

DOMINICA AT THE CROSSROADS: TOURISM WITHIN DIVERSIFICATION IN THE EASTERN CARIBBEAN

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ABSTRACT: *Dominica has exemplified a specialized export-oriented economy since the colonial period. Contemporary changes in the world economy impel the country to diversify its economic base. Tourism, primarily exploited as eco-tourism there, is one area targeted by those planning its diversification program. The current goal is to boost earnings from tourism without undermining its resource base, i.e., the beautiful island that people come to see. This paper profiles Dominica's tourism industry, analyzes current efforts to diversify within eco-tourism, considers the tensions now arising within the tourism sector, and concludes by suggesting whether the changes within tourism currently underway will enhance the diversification program.*

INTRODUCTION

The small island country of Dominica is among many states facing the challenge of trying to develop in a sustainable way while responding to external pressures that often (usually) push it in a different direction. Located in the eastern Caribbean, between the French territories of Guadeloupe and Martinique in the island arc that separates the Atlantic Ocean from the sea, this now independent (since 1978) country has just 75,000 inhabitants. Its land surface totals fewer than 900 square kilometers, much of it steeply mountainous, with forest-covered slopes that have historically deterred settlement efforts. Most of the populace lives in elongated communities between the mountains and the sea. The spectacular landscape suggests the potential for a flourishing tourism industry but, unlike its neighbours, Dominica has not emphasized that sector.

Like many former colonies of the European powers, Dominica's economy has characteristically been a highly specialized one, focused upon a narrow range of primary sector goods to serve the British market. Dominica was never a sugar island; its effective colonization occurred after sugar had been established on many neighbouring islands.

Instead, coffee, cocoa, vanilla beans, oranges, grapefruits, and limes have each been Dominica's principal commodity. Bananas are currently its product of importance, supplanting limes only in the 1950s, and this fruit alone generates 70% of the country's export earnings in most years. This renders Dominica the most banana-dependent economy in the region, not a desirable status given contemporary changes in the world's banana trade.

The overriding economic policy priority in Dominica today is the diversification of its economy. For the first time, the island is looking to create a mixed economy to replace its declining major crop. Previously, the approach had always been to supplant one principal crop with a new one, maintaining the specialized nature of the economy. The contemporary primacy of bananas will be short-lived because of two important changes in the international banana trade. The first of these involves the European Union (EU) to which Dominica and nearly 70 other African, Caribbean, and Pacific (ACP) states are linked through the Lomé Convention, now in its fourth stage. Lomé provides preferential access to EU markets, often at advantageous prices, for many agricultural and mineral products from the ACP states, all of whom are former colonies of EU members. The 1992 implementation of the Single European Market

included a complex, special arrangement for banana imports (see Wiley, 1996). This has led to price convergence within the EU banana market, including a lowering of prices in Britain, to which nearly all of Dominica's bananas are shipped. Thus, although Dominica has a guaranteed market share of 71,000 metric tons each year that it is seldom able to fill, its bananas now command lower prices than prior to the 1993 implementation of the new policy.

The second change is likely to be forthcoming from the World Trade Organization (WTO), which recently replaced the General Agreement on Tariffs and Trade (GATT). The GATT seldom dealt with agriculture as much of the world's agriculture remained outside of free trade negotiations in which the organization was involved. That changed with the Uruguay Round of talks that led to the creation of the WTO. The WTO strongly opposes preferential trade agreements, including the Lomé Convention, and it has been vested with greater enforcement authority than the GATT had ever enjoyed. The twelve ACP states that export bananas to the EU under the current arrangement are not expecting a renewal of the agreement following the expiration, in 2000, of the Lomé IV Convention. This will prove devastating to the industry in Windward Islands like Dominica because banana production there is not competitive with the much larger scale plantations of Central and South America.

