



FUTURE TOURISM: Rethinking Tourism and MSMEs in times of COVID-19

Tourism Diagnostic Report Dominica

United Nations Development Programme



FUTURE TOURISM: TOURISM DIAGNOSTIC REPORT DOMINICA

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UNDP Barbados and the Eastern Caribbean
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ACRONYMS & ABBREVIATIONS

ACS	Association of Caribbean States
CARDTP	Caribbean Digital Transformation Project
CARPHA	Caribbean Regional Public Health Agency
CCPF	Compete Caribbean Partnership Facility
CDB	Caribbean Development Bank
CHTA	Caribbean Hotel and Tourism Association
CREAD	Climate Resilience Execution Agency for Dominica
CRRP	Climate Resilience and Recovery Plan
CTO	Caribbean Tourism Organization
DDA	Discover Dominica Authority
DHTA	Dominica Hotel and Tourism Association
DRA	Digital Readiness Assessment
EC	Eastern Caribbean
ECCB	Eastern Caribbean Central Bank
GDP	Gross Domestic Product
GTRCMC	Global Tourism Resilience and Crisis Management Centre
ICT	Information and Communications Technology
IDB	Inter-American Development Bank
ITU	International Telecommunications Union
MBGEAFS	Ministry of Blue and Green Economy, Agriculture & National Food Security
MSME	Micro, Small and Medium Enterprise
MTITMI	Ministry of Tourism, International Transport and Maritime Initiatives
NRDS	National Resilience Development Strategy
NTO	National Tourism Organisation
OAS	Organization of American States
OECS	Organisation of Eastern Caribbean States
OTA	Online Travel Agency
PMS	Property Management System
SDG	Sustainable Development Goal
SIDS	Small Island Developing State(s)
SME	Small and Medium Enterprise
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
UWI	University of the West Indies
WB	World Bank
WTTC	World Travel and Tourism Council
XCD	Eastern Caribbean Dollar

LIST OF FIGURES & TABLES

Figures

Figure 1- Caribbean Tourism Sub-Sectors.....	14
Figure 2- Areas of Focus for Diagnostic Study.....	15
Figure 3- Trends in Visitor Arrivals by Main Category 2015-2020.....	22
Figure 4- Stay-Over Arrivals by Major Source Markets 2019.....	23
Figure 5- Distribution of Tourist Arrivals by Purpose of Visit 2019.....	23
Figure 6- Expenditure by Source Markets January – June 2021.....	37

Tables

Table 1- Number of Visitor Arrivals by Main Category 2015-2020.....	21
Table 2- Cruise Calls, Yacht Calls & Visitor Expenditure 2015-2020.....	22
Table 3- World Bank's Digital Economy Levers.....	27
Table 4- SWOT Analysis for Digital Transformation of Tourism MSMEs.....	33
Table 5- SWOT Analysis for Tourism Product & Market Development.....	40

EXECUTIVE SUMMARY

Tourism has been one of the most affected economic sectors due to the COVID-19 pandemic. The Caribbean, as the most tourism dependent region in the world, was particularly hard hit. Travel & Tourism Gross Domestic Product (GDP) contribution in Dominica declined 64.6 per cent, and tourism employment dropped 29.4 percent, costing 3,700 individuals their jobs in 2020. Women have been particularly impacted given their high employment levels in the accommodation and food and beverage sub-sectors.

The “**FUT-Tourism: Rethinking Tourism and MSMEs in times of COVID-19**” project was established by the United Nations Development Programme (UNDP) in Barbados and the Eastern Caribbean in January 2021, to revamp the tourism sector through regional dialogues and policy solutions, and technical and financial assistance for Micro, Small, and Medium Enterprises (MSMEs) within the sector.

This report focuses on Output 1.2 of the overall project and seeks to develop a country specific tourism diagnostic for Dominica. The diagnostic builds on the findings of the UNDP Regional Policy Dialogues on Tourism held between May and June 2021. Through desk research, a tourism MSME focus group and an interview with the President of the Dominica Hotel and Tourism Association, the report provides data and compiles information on impacts, current policies, ongoing efforts, needs and opportunities that could have a catalytic impact on the tourism sector in Dominica. The report analyses three priority areas that were identified in the UNDP Regional Policy Dialogues:

I. Digital Transformation of MSMEs, including the informal sector

The Government of Dominica views digitalisation as the back-bone of its resilience and developed a National Digital Transformation Strategy in 2021. The country’s digital infrastructure is relatively good, characterised by 106 mobile cellular subscriptions per 100 inhabitants, 16 fixed broadband subscriptions per 100 inhabitants and 70 per cent of the population using the Internet. Even though an assessment of the digital skills of MSMEs could not be made, 60 per cent of secondary school and college graduates have work-force-ready basic digital skills, which augurs well for digital entrepreneurship and support to current tourism operators. Additionally, since

the pandemic, the Dominica Hotel and Tourism Association has been able to support digital entrepreneurship through a micro-Property Management System (PMS) for small accommodation providers. With 60 per cent of the population already using digital financial services, there is great scope for tourism MSMEs to utilise DCash and other mobile payment systems for ease of business. While the country is making strides, more tourism MSMEs need to be encouraged and given the tools to have an online presence. Digital entrepreneurship offers opportunities for tourism MSMEs to build the creative economy and for the youth population to support the digital transformation (given their affinity for technology adoption and the high level of unemployment in the under 30 age-group in Dominica). At the national level, policy interventions for digital transformation include incentivizing skills training in the public service to address the dearth of technical ICT staff, tax incentives for private citizens and businesses to acquire digital devices and tax credits and/or other forms of financial support for MSMEs to digitize their accounting systems, improve online presence including website development, e-commerce and inventory management and digital skills capacity building at all levels.

II. Diversification of the Product Offering: Product and Market Development

Dominica has distinctive product offerings, routed in its positioning as the “Nature Island of the Caribbean”. Its eco-tourism product is strongly linked to opportunities for adventure tourism, aqua-tourism, agro-tourism, health and wellness, events, and entertainment. There is ample opportunity in Dominica for unique CBT experiences in the Kalinago territory and other communities. Development of the food and beverage sub-sector could include herbal tours and tastings which will

support the planned development of the country's nutraceutical industry. Dominica's strong agriculture sector, including the development of sustainable farms, makes traditional cuisine and farm to table experiences strong product offerings for the destination. Women-owned MSMEs can take advantage of CBT and food and beverage opportunities and augment it with agro-processing (rubs, lotions, soaps, teas, confectioneries, sauces etc.), cooking and craft lessons. Recommended policy interventions include developing a tourism policy consistent with building climate resilience; focusing on value over volume, packaging, and inclusivity; implementation of a tourism satellite accounting system; and instituting measures to address solid waste management.

III. Stakeholder Engagement and Regional Coordination

A lack of inclusivity did not appear to be a major challenge. Local stakeholders took responsibility for their apathy about stakeholder engagement as they described themselves as being in "survival mode" having been battered by hurricanes and more recently, the COVID-19 pandemic. Stakeholders acknowledged that it is also challenging for the Government, but felt officials were doing their best. Like many MSMEs in the region, access to financing is a challenge. Some of the MSMEs felt that some of the creativity and flexibility demonstrated by

institutions during the pandemic should continue post-pandemic. Recommended national policy interventions include a marine tourism policy and capacity development and funding mechanisms for MSMEs (including digital skills to empower women and more incubator programmes). At the regional level Dominica would benefit from reduced airline ticket taxes and fees and harmonized policies for intra-regional travel.

The impact of two severe weather events and the pandemic within the last five (5) years has made the tourism MSMEs battle-weary, as they strive to survive amidst multiple set-up backs and a prolonged building-back and recovery mode. A review of the National Tourism Policy and Master Plan should be undertaken given emergent consumer demands, travel trends and the country's vision to build the first climate resilient nation in the world by 2030.

Access to financing and capacity building of Dominica's tourism MSMEs would be key areas to accelerate the transition towards a more inclusive and sustainable tourism industry and progress toward the Sustainable Development Goals (SDGs). Additionally, the future of tourism in Dominica requires a greater concentration on unique experiences, tourism value over tourists' volume, natural hazards, and climate change resilience.





TABLE OF CONTENTS

1.	Introduction	10
1.1	The FUTURE-Tourism Project	10
1.2	Project Context	11
1.3	Objectives of the Diagnostic Report	13
1.4	Diagnostic Methodology	13
1.5	Structure of the Report	15
2.	Country Profile	18
2.1	Dominica in Brief	18
2.2	Initiatives Toward A Climate Resilient Nation	20
2.3	Tourism in Dominica	20
2.4	International & Regional Trends	24
3.	Focus Area I: Digital Transformation of MSMEs in the Tourism Sector	26
3.1	Overview	26
3.2	Dominica Digital Economy	29
3.3	Stakeholder Perspectives	30
3.4	Strengths, Weaknesses, Opportunities and Threat (SWOT) Analysis	33
3.5	Policy Interventions	34
	Additional Resources	34
4	Focus Area II: Diversification of the Product Offering: Product and Market Development	35
4.1	Overview	35
4.2	Product & Market Trends	36
4.3	Stakeholder Perspectives	38
4.4	Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis	39
4.5	Policy Interventions	40
	Additional Resources	41
5	Focus Area III: Stakeholder Engagement and Regional Coordination	42
5.1	Overview	42
5.2	Stakeholder Perspectives	42
5.3	Policy Interventions	44
	Additional Resources	45
6	Recommendations and Conclusion	46
	Annexes	47

1. INTRODUCTION

1.1 The FUTURE-Tourism Project

The “FUT-Tourism: Rethinking Tourism and MSMEs in times of COVID-19” project was established by the United Nations Development Programme (UNDP) in Barbados and the Eastern Caribbean in January 2021, to revamp the tourism sector through regional dialogues and policy solutions, and technical and financial assistance for Micro, Small, and Medium Enterprises (MSMEs) within the sector. The following ten (10) countries and territories in the Eastern Caribbean were targeted: Anguilla, Antigua and Barbuda, Barbados, the British Virgin Islands, Dominica, Grenada, Montserrat, Saint Kitts and Nevis, Saint Lucia and Saint Vincent and the Grenadines.

The project aims to technically and financially support MSMEs that are directly or indirectly linked to the tourism sector or have been significantly impacted by the COVID-19 pandemic. With gender equality and empowerment of women at its core, the project seeks to promote economic diversification, job creation and resilience with the “Blue Economy for Green Islands” approach in the tourism sector, thereby boosting recovery and supporting the digitally enabled transformation of the business processes and value chains of MSMEs.

There are three (3) main project outputs:

- (i) **Output 1:** Regional dialogue and policy solutions for the tourism sector enhanced through sub-regional and national diagnostics using consultative and participatory approaches:

Output 1.1: This output will create regional dialogues bringing together governments, regional organisations, big tour operators and anchor companies with MSMEs and other relevant stakeholders.

Output 1.2: Building on 1.1, this output seeks to develop or enhance country specific diagnostics in at least five (5) countries, and one (1) sub-regional analysis for the Eastern Caribbean. Consultations will provide data and compile information on the current situation, existing policies, on going efforts, needs, trends, scenarios, and opportunities that could have a catalytic impact on the sector.

- (ii) **Output 2:** Technical support for MSME retooling and access to markets within tourism value chains:

Focuses on the development of environmentally sustainable value chains with an inclusive business approach where MSMEs, women-owned businesses, producers’ associations and cooperatives that operate either as suppliers, manufacturers, distributors and/or commercial channels receive the support required to adapt to the new market conditions.

- (iii) **Output 3:** Financial assistance for the economic recovery of MSMEs affected by the impact of COVID-19:

Provision of grants to MSMEs to facilitate strategic investments and to further support resilience recovery from the impact of COVID-19. This may include investments to repurpose production facilities to manufacture high demand goods and services related to the tourism industry and/or transition from an in-person, physical interaction business model to a virtual and online one.

This report focuses on Output 1.2 and builds on the findings of the UNDP Regional Policy Dialogues on Tourism held between May and June 2021 and provides data and compiles information on impacts, current policies, ongoing efforts, needs and opportunities that could have an impact on the tourism sector.



