TOURISM DEVELOPMENT PLAN
2012 - 2022
(incorporating TDP3 and 5-Year Business Plan)

- Draft Final Report -
6th July 2012
GOVERNMENT OF MONTSERRAT

DRAFT FINAL REPORT

Tourism Development Plan
2012 – 2022
(incorporating TDP3 and 5-Year Business Plan)

6th July 2012
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1. INTRODUCTION

Seventeen years ago the volcanic eruptions destroyed much of Montserrat. In the aftermath, Montserratians were faced with the enormous tasks of resettling in the northern part of the island, rebuilding the infrastructure and redeveloping the economy. This process is on-going.

Prior to 1995, tourism was a significant contributor to the economy, representing between 20% and 36% of the national output (GDP). With the destruction of a considerable proportion of the island’s natural resource base and infrastructure, coupled with concerns about safety, tourism industry was decimated and now accounts for less that 5% of the economy (GDP).

Despite the reduction of available landscape, Montserrat still maintains its distinctive charm, based on the intimacy of its size, the friendliness of its people, the peace & tranquillity, safety & security and the relaxed/easy pace of life. The challenge is to build a tourism industry around these fundamental strengths.

To this end, the GoM has been implementing the first two phases of the National Tourism Strategy Plan. To date the Plan has delivered on the construction and facilitation of the requisite tourism infrastructure. However, performance with regard to increasing tourist arrivals has not met the projected targets.

Building on the successful components of the previous TDPs 1 & 2, the purpose of this TDP3 2013 – 2015 and 5-Year Business Plan is to:

‘clearly set out a strategy for improving the marketing and promotion of the island, development of on-island infrastructure and product, visitor facilitation and improving tourism industry standards’.

However, as the strategy for marketing and development must integrate with the proposed plans for Carr’s Bay and Little Bay, which have longer time horizons, it was agreed with the Board of the MTB that the TDP should cover the period 2012 – 2022 while at the same time incorporating the TDP3 2013 – 2015 and 5-year Business Plan.

In formulating the strategy, extensive consultations were held with all stakeholders directly and indirectly associated with the tourism sector on Montserrat in addition to a comprehensive review of published and unpublished tourism related reports, policy papers and other documents.

An important part of the study approach was the involvement of stakeholders in a highly participative manner so that the initiatives would be designed in such a way as to directly meet the needs of the sector and evoke its support and enthusiasm for their implementation. This was chiefly achieved through the organisation of a Tourism Planning Workshop on 30th May, 2012, under the aegis of the Montserrat Tourist Board.

The deliberations and recommendations from this workshop formed the basis of the tourism development strategy and plans as elaborated in this report.
2. SUMMARY

2.1 WHERE ARE WE NOW?

Size of the Tourism Sector and Performance

In 2011 there were just over 6,400 stay-over arrivals to Montserrat. In addition there were just under 2,000 excursionists and a similar number of yacht visitors. We estimate total expenditure by visitors to have been about EC$17M in 2011, contributing between 3.5% and 5% to the national economy (GDP). The stock of accommodation is just 250 rooms, mostly in villas (146) – virtually the same as a decade ago in 2001.

Despite the support of the UK Government (DFID) through the TDP 1 and 2 technical assistance programmes and the best efforts of all stakeholders directly and indirectly involved in tourism, the sector has failed to grow. Certainly, there have been improvements to the tourism product – improved facilities at Woodlands and other beaches, improved walking/hiking trails, a new national museum, Olveston House etc., but both stay-over arrivals and excursionists have declined over the last decade.

We spoke to tour operators and marketing representatives in the source markets, as well as to Montserratian tourism stakeholders as to why the tourist industry has stagnated. Their answers were consistently the same – totally inadequate air and sea access, virtually no ‘market ready’ accommodation for ‘high-end’ clients, and few attractions or things to do– no golf, no waterfront or focal point on the island like Road Bay in Anguilla, St. Lawerence’s Gap in Barbados.

Montserrat’s Image and Position in the Market Place

Prior to 1995 Montserrat was undoubtedly one of the more, exclusive ‘high-end’ destinations in the Caribbean – fashionable and well known. In the intervening years the market has moved on and now, according to market feedback, it is easier to say what Montserrat’s image is not rather than what it is. It is not known for luxury, ‘chicness’, culinary excellence, shopping. In fact Montserrat is an unknown quantity, except for the Volcano.

2.2 WHERE DO WE WANT TO BE?

Market feedback is that Montserrat should position itself as the next place to ‘really get away’ from it all, as many travellers are looking to avoid the overcrowded beaches and the ‘super size’ all inclusive resorts. It needs to be repositioned as ‘unspoiled, authentic, smart’, capitalising on its

- Peace and tranquility
- Timelessness
- Safety and security
- Friendly and welcoming people

This accords with the vision of tourism on Montserrat as elaborated by the participants at the tourism planning workshop convened on 30th May, under the aegis of the MTB. Participants’ vision for tourism on Montserrat is that of a ‘high-end/low –volume’ destination.
An exclusive private hideaway – a place where time stands still, the way the Caribbean used to be. Luxury accommodation would be provided in villas, small (20 – 40 rooms) resorts/lodges, and guesthouses/inns. Culinary excellence in a variety of eateries and there would be a range of things to see and do, including golf, walking/hiking, scuba diving with the emphasis on ‘refined relaxation’.

The Government of Montserrat sees tourism as a major driver of the economy, the strategic objective for the sector being to further the creation of a higher standard of living for an increasing population through job creation, income generation, improved quality of the economic & social infrastructure and the environment and contributing to fiscal stabilization through increased tax revenues. Reflecting this we have developed three scenarios for the tourism sector, predicated on different assumptions concerning investment in economic infrastructure, improvements to air and sea access and development of the tourism product.

<table>
<thead>
<tr>
<th>Metrics</th>
<th>2012</th>
<th>2022 – Low Growth</th>
<th>2022 – Medium Growth</th>
<th>2022 High Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stay-over</td>
<td>7,250</td>
<td>8,000</td>
<td>20,000</td>
<td>60,000</td>
</tr>
<tr>
<td>Yacht</td>
<td>2,000</td>
<td>2,500</td>
<td>10,000</td>
<td>20,000</td>
</tr>
<tr>
<td>Cruise</td>
<td>600</td>
<td>1,000</td>
<td>3,000</td>
<td>6,500</td>
</tr>
<tr>
<td>Excursionists</td>
<td>2,000</td>
<td>2,000</td>
<td>20,000</td>
<td>25,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td>11,850</td>
<td>19,300</td>
<td>53,000</td>
<td>120,700</td>
</tr>
<tr>
<td>Rooms</td>
<td>250</td>
<td>1,000</td>
<td>500 to 700</td>
<td>1,000</td>
</tr>
<tr>
<td>Direct Employ</td>
<td>100</td>
<td>n/a</td>
<td>500 to 700</td>
<td>n/a</td>
</tr>
</tbody>
</table>

The medium growth scenario shows visitor expenditure in Montserrat increasing from under EC$20M in 2012 to just over EC$70M in 2022. On the basis that the direct import content of tourism expenditure ranges between one-half and 2/3rds, tourism’s contribution to GDP is projected to be between 9% and 14% by 2022, assuming the economy as a whole expands by about 4% yearly over the period.

2.3 HOW DO WE GET THERE?

- Move to an investment driven strategy

Currently, Montserrat is a relatively low spend destination. This is because the tourism industry is totally dependent on its natural attractions as the motivation for tourists to visit. But the natural attractions, though unique in many ways, are not sufficiently strong in themselves to attract the numbers required to support a significant tourism sector. It is a primary factor driven strategy and characterized by limited investment, insufficient accommodation and medium to low quality product.

Montserrat is not alone in this regard. All destinations, where the core products are nature and culture based but are not considered world class, (as the Galapagos, Egypt, Greece), face this problem. The strategy that many destinations which do not have ‘world class’ nature and cultural attractions have pursued, is to invest heavily the product. These destinations have seen their tourism sectors prosper and grow. Ireland is such an example.

To move on to the next stage of development requires an investment driven strategy, with sustained investment in all aspects of the industry – infrastructure, access transport, amenities and attractions, accommodation, destination marketing, human resource development etc.
This requires the implementation of seven strategic initiatives to deal with the issues confronting Montserrat’s tourism sector, viz.

- Expand and Diversity the Tourism Product
  - increase the stock of accommodation
  - improve the excursionist product offer
  - competitive incentives to attract residential (villa) market
  - improve and diversify dive product (wreck diving)
  - develop the yachting product – moorings, facilities
  - develop golf, with associated real estate (villas)
  - hiking trail maintenance and updated guide.

- Enhance Tourism Attractions and Amenities
  - make the volcano a ‘must see’ attraction
  - Little Bay waterfront enhancement
  - restoration of AIR Studios
  - Arts & Crafts Centre at Carr’s Port or Public Market
  - establish marine reserve
  - restoration of Sugar Mill
  - further develop Botanic Gardens
  - ‘Character’ Village, Salem

- Upgrade Quality and Service Standards
  - registration of all tourism operators
  - establish codes & practices
  - provide training courses

- Seamless Air-Sea Inter-model Access and Visitor Facilitation
  - sea bridge connectivity – fast, daily service
  - air bridge connectivity – with regional int’l flights
  - better visitor facilitation (immigration procedures, passenger shelter at Heritage Quay, Antigua)

- Focused and Cost Effective Destination Marketing
  - focus on fewer markets
  - greater emphasis on internet marketing
  - work with and support smaller number of tour operators in source markets
  - Montserratian ground tour operators to spearhead development of niche product markets
  - joint promotions with Antigua, Dominica

- Recognise and Strengthen Institutional Arrangements
  - establish Sea & Airport Authority
  - amend 1993 Tourism Act (Ordinance) to expand functions of MTB to include culture/heritage
  - streamline organisational structure of MTB
  - outsource destination marketing activities in main markets guided by SMART principles; head office to have coordinator role
  - strengthen capacity within MTB

- Better Sector Management
  - establish TDP Steering Group
  - create Tourism Development Fund
  - develop tourism sector market/access model
  - initiate tourism and environmental awareness programme

2.4 HOW MUCH WILL IT COST?

Indicative costs for the implementation of TDP3 and the 5-Year Business Plan are shown on Table 2.2. It should be noted that these costs only refer to activities. MTB staffing and other overhead costs are not included.
Table 2.2: Implementation Costs (EC$000’s) 2013 – 2018

<table>
<thead>
<tr>
<th>Element</th>
<th>TDP3</th>
<th>5-Year Business Plan 2016/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand &amp; Diversify Product</td>
<td>500,000</td>
<td>535,000</td>
</tr>
<tr>
<td>Enhance Attractions &amp; Amenities</td>
<td>1,620,000</td>
<td>2,600,000</td>
</tr>
<tr>
<td>Upgrade Quality &amp; Service Standards</td>
<td>120,000</td>
<td>100,000</td>
</tr>
<tr>
<td>Air/Sea Access &amp; Visitor Facilitation</td>
<td>500,000</td>
<td>600,000</td>
</tr>
<tr>
<td>Destination Marketing</td>
<td>250,000</td>
<td>2,750,000</td>
</tr>
<tr>
<td>Instit. Strengthening</td>
<td>-</td>
<td>800,000</td>
</tr>
<tr>
<td>Sector Management</td>
<td>170,000</td>
<td>3,250,000</td>
</tr>
<tr>
<td>TOTAL</td>
<td>3,160,000</td>
<td>10,635,000</td>
</tr>
</tbody>
</table>
3. SOCIO-ECONOMIC STRUCTURE AND VALUE OF TOURISM

3.1 POPULATION, LABOUR FORCE AND EMPLOYMENT

In the 2001 Montserrat census, the population was recorded as 4,491 inhabitants. Since then the population has grown to an estimated 4,922 residents (2011 census). Of these, just under three-quarters (73%) are Montserratian. This includes persons who have acquired citizenship through naturalization or registration processes, as well as by birth.

Because of ‘double jobbing’ and flexi employment conditions, it is difficult to determine employment numbers. However, best estimates put the labour force at about 3,000, of which about 400 (or 13%) are unemployed.

3.2 NATIONAL ECONOMIC ACTIVITY AND VALUE OF TOURISM

Preliminary estimates for 2012 indicate a GDP figure just under EC$172M for Montserrat’s economy. Although the economy has rebounded from the sharp fall in 2010, output (in real terms) is still below the 2009 figure.

Table 3.1: Gross Domestic Product (EC$M), 2007 – 2012

<table>
<thead>
<tr>
<th>Metric</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP @ market prices</td>
<td>147.2</td>
<td>156.5</td>
<td>162.6</td>
<td>155.8</td>
<td>166.4</td>
<td>171.5</td>
</tr>
<tr>
<td>GDP constant prices @ 2006</td>
<td>146.4</td>
<td>152.4</td>
<td>152.6</td>
<td>143.2</td>
<td>148.5</td>
<td>149.8</td>
</tr>
</tbody>
</table>

Source: CSO, Montserrat and ECCB

Value of Tourism

In the national accounts, the contribution for the hotels & restaurants sub-sector was estimated at just under 1.5% of total GDP in 2011. This undoubtedly underestimates the value of tourism since a number of activities are not included – such as taxi/tours, scuba dive, hiking, retail expenditure by villa tourists, and spending by excursionists, yacht visitors and cruise passengers.

In 2011, total stay-over visitor expenditure was estimated at EC$16.3M, representing approximately 10% of the total output of the economy (GDP).

However, it should be noted that tourism receipts are a gross value and strictly speaking, the imported inputs to tourism sales should be excluded before expressing them as a proportion of GDP. To the extent, therefore, that direct imports have not been excluded, tourist receipts as proportion of GDP will be overstated. There are no published statistics available on the proportion that direct imports represent. However, on the assumption that direct imports represent between one-half and two-thirds of tourist expenditures, stay-over tourism’s direct contribution to GDP is currently between 3.5% and 5%.
4. TOURISM DEMAND TO MONTSERRAT

4.1 TOTAL VISITOR ARRIVALS

Trends in visitor numbers since 2007 are shown on the following table.

**Table 4.1: Visitor Arrivals 2007 – 2012**

<table>
<thead>
<tr>
<th>Year</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011*</th>
<th>2012**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stay-Over Visitors</td>
<td>7,746</td>
<td>7,360</td>
<td>6,311</td>
<td>5,981</td>
<td>6,414</td>
<td>7,250</td>
</tr>
<tr>
<td>Excursionists</td>
<td>968</td>
<td>959</td>
<td>1,024</td>
<td>1,726</td>
<td>1,997</td>
<td>2,000</td>
</tr>
<tr>
<td>Cruise Ship Visitors</td>
<td>273</td>
<td>-</td>
<td>189</td>
<td>878</td>
<td>500</td>
<td>600</td>
</tr>
<tr>
<td>Yacht Visitors</td>
<td>1,463</td>
<td>1,840</td>
<td>1,340</td>
<td>993</td>
<td>1,881</td>
<td>2,000</td>
</tr>
<tr>
<td><strong>TOTAL VISITORS</strong></td>
<td><strong>10,450</strong></td>
<td><strong>10,159</strong></td>
<td><strong>8,864</strong></td>
<td><strong>9,578</strong></td>
<td><strong>10,792</strong></td>
<td><strong>11,600</strong></td>
</tr>
</tbody>
</table>

*Source: CSO Montserrat, ECCB, MTB and Consultants*

*preliminary estimates  ** consultant’s projections

During the past three years (2009 – 2011) the number of stay-over visitors has averaged just over 6,000 annually and excursionists just under 1,500 annually. A significant increase in stay-over arrivals is projected for 2012 for the 50th Celebrations of Montserrat’s Festival. There has been no consistent pattern to the evolution of cruise ship or yacht visitors.

