Trail, thus giving "depth" to Dominica's tradition for trails;
7. name the sections of the Trail (either related to historical events, people or natural features) in order to give each part an identity, thus heightening tourists' sense of achievement at having successfully walked the Jacko Steps or the old Carib Trail section;
8. focus on improving the standards of guides, accommodation and other facilities and services which "serve" the Trail's users;
9. create a strong management set up, with good commercial skills as well as environmental and community-related strengths;
10. utilise extensive and effective interpretation tools along the Trail;
11. build on, and reinforce, the "nature island" concept in the marketing strategy and communications for the trail, and utilise the island's organic attractions: eg pure river water, world's "oldest" woman, local foods and crafts, etc;
12. seek to link communities with the Trail by training and educating villagers on the needs of trekkers, helping develop entrepreneurial skills in the communities, and providing technical and capacity-building support to develop appropriate forms of accommodation, ie invest in local people so that they have a sense of "ownership" of the Trail;
13. seek to sustain environmental awareness in the development and implementation of a marketing strategy.

Approaches/actions to avoid

1. selecting a route without links to a local community, or which bypasses key attractions;
2. allowing the cruise ship market to determine the form or content of the Trail;
3. pricing access to the Trail and services provided to "serve" walkers' needs so highly that visitors are alienated by their perception of poor value-for-money;
4. development of the Trail to a degree of difficulty and physical demands that it alienates the lucrative, top end of the soft core segment;
5. creating a bureaucratic and inefficient management system;
6. developing "me too" types of accommodation, as can be found in Miami and the mainstream Caribbean tourist islands;
7. failing to consult local communities in planning and implementation.

A.3 The Trail's Place in Dominica's Tourism Product Offering

The Trail's evolution has been in fits and starts, a pattern mirrored in the enthusiasm for the Trail of local stakeholders. This has affected the way the potential of the Trail has been viewed over the past four years.

In 1998 when the idea of the Trail was first publicised in Dominica, it was enthusiastically welcomed, in particular at the DfID-funded workshop. Many sectors participated: all agreed that with the collapse of income from the export of bananas, tourism was a way to generate income to all levels of society. The Trail was seen as an innovative idea and, in particular, a way to impact positively on rural communities, who had yet to see a tourist. There was a burst of public awareness of the Trail who saw it as a new and hopeful idea - perhaps a certain element of "grasping" at any "straw in the wind". Nevertheless, it was already seen, however, as a means to:

- get Dominica internationally recognised; and to
- expand opportunities for tourism development.

Since then, there have been periods of both activity and inactivity around the Trail. When the latter have occurred, a certain scepticism has arisen about whether the Trail will ever happen. On the other hand, there has more recently been a spin-off energy that has emerged from the original idea of the Trail. Communities have been thinking about their own existing trails and how they might use them to attract tourists; a hike along the traditional Chemin Etang trail from Roseau (west coast) to Rosalie (east coast) was organised in January 2002 by a new local grouping.

These independent activities suggest that more and more stakeholders are taking the idea of the Trail on board. At the end of 2001 there was certainly a positive feeling among a wide cross-section of Dominicans about the Trail, despite the lack of institutional arrangements or a known route.

At one level, the Trail is seen locally as a possible flagship for Dominica's tourism. This fits in, to some extent, with external thinking. It will raise the profile of the island and offer it an international status. Local tour operators, hoteliers and so on already see it as a way of raising the current low level of awareness of Dominica - the lack of a clear and stated tourism policy along with poor destination marketing being seen as largely responsible for this weak level of awareness.

While there is some interest in promoting the Trail as an "icon" of the island, encapsulating the image of the Nature Island, there is a more general view that the Trail and the island's tourism product as a whole could be used to promote each other. It would be part of the overall product.

The Trail is perceived as being able to incorporate and build on the present key tourism products, such as the Boiling Lake. ("I survived the Boiling Lake hike" is already an established slogan.). It could also provide an overall focus to the activities of the soft core segment who might want to walk just one part of the Trail. Consideration has also been given to using the Trail for the "if-it's-Tuesday, it must be Dominica" cruise-ship market.

This fits with the view of both tour operators and consumers who see the Trail as one of the reasons to come to Dominica – to use the Trail in conjunction with other aspects of the island's tourism product, such as whale watching, music, diving and so on.

A.4 Possible Tour Programmes and Itineraries Incorporating the Trail

An examination of the type of itineraries which tourists might develop using the Trail suggests that whatever the final route, many of the island's attractions can be incorporated in a walk/trek along the Trail. This can appeal to those using the Trail as a primary attraction who might also be encouraged to enjoy some of island's non-Trail features. It will also attract those who want to participate in the Trail but perhaps not so vigorously, and also do other things. The Trail can therefore have relevance to tourists right along the hard core: soft core continuum. The main merit, which should be exploited in the marketing strategy, is that the Trail acts as a linking mechanism from one attraction to the next. In this way, the walk/trek between two or more sites can generate a considerable sense of achievement by even the soft-core tourist. The hard core hiker will still have the more difficult-to-reach "gems" (eg Boiling Lake, Morne Diablotin, Jacko Steps).

Three indicative itineraries incorporating the Trail have been designed. They make certain assumptions as to which attractions will be incorporated in the Trail and which trails might be re-opened. They are hypothetical; merely suggestions to show the range of possibilities.

Itinerary 1	***Nature Adventure Tour to Dominica***
Duration:	*7 nights (with 4 days on the trail)*
DAY 1:	*arrival late afternoon*
DAY 2:	*Trail: Grand Bay - Tete Morne - -Soufriere*
DAY 3:	*Trail: Wotten Waven to Trafalgar Falls and on to Middleham Falls, then to Cochrane; or Jacko Steps/Layou River*
DAY 4:	*Off trail: exploring Roseau and whale watching*
DAY 5:	*Trail: the Boiling Lake*
DAY 6:	*Off trail: the Cabrits and the Indian River*
DAY 7:	*Trail: Pont Casse-Emerald Pool-Castle Bruce*
DAY 8:	*departure afternoon*
TARGET:	*that part of the soft core ecotourism market segment looking for an adventure component with the trail as main interest*

Itinerary 2	***Nature Tour of Dominica***
Duration:	*7 nights (with 3 days on the trail)*
DAY 1:	*arrival late afternoon*
DAY 2:	*Off trail: explore Roseau with afternoon trip to Trafalgar Falls and Wotten Waven sulphur springs*
DAY 3:	*Trail: Freshwater Lake to Boeri Lake*
DAY 4:	*Off trail: whale watching/snorkelling/swimming at Scott's Head*
DAY 5:	*Trail: Syndicate and parrot watching*
DAY 6:	*Trail: Emerald Pool (and on to Carib Territory by transport)*
DAY 7:	*Off trail: the Cabrits and Indian River*
DAY 8:	*departure afternoon*
TARGET:	*the less adventurous part of the soft core ecotourism market looking for a gentler option which is not too physically demanding. Trail of secondary interest*

NB: both above itineraries can either be based on accommodation, for example, in or around Roseau, returning each night, or be dual-centre with 4 nights in one location and 3 nights in another

Itinerary 3	***The Waitukubuli Challenge***
Duration:	*10 day trail trekking from end to end of the Trail - itinerary self evident*
TARGET:	*hard core adventure ecotourist*

PART B MARKET PROFILE AND POTENTIAL

B.1 Relevant Findings and Conclusions from WTO's Tourism 2020 Vision Research

Over the course of the past eleven years the World Tourism Organization (WTO) has been engaged in a continuing programme of research to identify and quantify long term trends in international tourism. Two series of studies have been published: **Global Tourism Forecasts to the Year 2000 and Beyond** in 1994/5; and **Tourism 2020 Vision** over the past two years. In the latter series there are separate reports for each of WTO's six geographic regions (including **The Americas**) and one on **Market Segments**. (Both reports should be read in the light of the events of September 11 2001.)

B.1.1 Geographic Prospects

Prospects for the Americas as a whole over the period to 2020 are below the global average because of the dominance in the region, both in terms of generating and receiving tourists, of North America (ie the USA and Canada), a "mature" tourism area. By contrast the other sub-regions of the Caribbean, Central and South America are seen as likely to achieve better rates of growth.

Table B.1 Growth Rates in International Tourist Arrivals, by Region, 1995 - 2020 (% per annum)

Region	Growth Rate
WORLD	4.1
Africa	5.5
Americas:	3.9
North America	3.5
Caribbean	4.3
Central America	4.3
South America	5.3
East Asia/Pacific	6.5
Europe	3.0
Middle East	7.1
South Asia	6.2

The Caribbean will attract 40 mn international tourist arrivals in 2020, almost three times the 14 mn recorded in 1995. The growth in flows from interregional sources (predominantly Europe) will be much faster than those from within the Americas region ie 6.8 per cent a year as against 3.6 per cent. As a result the dominance of intraregional source markets (despite strong growth from the Central and South America sub-regions) will fall from 84 per cent in 1995 to 71 per cent by 2020, when close to 12 mn European arrivals are forecast. Both the continued good rates of growth and the changing balance between the "regional" (North American) and long haul source markets represent a challenge and opportunity for the island countries.

B.1.2 Market Interest in Nature and Culture

Historically, the development of the Caribbean's tourism industry has been based on the North American sun-and-sea market segments. This remains the predominant form of tourism to the sub-region. The one-week beach resort holiday is the staple. Over the last decade that model has been gradually changing with the increased importance of longer-staying Europeans, a significant minority of whom are looking for more than seaside activities.

The WTO's **Tourism 2020 Vision** research programme identified what it termed the globalisation:localisation continuum as a major influence on tourism patterns over coming decades. Populations of both developed and developing countries are responding to the globalisation of economies, markets, systems and cultures by looking to their own identities. In developing countries, the conflict between identity and modernity is intensifying. More groups defined on ethnicity, religion and social structure will demand to be recognised and treated as important with their own special rights.

For tourism, there are two consequences. There is the increased questioning of the form and scale of tourism development and marketing in these societies. At the same time, and on the upside, this local-level resistance and introverted response to globalisation provides opportunities and focus for the development of tourist experiences related to the cultural and natural resources of these subsets of society.

The travel and tourism sectors are mirroring the global/local polarisation process in their systems and structures. There are few fully global networks - though it does not take many to exert a stranglehold on world markets. These mega groups cater for a large volume of tourist movements, accommodation, mainstream or mass tourism. At the other end of the scale are niche operators offering special products and services, experiences to individuals and collections of tourists with eclectic tastes. So, for example, in the UK tour operating sector four companies account for 55% of the market; a further 1,440 fully bonded operators make up the remainder of the 21mn inclusive tours sold.