1.2 Project Context

Tourism has been one of the most affected economic sectors due to the COVID-19 pandemic. The Eastern Caribbean saw its first set of COVID-19 cases being reported in March 2020 with travel restrictions instituted shortly thereafter. According to the World Tourism Organisation (UNWTO, 2020)¹, by April 6th, 2020, **96 per cent of all worldwide destinations had introduced travel restrictions** in response to the pandemic and around 90 destinations had completely or partially closed their borders to tourists. The Caribbean, as the most tourism dependent region in the world, was particularly hard hit.

The World Travel & Tourism Council (WTTC) reported that COVID-19 stripped the region's economy of US\$33.9 billion in 2020. The Caribbean Travel & Tourism sector's contribution to Gross Domestic Product (GDP) dropped 58 per cent, higher than the global average. Travel & Tourism's impact on the region's GDP fell from USD\$58.4 billion (14.1%) in 2019, to USD\$24.5 billion (6.4%) in 2020. Heavy reliance on international travel made Caribbean countries even more vulnerable. Travel and tourism GDP contributions in countries of the Organisation of Eastern Caribbean States (OECS), such as Saint Lucia saw a steep decline of 71.7 per cent, Dominica 64.6 per cent, St Kitts and Nevis 72.3 per cent, Grenada 65.5 per cent and St Vincent and the Grenadines 67 per cent (WTTC, 2020²).

¹ UNWTO (2020) https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-04/TravelRestrictions_0.pdf

² World Travel and Tourism Council, WTTC (2020)

<https://wtcc.org/Portals/0/Documents/Press%20Releases/WTTC%20research%20reveals%20Travel%20Tourism%20sectors%20contribution%20to%20Caribbean%20GDP%20dropped%20by%2034%20billion%20in%202020.pdf?ver=2021-05-27-121243-767>



Over 680,000 Caribbean Travel & Tourism jobs were lost, the majority in the Small and Medium Enterprise (SME) sector (WTTC, 2020) with many of these businesses owned by or employing women. Across the world, women make up most workers in the tourism industry, more than half in the accommodation and food services sectors. Women are more likely to undertake entrepreneurial activities in tourism than in other sectors and many women hold low skilled jobs in the tourism sector, making them vulnerable to shocks (UNCTAD, 2020³). Given the increasing care responsibilities of women, exacerbated by closures/lockdowns and online learning during the pandemic, it is anticipated that women's livelihoods in the tourism industry will not be easily rebuilt.

Micro, Small and Medium-sized Enterprises (MSMEs) which play a major role in most economies and represent about 90 per cent of businesses and more than 50 per cent of employment worldwide⁴ are equally challenged to rebuild post-pandemic. In the Caribbean, MSMEs account for 1 in 2 jobs and more than one-third of output. However, narrower profit margins and lower liquid reserves than other businesses, make it more difficult for MSMEs to withstand economic shocks. Additionally, MSMEs are characterised by many players operating informally and therefore some are unable to participate in social protection programmes such as unemployment benefits. One approach proffered to build the resiliency of MSMEs, is to build capacity for electronic commerce so businesses can engage suppliers and customers in real-time, while supporting health protocols and reducing supply chain delays that can lead to operational challenges.

While the anticipated travel & tourism rebound in the Caribbean started in 2021, recovery has taken much longer than anticipated as some countries have experienced a resurgence of the virus amidst new variants and vaccine hesitancy. As part of COVID-19 recovery efforts, the United Nations Development Programme (UNDP) Barbados and the Eastern Caribbean, in collaboration with ten countries and territories and partners, has launched the "FUT-Tourism: Rethinking Tourism and MSMEs in times of COVID-19" project to support governments, national institutions and the private sector including

MSMEs, to quickly adapt and respond to the contemporary needs of tourism demand.

1.3 Objectives of the Diagnostic Report

The main objectives of the diagnostic report are:

- To assess digital infrastructure at country level
- To examine opportunities for digital entrepreneurship for MSMEs in the tourism sector
- To identify market trends and opportunities or MSMEs in the tourism sector
- To identify catalytic interventions which are gender-responsive and reflect on specific women's needs to access training, financing or technical support
- To identify initiatives that will accelerate the transition towards a more inclusive and sustainable tourism industry and progress towards the Sustainable Development Goals (SDGs)

1.4 Diagnostic Methodology

The country selection for the diagnostic study was determined through consultations with the UNDP FUT-Tourism Project Coordinator and based on the timely response by countries to the invitation to participate in a country-specific diagnostic study.

The diagnostic study employed secondary and primary data collection methods. Secondary research included a literature review and analysis of tourism and related sector strategies and action plans, including for the digital economy; tourism demand, market assessment and performance reviews; statistical analysis; and competitive analysis.

A virtual focus group with tourism MSMEs in Dominica and a virtual interview with the President of the Dominica Hotel and Tourism Association

³ https://unctad.org/system/files/official-document/ditcinf2020d3_en.pdf

⁴ <https://www.worldbank.org/en/topic/sme/finance>

(DHTA) formed part of the consultative process and the primary data collection. Focus group participants were selected from the UNDP's Tourism MSME database which was created for the FUT-Tourism project. The MSME database for Dominica comprised of 153 MSMEs⁵. The participants were purposively selected to ensure representation from the Caribbean tourism's 8 sub-sectors (**See Figure 1- Caribbean Tourism Sub-sectors**). These sub-sectors represent the key players in the regional tourism value chain.

The initial invitation for the focus group (sent to 15 persons) had an overwhelming response, with nine (9) responses in the affirmative, however, only four (4) participants attended on the designated date. Focus group participants were anonymized and their names coded (e.g., DG01) to protect their identity. The focus group also included a representative of the Kalinago territory, home to Dominica's indigenous community. **See Appendix I - Interviewee Profiles.**

Two (2) interview requests were sent to the Ministry of Tourism, International Transport and Maritime Initiatives (MTITMI), but a meeting could not be arranged within the project's timetable. The MTITMI did participate in the diagnostic study's project kick-off meeting in October 2021.



Figure 1- Caribbean Tourism Sub-Sectors



Source: CTO⁶, 1999.

⁵ The MSME database had several double registrants for a single business, this, combined with other database errors means that the sample population is much less than reported. It was beyond the author's scope of works to sanitize the database..

⁶ Caribbean Tourism Organization (1999). A Guide to Tourism Careers, Education and Training in the Caribbean.

1.4.1 Limitations

The diagnostic report is not meant to be an in-depth analysis of every aspect of the tourism sector in Dominica but focuses on the themes and related issues that emerged during the project's Regional Policy Dialogues, with special emphasis on MSMEs in the tourism sector. The report does not, for example, include a diagnostic on institutional arrangements, air and maritime sectors, funding mechanisms or tourism legislation.

Desk research and virtual collection methods do not provide a verification means or an evaluation of the state of the tourism product or the opportunities for diversification. Conducting a virtual focus group, though practical in the COVID-19 era, is not an inclusive consultative process particularly if the informal sector is to be captured in the diagnostic. Lack of connectivity, devices and/or digital skills may have prohibited participation by some MSMEs. Furthermore, tourism MSMEs lack of participation in the virtual interviews could also be attributed to some level of fatigue with consultations or research/report preparations. Many tourism MSMEs across the sub-region described themselves as being in "survival mode", therefore income generating opportunities were prioritized over engaging with the Consultant.

Additionally, the Consultant was constrained by time, as six (6) diagnostic studies, including this report for Dominica, were to be researched, drafted, and finalized in eighty (80) workdays (4 months).

The primary data collection commenced during the start of the busy winter-tourism season and continued during the Christmas season, which made key informants/potential interviewees tardy or unresponsive.

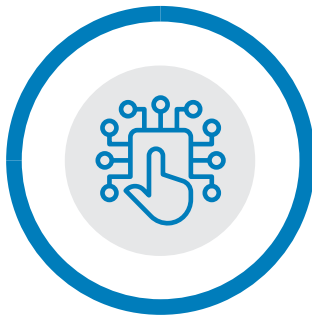
1.5 Structure of the Report

The diagnostic report for Dominica focuses on three (3) of the four (4) priorities identified in the Regional Policy Dialogue (See **Figure 2**). The fourth area identified in the Regional Policy Dialogue-Monitoring Key Performance Indicators, is treated as a cross cutting issue, as monitoring and evaluation are central to programme management; and project planning, implementation, and closure.

The three (3) priority areas form the core diagnostic areas and sections of the report. Each focus area includes stakeholder perspectives and policy interventions. Additional resources are provided at the end of each focus area. The diagnostic focus areas follow the introduction and the country profile. The report ends with recommendations and conclusion.

Cognizant of the significant role that women play in the Caribbean MSMEs and tourism sectors, and the need for a gender-sensitive approach to the reporting and analysis, the current initiatives and policy solutions proffered in the study also highlight linkages with the SDGs. Throughout the report one (or more) of the following 17 symbols related to the SDGs are highlighted:

Figure 2- Areas of Focus for Diagnostic Study



Digital Transformation of MSMEs, including the informal sector



Diversification of the product offering: Product and Marketing Development



Stakeholder engagement and regional coordination



Source: UNDP Barbados and the Eastern Caribbean⁷, 2021

The remaining sections of the report are structured as follows:

Section 2- Country Profile

The section includes a review of tourism performance by source markets, category of visitors, purpose of visit and assessment of the contribution of tourism to the economy. The impact of COVID-19 on tourism demand, international and regional tourism trends are also provided.

Section 3- Focus Area I: Digital Transformation of MSMEs, including the informal sector

This section provides a detailed digital diagnostic for the country using the World Bank's (WB) Digital Economy Levers. The chapter also includes a SWOT analysis for Digital Transformation of Tourism MSMEs and stakeholder perspectives about the challenges, opportunities and barriers they see for their businesses. Policy interventions are also provided.

Section 4- Focus Area II: Diversification of the product offering: Product and Market Development.

This section includes an assessment of the country's core tourism products and a competitive analysis that considers changing consumer behaviour and travel trends. Stakeholder perspectives of the country's product offerings and opportunities are also included. A SWOT analysis for product and market development and policy interventions are also provided.

Section 5- Focus Area III: Stakeholder engagement and regional coordination

This chapter provides an account of stakeholder engagement and examples of regional coordination that has been strengthened since the pandemic. Stakeholder perspectives are presented, as well as policy interventions.

⁷ <https://easterncaribbean.un.org/en/sdgs>

Section 6- Recommendations and Conclusion

The final section of the report provides over-arching recommendations for a more adaptive and responsive tourism industry. The chapter stresses the need

to de-emphasize volume driven strategies and to embrace quantitative and qualitative indicators of tourism's performance and benefits.



2. COUNTRY PROFILE

2.1 Dominica in Brief

The Commonwealth of Dominica attained its independence from Britain on November 3, 1978. Like several of its Caribbean island neighbours, Dominica had thriving indigenous populations before Christopher Columbus' exploration. The Ortoroids were early inhabitants, followed by the Arawaks and the Kalinago (or Caribs), who journeyed from South America. Successive battles for power by European colonisers drove many from the Kalinago community back to South America. Today, the Kalinago number around 2,000 and their 3,700-acre territory in northeast Dominica is a major community tourism and heritage attraction.⁸



Following independence, Dominica credited its economic success to a thriving agriculture sector, with banana as its chief export. By the 1990s and into the next decade, new trade rules, loss of preferential market access and competition, resulted in a sharp and gradual decline in banana exports. Today, while agriculture remains important, tourism has become a vital pillar of Dominica's economic development. The country's abundance of ecological assets including its tropical forests, waterfalls, mountains, lakes, volcanoes, and a UNESCO World Heritage site at Morne Trois Pitons National Park, has positioned Dominica as the "nature island of the Caribbean."