With its major industry clearly threatened, Dominica has begun the process of restructuring and diversifying its economy to prepare itself for a post-banana future. This task is not easy and should not be trivialized. The global push toward free trade based upon comparative advantage theory from neoliberal economics increasingly rewards those countries able to generate economies of scale in the production of individual goods. The very small size of Dominica's territory and population renders this a very great accomplishment for just *one good*, and it has been unsuccessful in doing so with bananas. Diversification, by definition, involves many activities, seemingly exacerbating the degree of the challenge at hand. Tourism is just one of these sectors, though it is becoming an increasingly important part of the national economy.

DOMINICA'S DIVERSIFICATION PROGRAM

Even without the constraints imposed by the trend toward globalization, diversification is/will be a difficult, often painful process fraught with challenges. It is more complicated than simply deciding what to grow or produce. A wide array of questions and issues must be considered *for each product* that might be included in a diversification mix. These relate to the country's factor endowments, the inputs needed to produce a given good, whether those can be locally obtained, the infrastructure needs of the diversification activities, its labor requirements and the training to provide that labor with the requisite expertise, transportation of goods from or tourists to the island, market development, and who the competition will be. So short a list is incomplete but still conveys the degree of complexity inherent in any diversification effort.

In Dominica's case, a series of internal and exogenous factors add to the challenges reflected in the questions raised above. Among the former are a limited natural resource base and a difficult terrain that renders large-scale agriculture impossible in most of the country, though the scenic qualities this suggests add to the island's tourism potential. A lack of exploitable mineral wealth confines its industrial potential to agro-processing or the assembly of finished goods from imported inputs or parts manufactured elsewhere, the latter involving additional costs, lowering any eventual earnings from the activity. Despite recent progress, infrastructure remains a grave problem. The country has a sufficient system of feeder roads that links most of the island to the port facilities at Portsmouth and Woodbridge Bay but the lack of an airport able to handle jet planes or night landings restricts the growth of tourism and other industries. Two modest airports exist but they receive only small planes, reducing air cargo efficiency, preventing direct flights from Europe and North America, and necessitating a change of planes for visitors. The small population generates insufficient public sector revenues to finance jetport construction; external funds are needed but have not been secured.

Dominica must reorient a substantial portion of its labor force as part of the diversification program. It has a good school system and offers the advantages of a well-educated, English-speaking labor force, useful in tourism and information-related industries. Dominica's otherwise disadvantageous small size does yield one benefit: a large number of new jobs is not essential for the country to realize its employment-generation goals. It can pursue modest projects knowing that each will have a positive impact on the small labor force.

Exogenous factors adding to the diversification challenge include market development processes, competition from new sources, the need for cooperation on infrastructural matters, and the inability to affect commodity prices. Comments from several interviewees (Clarendon, Edwards, Harris, Robinson, Satney, all 1995) indicated that market development is an imprecise science, particularly when operating from such a small base. Dominica is unable to afford its own trade missions and must rely on the efforts of the Caribbean Community (CARICOM), the Caribbean Tourism Organization (CTO), or the Organization of Eastern Caribbean States (OECS) to get its message out. While these associations open channels that would be difficult to create alone, such group marketing efforts submerge the country's identity, important to the development of its tourist market.

Securing funds for infrastructure development is another external factor affecting Dominica's success in diversifying its economy. The airport situation noted above is the most critical of these needs. A plan to build a jetport exists and the U.S. Army Corps of Engineers is committed to preparing the site once a donor has been found to fund construction. Dominica looks to the EU as this donor but, as yet, no commitment has been forthcoming. An alternate plan involves private foreign capital, linking the jetport to construction of a 200-room hotel (Fadelle, 1996), but this does not blend well with the country's tourism profile.

Such challenges are daunting but Dominica is moving ahead with its diversification program. It has little choice but to do so although it has some latitude with regard as to how it proceeds. In mid-1995 and early 1996, when this research was

conducted, efforts in three major economic categories were already in progress. Agriculture receives top priority, due to the fact that it is most negatively affected by current trends in the world economy. Industry, primarily agro-processing and informatics, has begun to generate more interest among those responsible for planning the country's diversification program. Tourism, which never received much attention, is now second in line and it is tourism's role within the diversification process that is the subject of this research.