Research by organisations like the Stanford Research Institute and Angus Reid consistently find that between 10 and 15% of discretionary travellers want the unusual - these are the alternative or new tourists. The demand growth from these groups is out-speeding that of mainstream segments. These tourists, typically highly educated, mature, affluent, well travelled, environmentally aware and sensitive to the social and cultural traditions, systems and mores of the destinations they visit, are responding to the demands of local groups to be heard, recognised and valued.

B.1.3 Market Segments

The 1980s and 1990s witnessed a revolution in business methods brought about by the increasing sophistication of electronic technological applications, and communications technology. This was especially marked in sales and marketing. The technology facilitated the establishment, storage and retrieval of electronic databases, and it became increasingly easy to purchase such databases matched to specific consumer profile and other characteristics. Marketers are now able to identify specific consumers in their target segments with great accuracy and at relatively low cost; while internet technology enables even the smallest operator in a developing country to communicate directly with these target consumers.

The marketing strategic approach of *segmentation-targeting-positioning* has been widely adopted by the travel and tourism industry, with some operators and destinations taking this to its ultimate form of *one-to-one* or *relationship marketing*. Certainly, it is now possible to sub-divide markets and segments within them to a growing degree of refinement. As discussed in section B.2 below, the research for the trail indicates that its potential lies largely within the *ecotourism* and *adventure tourism* market segments BUT that these comprise many different types of activity and consumer groups with varying profiles. Further specification of these is needed for the trail.

The **Tourism 2020 Vision** research suggests that the fastest growth segments in international tourism over the next two decades will include both *nature tourism* and *adventure tourism.* The following section draws on some of the material contained in **Tourism 2020 Vision, Volume 7 Global Forecasts and Profiles of Market Segments** (pages 92 -99). Growing at rates of up to 20 per cent a year, according to the WTO study, it is clear that these are highly attractive segments for a destination like Dominica. The events of September 11 and the gradual maturity - in product/market life cycle terms - are likely to see a moderation of these growth rates over the remainder of the decade. However, even with growth of between 8 to 10 per cent a year, this would see a doubling of market demand before the end of the decade.

B.2 Ecotourism and Adventure Tourism

Within the broad, non-mainstream tourist movement there are many segments and sub-segments. These include two of the most interest to Dominica and the Trail, in particular, ***ecotourism*** and ***adventure tourism.*** These segments are broad and encompass many different types of tourist activity. Indeed, they include some which can be categorised as mainstream or incorporated within a mainstream holiday eg an excursion to a mountain nature area or an area of rainforest while based at a seaside resort. In order to develop a sufficiently clear definition of the possible market for the Trail, it is necessary to consider first the definitions of the broad ecotourism and adventure tourism categories and then isolate from these large groups those tourists who would be attracted by the properties of the Trail and the experiences it can offer.

B.2.1 Definitions, Profiles, Dimensions, Structures and Prospects

Definitions

In any discussion about tourism in the developing world **ecotourism** is invariably held up as the major opportunity area. There is little consistency among the "disciples" of this form of tourism, however, as to what it actually constitutes. The term **ecotourism** was coined by Hector Ceballos-Lascuráin in 1983, and was initially used to describe nature-based travel to relatively undisturbed areas with an emphasis on education. The concept has, however, developed into a scientifically-based approach to the planning, management and development of sustainable tourism products and activities. Its growing use to mean good practice in relation to nature-based tourism has led to 2002 being established by the WTO as the International Year of Ecotourism.

The Ecotourism Society defines ecotourism simply ie responsible travel that conserves natural environments and sustains the well-being of local people. The Centre for Ecotourism at Pretoria University provides one of the most precise definitions of ecotourism defining it as:

> an enlightening, participatory travel experience to environments, both natural and cultural, that ensures the sustainable use, at an appropriate level, of environmental resources and, whilst producing viable economic opportunities for the tourism industry and host communities, makes the use of these resources through conservation beneficial to all tourism role players.

Ecotourism goes by many names: adventure travel, nature-based travel, environmental or ecological travel, scientific expeditions, cross-cultural exchange, language study, reality tours, earth restoration projects, wilderness tours, wildlife safari tours (including birdwatching, dolphin watching, elephant trekking, gorilla safaris, polar-bear watching, wildebeest migration, wolf and bear watching).

Note should be taken, however, of the fact that for some the term ecotourism has been abused and no longer has merit. Recognising the opportunity to boost custom as a result of the growing prestige among consumers of the concept of ecotourism, the commercial sector increasingly uses the term to describe tours and other forms of tourism product - in some cases with little justification. This has led to a devaluing of the term among the more knowledgeable members of the travelling public. It is interesting to note that the New Zealand Tourist Board, one of the first to use it in its marketing more than a decade ago, no longer features the word "ecotourism" in its marketing communications or promotional material.

Adventure tourism refers to trips undertaken by tourists seeking to engage in activities that are typically (but not necessarily) oriented to physical exertion. Adventure tourism tends to take place in remote or relatively unexplored areas. *Adventure tourism can be further defined as hard adventure and soft adventure.* Hard adventure is an outdoor activity that is usually considered to be somewhat unique and exciting. It may involve a certain level of risk and require some skill on the part of participants. Transport is generally human-powered. Travellers usually camp or stay in remote cabins or lodges with few amenities. Examples include activities such as rock-climbing and mountaineering, hang-gliding, diving, and white-water rafting on difficult rapids.

Soft adventure is less active, may use mechanised transport and more comfortable accommodation, such as a bed and breakfast guesthouse or a resort. Typical soft adventure trips include bird watching, hot air ballooning, or cycling.

Profiles
The WTO identifies the main consumer groups in the **nature tourism** segment to include: "dinks" (double income, no kids); "empty nesters" (mid aged couples whose children have left home); and "seniors".

These ecotourists tend to be relatively affluent, well educated, mature, and environmentally focused. They are usually experienced overseas travellers who typically travel with a purpose to see, experience and appreciate the natural environment. They tend to be outdoor enthusiasts, older than 30, and are equally split between males and females. Nature tourists generally take longer trips and are willing to spend up to 10 percent more for travel services and products than other travellers. Some studies show that visitors who rank nature-oriented activities as important spend nearly twice as much as non-nature-oriented visitors.

Around ten percent of US travellers reported taking at least one ecotourism trip in 1998. One third of these (almost 40 million adults) said they are likely to take another eco-trip in the next three years. Protected areas are the main reason for selecting a travel destination. Ecotourists do not always seek quality food and lodging although they can afford it. Rather, their preferences reflect a belief that the facility where they are staying is not destroying the natural resource, and is in harmony with its setting.

The consumer profile of **adventure tourism** differs from that of nature tourism in one respect. It reflects the fact that the physically-demanding aspect of adventure tourism is more suited to younger than to older people. The main consumers for adventure tourism are identified by the WTO as: "youth", "dinks" and "empty nesters".

The typical adventure traveller is well educated, well travelled, aged around 40, and is at the peak of their career with a large disposable income. As organised adventure holidays tend to be quite expensive, it is the middle-aged rather than the young who tend to have the necessary income and the long holiday entitlement. Nowadays, it is not exceptional for those in the 40-60 year-old age bracket to be physically fit enough to trek five hours a day or more, or sleep in a tent at night.

The market for adventure travel – particularly soft adventure trips – is growing as the population ages. Retired people and ageing “baby-boomers” are taking up hobbies like bird watching and hiking in unprecedented numbers. At the other end of the risk scale are the travellers, who are coping with their stress by taking up so-called “extreme” sports, such as sky diving, mountaineering, and bungee jumping.

Although younger age groups are theoretically more able to cope with the physical demands of an adventure holiday, the young people taking adventure holidays tend to travel independently, partly because they do not like group travel, but also because the price of an adventure package would simply not be affordable.

Adventure holidays are generally not designed for families with young children or teenagers - although a few operators have introduced family adventures.

Dimensions
According to travel journals and industry sources, **ecotourism** is the fastest growing segment of the travel industry. Travellers, like most of the general public, are becoming sensitive to issues concerning the environment.

As the definition of ecotourism varies, so therefore does the estimated number of “ecotourists” worldwide. Based on the Ecotourism Society definition, it is estimated that around 30 million international travellers (or around five percent of all international tourist arrivals) took an ecotourism trip in 1998. However, many ecotourism trips are domestic, with, for example, 20 million travellers in the United States of America taking an ecotourism trip in 1998.

Regardless of the size, the trend is up, with ecotourism being particularly prominent in tourism’s fastest-growing markets, such as southern Africa and Latin America. It even dominates in some markets. Kenya estimates that eight out of ten visitors come for wildlife, as do most in Costa Rica, although not all might be true ecotourists as defined by the Ecotourism Society.

The World Wildlife Fund for Nature estimates that 20 percent of the revenue generated from tourism in developing countries is due to ecotourism. It is also estimated that the return on land-use for ecotourism is ten times that of agriculture, thus attracting many developing countries to develop an ecotourism market.

The significance of nature as a resource for developing ecotourism can be illustrated by the case of Kenya. Kenya Wildlife Service recorded US$24 million of revenues from wildlife tourism in 1990, and US$54 million in 1995. A recent study of Amboseli National Park in Kenya determined that each lion there was worth US$27,000 and each elephant herd was worth US$610,000 in tourist revenue per year. It is worth noting, however, that some of Kenya's wildlife tourism has been developed at the expense of local communities, including displacement of populations.

With the **adventure tourism** segment being so diverse, it is difficult to quantify as a whole. The most recent published relevant market study is that of Adventure Travel in Travel and Tourism Analyst No.4 2001. The definitions used include walking/hiking trips - both hard core and soft core - though tourists who take a "general interest" holiday but include a walk along the Trail as a day excursion would not be included. The study calculates the overall adventure holiday tour market worldwide to be 4 to 5mn. However, it points out that the potential could be another 50mn, if those persons engaged in activities like skiing, scuba diving, nature -based tourism and culture-based tourism who would welcome a form, which is more physically demanding, were it to be included. Among this potential is an estimated half of the nature-based tourism market segment ie 15mn out of the total nature-based market segment of 30mn.