As a Small Island Developing State (SIDS), Dominica's vulnerabilities include size, global economic shocks, inability to capitalize on economies of scale, distance from international source markets and limited economic diversification, however, climate change impacts are the biggest threat to the country's sustainability. Tourism is both a victim and a contributor to climate change. A tourism product predicated on

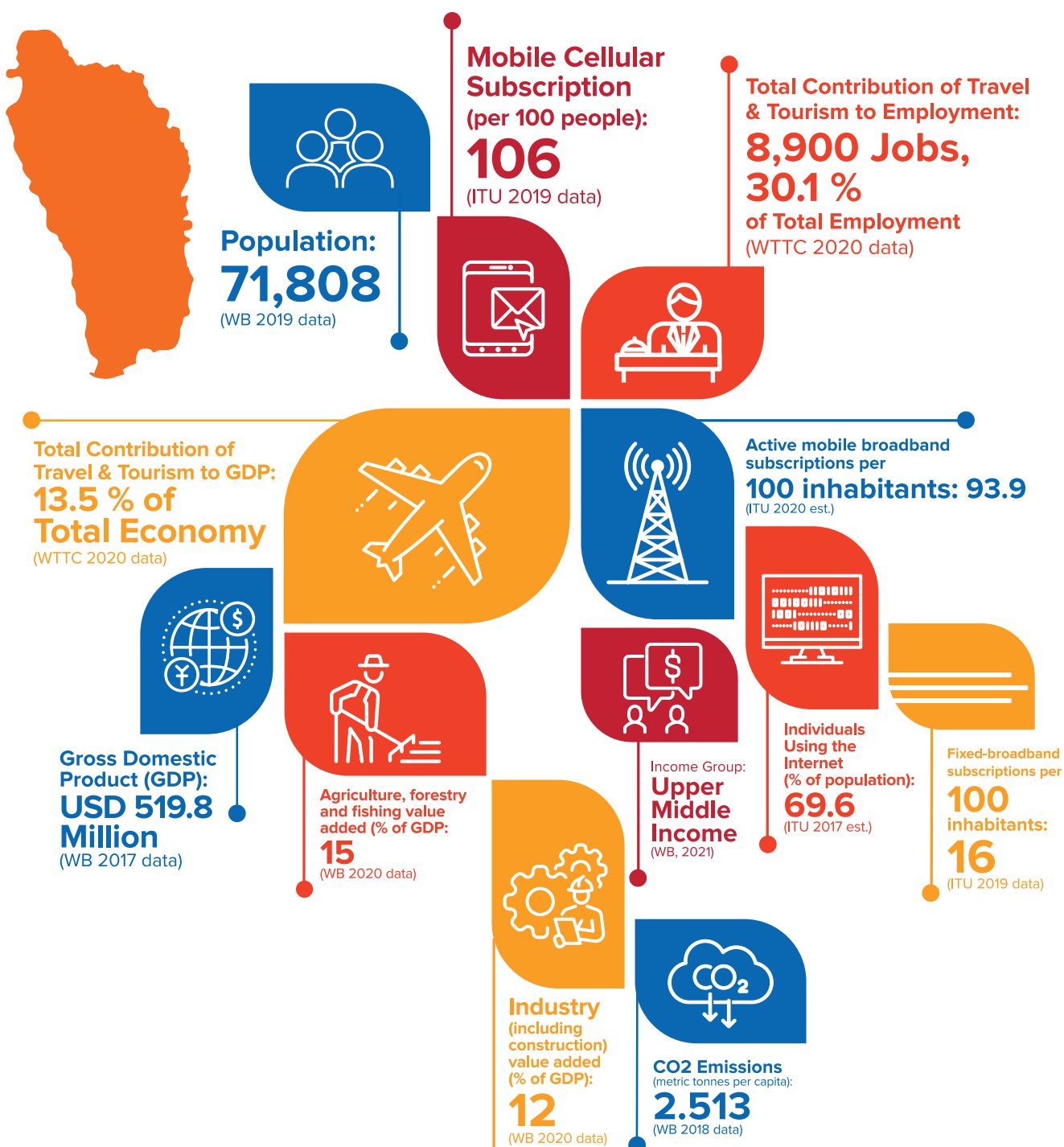
natural assets is a fragility that SIDS must contend with, as climate change impacts can lead to bio-diversity loss, loss of forest cover, loss of aesthetic appeal and general imbalance in ecosystems, threatening the livelihoods of already vulnerable communities. Additionally, the loss of ecological assets represents lost opportunities for tourism and a diminished visitor experience. Within recent times, the intensity and frequency of hydro-meteorological events such as storms and hurricanes have repeatedly set-back developmental gains. Tropical Storm Erika in 2015 was followed by Category 5 Hurricane Maria in 2018, which resulted in EC \$3.54 billion (US \$1.313 billion) in damages and losses; the equivalent of 226 per cent of Gross Domestic Product (GDP). After Maria's devastation of September 18, 2017, Prime Minister Roosevelt Skerrit declared four days later, at a United Nations meeting, that Dominica's vision is to build the first climate resilient nation in the world by 2030. Efforts towards attaining this vision is articulated in the [National Resilience Development Strategy Dominica 2030](#), which was developed in 2018⁹. The country has also prepared the Climate Resilience and Recovery Plan (CRRP) 2020-2030 which serves as an accompanying document to the NRDS. The CRRP acts as a guide for the preparation of sector strategic plans.



⁸ <https://discoverdominica.com/en/places/67/kalinago-territory>

⁹ www.dominica.gov.dm/images/documents/national_resilience_development_strategy_2030.pdf

FACT SHEET



Sources: World Bank (WB, 2021)¹⁰; International Telecommunications Union (ITU, 2021)¹¹; World Travel and Tourism Council (WTTC, 2021)¹².

¹⁰ <https://data.worldbank.org/country/dominica>

¹¹ <https://www.itu.int/md/D18-RPMAMS-C-0002>

¹² <https://wtcc.org/Research/Economic-Impact>

2.2 Initiatives Toward A Climate Resilient Nation

Dominica's progress (Financial Year 2020-2021) on becoming a climate resilient nation and its achievements of relevance to the diagnostic focus areas include:

- Capacity Building of Micro, Small and Medium Enterprises (MSMEs):** financial planning, business development and technical support for over 113 persons was provided during the fiscal year. MSMEs are also receiving on-going technical support on proposal writing, financial management and business plan development. Training was also provided for members of the Dominica Hotel and Tourism Association (DHTA) and Dominica Youth Business Trust. A monitoring and evaluation framework has been developed to assess the ongoing impact that the training has had on MSMEs.
- Stakeholder Engagement and Regional Co-ordination:** CREAD has collaborated with the Commonwealth of Learning (COL) to design an integrated platform that would connect government, organisations, communities and individuals, around a disaster response, as part of the Community Emergency Readiness Initiative (CERI). The Ministry of Tourism's Small Business Unit has collaborated with University of the West Indies Open Campus in Dominica, to offer training and sessions for business clients and entrepreneurs. The Unit has also collaborated with the Discover Dominica Authority (DDA) and the Caribbean Tourism Organisation (CTO) to organise workshops for two hundred and twenty-five (225) tourist vendors to include vendors from multiple areas including the Kalinago territory to upgrade their marketing and promotional and customer service skill sets.¹³



- Product and Market Development:** The Ministry with responsibility for Tourism developed an extended stay visitor programme aimed at attracting digital nomads to Dominica (Work in Nature). The Climate Resilience Execution Agency for Dominica (CREAD) has also been working to support the establishment of Dominica as a Global Centre for Agriculture Resilience – key areas of work include concept development for agro-parks, a model agriculture centre, food stores, farm stores and the blue economy. CREAD has also been working with the Ministry of Blue and Green Economy, Agriculture & National Food Security (MBGEAFS) on the establishment of a 25-acre smart sustainable circular farm project and branding for the nutraceutical industry.



2.3 Tourism in Dominica

2.3.1 Significance of Tourism to the National Economy

Tourism is given high priority in Dominica as the Government sees tourism as a valuable tool for economic growth and diversification and has undertaken numerous initiatives over the years in support of this thrust, including capital projects for sites and attractions, training, product development and promotion.

¹³ Commonwealth of Dominica Economic and Social Review for the Financial Year 2020 / 2021



“The mission for tourism development in Dominica is to develop the tourism industry in a responsible manner that will involve, engage and benefit ALL Dominicans, conserve the natural environment, preserve the authentic Dominican culture, and exceed the expectations of guests.”¹⁴

WTTC research reports that in Dominica, Travel & Tourism accounted for 35.9 per cent of employment (12, 600 jobs) in 2019 and contributed 32.6 per cent to GDP to a value of XCD 510.0MN (USD188.9MN).¹⁵

2.3.1 Significance of Tourism to the National Economy

Dominica’s stay-over arrivals grew steadily from 2015 up to the last quarter of 2017, before the island was ravaged by Hurricane Maria in September of that year. As the island recovered from the hurricane disaster, tourism declined 13 per cent between 2017 and 2018 but grew by 42 per cent between 2018 and 2019. As the pandemic hit the region and COVID-19 cases started to rise the Prime Minister shut the island’s borders on March 26, 2020. The impact of closed borders and suppressed tourism demand globally, has resulted in a decline in arrivals in all categories- cruise, yacht, and stay-over arrivals. The most precipitous decline occurred in stay-over arrivals (76 %) arrivals and a smaller but still significant decline occurred in cruise arrivals (49 %). **Table 1** illustrates the number of visitor arrivals by main category and **Figure 3** demonstrates the trends between 2015 and 2020 for cruise, stay-over and yacht arrivals. While there were noticeable increases in the year preceding the pandemic in each category, yacht arrivals have been relatively flat pre-pandemic.

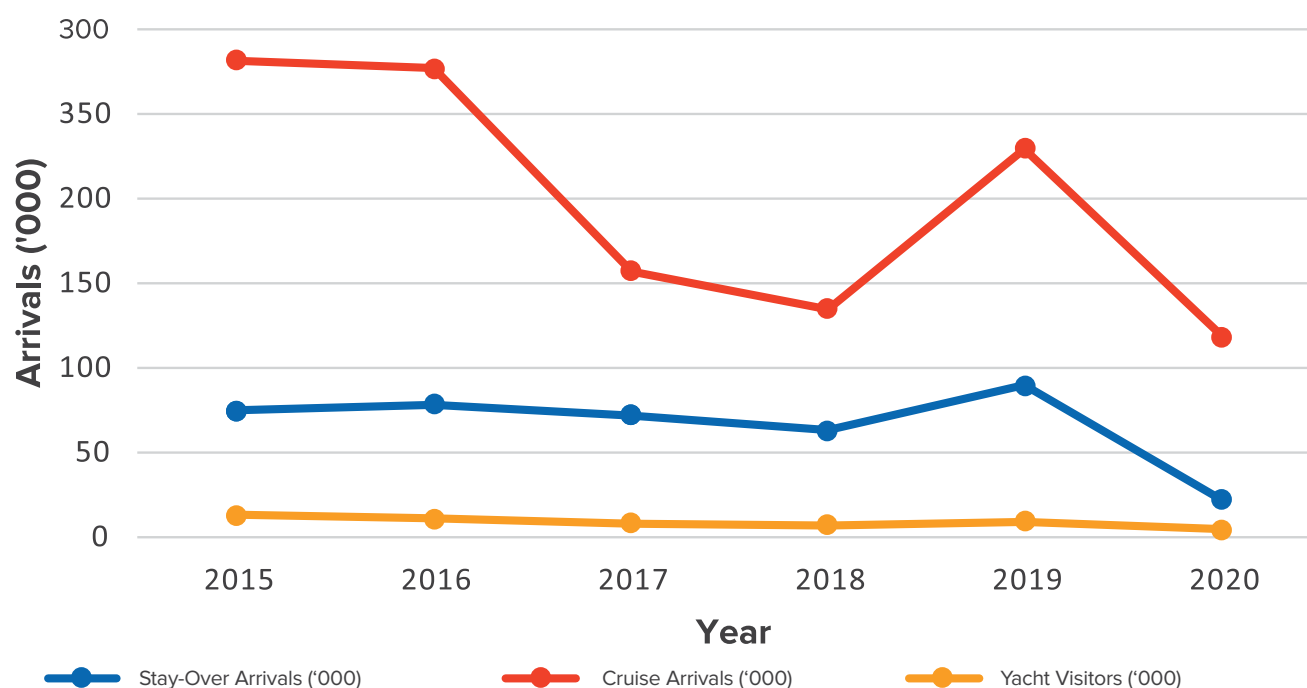
Table 1- Number of Visitor Arrivals by Main Category 2015-2020

Visitor Category	2015	2016	2017	2018	2019	2020
Stay-Over Arrivals ('000)	74.5	78.1	72.2	62.9	89.6	21.7
Cruise Arrivals ('000)	281.5	277.1	157.0	134.5	229.7	118.0
Yacht Visitors ('000)	12.9	10.9	8.0	6.8	9.0	4.1

Data Source: CTO

¹⁴ Commonwealth of Dominica Economic and Social Review for the Financial Year 2020/2021

¹⁵ <https://wttc.org/Research/Economic-Impact>

Figure 3- Trends in Visitor Arrivals by Main Category 2015-2020

Data Source: CTO

When cruise calls and yacht calls data are compared, the number of cruise calls are far less than the number of yacht calls (**See Table 2**). While cruise ships bring large passenger volumes for a few hours, the economic impact is relatively small. For example, 89,600 stay over arrivals and 9,000 yacht passengers spent USD 117.7 Million in 2019, while for that same year, 229,700 **cruise passengers**

spent USD 7.4 Million, a mere 6.32 per cent of total visitor spend¹⁶. Yacht calls are more frequent, have a smaller volume, bring longer stay visitors and have a greater economic impact, as the yachties interact with many businesses along the local tourism value chain. Up to date and verifiable data on visitor expenditure and the sector's total economic impact (for fuel, repairs and other services) is needed.