DOMINICA'S TOURISM PROFILE UP TO 1994

Given Dominica's environmental endowments, exquisite beauty, and climate, it is logical that tourism would follow agriculture in the country's diversification program. This constitutes, however, a shift in its development priority list. Until now, the island has avoided pursuit of the resort-oriented mass tourism market that characterize many of neighbors. Instead, it used its reputation as "the Nature Island" to attract ecotourists for whom the island is well-suited. The result was the emergence of a distinct tourism profile relative to others in the Caribbean and a smaller tourism sector overall. This distinctiveness is reflected in a variety of ways, including scale, hotel ownership, source regions, inputs sourcing, and tourist activities. As Table 1 indicates, the scale of the industry has remained rather small, despite recent increases in visitor numbers. Excluding cruiseship passengers, only 65,331 people visited the island in 1994, modest if compared to the numbers registered by several other Caribbean destinations. The total appears even more modest when one considers that it includes nearly 7,500 Dominicans living abroad who returned for a visit. The increase has been relatively more significant for those arriving by boat than by air, despite the fact that cruiseship passengers are not included. Most of those arriving by sea come on private vessels or by ferry, primarily from the neighboring islands of Martinique and Guadeloupe. Arrivals by air doubled during the period reflected in the data,

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Table 1 Visitor Arrivals in Dominica (1983-1994)

Year	By Sea	By Air	Total
1983	1,168	21,182	22,350
1987	1,786	26,120	27,906
1990	9,965	42,401	52,366
1994	22,834	42,497	65,331

Source: Table 11, Statistical Digest No. 8. 1995. Commonwealth of Dominica: Central Statistical Office, Roseau.

though virtually no increase was registered during the last four years, suggesting that current limits of access by air have already been reached. As indicated in Table 2, the number of visitors mirrors the accommodations available, just 757 rooms in 1994, including hotels, guesthouses, apartments, and cottages. Growth in the hospitality sector has been gradual and the size of establishments remains small. The 409 hotel rooms available in 1994 were distributed among 17 hotels, for an average of 24 rooms per hotel. The other two categories have fewer than ten rooms per establishment. The small scale indicates another significant difference regarding the country's tourism profile, the high rate (95%) of local hotel ownership (Edwards, 1995). The lack of foreign-owned accommodations differs from Caribbean norms. While this may signify a lack of foreign investment in tourism, it also minimizes the tourism earnings leakage problem that characterizes the industry in many developing countries. The high rate of local ownership enables the country to maintain a higher percentage of the profits generated by tourism. This is a goal elsewhere, though one seldom achieved.

Another distinct quality of Dominican tourism has to do with its market source areas. While much of the region is heavily dependent upon the North American market, the sources of visitors to Dominica are quite diverse. Europe contributed more (24.9%) visitors in 1994 than did North America (20.5%). The French are the largest cohort within that category and visitation from France increased fourfold since 1989 (CTO, 1994, Table 2). More than half came from other Caribbean states with Martinique and Guadeloupe responsible for nearly 30% of the total, also representing an increase in recent years. This mix is unusual, as it counters the normal dominance of

the global North in the tourist profile of most developing states. The data also indicate potential markets for Dominica, such as Latin America and Japan, which are still largely untapped. The diversity of sources of tourists is viewed positively as it renders Dominica less vulnerable to the impacts of economic slumps in individual First World states. Destinations like the Bahamas and Cancún, dependent upon the U.S. market, or Barbados, with its special connections with Canada, often suffer during economic downturns in those countries.