Of the 1mn adventure holidays currently purchased by Europeans from tour operators, Germany (225,000) leads the way, followed by the UK (173,000), France and Italy (both at 138,000). A very high proportion of Germans goes hiking while on holiday. A 1998 University of Marburg study found that two-out-of-three took 10 to 12 km walks even on mainstream holidays.

The adventure travel industry in North America is a major niche market. It is estimated that in 1998, 85 million people (around 40 percent of the population) took an adventure trip. It is estimated that adventure travellers paid US$45 billion on holidays, which included some kind of adventure activity. Some travel industry sources claim that annual revenues generated by the adventure travel sector – including transport and expensive equipment such as jeeps and rafts – could be as high as US$240 billion.

These figures may seem high, but adventure tourism, as defined by the North American travel industry, includes a wide variety of activities – from a walk in the woods, to canoe trips in the Amazon. A 1997 Travel Industry Association National Travel Survey found that 23% of the US adult population (ie 45mn people) had participated in hiking during the preceding five years, with over 70% of these also participating in cycling and bird/animal watching. 38% of US hikers are accompanied by their children. The Travel Industry Association of America survey indicated that the volume of Americans who engage in organised group adventure tours is between 4 and 5mn. This suggests that the annual level of tours taken is over 2mn a year, allowing for the fact that not all active participants will take such a trip every year.

Structure of Supply

Ecotourism's biggest problem is labelling: going on an ecotour is no guarantee of good ecology. So far, only Australia has an accreditation system to rate tour operators and resorts on the basis of their greenness. Therefore, it is necessary for the individual traveller to undertake research to discover which ecotour operator most suits their needs, has the least impact on the host population and environment, and maximises the amount of money that goes directly to the local community and to natural resource conservation. A growing number of operators have codes of ethics, and several organisations or bodies have drawn up checklists of questions to consider when choosing an ecotour operator.

According to the American Society of Travel Agents, the top destinations for US eco-tourists are: Central America, Southern America, Canada, the USA, the Caribbean, Antarctica, and Australia. However, the popularity of destinations is very much dependent of the type of ecotour being sought. For whale watching, the Azores, Iceland, SE Alaska, Baja California, and Japan are popular destinations, whilst for bird watching, eco-tourists are more likely to head for Uganda, Poland, Costa Rica or the Rift Valley lakes in Kenya.

Overall, the world's top destinations for ecotourism are considered to be Indonesia and Borneo, India, Venezuela, Galapagos Islands, Costa Rica, Canada, Antarctica, East Africa, and Madagascar.

For the **adventure tourism** segment, many of the specialist European tour operators were set up in the 1970s, with often the company founder, or founders, handling everything themselves. More operators were established in the 1980s and 1990s, creating a highly competitive marketplace. For the most part, each operator tries to develop a particular niche and avoid head-to-head battles, although that is not always possible. Explore Worldwide (UK) is the leading operator in Europe, with 25,000 sales a year, followed by Terres d`Adventure (France) with annual sales of 17,000, Ikarus Tours and Wilkinger Reisen, German operators both with sales of 16,000 a year, and Exodus Travels (UK) and DAV Summit Club (Germany) both with 12,000 annual sales. There are also much smaller but still high-quality operators.

In contrast, organisations like Trailfinders (800,000 sales) and Abercrombie and Kent (180,000 sales) cater for a broader market but include adventure products within their overall portfolio. Companies for whom adventure is only one part of their business are likely to experience below average growth in sales. It appears that generalist operators do not have the right image for people contemplating an adventure holiday, and this suggests that mainstream operators would be well advised to operate through specialist subsidiaries rather than specialist brochures bearing the mainstream brand.

The destinations these operators visit vary. However, there are destinations so significant to adventure travel that they are certain to appear in many operators' brochures. Nepal is one of those countries, with South America growing in popularity, and Ecuador and Peru now being introduced in many brochures.

In North America, there has also been a large growth in the number of new adventure travel operators in the last decade. According to the Adventure Travel Society, there are over 8,000 companies in the USA catering to adventure travellers. In Canada, there are over 700 such operators. As North Americans have a huge choice of destinations within their own continent, it is not surprising that around 80 percent of their trips are within the USA and Canada, with another 10 percent in Central and Southern America. However, outside of the Americas, Eastern and Southern Africa, Nepal, and the South Pacific are popular.

Future Trends and Prospects
With the growing public awareness of the environment and the need to protect it, the **ecotourism** segment will continue to grow in popularity over the next decade. WTO estimates that the demand for ecotourism grew by approximately 20 per cent annually over the last five years. Consumer demand for tourism based around *natural and cultural features and activities which are endemic to a destination* will continue to expand faster than mainstream holiday demand. This could mean 8 to 10 per cent a year growth as against 4 to 5 percent for mainstream tourism. This conclusion is based on research both from the WTO's long term forecasting programme and the consultant's own recent research enquiries with European and North American travel and tourism operators in connection with diverse destinations (Mongolia, Vladivostok, Hainan Island Province of China, Thailand, Kerala State in India, and Iran). These destinations are linked by the fact that their product offerings are strongly-based on their own nature and culture.

Destinations will look for opportunities within the broad definition of ecotourism to promote their product and benefit from this expanding market.

There are several examples of this already taking place, and the number of instances whereby ecotourism products are developed will continue to rise. To quote three examples from the Americas:

- Brazil is planning a US$200 million programme to develop ecological tourism in the Amazon. The project, which is being funded by the Inter-American Development Bank calls for 50 percent of the funds to go toward financing private sector companies interested in investing in ecotourism in the Amazon region. The other half will be used to improve and expand the conditions for ecotourism. The growth of investment of ecotourism in Brazil is significant, increasing from US$3 billion in 1996, to US$8 billion in 1998, and US$12 billion in 1999;
- Venezuela has perhaps more potential for ecotourism than any other country. However at present, only a small percentage of its visitors travel for ecotourism purposes. Nevertheless, the Venezuelan Ecotourism Society has begun training programmes for guides and aims to increase awareness of ecotourism;
- Cuba is entering the ecotourism market by declaring eight sectors in the north of the country to be protected areas, among them a huge Caribbean flamingo reserve.

Adventure travel will become more commonplace in the 21st century as travellers become more adventurous and want to experience something different. With several adventure operators reporting large growth (over 18 per cent) in sales of adventure tours in 1999, the prospects for growth over the first decade of the new century claimed by many operators of more than 10 per cent a year are not perhaps too optimistic.

Adventure tours are likely to get shorter, with adventures of one week becoming more commonplace in Europe. Domestic adventure trips taken by North Americans are already relatively short (average 6.9 nights for an active holiday and 5.4 nights for a soft holiday). With better communications and transport arrangements, Europe could be “condensed”, especially to destinations such as Morocco or Libya, where both the distances from Europe and differences in time are small.

In the future, there will be more adventure for families, with packages such as donkey trekking, camel trekking, and cowboy ranches specifically for family groups. The fastest growth area in the adventure tour sector will be by the specialist operators. Many of these operators will cater for the emergence of high-risk activities, such as paragliding, sky surfing, shark swimming, and coasteering.

Concentration in the adventure sector looks set to increase. It is increasingly likely that successful operators in the main tourist generating countries of Europe will look to purchase similar operations in other European markets. This growing concentration of the sector goes against the consumer preference noted above for small, highly specialist providers; it indicates the need for the travel groups to operate through separately-branded companies (albeit they will utilise the collective benefits of belonging to a larger group in respect of marketing, pricing etc).

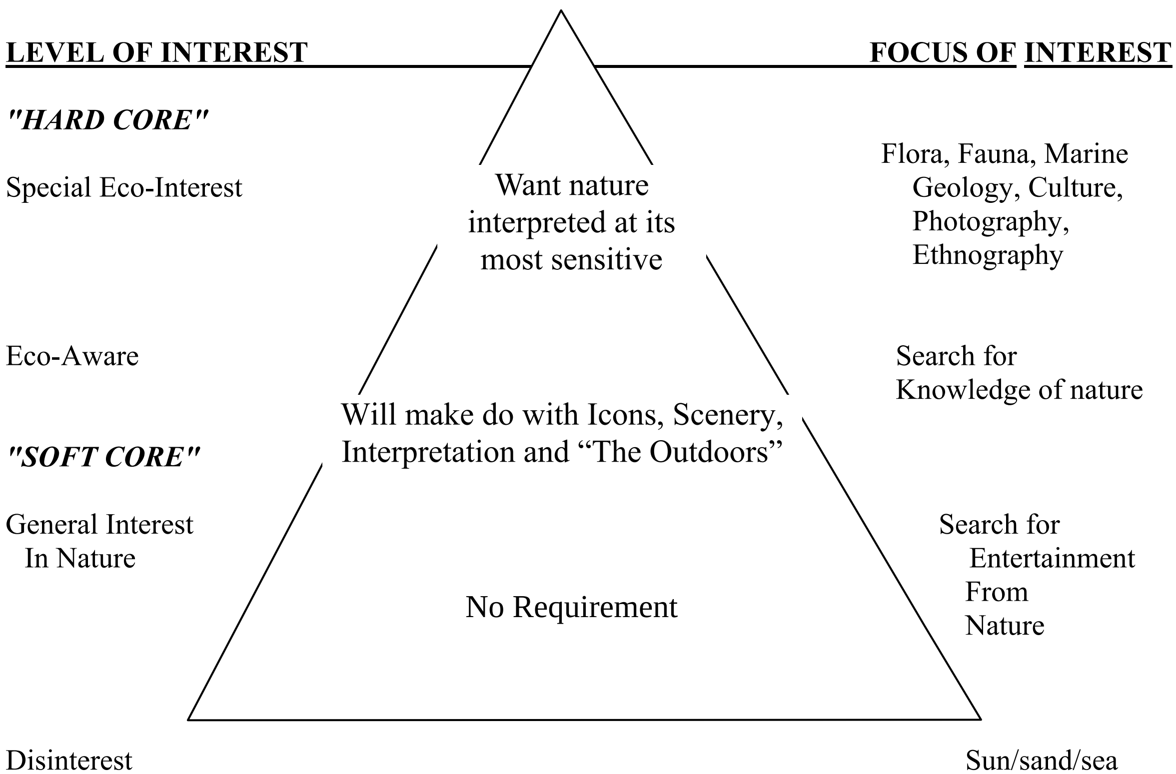
B.2.2 Hard Core vs. Soft Core

As indicated in the preceding section, demand from the ecotourist and adventure tourist market segments covers a wide range of activities, needs and types of participant. The extremes in both markets can be termed as *hard* and *soft core,* reflecting the level and focus of interest of tourists.