Table 2- Cruise Calls, Yacht Calls & Visitor Expenditure 2015-2020

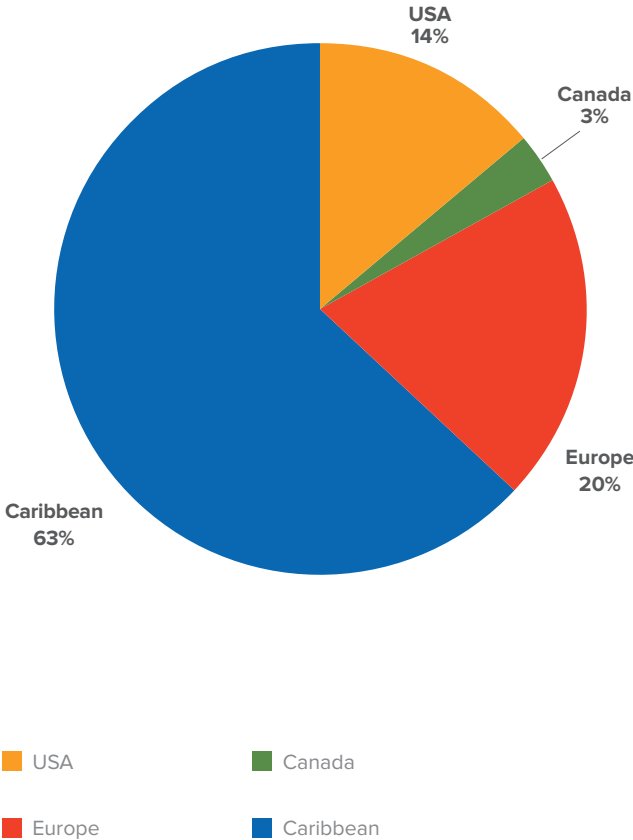
Category	2015	2016	2017	2018	2019	2020
Number of cruise ship calls	187	163	107	93	172	95
Number of yacht calls	3,175	3,153	3,021	1,831	3,183	1,354
Total Visitor Expenditure – XCD Million	336.97	276.21	203.46	220.57	284.74	79.72

Data Source: Eastern Caribbean Central Bank (ECCB)

¹⁶ Data compiled by CTO and submitted by the National Statistical and Tourism Offices.

Despite the often mooted challenges with intra-regional travel, the Caribbean has consistently been Dominica’s main source market. This has remained unchanged post-Hurricane Maria and even during the pandemic. While Dominica’s stay-over arrivals grew in all major source markets (USA, Canada, Europe and the Caribbean) over the recovery period 2018 to 2019, the Caribbean market grew the largest. Stay-over arrivals from the Caribbean increased by 48 per cent from 36,900 stay-over arrivals in 2018 to 54,700 arrivals in 2019, representing a 61 per cent share of the total. **Figure 4** presents the tourist arrival distribution by major source markets in 2019. Caribbean arrivals originate primarily from Guadeloupe, Martinique and Antigua and Barbuda.

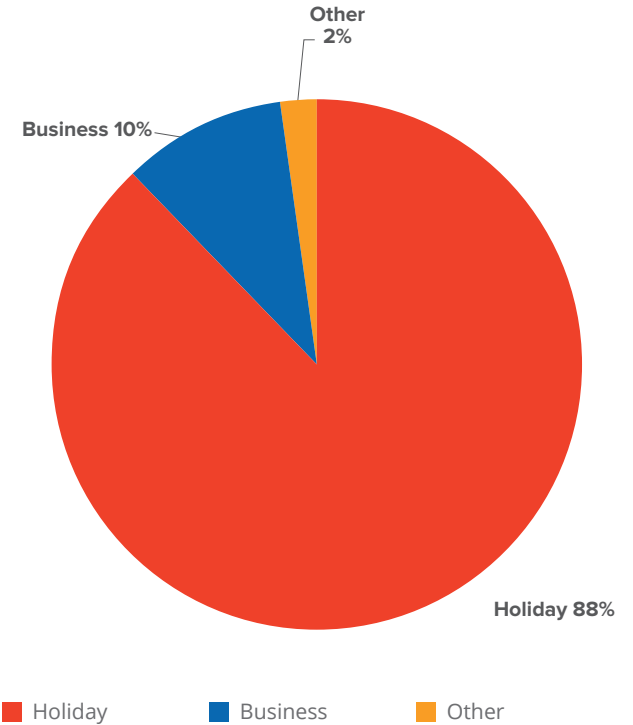
Figure 4- Stay-Over Arrivals by Major Source Markets 2019



Data Source: CTO

Visitors to Dominica travel mainly for holiday, in 2019, there were 67,484 tourist arrivals whose main purpose of visit was holiday and 8,704 arrivals for business. **Figure 5** shows percentage distribution of tourist arrivals by purpose of visit. Demographic data for 2019 shows that the vast majority of tourist arrivals are either in the 15-34 age group (31.4%) or 35-54 age group (36.3 %) and 52 per cent of visitors were male and 48 per cent female. This data would have implications for the destination’s marketing strategy including the fact that the 2022 travel trends highlights, that as COVID-19 restrictions ease, younger travellers are the first to return to travel.¹⁷

Figure 5- Tourist Arrivals by Main Purpose of Visit 2019



Data Source: CTO

Data for length of stay for 2017- 2019 was unavailable but the average length of stay reduced from 7.9 nights in 2016 to 6 nights in 2020. It is anticipated that the “Work in Nature” programme which aims to attract digital nomads, would have a positive impact on average length of stay and overall visitor expenditure in 2021 and beyond.

¹⁷ WTTC and Trip.Com (2021)

2.3.1 Significance of Tourism to the National Economy

Like many destinations in the region and internationally, Dominica has been severely impacted by the COVID-19 pandemic. The ensuing pandemic has lengthened Dominica's hurricane recovery period, but the island has forged ahead and adapted.

According to WTTC (2021), Dominica's Travel & Tourism employment levels were down 29.4 per cent and GDP by 64.6 per cent in 2020 when compared to 2019. Preliminary data from the DDA as of March 31, 2021, pointed to a 94 per cent decline in total arrivals over the corresponding period from 84,625 stay-over arrivals to 5,298. This is an estimated loss in overall visitor revenue of XCD 166.3 million. Flight capacity and seat capacity also declined by 61.2 per cent and 62.4 per cent, respectively, over the one-year period March 2020 to March 2021.

Cruise arrivals for the 2019/2020 cruise season (November to April) totalled 189,839 passengers, a 25 per cent decline over 2018/2019 season—attributed to the cancellation of 24 scheduled cruise calls in March and April 2020. A full cancellation of the 2020-2021 cruise season resulted in a 100 per cent decline in potential revenues, bringing the total revenue loss since the advent of COVID-19 in Dominica (March 2020 to March 2021) to XCD 20 million.

Unemployment is considerably higher among females than among males in most countries. A 2014 World Bank report noted that in Dominica, individuals younger than 30 years old account for 49.7 per cent of the total number of persons unemployed - 55.4 per cent of female and 45.3 per cent of male (Parra-Torrado, 2014)¹⁸. The OECS Commission (2020) reports that persistently high unemployment rates in member states makes it difficult to provide social protection such as unemployment benefits. The COVID-19 pandemic would have only served to make a challenging situation worse. Dominica's social protection support increased 24 per cent from pre-COVID-19 levels and as part of its COVID-19 response, the government, with funding from the World Bank,

implemented an Emergency Agricultural Livelihoods and Climate Resilience Project to provide direct input subsidies to the local farming community.¹⁹



2.4 International & Regional Trends

The World Tourism Organisation (UNWTO) reported a modest improvement in international tourism arrivals in June and July 2021. However, for the first 7 months of 2021 arrivals were 40 per cent below 2020 levels, and down 80 per cent pre-pandemic levels of 2019. Small islands in Africa, Asia and the Pacific, and the Caribbean, as well as a few small European destinations, recorded the best performance in June and July, with arrivals coming close to, or sometimes exceeding pre-pandemic levels. The UNWTO Panel of Experts continue to expect a rebound in 2022, driven by unleashed pent-up demand, mostly during the second and third quarters of that year (UNWTO, 2021).²⁰

According to the World Travel and Tourism Council (WTTC), which presents the global Travel & Tourism private sector, the Caribbean's Travel & Tourism sector is recovering at a faster rate than any other region in the world, with its contribution to GDP expected to rise more than 47 per cent in 2021, compared to just 30.7 per cent globally. The Caribbean is now benefiting from more relaxed restrictions around the world and vaccine availability, which is in turn boosting international travel spend and aiding the region's economic recovery.

While the global economy was set to receive a modest 30.7 per cent year-on-year increase from Travel & Tourism in 2021, representing USD 1.4 trillion and driven mainly by domestic spending, the Caribbean region was expecting a year-on-year increase of 47.3 per cent—an increase of nearly USD 12 billion, driven by both international and domestic travel

¹⁸ Parra-Torrado, M (2014). Youth Unemployment in the Caribbean. Caribbean Knowledge Series. World Bank <https://documents1.worldbank.org/curated/en/756431468012643544/pdf/883620WP0Box385224B00PUBLIC00April02014.pdf>

¹⁹ Organisation of Eastern Caribbean States (2020). COVID-19 and Beyond. Impact Assessments and Responses

²⁰ World Tourism Organization (2021). World Tourism Barometer. Volume 19 (5) September 2021



spend. However, while the Caribbean is recovering faster than other regions, this is still below its performance in 2019, a record year for the sector, where Travel & Tourism represented more than 14 per cent of the region's GDP, contributing more than USD 58 billion to its economy.

WTTC's research reveals that at the current rate of recovery, Travel & Tourism's contribution to the Caribbean economy could see a further year-on-year rise of 28.7 per cent in 2022, representing a boost of USD 10 billion.

After a 680,000 Travel & Tourism jobs were lost in the Caribbean in 2020, a 12 per cent rise in jobs (compared to 0.7% globally) was expected in 2021, with a similar potential year-on-year jobs rise across the sector in 2022 by 11.5 per cent (WTTC, 2021)²¹.

The Caribbean region was expecting a year-on-year increase of 47.3 per cent – an increase of nearly USD 12 billion, driven by both international and domestic travel spend

The CTO expects 2021 tourist arrivals to the region to exceed 2020 levels by 60 to 70 per cent but still 23.3 per cent below 2019 levels.