4.2 STAY-OVER VISITOR ARRIVALS

Numbers of stay-over arrivals by source market for selected years are shown on Table 4.2.

**Table 4.2: Stay-Over Arrivals by Source Market 2007 – 2012**

<table>
<thead>
<tr>
<th>Market</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011*</th>
<th>2012**</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>2,109</td>
<td>1,922</td>
<td>1,606</td>
<td>1,685</td>
<td>1,824</td>
<td>2,150</td>
</tr>
<tr>
<td>U.K.</td>
<td>2,190</td>
<td>2,152</td>
<td>1,864</td>
<td>1,380</td>
<td>1,795</td>
<td>2,100</td>
</tr>
<tr>
<td>OECS</td>
<td>1,419</td>
<td>1,298</td>
<td>1,132</td>
<td>1,261</td>
<td>1,178</td>
<td>1,300</td>
</tr>
<tr>
<td>Other Caribbean</td>
<td>1,377</td>
<td>1,360</td>
<td>1,135</td>
<td>998</td>
<td>931</td>
<td>950</td>
</tr>
<tr>
<td>Other Countries</td>
<td>651</td>
<td>608</td>
<td>574</td>
<td>677</td>
<td>686</td>
<td>750</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>7,746</strong></td>
<td><strong>7,360</strong></td>
<td><strong>6,311</strong></td>
<td><strong>5,981</strong></td>
<td><strong>6,414</strong></td>
<td><strong>7,250</strong></td>
</tr>
</tbody>
</table>

*Source: CSO Montserrat, ECCB, MTB and Consultants*

*preliminary estimates  ** consultant’s projections

The main markets are the US, UK and OECS which together account for about three-quarters of all stay-over arrivals. The MTB Stay-Over Visitor Exit Survey (2010/11) report provides a profile of stay-over tourists to Montserrat, the more salient findings being:

- just under half (48%) indicate ‘vacation’ as main purpose of visit, a fifth (20%) come for business and a further 15% to visit friends and relatives;
- high average length of stay – about 13 nights, mainly due to the high proportion of visitors staying with friends/relatives (40%) and those with second homes;
- just under three quarters (73%) are able to make ‘same day’ connections to Montserrat. Visitors from the UK are more likely (81%) to make ‘same day’ connections. Canadians are less likely (56%); and
- just under 2/3rds (62%) are repeat visitors.
**Stay-Over Visitors by Purpose of Visit/Activity Engaged In**

Based on the 2010/11 ‘stay-over visitor exit survey’ findings, the breakdown of visitor numbers by ‘primary’ activity engaged in, is as follows:

Table 4.3: Indicative Breakdown of Stay-Over Visitors by Main Activity/Motivation

<table>
<thead>
<tr>
<th>Motivation/Activity</th>
<th>Numbers</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>(i) Visiting Friends &amp; Relatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- general vacation</td>
<td>2,500</td>
<td>40</td>
</tr>
<tr>
<td>- personal visits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(ii) Business/Official</td>
<td>1,250</td>
<td>20</td>
</tr>
<tr>
<td>(iii) Non MNI Related Vacation</td>
<td>2,150</td>
<td>35</td>
</tr>
<tr>
<td>- general leisure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- scuba dive &amp; general leisure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- nature/hiking &amp; general leisure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(iv) Other</td>
<td>333</td>
<td>5</td>
</tr>
<tr>
<td>- study, sports groups</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>6,233</td>
<td>100</td>
</tr>
</tbody>
</table>

**Source:** Consultants estimates

Table 4.3 shows that the number of non-Montserratian related (either through friends/relatives or business) visitors coming for vacation or ‘other’ reasons was about 2,500 in 2011.

**4.4 YACHTING ARRIVALS**

In 2011, the number of yachts visiting Montserrat was 360 compared with 216 in 2010. With an average number of persons on board of around 5, visitor numbers were 1,881 in 2011.

Table 4.5: Yacht Arrivals and Associated Visitors

<table>
<thead>
<tr>
<th>Year</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011*</th>
<th>2012**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yachts</td>
<td>311</td>
<td>394</td>
<td>295</td>
<td>216</td>
<td>360</td>
<td>380</td>
</tr>
<tr>
<td>Visitors (including crew)</td>
<td>1,463</td>
<td>1,840</td>
<td>1,340</td>
<td>993</td>
<td>1,881</td>
<td>2,000</td>
</tr>
</tbody>
</table>

**Source:** CSO Montserrat, ECCB, MTB and Consultants

*preliminary estimates    ** consultant’s projections

**4.5 CRUISE SHIP PASSENGER ARRIVALS**

In 2010, 5 cruise ships made calls to Montserrat, with an average of 200 passengers per ship. There were 3 cruise ship calls in 2011 and a similar number is expected for 2012.

Table 4.6: Cruise Ship Calls and Passenger Numbers

<table>
<thead>
<tr>
<th>Year</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011*</th>
<th>2012**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cruise Calls</td>
<td>3</td>
<td>-</td>
<td>1</td>
<td>5</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Cruise Passengers</td>
<td>273</td>
<td>-</td>
<td>189</td>
<td>878</td>
<td>550</td>
<td>600</td>
</tr>
</tbody>
</table>

**Source:** CSO Montserrat, ECCB, MTB and Consultants

*preliminary estimates    ** consultant’s projections
The cruise ships which made calls to Montserrat in 2010 were Sea Dream II (4 calls) and Phantom (Windjammer). The cruise ships that called in 2011 were Sea Dream II, Discovery and Silver Sea.
5. NATURAL ENVIRONMENT, CULTURAL HERITAGE AND COMMUNITIES

5.1 NATURAL ENVIRONMENT

The topography of Montserrat is dominated by four volcanic mountains, Silver Hills, Centre Hills, Soufrière Hills and the South Soufrière Hills, from each of which numerous valleys and ghauxs spread downwards towards the coast. Which consists mostly of steep cliffs, with just a small number of sandy coves and low lying inland areas. In some places, the coastline has been pushed back by volcanic outflows.

Rainfall is highest in the south and west, and lowest in the north and east. The wet season (July to January) tends to coincide with the hurricane season, and when not suffering direct hits – as with Hugo (1989) and Earl (2010) – the island can experience high winds and tides in the aftermath of hurricanes and tropical storms that pass close by.

In common with other eastern Caribbean islands, Montserrat has a rich flora and fauna, with a high level of endemic species that are unique to the island. The population of wild mammals has been augmented in recent years by a growing number of feral cows, pigs and other domesticated animals in the Exclusion Zone. The health of the eco-system requires careful management which in turn depends upon effective enforcement of environmental and planning regulations, many of which require updating.

* Further details are given in the Consultation Draft: Physical Development Plan for North Montserrat, 2012 - 2022
Soufrière Hills volcano

Since 1995, the Soufrière Hills volcano has dominated the physical and human environment, especially in the south of the island (but unfavourable wind directions can result in ash falls throughout Montserrat). Around two-thirds of the island’s land area lies within the Exclusion Zone which covers the entire south-eastern half of the island. In addition, there is a Maritime Exclusion Zone (MEZ) which extends four kilometres off-shore along the eastern coast. Relatively quiet since early 2010, the volcano continues to be closely monitored by the Montserrat Volcano Observatory (MVO). Visitors are permitted entry into the Exclusion Zone only under specified conditions. Depending on the state and location of the volcanic activity, daytime access is permitted from 8:00am until 4:00pm, while boats are permitted to travel through the MEZ without stopping from 6:30am until 5:30 pm. Approval to visit Plymouth is considered on a case-by-case basis.

Protected Areas

There are three terrestrial protected areas on Montserrat covering some 30 percent of the land area of North Montserrat. These are:

- The Centre Hills Forest Reserve which is recognized as being of global ecological and biodiversity importance, and the last remaining habitat for numerous threatened species (including the Montserrat oriole, the “mountain chicken” frog, the galliwasp lizard and the endemic Montserrat orchid). Conservation measures are coordinated through the Centre Hills Project, which was launched in June 2005. The Centre Hills is also the primary source of all the island’s potable water, and the location of the majority of the island’s hiking trails;
The Silver Hills Forest Reserve covers 75 acres of dry forest, much of which is of outstanding landscape value, with a number of hiking trails; and
The Piper’s Pond Wildlife Reserve (and the associated Potato Hills Conservation Area) which encompasses the last significant area of mangrove swamp on the island, and also supports some birdlife.

All ghauts (which play an important role in watershed management) have de facto conservation status.

**Marine Environment**

The reef and marine system faces a number of threats, particularly from fishing activities and sedimentation. In some cases, a rapid deterioration has occurred in the condition of the reef, including the destruction of reef areas to the south of Woodlands Bay, and badly degraded areas from Woodlands to Little Bay. This is attributed to volcano-related sedimentation, combined with poor land and construction management, and intensified fishing activity on the remaining healthy reefs. These are now beginning to threaten the health of the marine system at Little Bay, Rendezvous Bay and locations further north. A further threat to Montserrat’s reef system is the recent discovery of the lion fish. Efforts are being made to conserve and develop the valuable reef resource, including an artificial reef and coral harvesting programmes at Woodlands Beach. In previous studies, recommendations have been made for the establishment of a mixed use marine reserve that would balance the needs of fishermen, divers and yachts with marine and reef conservation objectives.

**Environmental Concerns**

Among the main environmental concerns are:

- Need for updating and strengthening of the regulatory framework to support institutional changes (following the creation of the new Department of Environment), including enactment of the Conservation and Environmental Management Bill (drafted in 2007) and clearer and more effective procedures for environmental impact assessment;
- Impact of uncontrolled grazing, roaming feral and loose livestock, and vegetation clearance for development and agriculture;
- Effects of high tides and storm surge on low-lying areas, such as Carr’s Bay and Little Bay;
- Impact of the removal of beach vegetation, litter and garbage (which attract rats) on key nesting beaches for turtle breeding; and
- Impact of sand mining activities in the Belham Valley, including the associated heavy-axle truck traffic, on the surrounding residential areas and on the environment.

The built environment (existing buildings and future developments) has until now remained largely unregulated, posing a potential threat to the long term wellbeing of the tourism sector. There is need to enforce zoning, building design, construction standards, etc.

**CULTURAL HERITAGE**

Known sites of archaeological and cultural heritage are comparatively scarce in North Montserrat, partly because the focus of heritage and archaeological protection had been in the south, including Trants, Galway’s and Plymouth’s vernacular architecture.
Many historic churches and other buildings are relatively new, replacing buildings destroyed in earthquakes in the 1930s. A team from Brown University has updated an existing record of known sites held by the National Trust. The inventory includes sites of prehistoric and colonial heritage interest (e.g. sugar mills), as well as more recent history (e.g. the George Martin AIR Studios), some of which may have the potential of being restored as tourist attractions.

Under TDP2, measures have already been undertaken on the restoration of a number of historical sites (Carr’s Bay Gun Battery, the island’s oldest identified tombstone at Rocklands and one of the ruins in the Little Bay Heritage Site), while improvements were also made to the Botanic Garden, including the development of an Amerindian garden. However, with the present low level of tourist activity on the island, these attract relatively few visitors.

While important sites of historic and socio-cultural significance, and associated artefacts, need to be preserved for future generations, equally important is the need to preserve or encourage the development of the vernacular architectural heritage. The benefits of so doing can be seen on island of Saba which presents one of the most cohesive and coherent vernacular styles to be found in the Caribbean; the traditional designs are observed today in the construction of new buildings, and in the extension/alteration of existing buildings, resulting in a cohesive sub-urban pattern.

5.3 SETTLEMENTS AND COMMUNITIES

Settlements

The population of 4,921 (2011 Census) is spread fairly equally between the main settlement areas, viz. Brades and Cudjoe Head, Davy Hill, St. Johns, Lookout, St Peters and Salem. Following the loss of Plymouth, Brades has emerged as the unplanned economic centre and de facto capital. The intention is to develop Little Bay and Carr’s Bay as an integrated new town providing government, residential, commercial and tourism-related facilities.

Communities

The more active geographic community groups are concentrated in Davy Hill, Lookout, Cudjoe Head, Brades, and St. Peters. Salem is said (Source: Physical Development Plan) to have lost much of its previous “community spirit” because many of its long-time residents have left and Salem is now home to a large number of expatriate workers. In addition, there are community groups which are not geographically specific, including church groups, sports groups, Rotary, Spanish-speaking groups, etc.

Although the community groups’ focus is largely on the provision of social service, a number (such as Lookout, Davy Hill and Salem) are trying to become more involved in tourism and other development initiatives that affect their respective communities. Under TDP2, there was community participation in the beautification of a number of sites but there were reportedly “some challenges” with the maintenance of the sites by youth groups (particularly at Salem where the group did not appear to be fully committed). The other two sites - at St. John’s and part of the airport road - are maintained regularly.

The new community and housing estate at Lookout is pointed out to visitors as part of the package of ‘new things’ to see in the changed Montserrat, and, in a sense, is becoming part of the tourist product. Whether or not this is appreciated by the residents is unclear.
6. ECONOMIC INFRASTRUCTURE

6.1 AIRPORT

For several years after the enforced closure of the former WH Bramble Airport (also known as Blackburne), Montserrat was only accessible by helicopters or boats until the new Gerald's Airport (renamed John A. Osborne Airport in 2008) was completed in July 2005 at a total cost of approximately EC$50 million. The completion of the new airport allowed for the resumption of regular commercial airline service to Montserrat for the first time since 1997.

Whereas WH Bramble had a runway length of 1,030m (or 3,380ft), permitting the use of DH-8 (capacity: 48 seats) aircraft, the new airport runway in contrast is only 600m (1,968ft) in length restricting its use to Twin Otter (capacity: 18 seats) and smaller aircraft. Extension of the existing runway is constrained by the present hospital location and the nature of the surrounding terrain. The airport is equipped with modern air traffic control technology, Customs and Immigration facilities, and a small restaurant (and is only airport in the Caribbean with a public tunnel under its runway). Following a series of landing incidents, involving the same operator, a number of safety recommendations have been implemented.

In 2011, the number of arriving passengers was 8,195, of whom 5,040 were visitors (see Chapter 7 for further details). The departure lounge can accept around 30 passengers at any one time (equivalent to about five flights per hour for six-seater aircraft). This is more than adequate for the existing volume of passenger traffic, although capacity may be tested over the forthcoming Christmas and New Year period when large numbers from the Montserratian diaspora are expected to return home for 50th Anniversary celebrations.