The accompanying figure seeks to de-mystify the debate and explain how the different interpretations of ecotourism can be used to benefit destinations like Dominica. In essence there are two extremes: those who see ecotourism as an activity involving serious study of a natural subject, and those who interpret it more widely but who are nonetheless interested in the subject and want to learn a bit about it while at the same time being entertained (i.e. *edutainment* or *infotainment* seekers). Though accommodating this latter (infinitely larger) group can offend the purists, it makes sense for a destination to seek to cater for both the *hard* and *soft* ecotourism market segments. The finance generated by the stays, day trips and other forms of exposure to, and involvement in, ecotourism by the large volume of non-specialist "soft" ecotourists can be directed in part to preserving and conserving the natural resources they find attractive and interesting in their pristine state.

Thus, both the serious and casual nature tourist can co-exist and, indeed, can be seen to be interdependent. The same structure, profile, pattern and opportunities for exploitation apply in respect of the adventure tourism market segment, so the model below could be drawn to represent that segment. The triangle is indicative of the scale of demand along the continuum: limited demand from the hard core segments and increasingly greater demand the "softer" the level and focus of interest of the ecotourist. The bottom part of the triangle - the dedicated resort or general interest touring tourist - have little or no interest in, usage of, or contribution to make to, ecotourism.

MODEL OF ECOTOURISM



B.3 Market Potential for Walking Trails

B.3.1 Profile of Consumer

It would be grossly misleading to suggest that the research for this report has clearly pinpointed the exact consumer profile, or characteristics, of the key prospective user of the Trail. (Its research is focused on existing published research and experience/expertise from other parts of the world supplemented by the views and assessments of a limited cross-section of European and North American tour operators and feedback from a limited website survey.) It has, however, confirmed that the potential user is not narrowly defined in terms of demographics or level or focus of interest.

The Trail will have broad appeal, in line with the consumer characteristics of the overall ecotourism market, and (except for those who delight in supreme physical challenges) across the adventure market too. Of course, both in ecotourism and adventure tourism much demand is for specific activities, so walking on a trail cannot satisfy someone who really wants to go on a tropical river cruise, or engage in freefalling or whitewater rafting.

However, much demand within these market segments is unspecific, with consumers seeking to obtain the thrill and sense of achievement from a moderately strenuous activity in the open in a beautiful and interesting setting, with the opportunity to meet and interact with the local population. The Tearfund report (January 2000) describes this group of people as "wanting to see the real world". They will engage in a range of different activities in different parts of the world from year-to-year. The Waitukubuli National

Trail has the potential to be included in the holiday menu this group of people will consider.

This group is increasingly scrutinising the destination and specific facilities according to local policies and practices towards the environment and local population. The Tearfund survey of over 2,000 adults found that: almost half would be more likely to book a holiday with a company with a written code to guarantee good working conditions for its employees, to protect the environment and support local charities in their tourist destinations; and that over half would pay 5 per cent more if this money went towards local causes like environmental protection, the provision of improved wage levels or employee benefits, or local charities. A dated but highly relevant finding from the 1993 report of the American Society of Travel Agents' Environmental Committee found that:

> The consumer preference for culturally and environmentally sound travel is well illustrated by a 30 per cent annual increase in ecotourism, compared to a growth rate of 4 per cent in the US travel industry.

This growing sensitivity towards the way tourism is developed represents an opportunity for the Trail. Not only can the Trail generate business through demonstrating its adherence to sustainable principles in its marketing communications, but it can also be developed in a way that will look after both its natural features and the communities who live around it and act as its stewards.
In essence, the potential for the Trail can be identified as the majority of consumers who fall within the ecotourism and adventure tourism segments. In summary the profile and characteristics are as follows:

- age - all except the very young and very old with concentrations in 31 to 50 bracket, but significant volumes, too, in the 20s and over 55s;
- gender - broadly equal, with slightly more male than female in the adventure category;
- education - generally well-educated at college level or above;
- occupations - professional and business, more white than blue collar;
- income - mid-to-high, many dual income households with average household income being in the range of US$45,000 to 70,000 a year, according to surveys conducted by the Travel Association of America and Great Outdoor Recreation Pages (a leading US online retailer of adventure tours) respectively;
- travel experience - well-travelled though the strong growth suggests that there are new "entrants" to the ecotourism and adventure segments having "graduated" from mainstream activities or moving from domestic to more far flung destination or moving up from being backpackers as their income levels permit;
- activity level - widely variant from intensive to modest (little more than a gentle walk), depending on age/health and type of interest;
- travel arrangements - either small specialist tour operator or independent travel, with the great majority booking "direct", ie bypassing the travel agent, either by phone or online;
- facility requirement - again varies: from core tourists who are focused on the activity of their trip and have little concern for creature comforts, though they would resist staying in resort-type hotels and would expect adequate supply of equipment necessary for their chosen activity; to soft core tourists, the "top end" of which would want modest-to-good quality local-style accommodation, and the lower end would be less selective;
- travel characteristics - typically travel with a partner/friend(s) though increasing volumes in the soft core taking their families; few staying less than a week on an

overseas nature or adventure trip with most lasting 10 days or over, though this may edge down in line with overall market trends for a reduction in holiday length;

- spending levels - again a considerable variation with budget adventure travellers spending modestly but the "top end" of the soft core segment spending relatively heavily at between US$75 to US$150 a day in the destination;
- media influence - by far the most significant feature is the high level of familiarity with, and usage of, the internet among these travellers; but also good levels of consultation of specialist media and club/assocation membership;
- marketing descriptors - "dinks", "empty nesters", "baby boomers" who are driven even in their 50s to be different from their parents' generation and deny to themselves that they are as old as they are through activities such as adopting intensive health and fitness regimes, and participating in holidays involving physical activity.

B.3.2 Demand

In the absence of published or other reliable statistics relating to the overall size of the walking segment, it is necessary to prepare estimates by taking proportions of the ecotourism and adventure tourism markets. It is clear that walking/hiking/trekking is a leading form of both these markets segments. Not all walkers, however, would be valid for the Trail because of specific activity and/or destination preferences. In addition, the costs of travel to, and in, Dominica would rule out a considerable proportion of these markets.

However, even if only one tenth of the total estimated demand in the two market segments represented potential for trips, the central feature of which would constitute walking, this still represents a total potential market of 2 mn (with probably over half of this from North America and Europe, broken down between hard and soft core in the estimated ratio of 1:9). With growth of 8 to 10 per cent a year we can anticipate an overall potential walking holiday volume for which the Trail could realistically compete of 4 to 5mn by 2010.

The "hard core" group represent those who will be interested in intensive, focused and arduous usage of the Trail while the "soft core" group will use a Trail as part of a range of recreational activities. The latter are less physically demanding and are based on enjoyment of the walk and its setting.

The hard core group is dedicated to the activity of walking. They will be predominantly independent travellers, who want to stay in informal, inexpensive accommodation. They are interested in good interpretation of natural features along the Trail and are likely to vigorously protect the natural environment of the Trail. However, they have little interest in the culture of the local population or making direct contact with or purchases from trailside communities.

The soft core group is most likely to undertake shorter walks incorporating these with other ecotourism activities in a holiday visit. They are just as likely to travel on a package arrangement as independently; they are interested in interpretation of both natural and cultural features along the Trail and will enjoy visiting village communities along the Trail and making purchases there. They may also prefer a more upmarket type of accommodation.

B.4 Behavioural Profile of Walking Tourists

B.4.1 Trip Duration and Expenditure

Research indicates that a large majority of the potential market have quite a lot of time to devote to holidays. While visitors to Dominica may on average stay less than one week (the US market take short holidays), it **is** possible to attract visitors to a two-week stay on the island. Even Americans on ecotourism or adventure holidays focused on the Trail would stay 10 days if the itinerary could justify it. Natural history/hiking trips provided by Traveller's Tree tours, which operated on the island from 1987-90, lasted two weeks and showed that there was more than enough to do for the soft core adventure market. Though the growth of demand for the Trail would undoubtedly be faster if there were a more frequent and/or direct air service from the main tourist source markets, this would also result in a shorter length of stay on the island.

Tour operators organising a group to walk the whole Trail would be looking at a 10-day duration; for those not doing the whole trail, a 7-night holiday could be shaped to include both sectors of the trail and a few of the island's general attractions (see itineraries in section A.4 above).

Likely customers are well-heeled, professional people who are prepared to spend considerable amounts on a holiday – not in terms of conspicuous consumption but for the experience of, say, the Trail's attractions. All research points to a growing market of visitors who have disposable income (ie young/early middle age, well paid professionals or empty nesters, or the newly retired will have cash to spend). Caribbean prices are in any case high: one reason why back-packers are not traditional visitors.

User fees: there was a wide range of responses to a question about an acceptable daily cost for a user fee. The consumers were spread between up to US$5 and above US$20 with the most common response in the category US$10-20. Everyone, however, accepted that it was appropriate to levy a charge although some people insisted that the money go into a fund that would service the Trail rather than disappearing into the government exchequer.

Tour operators had a variety of responses, with again the majority in the US$10-20 category. They would, in any case, feed the fee into their overall charge for a trip assuming that tour operators could buy user fees independently and upfront. One tour operator said that it should be done on a business rating – eg whatever it costs to run. Another was reluctant to pay anything.

A system operated in other destinations is a one-off flat fee. In Nepal, for example, a conservation fee of between US$15 and US$30 is charged, the amount depending on the area. There is no daily charge but the permit obtained from payment of the conservation fee allows the tourist to enter the conservation area. On the Inca Trail, there is a flat fee of US$25 for a four-day hike.

The report, The Waitukubuli National Trail: its market position and potential (Bernard Lane, June 2001), took an average daily spend on the island of US$100 in preparing some indicative estimates of demand (which are examined further below in section B.6). The research for this present study confirms that this is a realistic figure to take for planning purposes.

B.4.2 Travel party/group

Our own research revealed, not surprisingly, that a large majority would travel with partner, family, or friends; only a small minority travel alone.

Overseas tour operators would send either small groups or independent travellers on tailor-made tours. There would be some demand from tour operators, such as Exodus, whose groups are as big as 16. That would be the maximum size of groups, unless they were school, scout, church groups, who would be more likely to be regional tourists (from the French West Indies, in particular) using low-budget accommodation.