²¹ World Travel & Tourism Council. Caribbean Travel & Tourism sector recovering faster than any other region in the world. <https://wtcc.org/News-Article/Caribbean-Travel-and-Tourism-sector-recovering-faster-than-any-other-region-in-the-world>

3. FOCUS AREA I: DIGITAL TRANSFORMATION OF MSMEs IN THE TOURISM SECTOR

3.1 Overview

The tourism and hospitality industry has long been transformed by Information and Communications Technologies (ICTs). The industry continues to use innovative ICT tools along the tourism value chain- from the Online Travel Agencies (OTAs), to pre- and in-trip virtual tourism experiences, to artificial intelligence, to geo-tagging, to social media, and contactless transactions. The industry continues to innovate in the pandemic era, using ICT tools to map and control the risk of diseases by contact tracing, mapping COVID-19 hotspots and sending mobile alerts for tourists and residents to avoid crowded areas and practice social distancing.

The use and adoption of digital technologies provide new opportunities to improve productivity and increase the market access of the private sector. Many MSME that had the capacity to improve their on-line presence during the pandemic, did so, others were unable to transition largely due to a lack of know-how, devices and/or connectivity.

On the public side, digital technologies increase the efficiency of public expenditure and enhance the cost effectiveness of public services. Overall, digital technologies have been proven to boost growth, expand opportunities and improve service delivery (World Bank, 2020)²².

The COVID-19 pandemic created innovation in the private and public sectors, where many services became accessible and payable online. Simultaneously, the move to more online services brought the digital divide into greater focus, as those without connectivity were left behind, even registration for COVID-19 vaccines in some Caribbean territories were initially on-line, which meant only those who were connected moved ahead in the queue, irrespective of health or age vulnerability. The education sector also continues to be challenged globally, where disadvantaged communities, cannot easily adapt from face-to-face learning to on-line learning, whether synchronous or asynchronous, due to the lack of connectivity and/or devices.

The International Telecommunication Union (ITU) views technology as a major accelerator of economic growth and development and an important driver of progress towards the 17 SDGs. Their 2020 edition of Measuring Digital Development: Facts and Figures highlights some global trends:

- **Mobile phone ownership widespread-** Ownership of mobile phones has been shown to be an important tool to empower women. In almost one third of the economies for which data are available (31 out of 69), women's mobile phone ownership is close to parity with that of men.
- **Rural areas continue to face greater challenges** than people in urban areas in terms of remaining connected during lockdowns, especially in developing economies. Large swathes of the rural landscape are still not covered by mobile broadband networks, and fewer households in these areas have access to the Internet.
- **The rollout of communications infrastructure is slowing-** observed since 2019 but too early to say if it has stalled because of the pandemic.

²² World Bank (2020). Acceleration Digital Transformation in Zambia. Digital Diagnostic Report. The World Bank

- **Mobile cellular subscriptions have been declining** for the first time in history, and the growth in mobile broadband subscriptions is levelling out. It is uncertain if this is due to the COVID-19 crisis.
- **Young people are enthusiastic adopters of technology** and have relatively high levels of Internet use. This trend is observable where connectivity is available and affordable. Young people aged 15 to 24 have a 70 per cent usage rate. This trend is encouraging in view of the fast-growing youth demographic in much of the developing world.
- **International bandwidth usage growth accelerated in 2020.** International bandwidth usage is estimated to have grown globally by 38 per cent. Growth of international bandwidth usage in developing countries outstripped growth in developed countries (ITU, 2020).²³

Recent research by the ITU (2021) points to gender parity in Internet usage in the Americas, a region of 35 countries, which includes Saint Lucia and 15 other Caribbean SIDS. In fact, a very small inverse

gender gap was observed in the Americas region in 2020, where an average 77 per cent of women and 76.3 per cent of men used the Internet. The ITU also noted that the COVID-19 pandemic has had an accelerating impact on digital development in the Americas region in many sectors, including retail, public services, education, health, and agriculture²⁴.



The World Bank has identified five (5) key levers that drive the growth of a digital economy and serve as diagnostic tools. These levers- digital infrastructure, digital skills, digital entrepreneurship, digital platforms, and digital financial services- are the foundation of digital transformation opportunities that can be applied in many social and economic sectors such as tourism and agriculture. **Table 3** presents the digital economy levers and a description. These levers have been used to provide a digital diagnostic for Dominica in Section 3.2.

Table 3- World Bank's Digital Economy Levers

DIGITAL ECONOMY LEVERS	DESCRIPTION
Digital Infrastructure	Examines connectivity (mobile and Internet), the Internet of Things (mobile devices, computers, and geospatial instruments) and data repositories (e.g., data centres and clouds).
Digital Skills	User skills for effective use of ICT tools, systems, and devices. Business skills to identify how digital technologies can create new opportunities or new business models.
Digital Entrepreneurship	The process of designing, launching, and running a new business, new product, or new service, where creating or using digital technology is a driver of new value creation.
Digital Platforms	Digital channels that offer products and services including government services and systems, as well as commercial platforms products and services.
Digital Financial Services	Provides individuals and households with convenient and affordable digital channels through which to pay, save, borrow, and insure. This can be firms or government digital channels that transact with customers and suppliers.

Source: World Bank (2020)²⁵

²³ Measuring Digital Facts and Figures 2020. International Telecommunications Union.
<https://www.itu.int/en/itu-d/statistics/pages/facts/default.aspx>

²⁴ ITU (2021) Digital Trends in the Americas 2021. International Telecommunications Union.

²⁵ World Bank (2020). Acceleration Digital Transformation in Zambia. Digital Diagnostic Report. The World Bank



3.2 Dominica's Digital Economy

The Government of Dominica views digitalisation as the backbone of its resilience and has demonstrated the prioritization of digital transformation by establishing the Digital Economy portfolio in December 2019. In 2021, the Government developed a National Digital Transformation Strategy. The strategy formulation process was facilitated by a Digital Readiness Assessment (DRA), a UNDP tool. Dominica was the first country in the world to pilot UNDP's new DRA tool, which was developed to assist governments in the evaluation of their digital transformation pathway and to identify priorities and gaps across the government, the business ecosystem, infrastructure, the regulatory environment, and human capacity. The tool provides rapid, high-level insights into a country's digital strengths and weaknesses.

The Government of Dominica has also secured financing from the World Bank for the implementation of the Caribbean Digital Transformation Project (CARDTP). The US\$28 million facility aims to develop the core foundations to enable digitization of Government and adoption of digital services, skills, and technologies among individuals and businesses.

The project includes three main elements:

- **Enabling environment-** creating a digital policy and regulatory enabling environment that will support a digital economy that drives competition, investment and innovation while promoting trust and security of online transactions.
- **Digital foundations-** Digital Government Infrastructure, Platforms and Services. This component will support public sector modernization, resilience, and delivery of digital public services to individuals and businesses.
- **Digital Skills-** Digital Skills and Technology Adoption with the goal of better equipping individuals and businesses for the jobs and economy of the future.²⁶



Digital infrastructure - data compiled by the ITU (2021)²⁷ demonstrates that Dominica performs well on some key indicators (based largely on 2019 data):

- 93.9 active mobile broadband subscriptions per 100 inhabitants – this at the higher end when compared with 35 countries in the Americas
- 16 fixed-broadband subscriptions per 100 inhabitants- this is greater than the global average
- 106 mobile cellular subscriptions per 100 inhabitants – this performance is middle of the range in the Americas. Saint Kitts and Nevis and Antigua and Barbuda are regional front-runners with 148 and 193 subscriptions, respectively
- 70 percent of individuals use the Internet (compared to 81 percent in Saint Kitts and Nevis and less than 30 percent in St Vincent and the Grenadines)

²⁶ Our Digital and Resilient Future: National Digital Transformation Strategy for Dynamic Dominica (Draft Version 1.2 September 2021)

²⁷ ITU (2021) Digital Trends in the Americas 2021. International Telecommunications Union

Digital skills assessment is highly subjective as it often based on self-reporting. The ITU considers the value for basic ICT skills as the average value of available recent data for four (4) computer-based activities: copying or moving a file or folder; using copy and paste tools to duplicate or move information within a document; sending e-mails with attached files; and transferring files between a computer and other devices. Using either ITU's definition or WB's definition of digital skills, in the absence of data, an assessment of Dominica's tourism MSMEs cannot be made. However, the draft 2021 Digital Strategy reports that 60 per cent of secondary school and college graduates have workforce-ready basic digital skills.

Digital entrepreneurship

The Government, in its draft 2021 Digital Strategy recognises that much work needs to be done to transform its own public services – *“Digital public administration within the government has much room for development. Electronic documents and records management systems are broadly missing, and document flows continue to be paper-based. The paper-base of government data is a key factor in the climate vulnerability of government public service delivery”*²⁸ (pg.9). Prior to the pandemic smaller players in the accommodation sector in Dominica did not have a booking system. However, the DHTA is providing digital entrepreneurship support to its members by providing access to a micro- Property Management System (PMS) that now enables accommodation providers to manage their own bookings, improve their record management and forecasting.

Digital Platforms and Digital Financial Services

Sixty per cent of the adult population of Dominica is using digital financial services.²⁸ Dominica is ranked 99 out of 193 countries globally on the 2020 United Nations E-Government Survey and is considered in the middle group of countries on the Online Services index (OSI), which assesses the national online presence of all 193 United Nations Member States. Infrastructure and human capital development are also more advanced than online services provision in Dominica²⁹. While Dominica was not one of the pilot countries for the implementation

of the Eastern Caribbean Central Bank's (ECCB) digital currency, DCash, which was launched in March 2021, the currency was introduced to the island in December 2021. Apart from DCash, MSMEs can also avail themselves of other digital payment platforms, including MLajan, a mobile wallet that has been developed and is being implemented by a local credit union- the Dominica Cooperative Societies League Limited³⁰. Credit unions are typically “trusted” more by MSMEs and are deemed more accessible than banks for loans, therefore there is an opportunity for such organizations to encourage greater use of digital financial services and their benefits to MSMEs.

3.3 Stakeholder Perspectives

The perspectives on digital transformation reflect the views of the focus group participants and the President of the DHTA, who were interviewed as part of the diagnostic study. The DHTA has 95 members covering all sub-sectors of the tourism industry- all of which are MSMEs.

There were notable transformative digital initiatives that occurred during the pandemic for focus group participants, as well as, among the membership of the DHTA. One participant (DG04), who represented three tourism sub-sectors- Adventure Tourism and Recreation; Food and Beverage, and the Travel Trade- also participated in the UNDP's FUT-Tourism project and received digital skills and other training, as well as grant funding. DG04 remarked:

“We made some serious changes that weren't quite revenue generating but they allowed us to pivot and has positioned us in a much better position, so we have gone full steam at digitizing what we do.”

Focus Group Participant, DG04

Other digital transformation initiatives undertaken by the tourism MSMEs during the pandemic included:

- On-line advertising (DG03)

- Delivery of enhanced training programme via Zoom (DG02)
- Creation of a booking line that allowed DHTA's very small accommodation providers to use the "freetobook" Property Management System (PMS)

One focus group participant (DG02) was also able to capitalize on the time difference of the digital nomads based in Dominica, whose workday was dictated by the time in European markets. The tourism operator was able to create customized packages for digital nomads who were free from 2pm Eastern Caribbean time.



²⁸ Our Digital and Resilient Future: National Digital Transformation Strategy for Dynamic Dominica (Draft Version 1.2 September 2021)

²⁹ United Nations E-Government Survey 2020. Digital Government in the Decade of Action for Sustainable Development

[https://publicadministration.un.org/egovkb/Portals/egovkb/Documents/un/2020-Survey/2020%20UN%20E-Government%20Survey%20\(Full%20Report\).pdf](https://publicadministration.un.org/egovkb/Portals/egovkb/Documents/un/2020-Survey/2020%20UN%20E-Government%20Survey%20(Full%20Report).pdf)

³⁰ <https://www.mlajan.com/>



The focus group participants expressed a general willingness to adopt digital solutions including payment solutions if the fees were reasonable, the technology widely available to their customers, and if there is an overall benefit to their business.

The DHTA President believes a lack of knowledge is the main barrier to adoption of technology by tourism MSMEs in Dominica, noting that a lack of knowledge may create the perception that having a digital presence is expensive, even with free tools available. A lack of technical know-how may also limit digital entrepreneurship among tourism MSMEs.

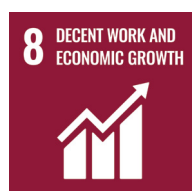
“They tend to focus on social media, focus on larger OTAs, don’t think it is affordable to have their own presence, lack of technical understanding. People feel secure in using a notebook.