One of the common criticisms of tourism in the developing world is its tendency to import many of the inputs required by the industry. Again, Dominica has broken the mold. The local ownership pattern evident in its accommodations sector extends to the sourcing of inputs for tourism, particularly food. The country's diverse agriculture allows the hotel and restaurant sectors to obtain most inputs without importing, setting the country apart from its neighbors. This extends tourism's multiplier effect there, estimated at greater than one (H. James, 1996), though is not formally calculated. Many of the fruits and vegetables listed above as diversification crops are non-traditional as exports but common to Dominican diets. They are served in the country's restaurants and hotels and, now, are targeted as exports for regional markets, to serve the tourism industries of neighboring islands.

Finally, Dominica's distinct tourism profile extends to the activities that it encompasses. The island lacks the sandy beaches common to resort tourism elsewhere. It does not, therefore, lend itself easily to the 4-S tourism model of surf, sand, sun, and sex that characterizes mass or resort tourism in other Caribbean destinations. Rather, eco-tourism is the dominant sector. As a result, the tourism experience there tends to be a rather active one,

Table 2 Guest Accommodations in Dominica Number of Rooms (1988-1994)

Year	Hotel Rooms	Guesthouse Rooms	Apartment/Cottage Rooms
1988	241	128	31
1990	335	120	76
1992	341	152	110
1994	409	175	173

Source: Table 27, *Travel Report for 1994*. 1995. Commonwealth of Dominica: Central Statistical Office, Roseau.

emphasizing the natural environment. Rather than remain on the coast and lie on beaches, visitors go to the interior of the island to enjoy hiking and other forms of nature worship. Many island attractions are oriented toward this kind of visitor; several are included in Dominica's national park system. The latter includes the Cabrits National Park in the north, which offers trails and a colonial fort, and the Morne Trois Pitons National Park in the south, whose enticements include a rainforest, several beautiful waterfalls, and the incomparable Boiling Lake.

DIVERSIFICATION WITHIN TOURISM

As Dominica confronts the need to diversify its economy, its tourism industry finds itself at a crossroads. It must grow but do so in a manner that contributes to the goals of the diversification effort, including employment and foreign exchange generation, and is environmentally sustainable so it can be maintained indefinitely. The government, through agencies like the Diversification Implementation Unit (DIU) of the Ministry of Finance and the NDC's Division of Tourism, has committed itself to a program oriented toward diversification *within* tourism. Its goal is to grow without undermining the essential appeal that has lured visitors to the island in the past. This prospect of growth, though, is beginning to generate discord within the industry itself; some view it as threatening the eco-tourism base that is the industry's mainstay. Thus, the tourism development model(s) ultimately pursued will determine whether

or not the tensions currently arising will eventually undermine the industry in Dominica.

Clear indications of these rising tensions have already been manifested over recent developments within the cruiseship sector, one of those sectors targeted in the diversification mix. The development of docking facilities and a visitor reception center at the Cabrits National Park in the early 1990s, with government finances, stimulated a large increase in the number of Caribbean cruise itineraries that include Dominica. Cruiseship calls have grown correspondingly, from just 13 in 1990 to 199 in 1994 (Table 3) and further growth is anticipated following the June 1995 opening of a new cruiseship pier in Roseau. This pier, financed by France, offers a more attractive location as the staging point for land-based activities than does the relatively remote Cabrits pier. As a result, large ships now visit the island regularly. Each call by such ships disgorges more than 1,000 passengers, contributing to the growth in passenger arrivals registered in the sector, a nearly twenty-five fold increase indicated in Table 3.

The advent of cruiseship tourism is changing the nature of Dominica's tourist industry. For the first time, the country is participating in what may be considered mainstream tourism, similar to that on neighboring islands. The arrival of a ship in Roseau generates chaos on the small city's streets, as the pier stands next to the country's only traffic signal. A long line of taxis assembles on mornings when a ship arrives, blocking the flow of vehicles into town from the south. As passengers walk off the ship, they are shepherded into the taxis for an island tour whose itinerary will be limited by the relatively brief time of the visit. As a result, the day-tripping cruiseship passengers are not able to

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Table 3: Passenger Ship Calls and Cruiseship Passenger Arrivals: Dominica 1990-1994

Year	Windjammers	Cruiseships	Total Calls	Passengers
1990	27	13	40	4,924
1991	41	89	130	62,159
1992	38	151	189	87,154
1993	52	163	215	83,713
1994	45	199	244	122,094

Note: Windjammers are small yacht vessels.