A large majority of the consumers normally travel independently (ie do not take an organised/tailor-made package); few bought a package. The independent travellers tend to be mainly younger and more “hard core” than the tour operators’ clients, who, by definition travel on an organised package (eg flights, ground transport, guides, accommodation in place).

B.4.3 Accommodation

A range of accommodation – B & B, guesthouse or hotel – was welcomed by the majority of the correspondents (both trade and consumer). It allows for the targeting of different types of market and for different inclinations.

There was a distinction between the tour operators and the consumers’ group with the latter less particular about accommodation – more being interested in a camp site (an unknown feature of current Dominican tourism) and a minority being interested in staying in a hotel. This could reflect that, as an uncontrolled sample, the respondents to the website survey may be more representative of hard core demand, since those with a dedicated interest might be more likely to respond to such a survey.

Particularly valued by respondents would be cleanliness, friendliness and "character". Confirming the finding of the Lane report, op cit, the more up-market and older clientele would require more in the way of "creature comforts".

Some tour operators, who anticipated largish groups, looked for compatible accommodation in guesthouses. The present accommodation in Dominica would find it hard to consistently provide for such groups. Some of the best and most appropriate and sensitive accommodation has, for example, only 5 or 6 rooms. On the other hand, the larger the units, the less appealing for this particular market.

B.4.4 Shopping

Nearly all of the consumer respondents would buy local food and drinks along the Trail; a large majority would buy crafts while nearly one half saw the likelihood of buying daily needs while walking the route. Tour operators emphasised the need for local produce: fresh fish, fruit, juices, and vegetables.

B.4.5 Interaction with Community

This was considered less important than the natural attractions of the trail although half of the consumer respondents rated this aspect as “highly important”, with a minority rating it as “of some importance” and a small minority “of little or no importance”.

Tour operators saw cultural/community attractions as slightly less important than the consumer respondents, although two thirds saw this aspect as either very important or of some importance.

The key is to find activities which the local community is happy to undertake with/on behalf of the tourist and which the walkers would find interesting. One activity that has proven popular in many developing countries in Africa and Asia, for example, is taking tourists to see and having some form of involvement in local food production and, particularly, cooking.

The expectations that the Trail will impact positively on local communities and the original objective of the trail to generate income in rural areas should be noted in relation to the needs/expectations of hikers. As indicated in section B.3.4, the hard core group are less likely to be interested in interacting with community although they are more likely to spend money in local B & B accommodation rather than requiring more upmarket accommodation.

B.5 Influences and Determinants of Destination and Trail Choice

Interviewees were asked what sources of information were consulted when considering a hiking trip.

The responses indicate an interesting combination of *high tech* ***and*** *high touch.* Every consumer respondent rated having *personal contacts with relevant experience* as "very important" (84 per cent) or "of considerable importance" (16 per cent). At the same time over half gave the same rating to *specialist websites* ie "very important" 17 per cent, "of considerable importance" 47 per cent.

Tour operators did not attach such a high weight to personal contacts - a half giving ratings in the top two response categories - while all except one rated websites as "very important". Websites have become an important tool, especially among the tour operators who see websites as vital to their bookings. A majority of bookings are now through websites, especially among specialist tour operators and they are busy upgrading their websites in anticipation of greater selling potential from that source.

Mentions in *specialist magazines* and *articles in travel sections of the media* are rated as most important resources by both tour operators (particularly the latter which all accorded "very important" status to) and consumers - around two-thirds stating "very important" or "of considerable importance" to these two types of information.

Consumer groups also rely on information from *local tourist offices*, one half giving this source the top rating of "very important" and a further 28 per cent classifying it as "of some importance". This links into their preference to travel independently rather than through a tour operator.

Advertisements in general media have a moderate impact (ie one-in-three consumer and trade respondents rating this medium as "very important" or "of considerable importance"). However, *travel agents* have little impact for consumers (only one-in-five giving one of the top two rating categories) or tour operators (none attaching any significance to them).

B.6 Target Volumes and Travel Arrangements for the Trail

When presenting demand estimates for the Trail, Lane stated: "…figures must…be very tentative, given no known route, and no assessment of the marketing arrangements likely to be in place...Much will depend on the skill and investment put into the Trail…growth would be dependent on effective promotion, and achievement of minor cult status as a speciality trail." (Lane report, June 2001)

Most of this still holds true. Although we now have a more detailed market assessment to hand, none of the institutional arrangements - let alone the route itself - have been decided upon. Thus, in presenting estimates of "realisable potential", the achievement of these levels of demand rest on committed and dynamic implementation of a marketing and communications programme following the lines of the strategy suggested in section C.3 below.

The table separates three types of Trail user, in line with the itineraries suggested in section A.4, ie the hard core, 10 day trekker; the 7 night nature- adventure, soft core tourist (spending 4 days walking the Trail) and the 7 night nature, soft core tourist (spending 3 days walking the Trail).

The estimated targets for the Trail in Years One, Five and Ten of operation are developed from:

- Lane's previous research, referred to above;
- our own enquiries with tour operators between November 2001 and January 2002 (bearing in mind this was a period of uncertainty for the sector in the wake of the events of September 11); and
- indications of demand growth in the ecotourism and adventure tourism segments from the wide range of sources consulted.

They are indicators of magnitude rather than definitive forecasts. The volumes indicated could be exceeded by as much as double if the Trail's development is completed quickly and the marketing support for the Trail is well-conceived and efficiently-executed. By the reverse token, if the development of the Trail is a slow, piecemeal exercise with only one section developed for the first one-to-two years and only limited and unexceptional marketing undertaken, the volumes could turn out to be far below those indicated in the table.

Category of Tourist	YEAR ONE		YEAR FIVE		YEAR TEN	
	Tourists	Nights	Tourists	Nights	Tourists	Nights
Hard Core	200	2,000	500	5,000	1,250	12,500
Soft Core: Trail main	500	3,500	1,250	8,750	2,500	17,500
Soft Core: Trail secondary	500	3,500	1,250	8,750	2,500	17,500
TOTAL	1,200	9,000	3,000	22,500	6,250	47,500

The targets relate only to additional tourists attracted to Dominica by the development of the Trail. Of course, the Trail will have a much higher level of utilisation than that indicated in the table. There will be other users: locals and members of the Dominican diaspora, the "traditional" visitors to Dominica who will certainly use the Trail, cruise ship visitors making a day trip to the Trail, and weekender tourists from nearby islands wanting to spend two days on the Trail.

The figures in the table for "nights" relate to total nights spent on Dominica by the tourists. A proportion of these can be attracted to accommodation provided along the route by local communities - virtually all of the hard core segment's demand and possibly as much as one third of the soft core demand. These accommodation facilities would also attract custom from the weekenders and many of the "traditional" tourists.

A hard core segment average annual growth rate of 20 to 25 per cent over the nine years between Years One and Ten is estimated; while for the two soft core segments the corresponding rate of growth over the period is estimated at close to 20 per cent a year.

While virtually all the hard core trekkers will travel to Dominica independently, the split between independent and tour operators' arrangements among the soft core segments is likely to be quite even.

B.7 The Role and Perspective of Tour Operators

The tour operator plays an important part in the success of a venture like the Trail. On the one hand, the typical consumer for products like the Trail (and Dominica as a whole) has an independent mindset and sufficient knowledge and experience of travel, reservation systems and communications technology to set up and make his/her own arrangements. Indeed, for many this is an integral part of the trip experience. This certainly applies to the hard core consumer and we have also suggested that a half of the soft core demand would come via independently-made bookings. That said, the level of independent bookings indicated in years Five and Ten would be unlikely to be achieved if a number of specialist nature/ecotourism/trekking-walking tour operators did not feature the Trail in its early years. Tour operators' brochures and other communications form a key part of establishing the credibility of the Trail as a worthwhile tourism feature to be visited.

Of course, the reverse could be argued in respect of the hard core consumer who, typically, would regard the incursion of tour operators with dread and disdain. However, if the Trail's development is sufficiently substantial to permit the hard core trekker to find sections - the more difficult ones - free (or largely free) of soft core tourists, then demand from this segment will not be impaired.

What induces a tour operator to introduce a programme to a new development like the Trail? First, it has to have merit as a feature to enhance the tourist's experience - in the case of the Trail all operators interviewed stressed the outstanding quality of the *natural features* in and around the Trail. Second in importance for tour operators - but only marginally so - is *effective management.* This can be seen from two perspectives: the maintenance of the Trail and the provision of appropriate facilities/amenities along it; and a management team with which the tour operator can readily do business ie which understands and responds to the needs and systems of a tour operator. Then, in terms of importance, come *appropriate accommodation* and *cultural/community attractions* along the Trail's route. All these factors are important - even for the lowest rated factor, *cultural/community attractions,* three quarters of tour operator respondents rated it as "very important" or "of considerable importance".

In Dominica's case, the good level of interest in featuring the Trail arises because the island is known for its range of nature attractions, and the Trail is seen as valuably adding to these, thus making the island's and the tour operator's offering more substantive. Most tourists are attracted by the opportunity to see lots of sites and to engage in many activities when choosing a destination - even if when they visit they only "do" a portion of them.

Thailand is one country, for example, which has recognised the importance of offering an extensive menu. Even beach-based tourists are attracted by the possibility of taking excursions to the rainforest, or local villages, or scenic spots, or going deep sea fishing etc. This was confirmed in research conducted by Euro-Leisure on behalf of the Thai Tourism Authority in June 2000 which found that half of Europeans chose Thailand for their holiday "to see as many aspects as possible".

The Trail will make Dominica a more complete product and thus be more attractive to tourists and to tour operators. Three quarters of tour operators interviewed stated that they would find a 100-mile walking trail in Dominica to be "highly attractive" to their business with the remaining one quarter rating it as "of some attraction". It should be borne in mind that the tour operator respondents were selected for the "matching" of the Trail with their business profile and several had participated at the September 2000 workshop on the Trail - so perhaps their enthusiasm overstates the Trail's appeal. Nonetheless, many European and North American specialist tour operators will respond to news about the development of the Trail and will be keen to have detailed information and make site visits. Converting this interest into specific tour programme offerings will depend on the extent to which the operator's representative(s) becomes committed to the Trail which in turn is determined by the level of support offered by the management of the Trail and by the tourism authority and industry of Dominica. These issues are dealt with in Part C.