Existing capacity bottlenecks in the inward immigration area in practice restrict the number of flights per hour to three (for six-seater planes (compared with a theoretical runway capacity of 30 flights per hour). Capacity could be increased through digitization of passport processing. Other constraints are the limited facilities for screening outbound baggage and the customs procedures for inbound baggage. In addition, there are no aircraft hangar or fuelling/re-fuelling facilities.

Car parking provision is adequate, but the entire landside area presents a less than favourable image to residents, tourists and business travellers.

MONTserrat TOURISM DEVELOPMENT PLAN 2012 – 2022
This is most noticeable in the unkempt appearance of the car park and in the access stairs to the roof of the terminal building where cracks are beginning to appear.

6.2 SEAPORT

Montserrat’s only operational port facilities are located at Little Bay (although the Plymouth jetty is sometimes used for sand exports). The current facility comprises a jetty and relatively narrow wharf that links the jetty to the warehousing and the port immigration building. Passenger facilities are limited and subject to overcrowding, and there is inadequate shelter in the event of inclement weather.

The current jetty was built originally as an emergency facility and was intended to be temporary. Due to the lack of a breakwater, there is no protection from adverse sea conditions (which tend to be experienced during the peak tourist season), with resulting delays in cargo, cruise and ferry traffic, sometimes for weeks at a time.

Other inadequacies of the present port include:

- Inadequate space for parking and the movement of cars, taxis and mini-buses;
- Departure lounge too small at peak times and décor needs refreshing; and.
- Organization of customs and immigration and customs procedures is poor, sometimes resulting in lengthy processing times.

The scheduled ferry service, which had been discontinued in 2005 when the new airport was opened at Gerald’s, was re-established in 2010 with a much slower, less comfortable vessel (the MV Fjortof) which is partially owned by the Governments of Antigua & Barbuda and Montserrat. The service is operated by Twin Island Ferries Services, Ltd. A new hybrid (passenger and cargo) ferry that would reduce travelling times to/from Antigua from as much as two hours to less than one hour is expected to be ordered by GoM during 2013 and to be in-service from mid-2014, to be followed by a new port at Carr’s Bay (including a new ferry terminal) by mid-2016 as part of the Master Plan for the Little Bay area. A ferry service might possibly be operated at the new port in advance of the final completion date.

6.3 ROADS

Formerly in good condition, with reasonably good surfaces, the road network as a whole suffered extensive damage due to the flash floods and landslides caused by Hurricane Earl in August 2010. Due to the intensity of storm waters most ghauts were also damaged by the flash floods.

A road reinstatement project commenced in late 2010, funded by DFID. By mid-2012, a significant portion of the works was nearing completion, including the main A01 which had been extensively damaged by poor weather and the movement of heavy-axle sand mining trucks. The heavy truck traffic has temporarily detracted from the island’s image of peace and tranquillity.
Improvements to feeder roads are being addressed under the Roads Master Plan, but in some instances progress has been constrained by the current curb on public capital expenditure. Access roads to beaches and other attractions are in need of improvement, particularly the roads to Garibaldi Hill and to the Silver Hills (the latter being impassable because of mudslides during the Consultant’s visit).

Compared with some other islands (e.g. Saba), the view of the roadside for the passing motorist often appears somewhat ‘scruffy’ with untidy yards, rusting and seemingly abandoned vehicles, unfinished buildings, and litter. This detracts from the visitor’s image of the island, and needs to be addressed. For the visitor, other concerns are the lack of road signage and markings, which in many places are absent or barely visible due to lack of maintenance. With poor public lighting, this is a major safety issue after nightfall.

6.4 UTILITIES

The provisions of the Montserrat Utilities Limited (MUL) Act, 2007 enabled MUL to take over the operations, functions and activities of the former Montserrat Electricity Services and Montserrat Water Authority, creating a single company which functions as a semi-autonomous statutory body with responsibilities for the both the island’s electricity supply and water resources.

6.4.1 Electricity Supply

Since the abandonment of the former power station at Plymouth, the current electricity demand on the island, which has a peak of under 2MW, has been met by the power station at Brades which houses five high-speed generators, designed originally as emergency standby units (or top-ups at peaks) with a service life of about 10 years. Consequently, they are now inefficient and unreliable and, in recent years, the number of power outages has been increasing. Allied to this, the costs of electricity in Montserrat, for both domestic and business users, are amongst the highest in the region. Together, these factors could make Montserrat unattractive to potential investors.

To address this situation, a EC$36 million power plant project, launched in June 2012 with funding from DFID and the Caribbean Development Bank (CDB), will provide the island with a more efficient and plentiful supply of power. The new power station is expected to be commissioned by mid-2014.

Geothermal Development

The GoM is actively pursuing its stated goal to reduce the island’s dependence on imported fossil fuel for its energy needs through use of renewable energy sources, such as geothermal and wind. While there are encouraging indications that a geothermal resource exists, this potential has yet to be proven. Accordingly, in February 2012, the GoM announced that it was inviting expressions of interests in the confirmation and development of the potential geothermal resource in Montserrat. According to the statement, interested developers would be expected to finance the drilling phase to in order to prove (or otherwise) the existence of an exploitable resource. The successful drilling company would then earn the right to install generating plant to meet current and likely future energy demands. However, presumably because no satisfactory offers were received, the UK Ministers agreed in April that that UK public funds should be used for the exploratory drilling phase for geothermal on Montserrat.

Other islands (for example, Dominica and Nevis) are also exploring their geothermal energy potential both for domestic use and export to neighbouring islands.
6.4.2 Water Supply

Due to the emphasis placed on the development of the water resources by Government over the years, and the implementation of several important water development projects, MUL is in the favourable a position of being able meet the demand for water in island.

The existing water supply is obtained from six surface springs originating within the mountains. The water is collected at the source and piped to reservoirs or storage tanks where, after being chlorinated against harmful bacteria, it is then distributed to customers throughout the water system. While there have occasionally been some supply problems (thought to be associated with volcanic ash temporarily blocking the aquifer), the overall supply of spring water from the Centre Hills is considered to be more than adequate to meet current demands.

However, if tourism demands were to increase significantly, some ‘water demand management measures’ could be needed, and very large water-using establishments, including tourism establishments, might need to have backup water resources to cater for their needs in times of shortage.

6.4.3 Waste Management

Most houses, offices and public buildings use individual septic tanks, with just the two main areas of Davy Hill and Lookout being on communal systems. Sludge from the individual tanks is collected and taken to sludge ponds near the landfill site at Jack Boy Hill, where there can be some leakage. The groundwater is at risk from uncontrolled disposal of solid waste. There is also some evidence of pollution of the marine environment caused by discharge of sewage from domestic and commercial establishments, and of oil from visiting yachts and ships.

There is a garbage collection service for solid waste which is then taken to the landfill at Jack Boy Hill. However, there is inadequate provision for recycling and no incinerator at the landfill to burn inflammmable items. The landfill currently does not have enough cover material and is unsightly for users of the Katy Hill trail network.

6.5 TELECOMMUNICATIONS

Montserrat has a modern and fully digitalized – but not yet liberalized - telecommunications infrastructure. Land line, mobile phone, internet and island-wide Wi-Fi internet services are provided by only one company, LIME. While internet speeds have increased in recent years, operators of tourism and other businesses consider the service to be still rather slow and business internet service rates to be expensive. Mobile phone coverage can sometimes be limited, and lack of signal is exacerbated by periodic power outages.

The island is a landing point for the East Caribbean Fibre System (ECFS) optic submarine communications cable with links to thirteen other islands in the eastern Caribbean, including Montserrat.
7. ACCESS TRANSPORT SERVICES

Visitor arrivals by mode of transport are shown in Table 7.1.

Table 7.1: Visitor Arrivals by Mode of Transport, 2000 - 2010

<table>
<thead>
<tr>
<th>Mode of Transport</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012*</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Air</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stay-over arrivals</td>
<td>7,667</td>
<td>6,800</td>
<td>5,599</td>
<td>5,070</td>
<td>4,067</td>
<td>4,600</td>
</tr>
<tr>
<td>Excursionists</td>
<td>903</td>
<td>784</td>
<td>617</td>
<td>799</td>
<td>978</td>
<td>1,000</td>
</tr>
<tr>
<td>Total A</td>
<td>8,570</td>
<td>7,584</td>
<td>6,216</td>
<td>5,869</td>
<td>5,045</td>
<td>5,600</td>
</tr>
<tr>
<td>B. Sea</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stay-over arrivals</td>
<td>79</td>
<td>560</td>
<td>712</td>
<td>911</td>
<td>2,347</td>
<td>2,650</td>
</tr>
<tr>
<td>Excursionists</td>
<td>65</td>
<td>175</td>
<td>407</td>
<td>927</td>
<td>1,019</td>
<td>1,000</td>
</tr>
<tr>
<td>Total B</td>
<td>144</td>
<td>735</td>
<td>1,119</td>
<td>1,838</td>
<td>3,366</td>
<td>3,650</td>
</tr>
<tr>
<td>Total A + B</td>
<td>8,714</td>
<td>8,319</td>
<td>7,335</td>
<td>7,707</td>
<td>8,411</td>
<td>9,250</td>
</tr>
</tbody>
</table>

Source: CSO Montserrat * consultant’s estimates.

Stay-over passengers travel preference is air access. The restrictive sunrise to sunset operating times of the John A Osborne Airport and prices seem to influence the relatively encouraging volume of stay-over arrivals by sea over the period. When long haul flights are late arriving at Antigua or the sun sets early, arriving passengers only option is to travel the final leg by sea for same day arrival on Montserrat. The ferry schedule has proven to be very flexible, sometimes waiting over one hour to facilitate passengers.

Generally some passengers are price sensitive and will change mode of travel because of price. The ferry offers a lower price but a much longer journey time. When journey time is not an issue, particularly for stay-over visitors, the ferry becomes the preferred option as borne out in the statistics.

These characteristics are expected to persist and the trends continue for as long as the transport modes remain as at present.

7.1 AIR ACCESS

7.1.1 Scheduled Air Services

(i) Passenger Movements

Table 7.2: Scheduled Air Services (June, 2012)

<table>
<thead>
<tr>
<th>Carrier</th>
<th>Type of Aircraft</th>
<th>Capacity (No. of seats)</th>
<th>Arriving from</th>
<th>Departing to</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Montserrat Airways Limited</td>
<td>BN2 Islander</td>
<td>9</td>
<td>Antigua (scheduled)</td>
<td>Antigua (scheduled)</td>
<td>6 movements daily (average)</td>
</tr>
<tr>
<td>SVG Air Limited</td>
<td>BN2 Islander</td>
<td>9</td>
<td>Antigua (scheduled)</td>
<td>Antigua (scheduled)</td>
<td>4 movements daily</td>
</tr>
</tbody>
</table>

In 2010 two airline services operated on Montserrat namely Winair and Montserrat Airways Limited (MAL). Winair operated a 19-seater twin otter (accommodating 17 seats) and MAL a 9-seater BN2 Islander accommodating 7 seats. They both operated 2 return scheduled flights daily all year round. The average load factors were Winair 54% and MAL 57%.

The airlines were provided with seat guarantees i.e., Winair 12 seats and MAL 5 seats on each flight/movement. These guarantees represented roughly 70% of their operating capacity and were a disincentive to any concerted efforts to develop the market. The indications are that if there were a focused market development programme the load factors would be have been much higher, thus reducing the need for any subsidy.
In 2011 major changes occurred, - an all year round ferry service (as opposed to 7 months in 2010) was introduced and the operation of all BN2 Islander flights became all year round. The daily seat availability was 70 with a load factor of 61% as opposed to 2010 with 96 seats and average load factor of 55%.

There are high and low months in the year. Generally the period of high activity coincides with the high tourist season, summer school vacation and Christmas. During those periods the patterns are higher load factors on one sector and low on the other. It evens out with reverse flows at the end of the periods.

Table 7.3: Passenger Movements

<table>
<thead>
<tr>
<th>Year</th>
<th>2010</th>
<th>2011</th>
<th>2012*</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of Aircraft movements</td>
<td>2,837</td>
<td>3,738</td>
<td>3,650</td>
</tr>
<tr>
<td>No. of Arriving Passengers</td>
<td>9,452</td>
<td>8,195</td>
<td>8,190</td>
</tr>
<tr>
<td>No. of Departing Passengers</td>
<td>9,135</td>
<td>7,874</td>
<td>7,870</td>
</tr>
</tbody>
</table>

Source: CSO Montserrat * consultant’s estimates.

Air passenger numbers in 2012 are expected to be flat relative to 2011, the reasons being that there are no expectations that the market demand situation will change in the course of the year and the airlines will be provided with subsidies to continue their services.

Comparative Air Fares

The airfare for the round trip from Antigua to Montserrat is US$148 plus taxes and surcharges.

Table 7.4: Comparative Air Fares (US$), 2012

<table>
<thead>
<tr>
<th>Hub</th>
<th>Fare (US$)</th>
<th>Flight Time</th>
<th>Fare /Minute ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. St. Maarten To:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>St. Barts (SBH)</td>
<td>240</td>
<td>10 min</td>
<td>12.00</td>
</tr>
<tr>
<td>Saba</td>
<td>201</td>
<td>12 min</td>
<td>8.40</td>
</tr>
<tr>
<td>B. Antigua To:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barbuda (BBQ)</td>
<td>100</td>
<td>20 min</td>
<td>2.50</td>
</tr>
<tr>
<td>Montserrat</td>
<td>148</td>
<td>20 min</td>
<td>2.70</td>
</tr>
<tr>
<td>St.Kitts</td>
<td>137</td>
<td>40 min</td>
<td>3.42</td>
</tr>
<tr>
<td>C. Other:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Curacao - Bonaire</td>
<td>93</td>
<td>30min</td>
<td>1.60</td>
</tr>
<tr>
<td>Dominica - Guadeloupe</td>
<td>279</td>
<td>30</td>
<td>4.65</td>
</tr>
<tr>
<td>St.Kitts – St. Martin</td>
<td>238</td>
<td>30</td>
<td>4.00</td>
</tr>
<tr>
<td>St.Lucia - Martinique</td>
<td>140</td>
<td>25</td>
<td>2.80</td>
</tr>
<tr>
<td>St.Lucia - SVG</td>
<td>237</td>
<td>30</td>
<td>3.95</td>
</tr>
</tbody>
</table>

Sources: WINAIR and LIAT websites as at June 26, 2012

Airfares to short haul destinations vary widely. In the examples of St. Barts and Saba above, the destinations are high end and they attract relatively high fares. On the other hand the same analysis of fares to short haul destinations between the traditional Caribbean islands destinations puts Montserrat in the same ballpark of fares per minute of travel time. In this context the fare structure to Montserrat is competitive.
However, the issue of whether fares to Montserrat are high is an on-going debate. The Antigua/Montserrat normal fare has remained unchanged since 2009 while fares in other short haul regional destinations have increased. The Access Strategy report showed the Antigua/Montserrat fare to be one of the highest in 2010. With the rest of the regional fares having increased in the meantime, Montserrat is now competitive.