Source: Tables 24 and 25, *Travel Report for 1994, 1995*. Commonwealth of Dominica: Central Statistical Office

experience Dominica in the way visitors traditionally have - on foot, slowly, interacting with the Dominicans, and savoring the island's special qualities as "the Caribbean the way it used to be." Since the cruiseship travelers have, in most cases, been day-tripping all week long, the uniqueness of the experience may be gone by the time they arrive in Dominica. This feeling registers with the local populace, who traditionally extend a warm welcome to visitors. There are fears that continual encounters with the day-trippers will erode this aspect of Dominican tourism and that residents will become jaded towards their guests.

Other issues abound. Cruiseship visitors spend an average of just \$29 (U.S.) per person during their single-day call, although this does generate a boom for Dominica's taxi drivers and craftspersons, both categories having local origins, thereby maintaining the aspect of fewer leakages. The accommodations sector of the industry feels that its needs, primarily infrastructural, were neglected in favor of pier development for cruiseships, although it should be recognized that many visitors from the French islands who overnight on Dominica also arrive by boat. In general, hotels do not benefit from the presence of a cruiseship sector except in those instances where passengers subsequently return to the island for a longer stay. In Dominica's case, the newness of the cruiseship sector prevents any statements about this impact.

Those associated with Dominica's traditional tourism sectors feel that cruiseship tourism is incompatible with eco-tourism. The day-tripping cruise passengers descend upon many of the same sites visited by the longer-term eco-

tourists, undermining the ambiance of the natural experience for the latter group. To prevent this problem from increasing, there is considerable support among those working in the eco-tourism sector for channelling cruiseship visitors to a limited number of the more accessible attractions, including the Emerald Pool and Trafalgar Falls, that can easily be visited in the relatively brief timespan available on most cruiseship itineraries. The idea is to unofficially designate these attractions as *sacrificial sites* and upgrade their capacity to handle large numbers, leaving the rest of the island to those preferring more in-depth encounters with the natural environment.

Aside from cruiseship tourism, the government clearly favors further cultivation of the country's eco-tourism and special-interest tourism potential. No interest in trying to compete in the resort tourism sector was expressed by officials in either the Ministry of Tourism, Ports, and Employment (formerly the Ministry of Trade, Industry, and Tourism) or the Division of Tourism of the NDC. Rather, there is a strong desire to diversify Dominica's product *within* the eco-tourism area. Among the activities this might include are SCUBA diving, birding, recreational fishing, and a combination of historical/cultural tourism. The country's coral reefs are featured attractions for SCUBA enthusiasts and Dominica already has a fledgling diving infrastructure in place. It has been the beneficiary of several laudatory articles in such outlets as *Skin Diver Magazine*, which extolled the unique aspects of the island's dive sites. The growth potential in this sector is limited by the airport situation noted above. The lack of a jetport

necessitates at least one transfer, usually in San Juan, Puerto Rico, or in Antigua, for onward connections to Dominica from North America. European flights are limited by the lack of night landings at either of the island's airports, a factor of importance due to the time difference involved. Recreational dive trips from those two regions are often organized as one-week packages, which makes the lack of direct flights unattractive due to the brief nature of such trips.

Birding is a growing special-interest tourism sector and its participants are often less concerned about cost than about what species they may be able to see. Such small islands like Dominica and its neighbors are currently not well known as birding destinations, a perception that may indicate the inherent conflict between eco-tourism and the resort tourism that characterizes much of the Caribbean's tourism profile. This perception must be overcome if activities like birding are to begin to contribute in a significant way to the country's tourism industry. One approach noted by Edwards (1995) would be to develop joint itineraries for birders, or for eco-tourists in general, that include Dominica with other islands in the region, as this would ease the marketing burden for one country acting alone. According to Fadelle (1996), however, there has been little progress in promoting joint itineraries with other islands which he attributes to local hotel owners who are unwilling to share their profits with the agents who would necessarily be involved in such cooperative ventures. Such obstacles will need to be overcome if this sector's potential is to be realized. Any review of the brochures issued by adventure (or nature) travel companies that offer eco-tourism experiences indicates that the Caribbean is generally missing from the programs available. This is attributed to the eco-tourists' perceptions of the resort-orientation of most Caribbean destinations.