We found that people are not really paying attention to record keeping unless you want a loan and certainly the bank is asking you for that, but it was never there before so you have never paid attention to it.”

DHTA President

The solutions from the DHTA’s perspective are:

- (i) Build awareness without a lot of the technical terms
- (ii) Identify what tools are available for MSMEs and the price- the applications must not be too expensive or complicated.
- (iii) Conduct small group training sessions- training must be relevant, training examples practical, procedures must be created so that businesses know how to continue on their own, but there should be follow-up (monitoring and evaluation).
- (iv) Training for women- make them aware of the training but put it at a time when it doesn’t interfere with the child rearing responsibilities and ensure the training is in an area or a location, that is very accessible.

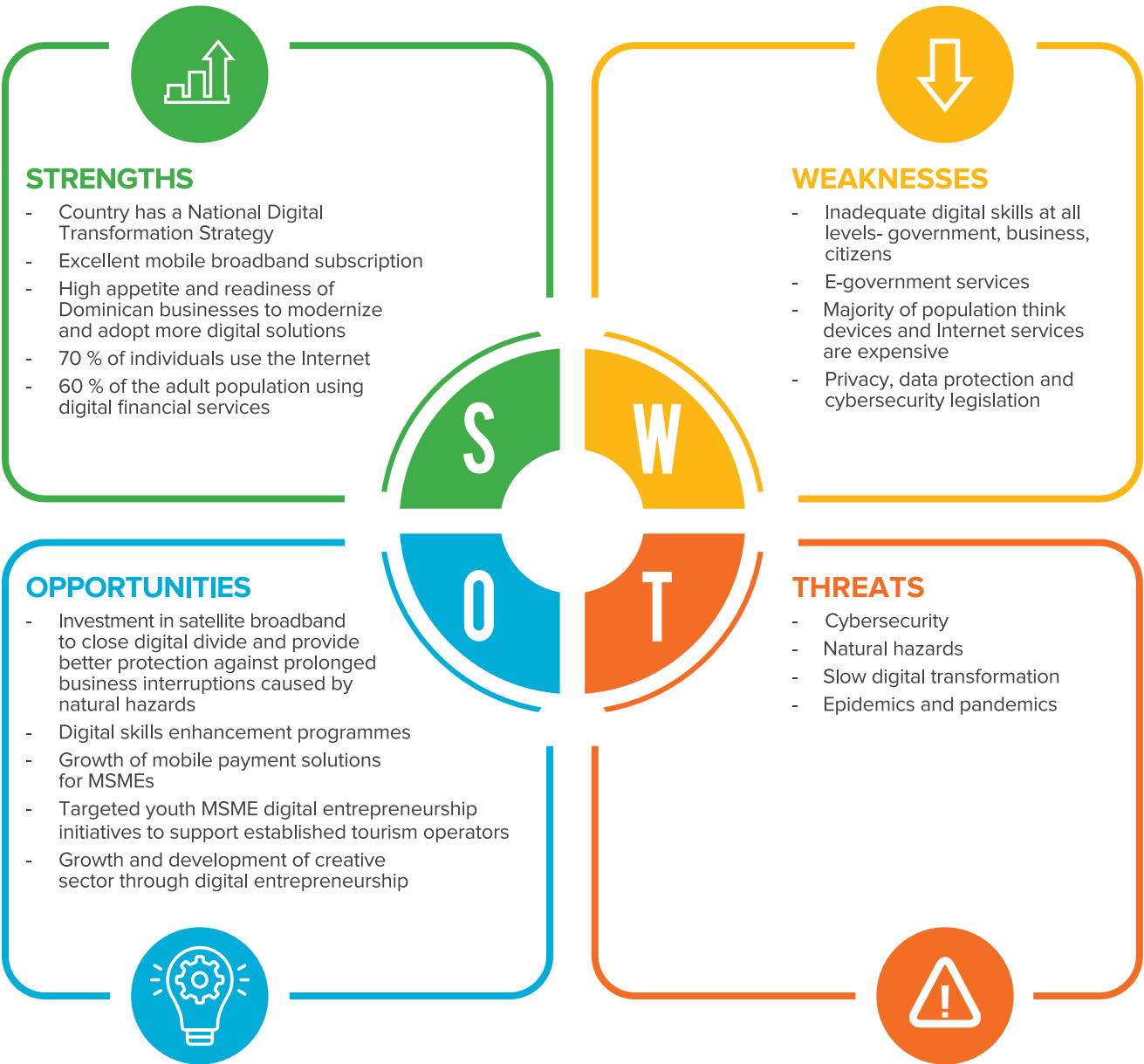


3.4 Strengths, Weaknesses, Opportunities and Threat (SWOT) Analysis

A SWOT Analysis is a useful and simple tool that gives a snapshot of key issues. A SWOT Analysis for key digital transformation issues in the tourism

sector is summarized in **Table 4**. When the Digital Economy Levers are analysed in the context of the tourism MSMEs, there are significant opportunities for digital skills development and digital entrepreneurship in Dominica, and this was recognized by the focus group interviewed for this report.

Table 4- SWOT Analysis for Digital Transformation of Tourism MSMEs



3.5 Policy Interventions

It is often difficult in SIDs to separate tourism players from non- tourism players, as many businesses are directly or indirectly connected to the tourism sector. Additionally, tourism has many inter-sectoral linkages. Therefore, a whole-of society approach is needed when an area significantly impacts the population, and digital transformation is an area of development that will impact all businesses, government, and society. The following proposed policy interventions will impact all levels of society including tourism MSMEs:

- **Incentivize ICT** skills training in the public service to address the dearth of technical ICT staff and over reliance on the Ministry of Public Works and the Digital Economy. The aim should be to have each Ministry self-sufficient in managing its digital functionalities.
- **Provide tax incentives** for private citizens and businesses to acquire digital devices and tax credits and/or other forms of financial support for MSMEs to digitize their accounting systems, improve online presence including website development, e-commerce, and inventory management.
- **Make digital skills a pillar of entrepreneurial development.** Given the relatively high unemployment rate in the under 30 age-group in Dominica; the fact that young people are enthusiastic adopters of technology; and women are likely to undertake entrepreneurial activities in tourism, the Government should create programmes to develop digital entre-



preneurship in tourism and related sectors. The MTITMI and the DDA should ensure that entrepreneurial skills development for the tourism sector incorporates digital skills and demonstrates opportunities for digital entrepreneurship. Train-the Trainer programmes should be rolled out for MSMEs to ensure wide and fast capacity development.

- **Re-design school curricula** to enhance digital skills at all levels, and ensure women and marginalized communities have access, and rural and urban children have equal opportunities to gradually transition to blended learning environments and have the basic skills to function in an increasingly digital world.



Additional Resources

- Giga Project in the OECS
<https://gigaconnect.org/oecs/>
- Connect2Recover
<https://www.itu.int/en/ITU-D/Pages/connect-2-recover.aspx>
- Caribbean Tourism Organization's Digital Tourism Toolkit
<https://www.onecaribbean.org/resources/digital-tourism-toolkit/>

4. FOCUS AREA II: DIVERSIFICATION OF THE PRODUCT OFFERING: PRODUCT AND MARKET DEVELOPMENT

4.1 Overview

A Tourism Policy and a Tourism Master Plan were developed in 2013 through a consultative process with Dominica's tourism stakeholders. The National Tourism Policy 2020 articulates that, *"Dominica's long-term vision should be to become a 'top end' destination on a par with the likes of St. Barths, Mustique, Canouan, and parts of Barbados, in the short/medium term the focus will be on achieving a 'higher' (rather than 'top' end) product concept"*. The Tourism Policy also recommended that Dominica should expand its marketing positioning from that of a nature destination to include *"culture and heritage, beach resorts, yachting, golf, health and wellness and a range of interesting things to do and see"*.³¹

The Master Plan identified a number of growth scenarios that did not include the impact of natural disasters in the scenario analysis. Consequently, the effect of severe hydro-meteorological (e.g., storms and hurricanes) or biological/ecological events (e.g., epidemics, pandemics) on tourism assets and visitation were not anticipated. Additionally, the scenario analysis did not acknowledge the risk of dependence on the contribution and opportunities presented by the Ross University School of Medicine. After a 40-year presence on the island, the medical school shuttered its doors in 2018 due to the damage caused by Hurricane Maria. These events underscore the need to have a diversified economy and diverse product offerings and target markets to reduce vulnerability.

Surveys conducted in 2013 in the overseas travel market (as part of the Master Plan development), revealed a low awareness level about Dominica in the source markets. This was deemed a major inhibiting factor to the island's tourism development³². Since then, the awareness level has increased due to improved destination marketing and media coverage in the aftermath of Hurricane Maria- but this assessment should be verified through new surveys. Over the last 10 years, the source market dynamics have changed, with the Caribbean market being a major player and should therefore be an



³¹ National Tourism Policy 2020 (2013). Commonwealth of Dominica. Ministry of Tourism and Legal Affairs

³² Tourism Master Plan (2013). <http://tourism.gov.dm/news-and-media/tourism-policies>

There will be a focus on nature and small islands, as people will increasingly crave space and a slower pace.

area of focus for marketers. The Discover Dominica Authority (DDA) launched a new destination brand and logo in February 2022, and this should augur well for brand identity and a distinctive positioning strategy.

4.2 Product & Market Trends

The growth in nature-based tourism and outdoor recreation provides opportunities for Dominica's tourism pillars – adventure tourism, aqua-tourism, agro-tourism, health and wellness, and events and entertainment. According to Winter et al (2019), nature-based tourism and outdoor recreation provide benefits to individuals, communities, and society and thereby contribute to sustainability. These tourism niches support conservation and provide mental and physical health benefits³³ – benefits that have been amplified since the COVID-19 pandemic.

The CEO and founder of Responsible Travel, Justin Francis believes that post-pandemic trends will see an increasing role for expert tour guides who can provide opportunities for tourists to gain experience about traditional crafts, cooking skills and receive personalized and inclusive tours. There will be a focus on nature and small islands, as people will increasingly crave space and a slower pace. While there will be a greater tendency to travel close to home, getting off the beaten track will appeal to the majority, and tourists will attach increasing value to sustainability measures³⁴. These trends are consistent with the 2022 trends in changing consumer behaviour and travel demand identified by a WTTC and Trip.com Group Report³⁵ and research conducted Google and Ipsos³⁶. **Figure 6** represents the author's compilation and analysis of the trends identified in the reports.



³³ Winter et al (2009). Outdoor Recreation, Nature based tourism and Sustainability. Sustainability 2020 12, (81) pp. 1-12

³⁴ Top 10 Travel Trends 2021 <https://www.responsibletravel.com/copy/travel-trends>

³⁵ <https://wtcc.org/News-Article/New-report-from-WTTC-and-Trip-com-Group-reveals-latest-consumer-trends-and-the-shift-in-traveller-behaviours>

³⁶ <https://traveltalksplatform.com/google-highlights-2022-travel-trends/>

Figure 6 - Major Trends in Consumer Behaviour and Travel Demands in 2022



Research conducted in 2019 by the Compete Caribbean Partnership Facility (CCPF) entitled, ***Diversification of Caribbean Tourism Experiences***³⁷ (though the research was conducted before the COVID-19 pandemic) provides some useful insights that can be beneficial to the diversification of Dominica's tourism offering. The CCPF report identified four (4) Community Based Tourism (CBT) activities for Caribbean MSMEs to prioritize based on high benefits and high interest in the US market:

- **Local tourism-** community experiences with local people.
- **Food and beverage tours-** rum, coffee and chocolate tours.
- **Traditional Cuisine-** Offered at family-run or local restaurants.
- **Farm to Table-** Culinary experience involving locally grown and prepared food.

There is ample opportunity in Dominica for unique CBT experiences in the Kalinago territory and other communities. Dominica's food and beverage tours could include herbal tours and tastings which will support the planned development of the country's nutraceutical industry. Dominica's strong agriculture sector, including the development of sustainable farms, makes traditional cuisine and farm to table experiences strong product offerings for the destination however, due attention must be given to quality standards including food safety. Women-owned MSMEs can take advantage of CBT and food and beverage opportunities and augment it with agro-processing (rubs, lotions, soaps, teas, confectioneries, sauces etc.), cooking and craft lessons.