**Air Access Issues**

Based on the findings of previous studies (Access Strategy Report, 2011) and discussions with tour operators and market representatives, the major air access issues are:

- fares considered too high for the excursionist market from Antigua
- reluctance by potential visitors to use the Islander – seen as too small, unsafe
- not possible to make through bookings from source markets – services not included in the major airlines' GDS (Global Distribution Systems) or the LIAT network.

### 7.2 SEA ACCESS

#### (i) Passenger Movements

<table>
<thead>
<tr>
<th>Year</th>
<th>2010</th>
<th>2011</th>
<th>2012*</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of Ferry-Boat movements</td>
<td>218</td>
<td>458</td>
<td>460</td>
</tr>
<tr>
<td>No. of Arriving Passengers</td>
<td>1,802</td>
<td>3,811</td>
<td>4,066</td>
</tr>
<tr>
<td>No. of Departing Passengers</td>
<td>1,908</td>
<td>3,468</td>
<td>3,754</td>
</tr>
</tbody>
</table>

*Source: CSO Montserrat * consultant’s estimates.*

The scheduled ferry service in 2010 only operated for the period February – August and then broke down. A replacement service was contracted in December and operated from December 8 – 31. The average load factor per voyage was 17 passengers or roughly 16% of total capacity.

In 2011/2012 the service operated all year round. The passenger loads were largely domestic with small numbers of excursionists from the Antigua stay-over market. With the termination of TDP2 marketing component there is now no marketing/promotions to support the available capacity.

#### Scheduled Services

**Table 7.6:** Scheduled Sea Services

<table>
<thead>
<tr>
<th>Operator</th>
<th>Type of Ferry Craft</th>
<th>Capacity (No. of seats)</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>M&amp;M Transportation</td>
<td>Monohaul passenger ferry</td>
<td>120</td>
<td>One return trip 4 days weekly, except December 15 – January 15 and St. Patrick’s week when it runs 6 days weekly.</td>
</tr>
</tbody>
</table>

#### Ferry Access Issues

- infrequent services
- ferry is not appropriate and does not have the aesthetic appeal for the excursionist market
- very slow making the journey – one way in 2 hours.
- only one day (Thursday) in the week when it is possible to make a day trip from Antigua to Montserrat. Moreover, it should be noted that the departure time of the ferry (0830) from Antigua does not facilitate cruise ship passengers wishing to travel to Montserrat as they rarely disembark the cruise ship before 0830/0900.

**MONTSERRAT TOURISM DEVELOPMENT PLAN 2012 – 2022**
8. TOURIST ACCOMMODATION, FACILITIES AND SERVICES

8.1 OVERVIEW

The following overview of the tourism sector is based on the MTB tourist guide and the Consultant’s own fieldwork.

Table 8.1 Structure of the Montserrat Tourism Sector
Facility/Service, 1994-2012

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Units</td>
<td>Bedrooms</td>
<td>Units</td>
<td>Bedrooms</td>
<td>Units</td>
<td>Bedrooms</td>
</tr>
<tr>
<td>Hotels</td>
<td>3</td>
<td>116</td>
<td>1</td>
<td>18</td>
<td>1</td>
<td>18</td>
</tr>
<tr>
<td>Guesthouses/B&amp;B</td>
<td>178</td>
<td>65</td>
<td>11</td>
<td>48</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apts &amp; Villas</td>
<td>1,123</td>
<td></td>
<td>18</td>
<td>37</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Apartments</td>
<td></td>
<td></td>
<td>58</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Villas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub-total</td>
<td>n.a.</td>
<td>1,417</td>
<td>240</td>
<td>249</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurants</td>
<td>10</td>
<td>16</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Craft/Gift shops</td>
<td>7</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Car Rental</td>
<td>12</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taxi/Guide</td>
<td>32</td>
<td>31</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ground Tour Companies</td>
<td>7</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Montserrat Tourist Board and Consultant’s estimates

8.2 ACCOMMODATION

Currently, the total saleable accommodation capacity is estimated to be 249 rooms, about the same as in 2002, but less than one-fifth of the accommodation stock in 1994/5. The decrease is due almost entirely to the fall in the number of rooms in the villas/apartments category – from 1,123 in 1994 to 183 in 2012. Due to volcanic activity in October 2002, the exclusion zone was extended to include a large number of villas as well as the flagship Vue Pointe Hotel*. Zone B was declared a daytime entry zone which meant that persons could not overnight in this area. A significant number of high quality rental villas were in this area, thus diminishing the already depleted and limited accommodation stock. Property owners in Zones A and B currently find it difficult to obtain bank loans or insurance covers for property renovation or development.

With the Tropical Mansions Hotel and most apartments primarily geared to the business segment of the market, the effective number of rooms currently available for the vacation/other customer segment is approximately 200. On the basis of an average annual occupancy rate of 35% (reflecting usage of the villas by their owners and the low travel during the hurricane season), the maximum number of stay-over visitors that can be accommodated per year is about 3,500 (on the assumption of 1.8 sleepers per room and average length of stay of 13 nights). As Montserrat currently receives some 2,500 stay-over leisure visitors, the possibilities of significantly increasing the number of stay-over arrivals is severely constrained by the shortage of accommodation plant.

8.3 RESTAURANTS

The MTB website lists 16 restaurants (excluding snackette and takeaway outlets). Of these, approximately only half could be considered to be of tourist standard. Décor is simple

* At present, there are no definite plans to re-open Vue Pointe Hotel (now closed) pending agreement on the financing arrangements for the necessary renovations.
- often basic; menus are limited, but service is generally very welcoming. Most do not offer meals on Sundays or Mondays, and some open and close at will. Visitors, especially excursionists, may not be able to eat without prior arrangement especially at weekends. This is particularly the case in the low season. Inevitably, the lack of regular dining facilities discourages excursionist traffic.

8.4 MEETINGS AND CONFERENCES

Since the closure of the Vue Pointe Hotel, Montserrat lacks the facilities to comfortably host large meetings or conferences. The largest of the available meeting facilities rooms is in the auditorium at the Cultural Centre which can seat up to 200 persons theatre-style on the ground level and approximately 240 in the ‘bleachers’, but with no air conditioning. In addition, there is a smaller conference room (with AC), while outside there is a large open area with staging that can accommodate open-air performances as well.

8.5 SHOPPING

A number of art and craft shops offer the visitor authentic examples of local art and craft, including hand-woven items made from locally grown cotton; volcanic soap; and preserves such as guava jelly and hot pepper sauce. However, business is presently very slow. The range and quality of handicrafts needs to be expanded, while assistance is also needed with regard to packaging and promotion. In the past, there was a central facility where craft producers could display their products. The new public market only partly meets this need.

8.6 LOCAL TRANSPORT

For the visitor, getting around Montserrat necessitates either car rental or taxi. The mini-bus service (which operates only on main roads and not after dark) is not adequate, particularly for the shorter stay tourist.

**Car Hire:** 15 operators are listed on the MTB website, most with only one vehicle.

**Taxis:** 31 listed taxi-guide services (which is more than adequate to cater for current visitor volumes) of which the majority are members of the Tour and Taxi Association. Tariffs are high; the quality of vehicles often poor, even unsafe; and the quality of guiding erratic (although this has improved after a CTO-conducted training course).

**Minibuses** (and taxis) can be hailed as they pass, but these vehicles usually operate only on the main roads in daylight hours, and very few after dark.

8.7 GROUND TOUR OPERATORS

The inbound tour business in Montserrat is not well developed for two main reasons; (i) historically, Montserrat was not a packaged destination – vacation tourists were primarily independent travellers (villa/residential tourists); and (ii) foreign tour operators are not inclined to include Montserrat in their catalogues because of the negative perceptions concerning the volcano and the lack of adequate air access. While a number of tour operators based in Antigua operate day trips to Montserrat that include volcano viewing, a tour of the island, lunch and transportation, there is only one ‘active’ ground tour operator on Montserrat – R T Travel & Tours.
8.8 ENTERTAINMENT AND RECREATION

Organised entertainment and recreational amenities for visitors are very limited. Apart from tennis at Olveston and Lookout, and sometimes the opportunity to watch cricket at the main Little Bay oval (which is now also the focal point for athletics) and Salem, and football at the well-appointed and FIFA-owned and operated football stadium at Blake’s, there are hardly any other land-based recreational facilities. Golf is now restricted to a small pitch-and-putt facility at Old Towne.

8.9 VISITOR INFORMATION AND FACILITATION

Visitor information services are only available at the MTB office in Brades during office hours. Facilitation, as experienced at airport customs and immigration is considered to be friendly and courteous, but less so at the port (especially for those arriving by yacht).

8.10 OTHER SERVICES

**Banking Services:** there are two banks – the Bank of Montserrat and Royal Bank of Canada (RBC) – at Brades. Both have external 24-hour ATM machines.

**Medical Services:** three doctors currently operate private medical practices at the 39-bed Glendon Hospital in St John’s, which is undergoing redevelopment and expansion. Visiting consultants make infrequent visits. For more serious conditions, patients have to travel to Antigua (or further afield), either by ferry or by air. Emergency evacuations by air are normally only possible during daylight hours. The nearest recompression chambers for divers are in Dominica or Saba.

8.11 PUBLIC SAFETY AND SECURITY

One of the greatest attractions of Montserrat for visitors is the friendliness of the local people, the almost total lack of crime and the ability to walk safely everywhere - even after dark - without fear of being molested or harassed (although there is some begging). In recent months, there has reportedly been an increase in the number of crime incidents, some serious, and anecdotally attributed to the influx of immigrants from other Caribbean countries.
9. TOURISM PRODUCTS AND ATTRACTIONS

9.1 WATER-BASED

(i) Beaches
Montserrat lacks the conventional white sand beaches to be found in most other Caribbean islands, but instead offers soft, pearl-grey volcanic sand.

The only non-volcanic white sand beach is Rendezvous Beach, which is accessible only by hiking or by a very short kayak or boat ride from Little Bay. All the beaches are public up to the high-water mark.
In addition to Rendezvous (which has few equals in the Caribbean for privacy and seclusion), the other beaches are:

- **Bunkum Bay**: (which also has a beach bar);
- **Woodlands Beach**: (with a covered picnic area on the cliff above the beach and other amenities);
- **Lime Kiln Beach**: (a secluded cove);
- **Old Road Bay**: (formerly a favourite bathing beach, the volcanic mudflows have now moved the shoreline outwards so that it now joins up with Isles Bay Beach (on the other side of the Belham River valley). The latter suffers from poor road access (particularly after rain) and a general lack of facilities and amenities; and
- **East Coast**: it is reported that a new beach has been formed on the east coast, close to the exclusion zone boundary, with access possible for 4x4 vehicles.

- Little Bay in the north is popular with locals as well as visitors, and has a number of beach bars, restaurants and snackettes. However, the showers and changing areas are in urgent need of upgrading; there is considerable litter and fly-tipping; and there is also need for more attention to landscaping, etc.

(ii) Diving
The coral reefs on Montserrat's coast offer a variety of tropical fish and other exotic undersea life, such as spotted rays, sea turtles and sponges. The diveable area reached from Old Road Bluff in the west around the northern shoreline towards the border of the Volcanic Maritime Exclusion Zone, offering in all over 20 km (13 miles) of coastline.

There are 16 dive sites, of which 10 are permanently moored dive sites (see Table 9.1). Dive visitors are also taken to sites around Redonda (officially part of Antigua). Site capacity varies from about 12 at a time at Pot of Gold to 100 or more at Rendezvous Bay, but there has been no detailed study of carrying capacity, detailed mapping or sonar scanning of reefs.
There are two PADI-registered dive operators - Green Monkey and Scuba Montserrat - both located at Little Bay, and each with the potential to handle considerably more business.

Unlike several other Caribbean dive destinations, Montserrat has no offshore wrecks and cannot match Saba’s wall diving product. Otherwise, the diving product is considered relatively good and attracts some (but not much) repeat business. A bi-annual reef check commissioned by Green Monkey with a New York college shows that deterioration is about the same/ or a little worse than the world average.

The dive operators lack a suitable launch site for their boats which limits the variety of sites that can be visited.
(iii) Snorkelling and other water-based activities
For snorkelling, the best sites are at Bunkum Bay and Rendezvous Bay Reef (with the opportunity of swimming into the Bat Cave with its hundreds of protected fruit bats). Other popular snorkelling sites include Old Road Bay, Woodlands Bay, Carr’s Bay and Little Bay.

Kayaking is also available at Little Bay. However, it is not possible to rent day-sail boats such as lasers, mirrors, squibs, hobby cats, sailboards, canoes, etc., while water-skiing, jet skiing, parasailing etc. are not available.

Boat tours may be taken to Rendezvous Beach, Plymouth and Around the Island (which allow visitors to witness the devastation the volcano has caused to the southern end of the island, including Plymouth and the former WH Bramble Airport).

(iv) Fishing
Fishing is reported to be excellent - offering a variety of catches, including marlin, wahoo, dolphin, kingfish and albacore tuna. There are several fishing boats for hire and two small sea angling operations. (but not on a par with Antigua larger and faster boats, with higher levels of comfort). Shore fishing is also a popular leisure pastime at Old Road Bay/Isles Bay, Little Bay and Rendezvous Bay. The Montserrat International Fishing Tournament is held annually, usually in October.

(v) Yachting
Currently, Montserrat (almost uniquely among the Caribbean islands) attracts very few visiting yachts. Some anchor in Little Bay and occasionally at Isles Bay or Rendezvous Bay, especially following Sailing Week in Antigua at the end of April/early May, and some on sailing charters operated by the Antiguan-based company, Ondeck). Given the island’s location between Antigua and Guadeloupe (two well-developed yachting centres), there is considerable potential for expansion (especially if plans go ahead to develop a Little Bay).

At present, there are no visitor moorings or jetties. The poor standard of the only shower facilities (provided in a hut near Green Monkey at Little Bay) discourage yachtsmen from using them and from returning to the island; neither do negative reports about Montserrat that circulate in sailing circles. Customs and Immigration are, according to feedback from yachts people, unwelcoming and obstructive. The provision of basic facilities and improved attitudes (now being addressed by the head of the Customs & Revenue Service) would encourage longer stays, and increased expenditure in bars, restaurants, shops, etc.

In addition to the EC$45 (about US$14) fee for all yacht arrivals at the port, Customs charge EC$55 for attendance outside of normal working day hours and at weekends/public holidays (to cover staff overtime), with a minimum of EC$110 per call out.