Dominica has begun to invest in the development of its historical/cultural attractions. With Canadian funds, it has restored Fort Shirley in the Cabrits National Park and begun construction of visitor facilities there. The colonial fort has a rich lore in the centuries-long competition between Britain and France for control of the island. An encouraging situation is the emergence of Dominica's Caribs on the tourism scene. Unique in the eastern Caribbean, the island has a Carib

Reserve with more than 3,000 residents, some of them pure descendants of the indigenous inhabitants encountered by the Europeans. To promote their culture, the Caribs opened the Kalinago Center in Roseau in 1995, raising their profile among nationals and visitors alike. Tours to the reserve are now available and the fine Carib basketry and other crafts are an important addition to the country's offering. The government has also created a Division of Culture within the Ministry of Community Development. According to Noreen Joseph (1996), the Division's goals include protection of the country's culture within a milieu of externally generated popular culture and the fostering of the island's traditional crafts, costumes, dances, and other art forms.

One final targeted addition to Dominica's tourism diversity is environmental/educational tourism. This would involve development of educationally-oriented programs, sponsored by universities in the global North, that emphasize the environment and sustainable development. It could include both study-travel programs that bring undergraduate and graduate students to Dominica for one or two-week visits and longer-term stays by scientists conducting research on tropical/insular subjects. These programs could be hosted by such institutions as the Springfield Environmental Protection, Research, and Education Center managed by the Dominica Conservation Association (Martin, 1995).

TOURISM WITHIN DIVERSIFICATION: SUMMARY AND CONCLUSIONS

Several of the challenges encountered in diversification processes noted generally above pertain specifically to attempts to diversify within tourism. These include market development and access, infrastructure creation, and competition from destinations offering similar attractions. As the country pursues so many avenues simultaneously, it must tackle each obstacle repeatedly, i.e., for each of the sectors it wants to include in a diversified tourism mix. This adds to the complexity of the diversification project.

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As with agriculture and manufacturing, market development in tourism remains, perhaps, the major challenge for Dominica. This is primarily due to the nature of its tourism product. Promotion of mass tourism is far easier to accomplish as much of it occurs within the multinational corporations that link airlines, hotel chains, and major tour packaging companies under one umbrella. The sales of package programs to travelling publics result from the distribution of colorful brochures to thousands of travel retailers in towns and cities throughout North America, Europe, and elsewhere. The use of 800-numbers offers easy access to reservation systems.

The tourism sectors that Dominica is seeking to develop do not lend themselves easily to such mechanized, globalized marketing strategies. Locally-owned Dominican hotels and the small regional airlines that service the island function outside of the multinationals' loop and are usually financially unable to join the computerized networks utilized by travel agents who collectively have such a great impact in guiding travelers toward particular destinations. These local operatives - almost countless in number - are influenced by the familiarization tours provided to them by large travel operators; most are unable to distinguish Dominica from the Dominican Republic.

Adding to Dominica's challenge is the profile of its target population. Special-interest travelers are often a rather dispersed group, rendering them difficult to reach. They are characteristically very independent and are less likely to respond to the advertising approach utilized by the multinationals. They read, but read a wide variety of sources. Nevertheless, this is the kind of traveler that Dominica has entertained in the past and it wishes to attract many more of them in the future.