The CCPF research highlighted that beach tourism will continue to remain a feature of Caribbean tourism, as sun, sea and sand are still motivating factors for travel to the Caribbean, but other factors highlighted earlier, are fast emerging. Tourists expressed a preference for transportation to be combined with packaged activities and were generally willing to pay more than current prices, as much as, USD 300 per CBT activity.



The thrust to develop and promote CBT experiences should be reflected in the destination's promotional website and a menu of options/experiences should be highlighted. The current DDA website (www.discoverdominica.com) "Experiences" menu does not profile CBT, but the "Adventures" option has a "Culinary Experiences" option. "Food and Lodging" menu option includes "Restaurants". The website's menu options should be reevaluated, and CBT experiences should also be showcased on the destination's various social media platforms.

4.3 Stakeholder Perspectives

Focus group participants were very passionate about the strength of Dominica's tourism product mix. They believe that Dominica has competitive product offerings when compared to other Caribbean destinations. Participants expressed the view that the island's product offerings are unique including a strong positioning for the development of CBT.

³⁷ <https://www.competecaribbean.org/documents/diversification-of-caribbean-tourism-experiences/>

“Dominica has its own uniqueness, it is an already known tourism destination, we have for example, the Kalinago people, that alone certainly beats everybody else. The Kalinago they produce craft, we have the living, we have the dances the evidence... Plus, then we have our own eco-tourism business. We have all the lakes or rivers, our valleys, we have our trails, we have so many things going for us. We shouldn't be patterning and trying to follow others.”

Focus Group Participant, DG04

“It's community that makes our product very unique and it's community that makes people come back here, year after year after year.”

Focus Group Participant, DG02

There was consensus by the focus group participants and the DHTA President that the product mix is right, and that the destination should focus on the visitor's experience and customer service. The focus group felt that the destination had the most to gain from the digital nomad as part of Dominica's COVID-19 tourism diversification strategy. DG03 felt that not enough was being done to develop CBT and that the communities should benefit more from cruise tourism. DG01 held much stronger views about cruise tourism:

“The cruise is actually the lowest part of the market, and it does guarantee volumes and it gives a false sense of good economic activity. It certainly isn't sustainable and it's not the best thing.”

Focus Group Participant, DG01

The DHTA President felt that the health and wellness and hiking product offerings could be further developed. She identified potential opportunities for MSMEs around the development of the hiking product, but a good trail management system is needed. The Government does have plans to develop a trail management authority.

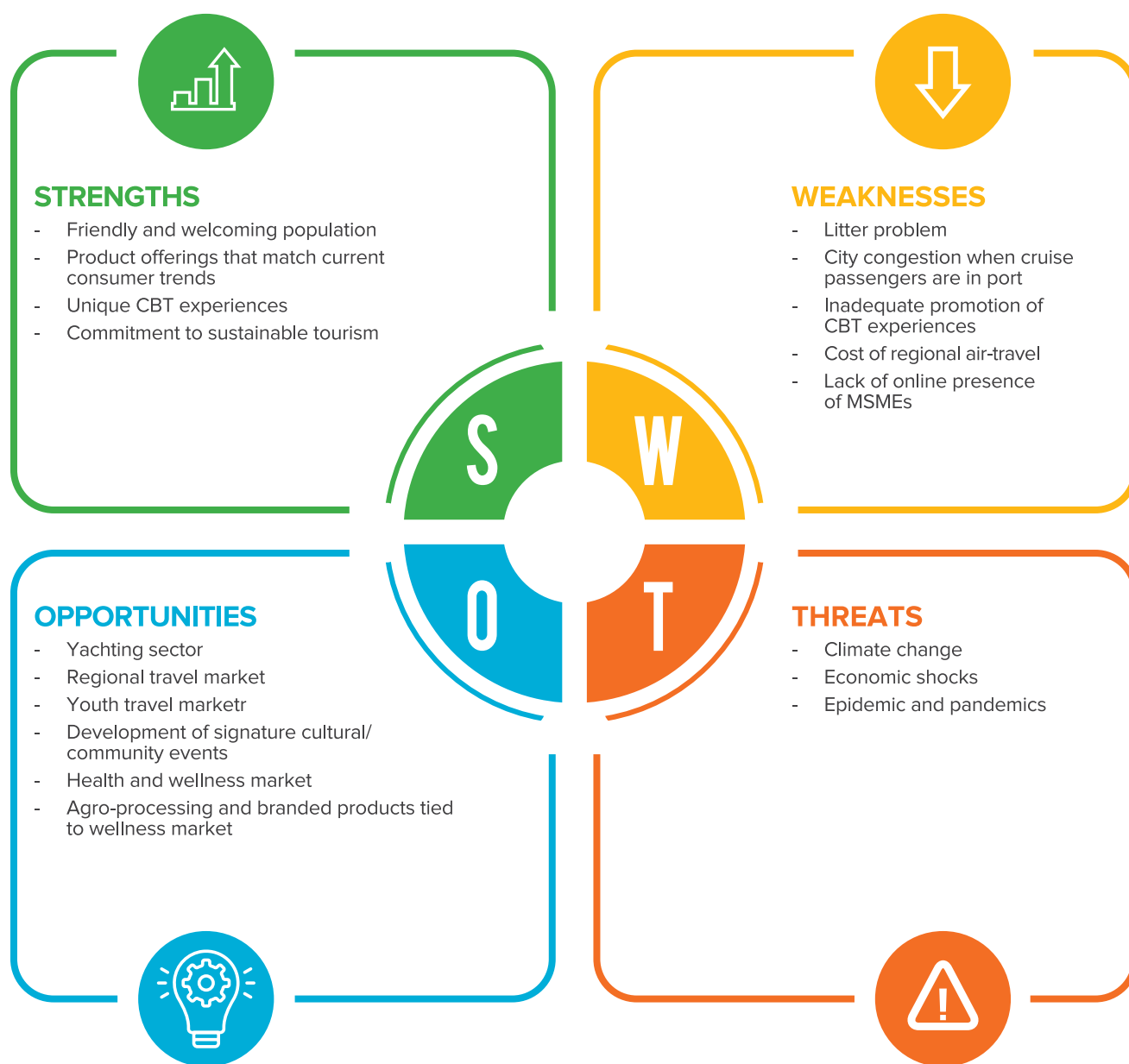
Focus group participants noted that the product offerings could be further developed by tapping into sports tourism (DG04), health and wellness (DG01) and farm and garden tours (DG03).

4.4 Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

It is incumbent on Dominica's tourism policy makers and marketers to adapt to and take advantage of the emerging trends, but at the same time be prepared for threats. A SWOT Analysis for Dominica's Tourism Product & Market Development is provided in **Table 5**. The analysis considers current tourism performance, regional and international markets, and product trends. The opportunities highlighted in the SWOT will accelerate the transition towards a more inclusive and sustainable tourism industry and progress towards the Sustainable Development Goals (SDGs). The opportunities are not limited to women owned MSMEs but to all MSMEs, but it is anticipated that women can benefit and make a significant contribution to CBT activities in Dominica through traditional cuisine, cooking lessons, arts and craft and accommodation services.



Table 5- SWOT Analysis for Tourism Product & Market Development



4.5 Policy Interventions

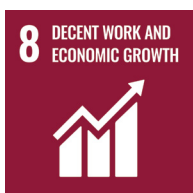
The following interventions are considerations for policy makers. These suggestions are not limited to agencies with responsibility for tourism, as strong inter-sectoral linkages are needed for the success of a destination:

- **Establish a Tourism Policy consistent with building Climate Resilience:** A volume driven strategy is incompatible with a sustainable tourism agenda. Given the low added value of cruise tourism to Dominica's economy (6.32 % of total visitor spend in 2019), the country should consider placing an annual cap on cruise ship passengers. This may be considered a bold move for any Government that seeks to satisfy grass-root "constituents" of craft and food vendors,

taxi drivers, tour-guides, and others. However, this type of policy would serve to protect the island's fragile marine environment (including coral reefs); provide some destination exclusivity; and create greater compatibility with its thrust to make to be sustainable, and to make Dominica the first climate resilient nation by 2030.



- Focus on Value over Volume, Packaging, and Inclusivity:** Product and market development should focus on attracting longer stay visitors including extended stay-visitors such as digital nomads and attracting higher spend visitors- visitors who are willing to pay a premium for Dominica's community-based tourism offerings. Ensure that there is added value in the packaging of tourism product offerings that are delivered along an inclusive value chain. The Kalinago community needs support to develop quality craft products and to develop their agro-processing capability for the export market. This will create more sustainable and diversified income streams in times of depressed tourist arrivals. Kalinago's products can be branded to demonstrate support for an indigenous community and women. Inclusivity is further enhanced through strengthening the on-line presence of tourism MSMEs, given that 70 % of visitors research a destination on-line before booking.



- Strengthen Evidence Based Approaches to Decision Making:** The implementation of a Tourism Satellite Accounting (TSA) system will provide a better picture of the economic contribution of tourism. Policy makers must have a comprehensive data on cruise passenger conversion rates to land-based (stay-over) tourists; on brand recognition of destination Dominica in major source markets; the value of different categories of visitors, that is, expenditure data and length of stay; and data on consumer demand trends in the regional travel market including the yachting sector. Destination marketing strategies must also be supported by digital analytics.



- Institute Measures to Address Solid Waste Management:** There is a noted litter problem on the island which is inconsistent with the destination's commitment to environmental care and protection, sustainability and the vision to build a climate resilient nation. Measures could include a national anti-littering campaign, creation of branded garbage receptacles co-sponsored by the private sector, establishment of a recycling programme, enforcement of Litter Act/ review of fines, and review and revamping of a litter warden programme.



Additional Resources

- Community Based Tourism Enterprise Handbook and Training Materials
<http://ourtourism.onecaribbean.org/cbt-toolkit/>
- The Development of a Strategic Business Management Model for the Development of Heritage Tourism Products in the Caribbean
<https://www.onecaribbean.org/content/files/CRSTDPheritage%20Tourism%20Report.pdf>

5. FOCUS AREA III: STAKEHOLDER ENGAGEMENT AND REGIONAL COORDINATION

5.1 Overview

The COVID-19 pandemic has strengthened the inter-Ministerial collaboration with the public sector particularly amongst agencies with responsibility for Tourism, Health, Finance, Social Services and National Security. There has also been stakeholder engagement between the private and public sectors to advance health and safety protocols and the safe reopening of some economic sectors.

There has been heightened collaboration and coordination between international and regional organisations and national agencies within the Caribbean. Collaborative efforts by countries and institutions sought to provide technical, social, and financial support in response to the pandemic. As part of the FUT-Tourism project, the UNDP Barbados and the Eastern Caribbean office has engaged in significant stakeholder consultations and collaborated with regional and tourism players in public and private spheres (including MSMEs). The following examples of regional coordination are also noteworthy:

- World Tourism Day Conference 2021 (September 27) – Virtual Caribbean Tourism Conference jointly hosted by the CTO, University of the West Indies (UWI), Caribbean Regional Public Health Agency (CARPHA), (CHTA), OECS, Association of Caribbean States (ACS), Caribbean Development Bank (CDB), Inter-American Development Bank (IDB), UNDP, Global Tourism Resilience and Crisis Management Centre (GTRCMC), Organization of American States (OAS) and Compete Caribbean.
- Guidelines and Checklists for Safely Resuming Business Operations and Restoring Caribbean Tourism in 2020 – developed by CTO, CHTA, CARPHA, OECS and the GTRCMC.
- CARPHA's Tourism and Health Program: Provides regional guidelines for traveller health issues in accommodation and passenger ship settings, capacity building in food safety, hospitality health and safety,

and environmental standards. The Tourism and Health Information System (THIS)- is a web-based application for syndromic surveillance of populations in tourist accommodations. The system was developed by CARPHA in partnership with the CHTA, CTO and the IDB. This real time, early warning system is confidential and only accessible by national authorities. **See Appendix II-Coordination and Surveillance Pathway for THIS Web App** which illustrates the coordination required. The early warning system forms part of the approach to comprehensive disaster risk management. The accommodation sector in Dominica is currently not participating in the implementation THIS.