9.2 LAND-BASED

(i) Soufrière Hills Volcano
Ironically, given the misery and destruction it has caused, the Soufrière Hills Volcano has become Montserrat’s major tourist attraction, offering visitors an unrivalled opportunity to observe an active volcano and learn about its origins and history at the Montserrat Volcano Observatory (MVO). In addition, there are a number of vantage points from where it is possible to view the destruction that volcano has wrought on Plymouth and other parts of southern Montserrat.
There are two main viewing sites:

(i). Jack Boy Hill which overlooks the former WH Bramble Airport, now covered by volcanic pyroclastic flows. The facility includes a viewing platform, picnic areas, Barbeque pit, washrooms (sometimes without water), a viewing telescope, a mini trail and landscaped grounds with access to the Katy Hill trail system (see below). There are many complaints in the MTB’s annual visitor survey about the poor condition of the road leading to this site; and

(ii). Garibaldi Hill (currently in the exclusion zone but daytime visits are permitted) which provides a panoramic view of Plymouth and other areas in the south, with contrasting prospects of Salem and lush greenery to the north. This site is not accessible during periods of heavy rainfall, and additional passing areas are needed on the very steep, single lane access road to the top. The present unkempt appearance at the summit (litter, overgrown bush, the LIME building and fencing, etc.), and lack of visitor facilities, also need to be addressed.

Another potential vantage point (further into the exclusion zone), is Richmond Hill, with an old sugar mill which formerly housed the National Museum. This site affords another, closer view of the abandoned former capital (which now lies buried in ash, mudflows and volcanic debris).

Volcano Interpretation Centre
Construction is expected to commence shortly on a new Volcano Interpretation Centre (VIC) adjacent to the new National Museum at Little Bay.

(ii) Hiking
There is a network of fourteen recommended hiking trails (shown on Map 9.1) which are for the most part carefully marked out and well maintained, but can be slippery and in need of clearing after storms and heavy rain. Most are designed for easy hiking, but some require a guide. The trails also provide opportunities for bird watching, including sightings of the Montserrat Oriole, the island’s national bird.

Table 9.2 Hiking Trails (illustrated on Map 9.3)

<table>
<thead>
<tr>
<th>Trail Name</th>
<th>Distance</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Cot</td>
<td>1.6 miles</td>
<td>light</td>
</tr>
<tr>
<td>Duberry-Cassava</td>
<td>0.5 miles</td>
<td>light</td>
</tr>
<tr>
<td>Oriole Walkway</td>
<td>1.3 miles</td>
<td>moderate</td>
</tr>
<tr>
<td>Dry Waterfall</td>
<td>1.2 miles</td>
<td>moderate</td>
</tr>
<tr>
<td>Blackwood Allen</td>
<td>1.2 miles</td>
<td>moderate</td>
</tr>
<tr>
<td>Underwood</td>
<td>1.0 miles</td>
<td>light</td>
</tr>
<tr>
<td>Katy Hill Trail System</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Big River</td>
<td>0.7 miles</td>
<td>extreme</td>
</tr>
<tr>
<td>- Katy Hill south</td>
<td>1.6 miles</td>
<td>extreme</td>
</tr>
<tr>
<td>- Katy Hill North</td>
<td>1.6 miles</td>
<td>extreme</td>
</tr>
<tr>
<td>- Baker to Katy</td>
<td>1.0 miles</td>
<td>extreme</td>
</tr>
<tr>
<td>Jack Boy Hill</td>
<td>0.8 miles</td>
<td>difficult</td>
</tr>
<tr>
<td>plus continuation to Katy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hill (0.4 miles; extreme)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13-14 Rendezvous</td>
<td>1.9 miles</td>
<td>difficult</td>
</tr>
<tr>
<td>(1.3 miles; moderate)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Although the mapped trails are nominally under management by MTB, it is the National Trust that assumes practical responsibility for trail maintenance together with rangers employed by the Department of Environment. Under TDP2, five trails (Blackwood Allen, Oriole Walkway, Dry Waterfall, Duberry-Cassava and The Cot) were rehabilitated and 20 signs, including markers, were placed on them. Some signs need correcting or re-siting. Another trail - the Rendezvous trail - was not completed due to land issues arising from the fact that the trail traverses private property. The section of this trail leading to Rendezvous Beach (described as ‘moderate’) is now quite hazardous in places.
Most of these and other trails suffered major damage during Hurricane Earl in 2010, with many trails washed out. The Tourist Board is working with the National Trust on a programme of phased rehabilitation.

(ii) Biking
There are presently two companies offering bike rentals. Some guest houses and villas have their own mountain bikes which guests can use or this growing adventure sport that is ideally suited to the island's rough trails.

(iii) Sightseeing Tours
Occasional cruise ships visit, as do some excursionists from Antigua. Typically, participants are taken to a number of vantage points around the island. Currently, the most usual tour takes in Look Out and Jack Boy Hill and then back along the same route, or maybe a detour to the MVO and/or the new National Museum. As presently packaged, the existing tours do not provide sufficient opportunities for interpretation of the island, opportunities to spend money or variety.

(iv) Events and Festivals
The two most popular festivals, attracting large numbers of domestic and regional visitors, as well as from the Montserratian diaspora, are Our Carnival (which runs from mid-December until New Year's Day when many hundreds ofMontserratians living overseas return to the island to reunite with families and friends and enjoy the festivities) and the annual St. Patrick's Festival (a weeklong celebration highlighting Montserrat's Irish heritage and local culture) that culminates with St. Patrick's Day on 17 March. It also commemorates the slave uprising on that same day in 1768.

Other festivals and events include the Montserrat Calabash Festival; Cudjoe Head Celebrations; the Police, Fire, Search and Rescue Community Week; the Alliouagana Festival of the
Word; the Volcano Half Marathon and Fun Run; and the Fishing Tournament.

There are proposals to organize a new Afro-Caribbean Music Festival at Salem, possibly in a new purpose-built amphitheatre at Salem Park, but this (like all festivals) would need funding support until becoming financially self-sustaining.

(v) Bird Watching
The Centre Hills area is home to the thirty-four species of resident land birds and migrant songbirds, including Montserrat's rare national bird, the endemic Montserrat Oriole, but there may not be enough variety to attract serious ornithologists.

(vi) Historical and Cultural Attractions
Compared to what was lost in Plymouth and other areas in the south (including Galway’s plantation), the present range of historical attractions is rather limited. Carr’s Bay has remnants of a fort, with several canons pointing out at sea in the direction of Redonda. Here there is also a model version of the War Memorial and Clock Tower that were destroyed in Plymouth. Prior to the current road works, Runaway Ghaut was a popular tourist stop, but is now less accessible. More recent attractions include the Cultural Centre (which features a new handprint ‘Wall of Fame’ exhibit of bronze hand-prints of famous musicians who had recorded in Montserrat during the 1980s) and the new National Museum, both at Little Bay.

The temporary exhibition used for the museum’s opening ceremony is due to be replaced by a more comprehensive permanent exhibition under guidance from an experienced museum curator. Some of the now ruined buildings on the site of the former Carr’s plantation adjoin the museum are to be restored to become a heritage space.

Otherwise, the choice is limited but there are some unexplored possibilities, including

- restoration of the former AIR Studios (now closed after damage by Hurricane Hugo) which could be developed as a place of pilgrimage for devoted rock star fan club members;
- restoration of one of the many sugar mills that dot the landscape as a working example of the sugar era (similar to what has been done at Betty’s Hope in Antigua and Morgan Lewis in Barbados); and
- restoration of one of the old cotton ginning, lime or sugar plantation houses, now mostly in ruins (but not at in the case of Blake’s estate where the house is being restored by the present owner – mainly for his own use but the public could be admitted to certain areas).

(vii) Walking Tours
Under TDP2, four persons were contracted to identify and collect information on sites of historic and cultural significance in four different areas (Salem and environs; St. Peter’s and environs; Cudjoe Head and environs; and St. John’s and environs) with a view to the organization of heritage walking tours in those areas. With the present low level of tourist activity on the island, demand for these tours has been very modest, even non-existent in some cases.
(viii) Botanic Garden
The well-laid out Botanic Garden at the headquarters of the National Trust in Olveston has a wide range of trees and plants, including herbs that Montserratians have traditionally used as medicine, plants that have contributed to the economy and plants that are only found in the Centre Hills, such as the *Rondelitia Buxifolia*, which belongs the coffee family, as well as an Amerindian Garden. The main building houses a natural history centre (which displays exhibits about the island's history and heritage, biodiversity and marine life); a small reference library (with videos and photographs on the history of Montserrat and information which may help persons with to trace their Montserrat roots); and a small gift shop.

(ix) Philatelic Bureau
For stamp collectors, the Montserrat Philatelic Bureau (now located in the government complex in Brades) offers a limited range of stamps to purchase, including some attractive first day covers.
10. TOURISM TRAINING, EDUCATION AND AWARENESS

10.1 LABOUR MARKET

In 2006, the total labour force was estimated at 3,006 persons, of whom 2,593 were employed (indicating an unemployment rate of 13.7 percent). More details will be available when analysis of the results of the 2011 Census is completed.

Estimating the numbers employed in tourism is difficult, partly because many of those engaged in this sector are involved in multiple activities. Given that the number of rooms has remained about the same, the current figure is unlikely to be significantly different from that given for 2003 in NTS&P where the “the numbers directly and indirectly dependent on tourism” is estimated at about 250 persons. This figure includes self-employed owners/managers as well as others who, while not directly employed in tourism establishments, provide services to such establishments (including construction workers, electricians, plumbers, gardeners and in areas such as pool maintenance, air conditioning, etc.). At present, many of these jobs and services are being filled by foreign workers recruited from the Dominican Republic, Jamaica, Guyana and elsewhere in the Caribbean (some of whom have acquired Montserratian citizenship either through naturalization or registration processes).

Nevertheless, there is still an acute shortage of skills as young and more mobile Montserratians continue to leave for the United Kingdom in pursuit of education and educational opportunities. Using norms from other countries, it is probable that not more than ten secondary school graduates (about 15%) each year will want to follow a tourism-related career in Montserrat.

10.2 TRAINING DELIVERY

Current training efforts only address a relatively small proportion of the overall need for skills development and capacity building. Present approaches depend to a large extent on in-house training programmes for hotel and restaurant staff. A limited amount of formal training is provided at the secondary school and the Montserrat Community College (MCC), as follows:

(i) Secondary Level

There is a kitchen for vocational training at the secondary school. This caters to all forms of cookery training, domestic as well as industrial.

(ii) Tertiary Level

The MCC is mandated to provide vocational and technical courses to support labour market needs. There is a general provision in the college for tourism training. A wide range of courses have been proposed but there appears to be little relationship between the number and range of courses proposed and the numbers of students potentially available. The small size of the population makes many subjects unviable. Curricula need to be finalized and teachers are in short supply.

The UWI Open campus in Montserrat provides both distance-learning programmes and local vocational courses, including introductory courses in information technology and languages, for which there is a growing demand.
10.3 TRAINING NEEDS

The Department of Education is looking for technical assistance to conduct a full training needs analysis for the entire economy, not just the tourism sector, which would also come up with proposals for mechanisms for training delivery.

For the tourism sector alone, training is required in a large number of areas including: management/supervisory skills; train the trainer; front office; customer care relations; cookery; waiting skills; housekeeping; tour guiding; and taxi driver guiding. The NTS&P recommended the following priorities (in order of priority) for existing employees:

- Customer Handling
- Cookery
- Tour Guiding, including taxis
- Housekeeping
- Waiting Skills
- Front Office
- Management/Supervisory Skills
- Train the Trainer

The dilemma faced then and now is how to provide the necessary training interventions when the numbers are going to be so small, with few new entrants, and will fall substantially after the initial retraining of existing staff. It would obviously be unrealistic to have eight different teachers for each of the above priority areas.

The approach adopted under TDP2 was the continuation of the short courses that were run in previous years by CHTI and by private organizations. During 2009, CDB-sponsored consultants conducted training courses in Guest Relations for 41 persons - 25 airport staff and 16 general staff; Food & Beverage Service (16 persons); Basic Food Preparation (17 persons); Housekeeping (23 persons); Cake and Pastry Making (14 registrants), while (with the return of the ferry service). In all, A total of 111 persons were trained in Years 1 and 2 of the programme. A CTO consultant conducted a 20-hour taxi tour guide and customer service training programme in early July 2010.

As with most short courses these are useful, but more in-depth interventions are required to upgrade levels of competence.

10.4 TOURISM EDUCATION

In schools throughout the Caribbean region, tourism is accredited as one of the core units or options of the Social Studies module in the revised CXC syllabus. This helps to inform secondary schoolchildren about the importance of tourism to the local economy as well as about prospects for careers in the tourism industry. However, there is need to develop a supplementary career guidance service for those studying tourism.

Within the OECS sub-region, the Antigua and Barbuda Hospitality Training Institute (ABHTI) has been identified as an OECS Centre of Excellence in Tourism and Hospitality. It currently offers one year certificate programmes and two year diploma courses in the areas of Food & Beverage, Culinary, or Hospitality Management, as well as a variety of short courses. There are plans to expand its reach to the wider OECS tourism and hospitality community. Montserrat should be able to benefit from this initiative.
10.5 TOURISM AWARENESS

For tourism to be developed on a sustainable basis, the wider public needs to be given the opportunity to learn about tourism and its importance to the local economy. There is also need to raise awareness among government officials, the media and other opinion formers in order to generate a better appreciation of how Montserrat as a whole benefits from the tourism sector. On-going initiatives to address these objectives include the community programmes that have been implemented under TDP2.
11. DESTINATION MARKETING

11.1 MARKETING BUDGET

With a total budget of about EC$2M in 2011, the MTB’s function of destination marketing is achieved through a combination of advertising, production and distribution of collaterals, public relations, travel trade promotions and through its web site.

During the 3-year period 2009 through 2011, an average of just under EC$1,450,000 was spent yearly on marketing, of which 42% was spent on PR/Representation; 13.5% on participation at holiday fairs/trade shows; 12% on advertising and just over 1% on web marketing.

With only about 2,000 non-Montserratian related vacation stay-over tourists visiting annually during these years, this represented a very high marketing cost (EC$725) per arrival.