PART C MARKETING STRATEGY AND APPROACH

C.1 Destination Marketing and Facility/Operator Marketing

The Trail cannot operate in a vacuum. It will be an important part of Dominica's total product offering. It is therefore relevant - indeed vital - to consider the way it "fits" and should be integrated with the island's overall strategic approach to tourism. For the purpose of this report, it is necessary to examine how this integration can best be approached in terms of marketing, both with the national, destination marketing strategy, and with the existing private sector's marketing efforts (the latter being considered in section C.4 below).

Is Dominica yet ready to support a venture like the Trail with appropriate marketing and promotional effort? Betty Perry-Fingal's December 2001 report - The Waitukubuli National Trail: an assessment of the social, economic and cultural impact - prepared under the same feasibility study scheme as the present report makes some key observations in its Context section. Perry-Fingal spells out both the underlying problems and the new initiatives which give encouragement that these are now being effectively addressed. This text is reproduced below with one sentence of vital significance to this present report highlighted and underscored:

> Dominica's tourism product has been assessed many times in the past. There is general agreement that the natural and cultural resources exist to support a high quality ecotourism product. Time and again, reports have concluded as well that the accommodations and the level of service now in place are well below international standards. Discussions occurring within Dominica have raised questions about the readiness of Dominicans to endorse tourism wholeheartedly. There is evidence of some ambivalence toward tourists and a lingering feeling that service is equivalent to servitude.
>
> The Government has recently taken steps to address the concerns raised about the tourism sector. *More resources are being put into marketing.* The Government has enacted legislation for the establishment and enforcement of service standards for the industry (the NISE Programme). The Product Development Department of the National Development Corporation's Tourism Division is working with service providers to educate them about necessary standards and to assist them in meeting the standards. The European Union has agreed to provide financial support for a wide-ranging, comprehensive Ecotourism Development Programme, a programme developed after several years of study.
>
> Another initiative that is currently underway is the development of a National Integrated Development Plan. It is too soon to know where the proposed national trail project might fit into such a plan. It is clear, however, that this project must be considered in light of the overall strategy for developing Dominica….
>
> Locally, both formal and informal groups are meeting to consider how the tourism product in their area could be improved. Village Councils, Village Improvement Committees, regional tourism development associations and non-governmental organisations are attempting to identify the available natural

> resources, assess what is needed to develop those resources into a marketable product and identify sources of assistance for such development…..
>
> These activities are all consistent with the concept of developing a national trail. The particular value of the trail, if developed along the lines conceived by the WEF, is that it would encourage the inclusion of rural areas in the tourism product while respecting local resources and traditions. The Ecotourism Development Programme developed for the EU specifically references the proposed trail and calls for coordinated efforts between the projects.

Commenting specifically on the island's marketing Perry-Fingal states:

> While other experts are addressing the issue of marketing in depth, two points came out of the focus group meetings on this issue that are worth mentioning. The people in Soufriere explained that the trail that was recently rehabilitated there is barely used. They feel that the plan to rehabilitate the trail should have included a marketing plan. Their experience simply re-enforces the notion that even a high quality product will not do well as long as it remains unknown.
>
> The villagers of Laudat also expressed their concerns about marketing. The situation is different there. Many visitors pass near the village to see what are Dominica's most dramatic natural resources, including the Boiling Lake, Boeri Lake and Freshwater Lake. Nonetheless, the village sees very little benefit from these visitors. The residents have requested specifically that assistance be provided to the villages in developing individual marketing plans. As the residents of Laudat are acutely aware, the competition for stay-over visitors is not just with other destinations. Competition exists within Dominica as well. Most villages have no expertise to evaluate and market their local attractions.

There is much about this analysis which is positive but there are elements which are alarming. It is apparent that a major awareness and education programme will be necessary among the Dominican population, and the communities along the Trail in particular, both in respect of the ways in which tourists will use the Trail and the opportunities this creates for local entrepreneurs. The traditional model of communal self-help will be an important guide; while avoiding incidents of resentment of entrepreneurial success and dissension among villagers is vitally important since such events could seriously damage the Trail's (and the island's) reputation overseas.

From the marketing perspective, a number of points need stressing:

- Dominica's awareness as a tourism destination is extremely low in tourist markets, as a consequence of very limited and weakly-conceived marketing of the destination by the Government. Dominican tour operators complain that they have to do all the work themselves!
- there is still widespread confusion among the mainstream market segments between Dominica and the Dominican Republic with its vastly different tourism offering and focus; BUT
- among the well-travelled consumer, Dominica *is* differentiated from the Caribbean sun-sand-sea islands. Apart from the mass tourist consumer, the tourist market is showing a growing sophistication of knowledge of tourism destinations. These consumers, who are estimated to constitute at least a quarter

of the foreign holiday market, also represent the great bulk of Dominica's potential. For them, the Caribbean is *not* viewed as a homogenous destination comprising solely beach resorts. These consumers differentiate and distinguish;

- the problem for a small destination like Dominica is that these tourists are targeted by many worthy destinations around the world and no country can expect to gain substantial flows without competing in respect of marketing and promotion;
- put bluntly Dominica's present destination marketing effort is wholly inadequate. The UK/France market representative for Dominica has only a broad strategic guide ("market the destination to specialist tour operators") and no funds for any concerted marketing programme. The sum total of activities are: sharing the costs of a flyer with a committed tour operator (to the tune of £500 each), facilitating press trips for articles (where the tour operators and hoteliers would bear much of the cost) and “fam” trips for tour operators (with again only a small portion of costs met from the national marketing allocation), and participation at trade fairs (with EU assistance and virtually all the activities organised by the private sector representatives who fund their own trips). The foundation of marketing support for Dominica's tourism sector simply does not exist.

Virtually all marketing follows the AIDA principle: first, create *awareness* in the product or service offered, then convert this into *interest,* then to *desire* and finally *action* with the consumer making a purchase. Thus, in Dominica's case, one part of the tourist market already has an awareness and interest and is ripe to be moved further along the continuum but this needs a concentrated marketing effort; while the other part still needs to have an awareness created, again indicated by substantive marketing investment. While the mainstream market is not an appropriate target for Dominica, the failure to address the already-interested segment is a major lost opportunity.

In destination marketing, particularly in respect of emerging developing country destinations where awareness in tourist markets has not developed widely among the travelling public, there is a prevailing need to focus on heightening this awareness. It is unreasonable and illogical for governments to expect individual operators to bear the financial burden of the marketing support needed. By the reverse token, no government has the responsibility to fill the seats or planes of individual operators. Governments' marketing and promotional efforts pave the way for successful individual operators to build on the image and standing of the destination created through national tourism office efforts.

The relevance of this analysis for the Trail is that it will not be a commercial enterprise with a large commercial income, and will not be in a position to invest heavily in marketing. Yet, the Trail will have a beneficial impact on virtually all of Dominica's tourism operators and many communities on the island, and can therefore be seen as a major national asset. Thus it warrants marketing support from the national tourism promotional agency, as a key component of the island's nature tourism product offering.

The Trail’s success depends fundamentally on the effort made to create awareness and interest in it through becoming a central component of the government's marketing strategy and programme. At the same time, the government must boost its support for tourism to Dominica. This will enable the Trial management's own relatively limited marketing presence to have a sound platform and thus achieve strong impact. Unless such developments occur, however, there have to be doubts as to whether walking the Trail will be anything other than a pastime of locals and of small numbers of dedicated, hard core visitors who have found out about it through their intensive research.

C.2 Institutional Arrangements for the Trail

In examining the most appropriate and effective approach to the marketing of the Trail, the fundamental question is who is going to translate the marketing strategy into a detailed plan and implement it? It is understood that an institutional study is in progress. This needs to take into account the observations made in the preceding section, namely that the Trail's "institution" will not be a big income earner, but will obtain its revenue from user fees and providing services to tourists and tour operators. How extensive and what are these services likely to be? Will the Trail provide transport? Or guides? Or restaurant or, even accommodation, facilities? This will be determined in the upcoming feasibility study but it is difficult to see such operations, other than at the margin, being feasible. This is both because of the capital costs and the resentment created among existing operators who would then see the Trail as undermining rather than supporting their business

The consultant is advised by CANARI that there are basically three options, or sets of options, for the management of the Trail:

(a) it is managed by a government agency, and the Forestry and Wildlife Division, with its mandate to manage National Parks, would be the most obvious candidate,
(b) it is managed by a new entity, non-governmental, though there is no clear view as to what form this would take, and
(c) it is a formal co-management arrangement, in which all agencies retain their current management authority and responsibility, ie organisations do what they are currently mandated to do with respect to trail management, but there would be a new body that is responsible for co-ordination.

While the last of these options appears the most realistic, it is also likely to be the most challenging.

As suggested in the preceding section, the small size and nature of the tourism sector and its components in Dominica mean that the private sector has a very limited role in promotion, with only the Fort Young Hotel and the diving sector undertaking a significant overseas marketing effort. This is different from the situation in most other islands and, as noted above, places a major onus on the government's promotion and marketing arm, the National Development Corporation, to build destination knowledge and image - but it is currently falling short in this role.

If the co-management option is chosen, it is important to determine the respective roles and inter-relationships between the partners, particularly from a marketing stand point, and the key requirements to perform these roles, i.e. who should do what, and what do they need to do to do that properly? One of the main current fashionable trends in destination marketing is public:private partnership. Such arrangements are founded on the principle of "fair" returns related to inputs. So, the local tourism operators could perhaps play a role in ensuring the maintenance and upkeep of the Trail so that they can feature it with confidence in their individual marketing material and use it to attract tourists to the island and to their own business. In turn, they can expect the Ministry of Tourism/National Development Corporation to step up government marketing investment of the island using the Trail as a major feature. A partnership could also involve local communities, though this would not be of central significance to the marketing of Trail.

One idea put forward in Dominica is a government:non-governmental organisation (NGO) partnership, or a partnership as in the case of the marine reserve between the private and public sectors, the idea being to combine the Government's functioning structures and the greater efficiency and business acumen of an NGO (possibly) or the private sector.