5.2 Stakeholder Perspectives

At the local level, the focus group took some responsibility for their lack of engagement with local tourism authorities. This was partially attributed to their survival mode after many hazard events. One participant also recognized that these are also challenging times for the Government, as they try to build-back the country (DG02).

The DHTA President believe that as a small country, with many locally owned and operated business, that there is significant inclusivity and benefit at the local level but noted that women must be encouraged not to treat income streams as hobbies but as entrepreneurial opportunities for expansion and product development.



“The Community Tourism Association are really focused on products that are developed around the community itself. We are committed to tourism, we are trying really hard to ensure that the local participation is really benefitting, and that is not just it’s not just being part of something but actually getting some financial benefits from it”

DHTA President

One of the participants expressed frustration that despite all the good training from the UNDP-UWI programme, he was rich in information but couldn’t implement because the funds needed to be provided much sooner so he could finance the tools needed for his business (DG04). The focus group participants all felt that the greatest need of tourism MSMEs is funding.

“Since COVID, since Maria we’ve seen a lot of small enterprises, a lot of small businesses have come up, but what has been really difficult is the markets and also finding funding for those, and so this is an area, I think, that really needs to be looked at, the Government needs to make it easier for persons to be able to get funding”

Focus Group Participant, DG03

Access to funding is something that has plagued MSMEs, not only in Dominica, but throughout the Caribbean, prior to the COVID-19 pandemic. The mainstream financial institutions have onerous processes that deter entrepreneurial development. Some of the MSMEs felt that some of the creativity and flexibility demonstrated by institutions during the pandemic should continue post-pandemic.

5.3 Policy Interventions

The pandemic has highlighted how difficult it is to harmonize certain policies at the regional level. Arguably COVID-19 health and safety protocols

governing border entry must be based on the current sources and level of transmission of the virus from the tourism generating region and the host population, respectively. However, contemporary challenges should not deter attempts to tackle some long-standing issues that hinder the development of Caribbean tourism and the protection of its ecological assets. These interventions will benefit Dominica and other destinations:

- **Reducing regional airline ticket fees and taxes.** The cost of regional travel has been a perennial problem. For some Caribbean destinations, it has proven to be cheaper to travel to Florida than to fly to other regional destinations. Research and analysis conducted by the ACS reveal that intra-regional flights among Caribbean SIDS for extra-regional flights originating from outside of the Caribbean is weighted approximately 13 times heavier per nautical mile travelled than for its extra-regional counterpart. (Although the distance travelled on intra-regional flights is much shorter). On average, the base fare for a short-haul intra-regional flight, which excludes taxes and fees, costs an average of 4.8 times more per nautical mile than an extra-regional flight³⁸. Regional airlines and other tourism players such as the CTO have long argued that the fees and taxes on airline tickets are hampering the development of the intra-regional travel market. It is an issue that the former Chairman of CARICOM, Prime Minister Gaston Browne had placed on his agenda and has made a reality in July 2021 for Antigua and Barbuda, which reduced airline ticket taxes by 50 %. The Government of Barbados has also reduced taxes on regional airline tickets. These recent initiatives illustrate what is possible, but more harmonization and cooperation is needed.
- **Developing Environmental Policies for Marine Tourism:** There has been a few unsuccessful attempts to develop a Regional Cruise Tourism Policy dating back to the 1990s. In the end the cruiselines pit island Governments against each other and quickly trade one port of call for the next, resulting in the loss of revenue from head taxes and loss of income for hair-braiders, vendors, tour operators, guides,



taxi-drivers, and others. A lower hanging fruit could be policies for environmental protection and polluter pay-mechanisms to protect the region's blue economy- not only for touristic pursuits but also for food security. The Caribbean Sea is a common regional asset, threatened by climate change and needs protection. There must be greater stakeholder engagement, education, coordination and commitment to environmental monitoring and protection.

- **Capacity Development and Funding Mechanisms for MSMEs:** Ongoing strategies to empower women and enhance digital skills is needed. MSMEs need a more expanded view of what going digital means- not limited to social media marketing or online sales but for accounting, records management, and forecasting. Public and private sector leaders have noted that MSMEs need handholding, which means that more incubator programmes are needed. Even with funding from external sources, MSMEs need to know where funding is available and how to develop winning proposals. National and sub-regional financial institutions need to reassess what it means to be credit worthy. They should work with the Government to provide guarantees and /or reimagine financial mechanisms that could give MSMEs greater access.

Additional Resources

- UNDP Finance Hub for SDGs and COVID-19 Recovery
<https://sdgfinance.undp.org/>
- Integrated Policy Practitioners Network
<https://sdgintegration.undp.org/ipn>
- Resuming Tourism Operations in Era of COVID-19
<https://www.onecaribbean.org/resources/guidelines-and-checklists-resuming-operations/>

³⁸ <http://www.acs-aec.org/index.php?q=transport/aviation-taxation-burden-an-examination-of-caribbean-sids>

6. RECOMMENDATIONS AND CONCLUSION

The impact of two severe weather events and the pandemic within the last five (5) years has made the tourism MSMEs battle-weary, as they strive to survive amidst multiple set-up backs and a prolonged building-back and recovery mode. The lingering threat of new COVID-19 variants and the ever-present threat of climate change can make tourism MSMEs in Dominica risk averse.

A review of the National Tourism Policy and Master Plan should be undertaken in 2022 given emergent consumer demands, travel trends and country's vision to build the first climate resilient nation in the world by 2030. Regional and international tourism trends are encouraging, and tourism businesses are cautiously optimistic, but technical and financial support is needed for digital transformation and product diversification.

The lessons learnt during the Covid-19 pandemic and the future of tourism in Dominica requires:

- (i) Robust health and safety protocols: if harmonized at least across the OECS, this will bolster intra-regional tourism
- (ii) Further development of the intra-regional travel market given the global trends to shorter travel distances and longer stays
- (iii) Agile tourism strategies that are anticipatory of hazard events arising out of climate change impacts, global economic shocks, and other crises
- (iv) Inclusive and sustainable tourism that supports the development of niche markets with lower environmental impacts and products and market that make a greater contribution to the local economy
- (v) Strengthening of inter-sectoral linkages to increase GDP contributions and reduce leakages
- (vi) Use of ICT tools and applications for marketing including crisis communication; and stakeholder engagement and collaboration with public, private, and community-based organisations

- (vii) Market and product development to reduce the seasonality of demand of the various categories of visitors

- (viii) Evidence-based decision making

Value must take precedence over volume. Countries in the Caribbean, and even more so the smaller islands of the Eastern Caribbean, must recognize there is an incompatibility with a volume driven tourism development strategy and sustainability. The unmanaged expansion of cruise and air arrivals has incremental social and environmental impacts with implications for over-crowding, traffic management, sewage treatment, waste management, domestic transport, water demands, health, safety, security, and other issues. There must be a shift away from arrivals as a key performance benchmark to other quantitative and qualitative benchmarks that balance economic contributions with the social and physical/ecological carry capacity of the destination.



ANNEXES

Annex I- Interviewee Profiles

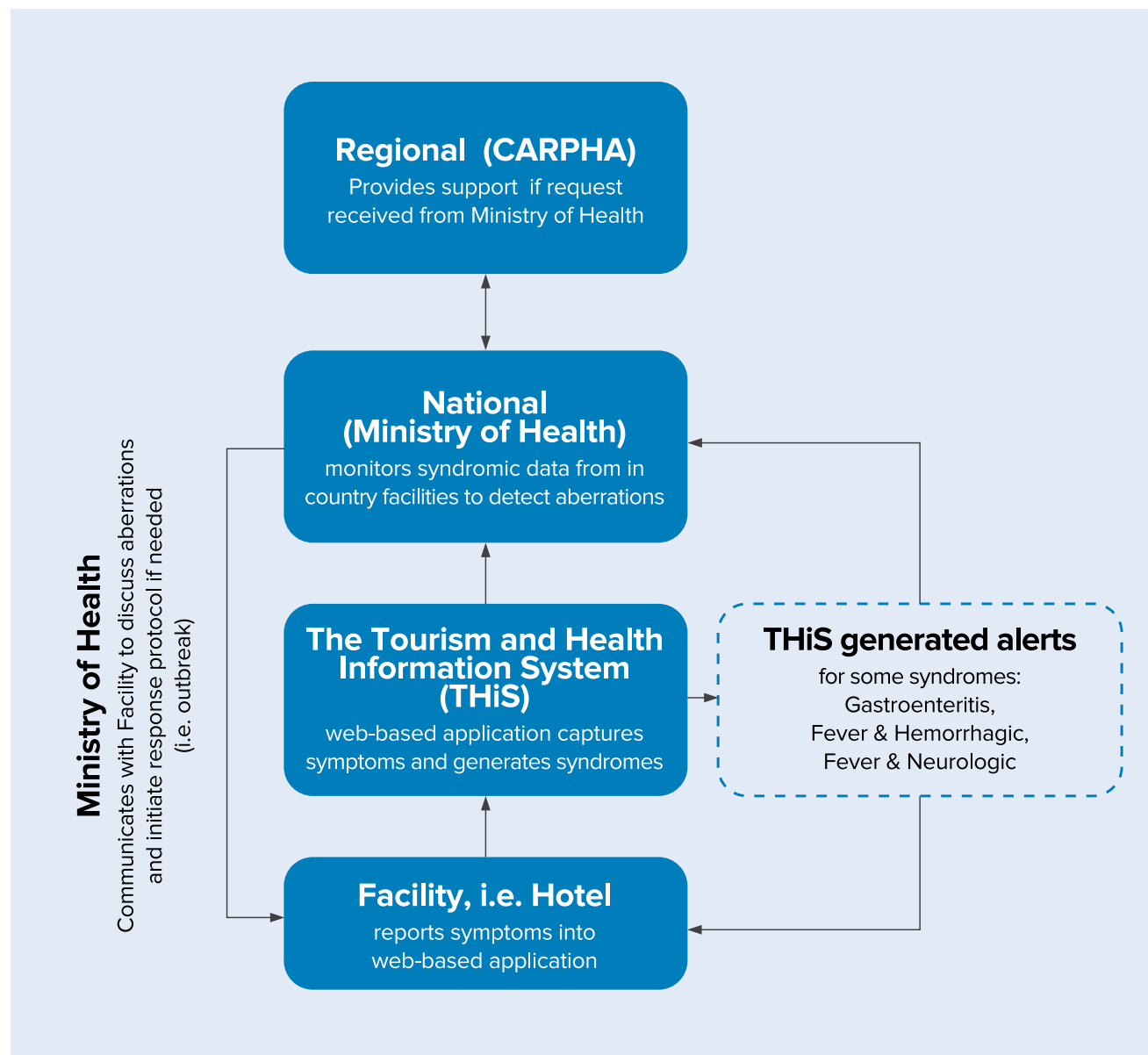
(a) Summary Profile of Dominica's Tourism MSME Focus Group

Coded Name	Tourism sub-sector	Woman-Owned business	Business Registered	Business' On-line presence	On-line orders/ reservations	Process Payments On-line
DG01	Attractions; Accommodation	Partially	Yes	Website, Facebook, Twitter, YouTube, Instagram	Reservations for Accommodation via booking.com WhatsApp f or quotes	Yes (via booking.com)
DG02	Adventure Tourism & Recreation	Partially	Yes	Website, Facebook, Instagram, Trip Advisor, Other	Yes	Yes
DG03	Food & Beverage	Yes	Yes	Facebook	Yes	Yes
DG04	Adventure Tourism & Recreation; Food & Beverage; Travel Trade	Partially	Yes	Website, Facebook, Trip Advisor	Yes	No

(b) Interviewees:

- President of the Dominica Hotel and Tourism Association Ms. Avril Coipel

Annex II - Coordination and Surveillance Pathway for THiS Web App



Source: CARPHA, 2021³⁹

³⁹ <https://carpha.org/THP/THiS-Hotel-Based-Surveillance>





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