Table 11.1: Breakdown of MTB’s Budget 2009 – 2011

<table>
<thead>
<tr>
<th>Budget Heading</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. MARKETING</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advertising</td>
<td>195,250</td>
<td>126,600</td>
<td>209,800</td>
</tr>
<tr>
<td>Collaterals</td>
<td>61,700</td>
<td>86,900</td>
<td>98,400</td>
</tr>
<tr>
<td>PR Representation</td>
<td>580,600</td>
<td>602,250</td>
<td>619,950</td>
</tr>
<tr>
<td>Journalist Visits</td>
<td>44,300</td>
<td>49,100</td>
<td>50,800</td>
</tr>
<tr>
<td>Holiday Fairs/Trade Shows</td>
<td>269,250</td>
<td>168,650</td>
<td>145,650</td>
</tr>
<tr>
<td>Research &amp; Statistics</td>
<td>24,550</td>
<td>44,800</td>
<td>55,500</td>
</tr>
<tr>
<td>Web Marketing</td>
<td>17,900</td>
<td>35,300</td>
<td>4,600</td>
</tr>
<tr>
<td>Marketing Manager</td>
<td>307,550</td>
<td>312,870</td>
<td>192,400</td>
</tr>
<tr>
<td>TOTAL MARKETING</td>
<td>1,501,000</td>
<td>1,426,47</td>
<td>1,377,100</td>
</tr>
<tr>
<td>B. PRODUCT DEVELOPMENT &amp; ACCESS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attractions</td>
<td>684,650</td>
<td>153,950</td>
<td>214,050</td>
</tr>
<tr>
<td>Development Manager</td>
<td>283,200</td>
<td>282,600</td>
<td>128,610</td>
</tr>
<tr>
<td>TOTAL PRODUCT DEVELOPMENT &amp; ACCESS</td>
<td>967,850</td>
<td>436,550</td>
<td>342,660</td>
</tr>
<tr>
<td>C. CAPACITY BUILDING</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community Involvement</td>
<td>20,200</td>
<td>200</td>
<td>16,600</td>
</tr>
<tr>
<td>Staff Training</td>
<td>94,150</td>
<td>17,400</td>
<td>26,200</td>
</tr>
<tr>
<td>TOTAL CAPACITY BUILDING</td>
<td>114,350</td>
<td>17,600</td>
<td>42,800</td>
</tr>
<tr>
<td>D. TOURISM CHALLENGE FUND</td>
<td>1,175,200</td>
<td>357,750</td>
<td>196,500</td>
</tr>
<tr>
<td>E. ADMINISTRATION</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Administration</td>
<td>26,500</td>
<td>10,400</td>
<td>13,000</td>
</tr>
<tr>
<td>Salaries &amp; Overheads</td>
<td>100,000</td>
<td>100,000</td>
<td>60,000</td>
</tr>
<tr>
<td>TOTAL E ADMINISTRATION</td>
<td>126,500</td>
<td>110,400</td>
<td>73,000</td>
</tr>
<tr>
<td>TOTAL (A+B+C+D+E)</td>
<td>3,885,000</td>
<td>2,348,770</td>
<td>2,032,060</td>
</tr>
</tbody>
</table>

Source: MTB  
note: figures rounded
11.2 COMPARATIVE BUDGETS OF CARIBBEAN NATIONAL TOURISM ORGANIZATIONS (NTOS)

In the context of a highly competitive international tourism market, Montserrat’s budget is small. However, as illustrated on Table 11.2, the MTB budget is well outside the range of about 2% to 3% of visitor expenditure, which would appear to be the norm for many Caribbean NTOs.

Table 11.2: Expenditure by National Tourism Organizations, 2007/2009

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2007</td>
<td>2009</td>
<td>2007</td>
</tr>
<tr>
<td>Antigua</td>
<td>3,700</td>
<td>4,000</td>
<td>115,000</td>
</tr>
<tr>
<td>Aruba</td>
<td>23,595</td>
<td>23,595</td>
<td>808,400</td>
</tr>
<tr>
<td>Bahamas</td>
<td>67,150</td>
<td>73,331</td>
<td>2,056,400</td>
</tr>
<tr>
<td>Barbados</td>
<td>22,137</td>
<td>22,137</td>
<td>953,400</td>
</tr>
<tr>
<td>Bermuda</td>
<td>35,900</td>
<td>35,299</td>
<td>513,200</td>
</tr>
<tr>
<td>Bonaire</td>
<td>1,676</td>
<td>1,888</td>
<td>83,700</td>
</tr>
<tr>
<td>BVI</td>
<td>4,115</td>
<td>11,580</td>
<td>436,700</td>
</tr>
<tr>
<td>Curacao</td>
<td>9,343</td>
<td>10,121</td>
<td>276,400</td>
</tr>
<tr>
<td>Montserrat</td>
<td>n/a</td>
<td>650</td>
<td>7,450</td>
</tr>
<tr>
<td>St. Kitts/Nevis</td>
<td>3,328</td>
<td>3,328</td>
<td>106,900</td>
</tr>
<tr>
<td>St. Lucia</td>
<td>6,918</td>
<td>6,918</td>
<td>284,600</td>
</tr>
<tr>
<td>Turks &amp; Caicos</td>
<td>2,316</td>
<td>2,316</td>
<td>304,000</td>
</tr>
</tbody>
</table>

Although Montserrat’s budget has been out of line with this norm, it doesn’t tell the full story. Other destinations, particularly those with direct scheduled international flights from the main tourism source markets get considerable additional promotional support from the international airline(s) with scheduled services to the destination and also from the travel trade in the market(s). Thus Bonaire, which has one of the lowest marketing budgets, gets additional promotional support in Europe from KLM (which has 8 flights per week to the island) and the Dutch travel trade.

Moreover, there is a minimum amount which must be spent when marketing activities are engaged in. Printing of collaterals, appointment of a PR agency are typical examples.

11.3 MARKETING PLAN

Montserrat’s marketing strategy and plan is described in the MTB’s Destination Promotion Plan & Activities 2008 – 2011 document which covers all the main topics, viz:

- Marketing Objectives
  - build awareness and strengthen brand Montserrat
  - generate positive news about Montserrat
  - make website main source for information
  - increase number of tour operators featuring Montserrat
    - from 13 in 2008 to 40 by 2011
  - increase visitor arrivals and spend
    - 13,000 stay-over arrivals and 5,000 excursionists spending EC$50M by 2011
Target Market Niches
- villa based tranquility
- volcano enthusiasts
- soft adventure
- excursionists and short breaks
- dive market
- Irish market
- diaspora
- sports tourism
- business travellers
- yachting market
- cruise market

Geographic Market Focus
- USA (North Eastern Seaboard, South East, South West)
- Canada (Ontario, Quebec, Alberta)
- UK & Ireland
- Caribbean
- Germany and Continental Europe

Marketing Mix
- public relations
- advertising
- sales promotion
- travel trade promotions
- direct marketing and data base marketing
- personal selling

Monthly progress reports were produced by the PR representatives in Antigua, Guadeloupe, US, UK and Germany reporting on activities undertaken such as press releases, articles published, participation at holiday fairs/trade shows etc.

A yearly progress report (until 2009) was prepared on the overall marketing effort, detailing activities undertaken in the various markets.

WEB-MARKETING

Increasingly, tourist destinations are using interactive web sites and web services to raise awareness, attract visitors and generate revenue from travel. General opinion is that the internet is more efficient and less costly than the traditional tools of travel marketing – notably advertising, travel fairs, production and distribution of brochures. Traditional marketing methods face new challenges as technology has displaced mass marketing with direct messaging to more specific audiences. Today’s marketing best practices include strategic website design, search engine marketing, e-commerce, application integration, data collection, electronic fulfilment, real-time support, interactive tools catering to a global audience.

This is particularly relevant when it is noted that according to the Montserrat stay-over Visitor Exit Survey Report (2010/11), www.visitmontserrat.com was identified as the most important source of information Montserrat as a tourist destination.

Visit Montserrat Web Site

Montserrat’s web site is simple, though attractively designed. However, there are a number of significant shortcomings which need to be addressed.

- Web site is basically an on-line brochure and not an interactive web site.
- Imagery poor – in particular, the photo gallery is, with the exception of a few shots, uninspiring. Some (e.g. the
Antillean Crested Hummingbird) are impossible to make out.

- No map of Montserrat showing points of interest, place names, etc.

- Although Spanish, French and German editions of the web site are indicated, they don’t work.

- Out of date information
  - the Rediscover Montserrat downloadable brochure indicates
    a) PR agencies in the US, UK, Germany and Guadeloupe as providing information services. But these contracts have been terminated
    b) Winair as providing flights to Montserrat, which has been discontinued, and
    c) no mention of SVG scheduled services to Montserrat.
  - the old Guide to Montserrat ‘downloadable’ brochure is out of date and should be removed
  - the Dive Guide has not been uploaded.

- List of overseas tour operators featuring Montserrat misleading
  - only one of the 20 UK listed tour operators feature Montserrat
  - Guadeloupe tour operator only features Guadeloupe
  - German tour operator featuring Montserrat (Caribicinseln) not mentioned.

Use of Web Site

As web site statistics are not collected on a consistent basis, it is not possible to form any judgement as to the use, performance or effectiveness of the web site. However, available data for the year June 2011 to May 2012 indicate:

- approximately 16.3 million hits
- just over 1.3 million pages viewed from nearly 267,000 visits
- average of 22,200 visits per month
- just under 168,000 unique visits to the site
  - the average monthly unique visits is approximately 13,000 which does not vary significantly during the year.

It is unfortunate that web statistics are not collected consistently as they can provide useful information on the effectiveness of promotions activities/campaigns in individual markets. A Google analytics statistics tracker was set up for www.visitmontserrat.com, but the credentials to access the statistics seem to be missing.

11.5 MONTSERRAT’S LOGO AND TAG LINE

A logo is a graphic mark or emblem used by an organization or country to aid and promote instant public recognition. Some well known logos include Apple Inc’s apple with a bite missing. Coca-Cola’s script is known worldwide.

A tag line is a succinct phrase, situated under or alongside a logo and communicates a single, but powerful brand message designed to resonate strongly with the intended audience. It can be concrete, abstract, serious or funny but to be memorable, it should be original, believable, simple, positive, relevant. Memorable tag lines include ‘Love means never having to say you’re sorry’ (Love Story); or ‘Where’s the beef’ (Wendy’s).
Montserrat’s current logo makes use of the shamrock, evoking the island’s Irish heritage. The tag line is Montserrat – a Caribbean Treasure – Spectacular by Nature.

As part of the strategy for the development of Little Bay & Carr’s Bay, 7th Heaven Properties have changed Montserrat’s strap line to Montserrat – Relaxation Refined and created a new logo.

It is outside the scope of this study to comment on which logo and tag line more appropriately sums up and reflects Montserrat’s intrinsic appeals, other than to say that only one logo/tag line should be used on letterheads, printed literature, web site etc.
12. INSTITUTIONAL ARRANGEMENTS

12.1 INSTITUTIONAL FRAMEWORK

12.1.1 Central Government

Because of the diverse nature of tourism, the ministries, various departments therein and state owned enterprises have important roles in relation to tourism.

The tourism sector is affected to a greater or lesser extent by the policy decisions and actions of all four Ministries, notably the departments responsible for finance and investment, transport & public works, fisheries and land, customs and immigration, police, health & hygiene.

<table>
<thead>
<tr>
<th>Ministries/Departments</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office of the Premier</td>
<td>tourism, culture, customs &amp; immigration</td>
</tr>
<tr>
<td>Finance, Economic Management</td>
<td>national planning, budgets, statistics</td>
</tr>
<tr>
<td>Agriculture, Lands, Housing &amp; Environment</td>
<td>physical planning, marine</td>
</tr>
<tr>
<td>Education, Health &amp; Community Services</td>
<td>training, youth affairs &amp; sports</td>
</tr>
<tr>
<td>Communications &amp; Works</td>
<td>infrastructure, airport, seaport</td>
</tr>
</tbody>
</table>

Tourism

Tourism comes under the responsibility of the Premier’s Office – there is no Ministry for Tourism. Also there is no Permanent Secretary for Tourism, this role being filled by the Permanent Secretary in the office of the Premier, who is also the Chairperson of the Montserrat Tourist Board (MTB).

There is no Tourism Unit within the Premier’s Office that deals with policy, planning and international relationships.

12.1.2 State-Owned Enterprises and Organisations

The main State Owned Enterprises (SOE’s) relevant to tourism are the:

- Montserrat Tourist Board (MTB)
- Montserrat National Trust (MNT)
- Montserrat Volcano Observatory (MVO)
- Montserrat Development Corporation (MDC)

12.2 MONTSERRAT TOURIST BOARD

12.2.1 Statutory Functions

The Montserrat Tourist Board was formed as a body corporate under the ordinance of 1993. The functions of the MTB are:

i. to develop all aspects of the tourist industry of Montserrat and to promote its efficiency;
ii. to adopt all such measures as the Board may think fit to advertise, promote and market Montserrat as a tourist destination throughout the year;

iii. to promote and encourage increased shipping and airline facilities as will increase tourist traffic to Montserrat;

iv. to secure the most favourable arrangements for the entry of tourists into Montserrat;

v. to encourage by such measures as they may think fit the development of such amenities as may be calculated to enhance the attractiveness of Montserrat to tourists with special reference to entertainment, conservation of local flora and fauna, nature trails and handicrafts;

vi. to undertake such research, experiments and operations as may appear to be necessary for the improvement of the tourist industry and to control or eliminate any undesirable factors that may affect it;

vii. to foster an understanding within Montserrat of the importance and economic benefit of the tourist industry;

viii. to make all such enquiries of, and to collect all such information as it may think necessary for the purpose of carrying out its duties and functions under this section; and

ix. generally to take all such other lawful measures as it may consider likely to assist it in carrying out most effectually the purposes of this Ordinance.

In addition, the MTB has a regulatory role in respect of the registration and grading of hotel and other tourist accommodation and facilities catering for tourists.

The act conceives of the MTB as being the executive arm of a Ministry and empowers it to undertake almost any function which has the objective of furthering the development of tourism to Montserrat. Moreover, in prescribing the composition of the Board of the MTB, the Act ensures that the members so appointed are representative of the wider tourism industry. It is a sound piece of legislation which should stand the test of time in that it is flexible enough to deal with any changed circumstances which may require the MTB to undertake different activities for the development of tourism.

However, just because the Act empowers the MTB to undertake almost any function for the development of tourism does not mean that it should undertake them all. Different circumstances at different times will require the MTB to focus on one or a number of the functions for which it is empowered. These circumstances may be market related, product related, HRD related or, indeed, funding related.

A notable omission in the Act is any responsibility for the conservation and enhancement of Montserrat’s cultural and heritage resources. This is being compensated to some degree at the operational level, with the addition of a Culture Unit to the MTB,
12.2.2 Organisational Structure and Staffing

The MTB’s organisational structure is shown on Diagram 12.1.

Diagram 12.1: MTB Organigram

Presently the MTB has been reduced to a skeleton operation with a committed, willing, and well intentioned staff but operating in a dysfunctional environment due to circumstances outside their control.

In April 2011 the contracts of the Development Manager and the Marketing Manager ended and were not renewed. Shortly after, the Director of Tourism resigned from that position and the Marketing Officer proceeded on study leave for 3 years.

These developments resulted in a loss of 3 senior management positions - the Director of Tourism, the Product Manager and the Marketing Manager. The entire Marketing arm of the MTB has now been reduced to one junior officer - The Acting Marketing Officer who is relatively inexperienced in tourism and so is challenged to perform efficiently in the absence of a senior manager to provide direction and supervision.

In order to compensate for this lacuna, another officer, the Development officer (substantive) who is without a formal contract at this time is now the Acting Development Manager. This same officer performs the function of Marketing Manager on an informal basis. The Finance Manager, whose substantive position is to be renewed for 2 years till May 2014, but is still without a contract, is the Acting Director of Tourism, while the post of the Technical Advisor remains unfilled.

At the end of 2011 the contractual arrangements for all the international Marketing and PR Representatives were terminated while the Antigua representative was retained until March of 2012. Thus, the entire marketing support network is non-existent at this time. It is difficult to establish to what extent and how efficiently the MTB is able to service requests from the travel trade, the media and consumers.

MONTSESSAT TOURISM DEVELOPMENT PLAN 2012 – 2022
Currently there is no leadership providing vision and giving the direction necessary to achieve the MTBs mission and objectives. This situation does not augur well for stimulating confidence from the private sector tourism stakeholders and other strategic partners with which the MTB must constantly engage to redevelop and market tourism.