Whatever institutional model is finally decided upon for the Trail, the three key issues from a marketing standpoint are:

- should the Trail be marketed by its management agency (whatever its form) in its own right? **There is a strong case for the Trail to be a core feature of national marketing strategy and activities, both because it can be defined as a "destination" rather than a "facility/operation";**
- how is the Trail's agency going to generate sufficient finance to engage in costly activities like marketing? **This does not seem possible from commercial activities, so a substantial grant/ subvention would be needed. If this comes from an outside source, then there will be a major task in dovetailing the Trail's marketing with that undertaken at national level. If it comes from Government, then the Trail's marketing can be developed and undertaken in liaison with the NDC;**
- who within its management (whether partnership, government agency or whatever) is going to bring the necessary marketing expertise to the Trail? **The Trail is a major natural resource and attraction which will need environmental, visitor flow and hands on trail maintenance skills BUT it will also need commercial skills if it is to partake in sales and marketing activities.**

C.3 Strategy, Positioning and Image

The key foci of the Trail's marketing strategy are proposed as follows:

1.target the three broad segments of: ***nature adventure tourist*** (soft core, main focus on Trail), ***nature tourist*** (soft core, secondary interest on Trail) and ***hard core adventure tourist;***

2. concentrate on distribution at three levels: through ***specialist tour operators in main overseas markets; through direct bookings from foreign clients; and through local access/sales for non-Trail visitors to the island and for demand from neighbouring islands;***

3. work as closely as possible (whatever the final form of institutional arrangement chosen for the Trail) with the government agency responsible for tourism destination marketing and the Dominican tourism private sector ***to ensure consistency of approach and message, to maximise benefits to all stakeholders and to avoid duplication of effort and wastage of precious marketing monies;***

4. present the Trail as a part - a core, central part, of Dominica's nature tourism product offering (linked to such outstanding features as whale watching and scuba diving). It is not a stand-alone attraction for marketing but its inclusion in national destination marketing will make the whole island more attractive and be of benefit to all.

In determining the optimal strategy, positioning and image for the Trail, the following observations, factors and principles need to be taken into full consideration:

- any destination/facility looking to target the ecotourism market should recognise the fragile balance between promoting tourism and maintaining the environment; attempt to produce goods and services that do not harm the environment; and adopt processes and procedures that are kind to the environment. **Both because it is good practice and because it is what the target tourist segments want.**

- an image should be projected which reflects a sense of environmental responsibility, guided by the principles of "reduce, reuse and recycle";
- education and entertaining is the vital combination - it is important to educate travellers about natural and cultural features and practices, strengthen the conservation effort and encourage greater appreciation of nature, but at the same time the attractions of the Trail have to be accessible and satisfying for visitors;
- the demand for the Trail will come from a variety of segments with different values and expectations, desires, needs etc - the strategic approach chosen and messages communicated should not deter but encourage each of these, though slightly differently slanted ideas can be transmitted through different vehicles with one group known to be more likely to consult than another;
- the choice of distribution needs to weigh the "reach" of tour operators with the strong aversion of many consumers in the target groups to use "packaged" arrangements. Less than half the overall potential will use tour operators, instead booking direct, but the specialist tour operator is a vital medium of increasing the Trail's marketing reach and should be nurtured;
- to ensure the independent traveller can be reached by a dedicated webpage linked to other appropriate sites will be a prime requirement, while other good quality print material will be needed (eg a guide book);
- nature-based and adventure travellers have motivation - it does not need to be created. The challenge is to stimulate that motivation by way of presentation of the Trail, creating a strong aspiration to "walk the Trail" by focusing in marketing material on the challenge, the sense of achievement, the privilege at having the experiences of the Trail. Make sure the Trail fulfils (at least some) of the dreams they have;
- the focus should be on the travellers' emotions, using words that convey the message that can make their dream come true. More specifically, the focus should be on the activity first, and the travel details second.
- while the target "usership" is quite wide, the strategy should not be to focus on how easy it is to walk the Trail but to maximise the challenge it represents. One respondent summed the marketing approach nicely citing the Appalachian Trail as a valid example. This is a long trail able to cater for both the long and short distance walkers; as such it is seen as a challenge which excites the imagination. This fact should be stressed because then even the visitor to Dominica who has walked a stage or two can claim "I walked the Waitukubuli Trail" with a sense of achievement earning a "badge of honour" among family, friends, colleagues etc. The Trail could even pose the question: "are you up to walking Dominica's new Trail and seeing our innermost secrets?"

It is the conclusion of this present programme of research that the Trail should seek to create an image and positioning as a challenge, both physical and of the senses. Making the effort to achieve the Trail will bring a great sense of personal achievement at having completed the walk, and bring access to a world of natural beauty and to the culturally-rich people who live along the Trail.

C.4 Indicative Marketing Programme

The intention for this report to provide a range of appropriate marketing and promotional activities in support of the proposed strategy for the Trail presupposed clarity on the institutional arrangements and who would be responsible for which elements of the destination tourism product mix ie destination, attractions, facilities/operations. Anything detailed in this section has to be prefaced with the statement that its appropriateness all depends on the organisational and management structures and responsibilities finally put into place for the Trail.

A number of principles can be stated without fear of contradiction, however:

- the trail's management will not have the finance to undertake much marketing unless it attracts a substantial grant/subvention; however, a marketing budget of not more than US$30,000 could be justified;
- there is a strong need to keep the specialist foreign tour operators sector fully abreast of news of development of the Trail, including its strategies, plans and activities in respect of marketing. A short non-commercially-made video circulated to this group demonstrating the progress in clearing and laying the Trail, along with the announcement of plans would be an inexpensive way of doing this and would be appreciated by these tour operators;
- a website page should be established and linked to other key websites in destination marketing, Dominican tourism operators, specialist associations/clubs. Responsibletravel.com, for example, is, as its name suggests, and requires a certain criteria in environmental awareness to be featured through its website. Having met the criteria, there is a small membership fee; a 5% commission is taken for every booking made through the site. Building up a data base and putting out an email newsletter on the Trail would be a cheap and effective way of cascading information. At present, there is substantial goodwill towards those promoting adventure and sustainable tourism activities;
- travel journalists should be encouraged and hosted at the time when a substantive portion of the Trail is cleared and laid, since the articles and features they will generate constitutes a medium which is given high weighting by prospective tourists in the soft core segments being targeted;
- when a number of sections of the Trail are complete, a detailed, high quality guide should be prepared and made available through overseas Dominican representative offices and selected foreign tour operators; until this time is reached and the users of the Trail represent "pioneers" rudimentary information about the Trail should be provided;
- eventually a commercially produced video featuring sites from the Trail will be needed as this will be a stock purchase for every soft core tourist who walks it - and as in all highly scenic spots with interesting local culture a range of postcards and special topic leaflets should be produced.

Other suggestions made by the consultants are presented more tentatively and further study is indicated to elaborate or verify these ideas:

- there is little evidence from the research that forging close ties with special interest walking/ rambler groups is likely to bear much fruit: both hard core and soft core targets tend not to use this type of source for information on their choice of destination, route etc. Maybe, however, the exact role of such organisations and their potential benefit to the Trail should be explored more deeply through follow up study;
- acquisition of membership lists from specialist walking groups or from magazines, radio stations etc whose subscribers/listeners "match" our target segments might be worth examining further to assess the cost-effectiveness of such an approach - though this was not considered likely to be productive by respondents we talked with;

- joint flyers with selected small specialist tour operators is something the operators themselves are keen about - since it would defray their own costs - but the problem with such an approach is that once you do it for one it becomes the standard request and both costly and the source of souring relations upon refusal. To bring in a new operator it is valid but should treated with utmost caution. Trading off the contribution for the tour operator's mailing list should be a key principle guiding such support;
- press trips and fam trips - the key is selectivity: scrutiny of the prospective traveller's standing and intentions ahead of facilitating the visits is essential. The present practice whereby costs are widely shared is a good one but if returns cannot be demonstrated over a reasonable time period support from other Dominican tourism stakeholders will diminish;
- there does not appear to be justification for the Trail to engage in any of the more widespread, direct consumer or trade marketing and promotional activities since participation at trade fairs, paid advertising (even in specialist media) etc cannot be demonstrated for an attraction like the Trail to be cost-effective. The Trail will be part of the marketing and promotional material generated by individual Dominican tourist operators, and it is they who will talk about the Trail and show its attractions at overseas trade fairs etc. The challenge with this is, as noted above, there has to be consistency in what is being said about the Trail in these marketing communications so as not to dilute the sense of challenge of walking the Trail.

APPENDIX 1: PROGRAMME OF RESEARCH

Desk research

The following studies, publications and other research material have been accessed and examined:

- promotional and other material relating to tourism and tourist attractions and facilities in Dominica;
- promotional and other material relating to walking/hiking trail operations in the Caribbean and other parts of the world (specifically Europe, Africa, Pacific/Asia);
- reports and other documents relating to the Waitukubuli National Trail ie August 2000 feasibility study proposal document, July 2001 Lane report, The Waitukubuli National Trail: its market position and potential, the October 2001 Edwards report The Waitukubuli National Trail: the December 2001 report by Betty Perry-Fingal and the November 2001 report by David Lang, relating to the Trail;
- market studies, reports and other documents on broad topics of relevance ie tourism market trends (2001 World Tourism Organisation Tourism 2020 Vision study reports Volumes 2 Americas and 7 Global Forecasts and Market Segments), ecotourism (the May 1997 Caribbean Futures report, Dominica's Ecotourism Approach - Towards a Model for Sustainable Development, papers from 1997 Caribbean Tourism Organisation conference Sustainable Tourism Conference held in Dominica), adventure travel (eg Mintel Travel and Tourism Analyst No 4 2001 on Adventure Travel), walking/hiking (eg extracts from a report supplied by CANARI on the experience of long-distance walking trails in Guadeloupe and Martinique, speakers' notes from the November 2001 South East Walks Partnership conference Walking - the Way to Wealth, 1999, see Appendix 2 (English Tourist Board guide English Walking Holidays Tool Kit); consumer profile/characteristics (eg January 2000 Tearfund NGO report Tearfund Guide to Tourism
- relevant newspaper and magazine cuttings (eg Lufthansa November 2001 in-flight magazine feature on ecotourism, Tourism takes a new turn).

2**. Interview programme**

Interviews were undertaken with relevant interest associations/groups, tour operators and media. An extensive range of relevant organisations and individuals was consulted. (It should be remembered that this research took place following the 11 September events.)