The keystone to success for the Dominica's diversification program in general and for its tourism efforts in particular lies in pursuing a *niche market* strategy, a term was used by Clarendon, Harris, U. Martin, Robinson, and Satney, among others, in 1995. This strategy binds together many seemingly disparate elements. It is oriented toward overcoming the disadvantages of the country's small size on world markets by focusing on production of specialty goods for which a factor other than price

is the primary purchase consideration. This alleviates the need to achieve the economies of scale that Dominica can never realistically expect to attain and accentuates those items for which the island's factor endowments are well suited.

There are three basic ways, not mutually exclusive, in which this tactic can be implemented. First, upscale and ethnic markets in developed states can be identified for unique items whose high quality offsets price in the decision to purchase. For Dominica, gourmet coffee, cut flowers, hot pepper sauce, and its tourism product all fit into this category. Second, other niches can be distinguished among gaps in competitor states' annual crop cycles when they are unable to fulfill demand for tropical goods in northern markets. When their "down time" occurs at a time that coincides with Dominica's ability to harvest, an exploitable niche exists. Examples includes supplying Europe with citrus crops during Israel's export gap each October and selling avocados to Hispanic groups in the U.S.A. between California's growing seasons each November through March (OECS/ADCU, 1994). Within the region, a similar result can be achieved by supplying foodstuffs to nearby islands and cruiseships during brief periods when the customary provider is "down." This aspect of niche markets is not directly pertinent to the tourism sector. A third niche category involves developing relationships with individual retail chains, rather than with entire countries, in larger states like the UK, Germany, or Canada. This would enable Dominica to supply a variety of goods to one organization that already has a distribution network in place. Size prevents Dominica from fulfilling national level demand in those larger states; it can, however, supply one major chain.

Philosophically, the niche market concept is sound. It reduces the negative impact of small size and the lack of price competitiveness on the nation's economy. As a strategy, it corresponds nicely to the island's scale. It recognizes that Dominica does not need large niches in world markets; small ones are sufficient to help the country achieve its job creation needs.

The nature of Dominican tourism's target population renders a *niche market* strategy so appropriate to its efforts in this area. This is particularly true with regard to the first and third

categories of niche markets identified above. The upscale label is quite applicable to Dominica's tourism product, especially with the currently poor prospects for the completion of the jetport; therefore, a wealthier target market is a wise choice. It is costlier to travel to the island than to many possible competitor destinations and, once there, the activities in which one might engage can also be expensive, including hiking where guides might be contracted. Considered a middle-income country by the UN Development Programme's system of classification, Dominica cannot hope to compete with selected other tropical destinations based upon price. The Dominican Republic and Cuba (for non-U.S. travelers) will always be less costly. Thus, it makes good sense that Dominica will pursue the elusive, independent special-interest traveler and lure that person with its high quality offerings.

The third niche market strategy category involves attempting to align oneself with just a few retail outlets and, in the case of educational programs, major universities. The country's scale in tourism, as with agriculture and manufacturing, is small enough that just a few travel retailers and large universities could yield a number of visitors sufficient to occupy the country's hotels, restaurants, taxis, and tourguides beyond their current capacity. Dominica does not need to succumb to the temptations of resort tourism because its small population size and multi-sectoral diversification program means that tourism alone does not have to generate all the jobs and foreign exchange earnings necessary to make the overall venture a success.

In the final analysis, Dominica's success will hinge upon its ability to obtain cooperation. Though the risk of identity submergence is always there, the country lacks the resources to market its tourism product effectively alone, especially given the difficulties just mentioned. Therefore, it will have to continue to work within the framework of associations like the CTO, the OECS, and the Caribbean Community (CARICOM), to which it already belongs. It needs to change its strategy of operations within these groups, however, and focus its efforts on generating the cooperation level necessary to develop joint itineraries and the coordination of airline/shipping line schedules. This would facilitate the development of multi-island programs that would aid in accomplishing the niche market strategy that is appropriate to the country's

tourism development goals. If it can achieve this, it may succeed in limiting the rising tensions over tourism to the cruiseship sector whose now established presence makes it a seemingly permanent aspect of Dominica's tourism industry.

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