Because of deficiencies in leadership and staff/budgetary resources there is no evidence of formal planning, with staff coping by handling matters as they arise, day by day. In the circumstances the lines of authority and definition of roles within the organisation are blurred and there are few opportunities for a transfer of expertise or professional development. Staffs get on with whatever task is at hand, and display a strong team spirit by “pitching in” wherever necessary. Consequently there is a strong focus on tasks that must be carried out rather than on results.

12.2.3 Culture Unit

The organizational arrangements at the MTB are further complicated by the lack of clarity concerning its relationship with the Culture Unit. The Culture Unit was transferred from the Ministry of Youth Sports, Tourism and Culture to the Tourist Board by a cabinet decision in late 2009. Broadly speaking, the mandate of the Culture Unit is to:

- Preserve and promote Montserrat’s culture. To position Montserrat competitively in appropriate markets by increasing investment in cultural activities and to establish a culture policy.

In practice the Unit seems to be immersed mainly in organizing festivals and events, and the performing arts. It also arranges for festival queens and cultural groups to attend and represent Montserrat at shows abroad. To a lesser extent some work is being done to archive Montserrat’s heritage such as folklore, stories, songs, sayings, games etc but from all accounts this has not been very successful. The Unit also publishes a quarterly newsletter.

With regard to establishing a culture policy, no action has been taken regarding this task. However, recently a study – Towards the Formation of a National Culture Policy – was commissioned by the Office of the Premiere, with a deadline set for the Culture Policy to be completed by the end July.

Administratively the unit is a part of the MTB. There are 4 staff members in the unit staff. Its most senior officer, the Culture Coordinator reports to the Director of Tourism. One other post (the Events Coordinator) has recently been filled; a third post for a Cultural Officer has been approved and will be filled in a few weeks. The 4th member of staff is a Clerical Officer.

At present the unit sits physically apart from the MTB in the basement of a building in Brades, but it is anticipated that when the MTB moves into its new location at Little Bay, the Culture Unit will be relocated to those premises.

At the operational level the Unit operates independently of the MTB – the Culture Coordinator meeting with the Director occasionally, mainly to discuss events that are planned and associated budgets. The interaction is described as “sporadic” rather than routine. However, the MTB does promote activities or festivals staged by the Unit.

There seems to be an appreciation on the part of the Culture Coordinator for the connection between culture and tourism and the fact that the MTB promotes the festivals and events that the Unit coordinates. Beyond this there is no vision as to how the Unit could be better integrated into the MTB’s functions, what forms of collaboration could take place or the role which the Unit could play in fulfilling the MTB’s mandate.
12.2.4 **Operations of MTB**

During Phase 2 of the Tourism Development Project 2008-2011 the Management and staff of the Montserrat Tourist Board (MTB) were engaged with a wide range of activities reflecting the standard operating procedures of most National Tourism Organisations.

The MTB activities included marketing and promotion (through intermediaries in neighbouring Antigua, Guadeloupe, The USA, Germany and The United Kingdom), hosting media and travel trade visits, attending travel trade shows, and fulfilling information requests.

In addition, on the development side, the MTB was fully engaged in improving the tourism product. These product development initiatives included the establishment of a network of nine hiking trails, a viewing area at Jack Boy Hill and the improvements to the Botanic Gardens (implemented by the National Trust).

A significant omission from both the organizational structure of the MTB and its operations is a position with responsibility for the web site and internet marketing – a web master. The MTB web site is serviced by a company in Barbados (Acute Vision), but the company does not administer or manage the web site (e.g. updating content, answering queries etc).

12.3 **MONTSERRAT NATIONAL TRUST**

The role of the Montserrat National Trust (MNT) is to preserve and promote the island’s national environment and its archaeological, historical and cultural resources for present and future generations. It is the repository of the island’s patrimony – managing the national museum at Little Bay, which has an extensive collection of documents on the history and environment of Montserrat.

12.4 **MONTSERRAT VOLCANO OBSERVATORY**

The MVO is first and foremost a scientific centre, providing information on the state of activity of the volcano to the authorities and the public, making regular hazard and risk assessments.

The MVO also functions as an interpretative centre for visitors. Audio/visuals are screened and lecture tours are conducted daily, explaining the history of the volcano, the eruptions, etc.

The construction of the proposed Volcano Interpretation Centre (VIC) beside the National Museum at Little Bay will substantially improve the capacity of the MVO to provide this interpretative function.

12.5 **MONTSERRAT DEVELOPMENT CORPORATION**

Formed in 2077, the Montserrat Development Corporation was established in 2007. Its mandate includes trade investment promotion as well as the wider services of a development corporation - property development and management (in particular Little Bay); business support for SMEs and microenterprises.

12.6 **PRIVATE SECTOR**

The active associations relating to tourism are the

- Montserrat Chamber of Commerce
- Montserrat Tour and Taxi Association
- Montserrat Tour Guides Association
13. SUCCESSFUL TOURISM DEVELOPMENT – IMPORTANCE OF INFRASTRUCTURE

As illustrated on the following diagram, Montserrat’s tourism sector is composed of environment based natural attractions, facilities, amenities, services and supporting economic infrastructure. In looking at the island’s tourism sector it is important to distinguish between:

- the primary tourism attractions – natural environment, cultural heritage, etc.
- the economic infrastructure – air and sea ports, roads, utilities, telecommunications
- the tourism services and facilities – access transport, accommodation, restaurants
- the enabling environment – institutional arrangements, regulations, human resource development, etc.
- sector management – destinations marketing, research and statistics, product development, etc.

The primary tourism attractions, economic infrastructure, supporting facilities & services, enabling environment and sector management are interdependent in several ways:

(i) if the primary attractions are or become severely impaired by environmental damage or overuse, etc. – the raison d’être for tourism facilities disappears
(ii) conversely, the primary attractions can effectively attract tourism only if there is adequate supporting facilities and services available
(iii) underpinning the tourism facilities, it is necessary to have:

- the economic infrastructure of roads, airports, seaports, utilities
- the enabling environment of appropriate institutions, regulations, etc
- effective sector management covering policies and planning, destination marketing etc.

Successful tourism requires many different components to be in place before there is a ‘competitive’ product on offer in the marketplace. The implication is that a deficiency in any one component will undermine the capacity of Montserrat to meet the expectations of tourists.

**Fundamental Importance of Economic Infrastructure**

Adequate infrastructure is essential for successful tourism development. Airports, seaports, roads, utilities and telecommunications are all components of the infrastructure which must be in place before there can be successful and sustainable development of tourism.

**Infrastructure the Key to Tourism Development on St. Kitts**

For many years prior to the mid 80’s, international tourist arrivals to St. Kitts were about 30,000 annually. The construction of the new International airport facilitated direct international flights to the island. By 1995, some ten years later, international tourist arrivals were about 80,000 and are now (2011) not far off 100,000.

However, it is important to note that although economic infrastructure is a necessary condition for successful tourism development, it is not a sufficient condition. Other factors also have a determining influence, particularly access transport and sound sector management in Montserrat’s case.
Figure 13.1: Montserrat’s Tourism Sector
14. TDP2 OUTCOMES AND LESSONS FROM EXPERIENCE

Originally, TDP2 was to cover the period 2008 – 2010, but was extended to March 2012 to facilitate the completion of a number of activities.

14.1 TDP2’s AIMS AND COMPONENT ACTIVITIES

Aims

As described in the MTB TDP2 project memorandum, the purpose of the project was to increase visitor arrivals and visitor spending; and to develop a range of tourist attractions to international standards.

The benefits of the project were anticipated to include:

- increase in tourist taxes by 10% in 2008, 13% - 15% in 2009, and 16% - 18% in 2010
- visitor numbers up from an estimated 9,000 in 2007 to 15,000 in 2010
- completion of 75% by value of planned tourism projects by Dec 2010
- an increase in foreign exchange earnings and tourist expenditure
- an increase in tourism industry employment in the tourism industry
- higher labour productivity, increased profitability of individual enterprises and the creation of up to 10 new businesses per annum
- higher levels of tourist satisfaction as a result of professional standards in the tourism industry

Components

The main components of TDP2 were:

- Capacity Building
  - appointment of a Development Manager
  - staff and industry training
  - community education and involvement
  - tourism legislation
- Access
  - visitor access improvements (Montserrat and Antigua)
- Attractions
  - beach and marine environment improvements
  - new MVO Visitor Centre
  - Botanic gardens, Centre Hills field guide and trail improvements (amenities, interpretation)
  - preservation/restoration of historical buildings and a new National Museum
- Marketing
  - appointment of a Marketing Manager
  - visitor information and statistics
  - advertising, marketing collateral, web and e-marketing and trade shows
  - PR representation and press publicity
  - tour packaging
- Tourism Challenge Fund
  - fund for creative ideas
14.2 ACHIEVEMENTS OF TDP2

After almost four years of the TDP2, the MTB has completed all the travel related projects, ferry port terminal, visitor information signs, and the facilitation of travel through the Antigua and Montserrat airports. Four capacity building projects have also been completed and under the Attractions component, 8 projects have been completed:

- Woodlands Beach facility;
- Rejuvenation of the hiking trails;
- Publication of the Centre Hills Field Guide;
- Botanic Gardens interpretation
- The Amerindian Garden
- Historical Buildings and Sites Inventory
- Heritage Walking Tours
- National Museum at Little Bay opened

Plans for the Volcano Interpretation Centre, are well advanced.

The Tourism Challenge Fund supported some 26 projects, of which between 30% and 40% are considered successful, which include the operation of a new local airline; and adventure eco-tour company; and outdoor campsite at Mount Pleasant; an annual Literary Festival; opening of a guest house/restaurant at Olveston House; and the rejuvenation of the marine habitat at Woodlands Beach.

With regard to the Marketing component, all the required activities were undertaken, as described in the monthly/yearly progress reports, viz:

- Collaterals produced
- PR agencies appointed in the main source markets who represented Montserrat and undertook public relations activities
- Advertising placed with relevant media
- Participation at holiday fairs and travel trade shows
- Upgrade of the web site
- Travel trade promotions to get Montserrat included in tour operators programmes/brochures.

Outcomes

When measured against the aim of the TDP2 (to increase visitor arrivals and visitor spending; and to develop a range of tourist attractions to international standards) the results are mixed.

Certainly, the quality of certain visitor attractions have been improved, notably the Woodlands Beach facility, the rejuvenation of the hiking trails, the Amerindian Gardens at the Botanic Gardens, and the construction of the National Museum at Little Bay. The operation of the Tourism Challenge fund was, in general, successful, notably in the support given to the start-up of a new airline (Fly Montserrat); the opening of Olveston House guest house; and the annual Literary Festival.

The major disappointment was the failure to increase visitor arrivals and spending. Instead of increasing visitor arrivals to 18,000 (13,000 stay-over arrivals and 5,000 excursionists) spending EC$50M by 2011, stay-over arrivals were just over 6,200, excursionists just under 1,700 and expenditure was just over EC$16M. Instead of Montserrat being featured in some 40 tour operator brochures/programmes** only 3 tour operators (one in Canada, one in Germany, the other in UK) now feature Montserrat.

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* MTB Destination & Promotion Plan 2008 – 2011 **excluding the Antiguan ground tour operators
The main reasons for the failure of the Marketing Component to deliver were:

a) **Inadequate air and sea access**: Improved and more frequent air services and the re-introduction of an improved ferry service were critical assumptions underpinning TDP2. In the event, neither materialised.

b) **Insufficient product**: In 2007 there were only some 240 rooms on the island (Tropical Mansions, some 5 guesthouses, and about 65 villas/apts). Today, the figure (at 249 rooms) is not significantly different.

c) **Flawed and dated marketing planning approach**: The MTB 2008/2011 marketing plan and activities was disproportionate to the product Montserrat had to offer in the market place. The template used was more appropriate to a well established destination (such as Anguilla, Antigua) with a range of ‘market ready’ products on offer. For example, participation in tourism fairs such as ITB (Berlin), WTM (London), which are tour operator focused is only relevant for destinations which have sufficient accommodation volume to be of interest to tour operators. Moreover, the marketing ‘template’ used was, to a important extent, dated in that the plan and activities relied overwhelmingly on the traditional tourism channels of promotion and distribution, failing to recognise the changes that been brought about the WWW and take advantage of the more cost effective e-marketing and e-distribution methods in destination promotion that are currently available. It is recognised that there was some improvement to the web site, but there was no coherent e-marketing campaign to drive customers to the web site.

**Lessons Learned**

Arising from the analysis of what makes for a successful tourism destination in Ch. 13 earlier and the experience of TDP2, the salient lessons would appear to be:

a) Fundamental importance of having the economic infrastructure in place before embarking on tourism product development and destination marketing. For Montserrat, this means having good ports, roads, utilities in place.

b) The need for direct, safe, reliable, easy and competitive access to be in place before going ahead with destination marketing plans and tourism product promotion. For Montserrat, this means that marketing plans must be drawn up and implemented in lock-step with appropriate access transport services.

c) The need for tourism product development to come on-stream. For Montserrat, this means that the expansion of the tourism product must be in lock-step with the destination marketing plans. There is no point in generating market awareness and interest in vacationing in Montserrat if there is insufficient accommodation and things to-see-and-do.

d) Greater focus on ‘outcomes’ rather than ‘processes’. Bearing in mind that a detailed assessment of TDP2 is outside the scope of this study, our impression is that there was an overemphasis on whether the component activities were undertaken and how they were undertaken rather than relating the activities to the expected results or outcomes and making changes accordingly.
e) The need for the appropriate level of technical expertise. We recognise that this is a difficult ‘call’ as the level/quality of technical expertise can be difficult to define. But for Montserrat, this simply means having sound, practical marketing and product development expertise available rather than high profile agencies.

f) Piecemeal and stop-gap investments don’t work. This is particularly relevant where economic infrastructure and access transport is concerned. Invest appropriately or not at all – there is no middle ground.

g) Poor communications/coordination. The marketing people did their own thing. The development people did their own thing and the access transport people did their own thing – better sector management. No ‘joined-up’ thinking.

h) While recognising that any organisation needs a minimum number of staff to be organisationally effective, organisational structures and staffing must relate to the scale of the industry.

i) Don’t spread resources too thinly between activities/projects. Better returns are achieved by focussing/concentrating resources on limited (priority) activities/projects.
15. PLANNED ACCESS TRANSPORT IMPROVEMENTS

In 2011, Montserrat developed and approved a long term integrated Access Strategy* in keeping with its sustainable development plan, 2008 - 2020. The strategy outlined a proposed policy agenda, made recommendations for both air and sea access modes, identified and detailed recommendations for strong functional integration of the access and tourism agendas, and importantly, it recommended the specific investments which should be made to ensure long term sustainable access for Montserrat. An economic appraisal* of the recommended access investments supported the strategy and the recommended investments.

Currently, the Government of Montserrat (GoM) and DFID are about to develop prospectuses for each of the access investments to be made and will subsequently seek private sector interest in investing in them.