- Interviews with hiking specialists at the November 2001 World Travel Market (WTM) from African, European and Pacific/Asian countries;
- Interviews with 12 British specialist tour operators, some of whom participated at the September 2000 seminar on the Trail at the Dominica High Commission in London; others did not attend the September seminar but expressed interest in the Trail.
- Interviews with two German and three US tour operators offering comparable tour products to that which could be developed around the Trail.
- Interviews in Dominica with a range of stakeholders and officials.
- Contact was made with walking trail development and marketing specialists in New Zealand applying principles of relevance from similar operations in the Pacific/Australia/New Zealand to that proposed for the Trail
- email correspondence with former editor of the American Hiker magazine who recently visited Dominica to assess his view on trail potential
- Interview with webmaster/moderator of planeta.com, a well-established website that examines environmental tourism issues
- Questionnaire was designed and installed on two website listservers specialising in ecotourism and related interests ie planeta.com, and cangonet.com. Twenty responses were received.
- Interviews with website operators regarding structure and costs of website marketing

TOUR OPERATORS' QUESTIONNAIRE

The following questionnaire was designed for UK specialist tour operators.

1. Would you envisage the trail to be:
- the sole purpose of a trip to Dominica?
- combined with other aspects of a trip to Dominica?
- part of a two-centre/island holiday?

2. Would you like the trail to offer:
- a physically challenging route?
- a relaxing route?
- a natural history/discovery route?
- a community route?
- a mixture of the above?

3. What, in your opinion, are the most important characteristics of a successful walking trail? (please rank each item: 0 – not important; 1 – of some importance, 2- of considerable importance, 3- very important)
- natural features
- effective management
- appropriate accommodation
- cultural/community attractions

4. What sources of information does your "typical" client consult when booking a trip featuring a walking trail? (Please rank each item 0 – not important; 1 – of some importance; 2 – of considerable importance; 3 – very important)
- specialist (ie relevant activity-based) clubs/associations Rank
- specialist magazines Rank
- specialist websites Rank
- advertisements in general media Rank
- articles in travel sections in general media/TV features Rank
- travel agent Rank
- tour operator Rank
- destination tourist office Rank
- personal contacts Rank

5. What sort of tourist accommodation would your clients prefer to use along the Trail?
- Camp site Yes No
- Bed and breakfast in village Yes No
- Local guest house Yes No
- Hotel Yes No
- Mixture of the above Yes No

6. What might your clients consider to be an acceptable daily charge per person for access to a trail?
- up to US$5
- US$5-$10
- US$10-$20
- above US$20

7. Would a 100-mile walking trail in Dominica be:
- highly attractive to your business
- of some attraction to your business
- of little or no attraction to your business

8. Could you estimate – approximately – the size of the market for the trail from your company in:
- year one of the trail's operation?
- year five of the trail's operation

9. Finally, could we ask you to provide some brief details about your "typical" clients?

Age Group: below 30 ;31 - 40 ;41 - 50 ;51 - 60 ; over 60 ; mixture

Are your "typical" clients:
- professional people
- managers/administrators
- blue-collar workers
- students

Are your "typical" clients:
- experienced travellers in developing countries
- experienced travellers in Europe and/or North America
- inexperienced travellers

CONSUMERS QUESTIONNAIRE

THIS QUESTIONNAIRE WAS SENT TO TWO APPROPRIATE WEBSITES: PLANETA.COM AND CANGONET.COM.

HOW SHOULD A WALKING TRAIL BE MARKETED?
A number of destinations are developing walking trails as part of their "ecotourism product". We are engaged in research to ascertain the attractiveness of such a trail in Dominica, eastern Caribbean, in order to determine the best way of marketing it to the public. We would be grateful if you could help us by sparing a few moments to consider the following questions and register your responses.

This questionnaire has been put together by Robert Cleverdon and Polly Pattullo. It is part of a marketing research project being done on behalf of the Caribbean Institute for Natural Resources (CANARI) and the Waitukubuli Ecological Foundation as a contribution to a study of the feasibility of creating a long-distance national trail in Dominica. Robert Cleverdon is an international tourism development and marketing analyst with experience working in developing countries. Polly Pattullo is a journalist with a special interest in the Caribbean; she is the author of the book Last Resorts: the cost of tourism in the Caribbean. Please reply to pollyp@globalnet.co.uk. by December 31 2001. We welcome answers from allcomers and much appreciate your contribution. Please mark the Yes/No questions with a X

1. What, in your opinion, are the most important characteristics of a walking trail?
(Please rank each item: 0 - not important, 1 - of some importance, 2 - of considerable importance, 3 - very important.)

* natural features Rank
* effective management Rank
* appropriate accommodation Rank
* community contact Rank
* cultural attractions Rank

2. How do you like to use a walking trail?
* as the sole attraction/purpose of a trip Yes No
* combined with other ecotourism aspects of a trip Yes No

3. When considering a trip involving a walking trail, what attracts you to a specific trail? (please write in your comments)

4. What sources of information do you consult when considering a trip featuring a walking trail? (Please rank each item: 0 - not important, 1 - of some importance, 2 - of considerable importance, 3 - very important.)
* specialist (ie relevant activity-based) clubs/associations Rank
* specialist magazines Rank
* specialist websites Rank
* advertisements in general media Rank
* articles in travel sections in general media/TV features Rank
* travel agent Rank
* tour operator Rank
* destination tourist office Rank
* personal contacts with relevant experience Rank
* any other sources - please specify and rank

5. What travel arrangements do you make for a walking trail trip?
* always use a tour operator's "package" Yes No
* sometimes buy a package Yes No
* sometimes travel independently Yes No
* always travel independently Yes No

6. On a walking trail what items do you buy from communities along the trail?
    * local foods and drinks Yes No
    * handicrafts Yes No
    * regular daily needs (not locally made) Yes No
    * other items (film etc) Yes No

7. How important is the interpretation of natural features along the trail?
* highly important
* of some importance
* of little or no importance

8. How important is the interpretation of cultural features along the trail?
* highly important
* of some importance
* of little or no importance

9. How important to you is visiting local village communities along the trail?
* highly important

* of some importance
* of little or no importance

10. What sort of tourist accommodation do you like to stay in along the trail?
* Camp site Yes No
* Bed and breakfast in village Yes No
* Local guest house Yes No
* Hotel Yes No

11. With whom do you normally travel on a walking trail trip?
* Alone Yes No
* with partner/companion Yes No
* with a group of family/friends Yes No
* with a guide Yes No

12. Would a one-week trip based on a walking trail in Dominica be attractive to you?
* highly attractive
* of some attraction
* of little or no attraction

13. What would you consider to be an acceptable daily charge for access to a trail?
* up to $5
* $5-$10
* $10-$20
* above $20

Please specify the capacity in which you are answering this survey.
* tour operator
* activity interest group
* media/marketing person
* potential consumer

Finally, could we ask you to provide some brief details about yourself?
Age Group: below 30 ;31 - 40 ;41 - 50 ;51 - 60 ; over 60 .
When do you travel: any time ; December-April ; May-November .
Length of trip: up to one week ; one week ; two week ;three weeks or more .

Do you belong to a walking or nature-related club/association? Yes No

We appreciate your interest and time in our research and will post an outline of our findings on this website.

Robert Cleverdon and Polly Pattullo

Appendix 2 English Walking Holidays - Profile of Two Key Market Segments

Identifies: young socialisers (16 - 34)
young leisure adventurers (18 - 35)
family actives (families with children under 16)
leisure explorers (empty nesters, 45 - 59)
older organised (early retired, singles and couples, 55 -65)

Leisure Explorers:

- walking - strolling and discovering. They want to feel unconstrained, with time to wander, explore and enjoy points of interest along the walk. They walk with the intention of "seeing things". It is a natural, simple experience with a gentle pace and no pressures - contemplative and self-reflecting
- where? - gently undulating scenes, with "rolling hills and trickling water". They like to see mountains but they certainly do not want to climb them. The preferred "feel" of an area is not wild and isolated, but warm and welcoming and close to civilisation.
- finding the way - they do not want to use maps but they need to know they are on the right way. They like to feel they are walking on a "proper" path. They are well-educated and enjoy learning, exploring and "getting to know" the area they are visiting.
- accommodation - good accommodation and food are of utmost importance. They want friendliness, cleanliness and an escape from chores. They may not want excessive comfort or luxury, but do enjoy soaking up the real character of the place being visited.
- facilities and activities - like to see and explore at leisure along the route. They want to be away from crowds, and are less interested than some other groups (see "older organised) in the local way of life. Enjoy pottering, browsing and watching the world go by.
- spend - all relatively well-off. Home and holidays are important priorities.
- information - impulse holiday takers, always open to new ideas. Do not plan meticulously but like some idea of what they intend to do. Use guidebooks, tourist office. Accommodation tends to be pre-booked chosen through word-of-mouth recommendation or via tourist office or printed media. They certainly do not want to be heavily packaged.
- lifestyle - busy people dominated by work and socialising. Making the most of their new time. Heavy newspaper and radio usership, but low on magazines.
- barriers - perceived lack of information which is tailored towards their specific needs rather than the "professional" walker/rambler. They do not want to be too organised and are turned off by walker etc associations.

Older Organised:

- walking - will walk almost every day but they do not want to feel under pressure to walk all day, every day. They want proper walks where their boots get muddy. They do not walks which non-walkers could do in their trainers. At the same time they do not want to be over-stretched - they are out there to achieve, but also to enjoy. They recognise that they are not mountaineers and they do not aspire to become anything more serious. Not just fair weather walkers - happy to get a bit wet. Like the idea of walking along a route from one base to the next.
- where - scenery and landscape are top priorities for this group - much more important than anything else. They enjoy walking through a variety of landscapes and "unexplored" areas - they like to get "off the beaten track".
- finding the way - though they want to have the sense of exploring, they value their security and are not prepared to take risks. They enjoy finding out about local facts and like to "get to know" the area being visited.
- accommodation - a key point. They expect comfort and quality and can afford it. Quality food is an important part of the experience and they enjoy trying out different dishes.
- facilities and services- lesser importance to this group. They are interested in the local area and enjoy being involved in the community. They like the idea of alternative things to do.

- spend - most comfortably off, some very much so. Holidays and home are important priorities. On holidays they have few budget restrictions.
- information - most plan well ahead and in some detail. They like the security of knowing what they will be doing and need to make sure that they are making the most of their time there. Like to have a good idea of the walks, the scenery and the local area. Will buy books before going - covering walks and local information.
- lifestyle - most taken early retirement. Busy people dominated by interests and hobbies. Walking is a main interest. Also photography, classical music, DIY, golf badminton. High interest in current affairs, nature issues.
- barriers - fear of being too organised. Concern they will be pressured to walk too far.