15.1 AIR ACCESS

The proposal is to dry lease a suitable Twin Otter aircraft to service Montserrat and other territories in the region i.e., St. Kitts & Nevis, Antigua & Barbuda, Dominica (Canefield Airport), which require scheduled services. The aircraft must operate in the LIAT network to ensure seamless travel regionally and extra-regionally through the Antigua and possibly St. Kitts gateways. Additionally, it must complement LIAT’s services by code sharing or similar type of service arrangement to the territories which LIAT either cannot serve or does not serve adequately.

This strategy involves a Twin Otter and BN2 Islander services on Montserrat. Further, it is critical that the operation is within a service arrangement which has access to an additional twin otter. This will facilitate maintenance needs and downtime to ensure continuation of services.

The Twin Otter will be the principal aircraft and flagship for Montserrat’s tourism marketability. The twin otter has the following main characteristics:

- Maximum passenger capacity - 19 (17 on Montserrat’s route)
- Maximum flying range - 770 nautical miles
- Airport runway requirements - Can operate on 600 metre runway
- STOL capability - Short takeoff and landing
- Number of pilots - 2 pilots standard operating requirement
- Maximum takeoff and landing weight - 10,500 – 12,500lbs
- Rate of climb - 1,600 feet per minute

* Economic Appraisal of Access Investments and Subsidies in Montserrat, January 2012. Government of Montserrat and the UK Department for International Development (DFID)
* LIAT is a regional airline. It is the only airline which connects the entire Caribbean. It is a well known name and brand. It is based in Antigua and operates the regional hub there.
The appropriate aircraft for the John A. Osborne Airport is the Twin Otter. Its capabilities as outlined above make it the ideal aircraft for operations at the airport. Twin otter services operated at the airport until December 2010. Twin otter services are also found in 11 Caribbean islands and 45 other countries worldwide. They are also used by the Police and Military in several countries including the USA, Canada, France and the UK.

Industry indications are that travellers are more comfortable flying in relatively larger aircraft than relatively small ones. The same is true in the Caribbean.

The major tourism source markets for travel to Montserrat are the Caribbean, UK and USA. The twin otter will complement the tourism effort in those markets more effectively than a BN2 Aircraft. The Twin Otter flies with two pilots and has a larger passenger carrying capacity.

15.2 SEA ACCESS

The proposal is to provide an appropriately designed passenger and cargo ferry with adequate carrying capacity, domiciled in Montserrat and serving Montserrat’s economic security and emergency needs. This requires a purpose built, fast passenger/cargo ferry as detailed in the Access Strategy Report. The optimum design is for 150 – 170 /200 passengers and 10 – 15 tons of cargo, and its journey time must be within an hour.

For the service to be viable, the ferry has to be positioned to service Montserrat, Antigua & Barbuda and Guadeloupe on a schedule basis. Occasional services can be provided to St. Kitts & Nevis.

The ferry’s core traffic are domestic passenger movements and day tours. These depend on Montserrat’s ability to generate local and regional traffic, and on Antigua’s cruise and stay-over markets. Incoming and outgoing long haul flight connections will predominantly use seamless air service to Montserrat, assuming this is available. Guadeloupe is projected to be a significant source market and route for the ferry in order to sustain its viability and strategically grow traffic for Montserrat. Detailed analyses are found in the Access Strategy and Economic Appraisal Report on the recommended access investments.

Services to connect the sub-region will be through Guadeloupe as the interchange node for both passengers and cargo. The service will open up access to Guadeloupe’s large resident and stay-over visitor markets.

Reliable back-up service arrangements must be established with a sub-regional ferry operator.
16. PLANNED ECONOMIC INFRASTRUCTURE DEVELOPMENT

16.1 AIRPORT

Under PDP Policy AP1, some 200 acres of land is to be safeguarded for possible future airport development at Thatch Valley and Old Quaw. This is regarded as being the only option available for the construction of a runway and associated infrastructure large enough to enable the operation of larger inter-regional aircraft to/from Montserrat. However, it is further stated that, for economic and current travel demand reasons, this is unlikely to occur before 2022.

With the possibility that a new Twin Otter service might be in place by mid-2014, (as outlined in the previous chapter), the current immigration processing capacity will need to be increased (e.g. through digitization of passport processing) together with the introduction of improved procedures for both outbound and inbound baggage handling and screening.

There is also need for an aircraft hangar and a fuelling/re-fuelling facility.

On the landside, the general appearance needs to be enhanced, particularly the car parking area, and repairs carried out to the access stairway to the roof of the terminal building, and other on-going maintenance.

16.2 SEAPORT, TOWN AND TOURISM DEVELOPMENT

As set out in Chapters 6 and 7, the case and need for new port facilities and an improved ferry service is incontrovertible.

The final version of the Master Plan for Little Bay/Carr’s Bay includes provision for an entirely new port at Carr’s Bay which, as well as ensuring the safe and efficient movement of passengers and freight, will also include facilities for docking inter-island ferries, cruise ships and mooring other pleasure vessels. The size/type of cruise vessels to be catered for will be determined by a design team, but is the maximum length of vessel envisaged is unlikely to exceed 150m (which will accommodate the smaller range of cruise ships such as Sea Dream and Windstar). There is also provision for a possible new marina and boat service facilities, plus safe storm storage area at the northern end of Little Bay, plus a Fisherman’s Village (described as “a place where Montserratian lifestyles and flavours can be sampled”).

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**Final Version of the Little Bay / Carr’s Bay Master Plan**

1. northern breakwater moved further south to fully enclose waterfront town
2. storm drain to be redirected along southern foot of Pottao Hill
3. moving the northern breakwater allows additional berths for visiting vessels
4. location of the bio-diversity centre is provisional only and subject to its case planing application to the PDA
5. southern breakwater moved further south to fully enclose waterfront town
6. Fishermen’s Village layout to be enhanced but not significantly changed
7. The area within this red box is assigned to the National Trust, so it cannot be developed as proposed here by the PWD
8. design and layout of the hotel resort and residences will depend on the final design agreed with the developer
9. Fisherman’s Village layout to be enhanced but not significantly changed

**Source:** John Cox, MDC
In the plan, the breakwaters at both the new port and the proposed marina have only been shown illustratively, and have not yet been designed by the port engineers.

The final design for the new port is due to be completed by end-January 2013, with a funding decision (following a detailed economic assessment) in February 2013. If approved, the new port could be in place by June 2016. However, this is linked in an MOU between the Government of Montserrat and the UK for a simultaneous commitment by the private sector to the development of the town and tourism/residential complex at Little Bay and GoM agreement (already given) to an ambitious set of policy reforms aimed at faster growth and investment.

16.3 ROAD TRANSPORT

The main focus needs to be completion of the on-going rehabilitation of the A01 main road between Salem and St John’s.

Next, further consideration should be given to the proposed opening of new roads linked to the developments at Little Bay and Carr’s Bay (such as a new route between Little Bay to the airport and realignment and/or protection of the Carr’s Bay road away from the beachfront where it is currently subject to erosion).

Repairing and upgrading secondary roads is also important. This should include access to Garibaldi Hill, Isles Bay beach and the Silver Hills, but, from the tourism perspective, access to Plymouth should remain more or less as it is as a type of ‘adventure trail’.

Axle load limits and other ameliorative measures should be imposed in order to minimize the inconvenience caused by heavy truck traffic, particularly those used for sand mining activities in the Belham Valley.

Road signage and markings need to be improved, especially (but not only) for the benefit of visitors.

16.4 UTILITIES

(i) Electricity Supply

The main priorities are

- Completion of the new power station project; this will provide the island with a more efficient and reliable supply of power pending the transition to more renewable sources of energy that will reduce the cost of electricity;
- Continuation of plans to harness geothermal energy, including exploratory drilling (using UK public funds) and the completion of an economic impact study on the potential for geothermal energy; and
- Incentives to encourage increased use of solar panels for hot water at homes, government offices and businesses.

(ii) Water Supply

The development of commercial and residential properties, plus maritime activities, at Little Bay and Carr’s Bay will place significant additional demand on the water supplies in these localities. This will necessitate an increase in water storage capacity in these and other areas in order to provide a minimum supply in the case of shortages in the spring supplies.

In addition, very large water using establishments, including tourism-related establishments/facilities (e.g. golf) should be encouraged to have backup water storage facilities to cater for their needs in times of emergency.
(iii) Waste Management

Communal systems for waste management will need to be incorporated in the developments at Little Bay and Carr’s Bay. These systems should also cater to waste generated by visiting vessels yachts and cruise ships.

The existing landfill facility at Jack Boy Hill will need to be upgraded, as far as practicable, in order (inter alia) to minimize the visual impact for persons using the Katy Hill trail system.

New tourism-related and other larger developments should be obliged (as part of the planning approval process) to incorporate measures for reducing, reusing and recycling waste so as to minimize transfers to the landfill site.

(iv) Telecommunications

The main policy recommendation in the PDP for the further development of the telecommunications sector in Montserrat is “to create an open market for the provision of facilities and services and conditions in Montserrat’s telecommunications sector in support of the continued development of tourism, financial services and information-based services on the island”. This should result in a more competitive market – and reduced charges – for existing and new customers (including those in the tourism sector).
17. POTENTIAL FOR PRODUCT EXPANSION AND DIVERSIFICATION

In planning for the realization of the plan's growth objectives, a major issue is the extent to which the supply of Montserrat's tourism product can be expanded and diversified.

An assessment of what the market wants, linked to Montserrat's ability to supply the required tourism products is shown on the following matrix. Correlating what the market wants with what Montserrat can realistically supply indicates how the island's tourism product can be expanded and diversified and what is necessary to achieve this in terms of product development which is consistent with the sustainable tourism vision for Montserrat.

The assessment outlined on Table 17.1 following is based on the product/site inspection trips undertaken during the course of the fieldwork; a review of existing development plans and other relevant documents; meetings with individuals stakeholders as part of the process of this tourism strategy formulation.
### Table 17.1: Matrix of Product – Market Potential for Expansion and Diversification

<table>
<thead>
<tr>
<th>Market Segment</th>
<th>Characteristics</th>
<th>Requirements</th>
<th>Development Potential</th>
</tr>
</thead>
</table>
| **A. Nature Tourism** | • birding  
  • botanical  
  • natural history | • moderate use of tourism plant  
  • high spend  
  • seasonal  
  • moderate growth rate | • nature reserves/parks  
  • range of accommodation  
  • guides & ground tour arrangements | • major potential, but  
  • interpretation lacking, need for biodiversity tours |
|                |                 |              |                       |
| **B. Activity Tourism** | • hiking  
  • mountain biking  
  • kayaking  
  • zip-lining | • moderate use of tourism plant  
  • seasonal  
  • moderate growth rate | • nature reserves/parks  
  • marked trails  
  • range of accommodation  
  - activity centre | • new circular trail to link trail network required  
  • increased on-going maintenance required  
  • activity centre needed |
|                |                 |              |                       |
| **C. Volcano Tourism** | • viewing and observation tours  
  • educational | • high use of tourism plant  
  • moderate spend  
  • moderate growth rate | • nature reserves/parks  
  • mountains/rough terrain  
  • good information  
  • range of accommodation | • significant potential, but  
  • tour guides required  
  • maps and other information lacking  
  • poor access to viewing sites |
|                |                 |              |                       |
| **D. Cruise Visits** | • small cruise ships (up to 150m) | • high volume  
  • very short stay  
  • high environmental impact  
  • seasonal demand | • interesting/attractive/accessible nature sites  
  • historic sites  
  • cultural and heritage experiences  
  • shopping  
  • ambience  
  • safety and security  
  • things-to-see-and-do | • significant potential, but  
  • port improvements required  
  • transport services from Carr’s Bay to Little Bay  
  • limited number of passengers with only one cruise ship visit per day allowed |
|                |                 |              |                       |
| **E. Eco-resorts** | • hill and wilderness resorts  
  • wellness/spas | • high spend  
  • high use of tourist plant  
  • all year demand  
  • high growth | • small scale hotels and lodges  
  • high quality facilities (e.g. infinity pool)  
  • secluded settings  
  • nature walks, trails, things-to-see-and-do  
  • professional therapists, dieticians  
  • medical support facilities | • significant potential but on small scale  
  • number of possible locations available  
  • need for international ‘brand’ such as Baynan Tree, Sixth Senses  
  • wellness treatment by professionals  
  – high quality clinical equipment |
### F. Residential/Long Stay

- retirees
- medical students
- villa/town houses, condos (ownership rentals)
- holiday homes • long, frequent visits
- high spend
- high growth
- seamless access from regional hubs, esp. Antigua
- reassurance about safety and services
- things-to-do
- tax incentives
- regulatory framework
- medical support facilities
- significant potential but on small scale
- small hotels and lodges of appropriate scale
- planned development of 30 to 40 villas with associated retail facilities, etc.

### G. Sports

- sports matches and training
- events
- comprise groupings of participants, fans and passive spectators
- high use of tourist plant
- short 2 – 4 days
- moderate growth
- good and appropriate sporting facilities
- range of accommodation
- things-to-see-and-do
- good local food
- entertainment/local ambience
- some potential at new football stadium

### H. Scuba Diving

- diving
- snorkelling
- 1 week average stay
- high use of tourism plant
- high spend
- seasonal
- low environmental impact
- range of dive sites
- dive shops/diving masters
- medical support facilities
- range of accommodation
- things to-see-and-do for non-dive companions
- major potential with sites fully identified and mapped
- ‘wreck’ diving should be developed to expand product appeal

### I. Yachting

- yachting
- short stay
- low use of tourism plant
- moderate spend
- low environment impact
- jetties/moorings/marina
- jetties/moors/marina
- on-shore facilities – showers, laundry
- things to see and do
- shopping/provisioning
- fuel/water supplies
- major potential, but lack of moorings/pontoons
- shore facilities sub-standard or non-existing
- lack of facilities for water/fuel uplift • poor image of Montserrat re yachting

### J. Short Breaks

- general holiday maker
- 2 to 3 night stay
- high spend
- high use of tourism plant
- off-season
- low repeat
- intra-Caribbean mainly
- small scale facilities
- things-to-see-and-do
- good food
- entertainment/local ambiance
- interesting attractions
- competitive car rental tariffs
- events/festivals
- significant potential, but
- improved packaging required
- tourism product needs development
- no entertainment
- better quality restaurants required with regular opening hours
### K. Excursionists
- **Day Visitors - One-day Stay**
  - Low use of tourism plant
  - Low spend
  - Competitive access transport
  - Organised tours
  - Things to see/interpretation/shopping
  - Significant potential from Antigua
  - Taxi/tours available

### L. Weddings & Honeymoon Stays
- **Niche Market**
  - High spend
  - 3 – 7 night stay
  - High use of tourist plant
  - Low environmental impact
  - All year demand
  - Attractive church/location for ceremony
  - Attractive location for photography
  - Wedding venues – accommodation with room for reception
  - Wedding planner
  - Clear legal situation
  - Limited potential, but
    - Needs more publicity and venues

### M. Festivals/Events
- **Carnival**
  - Returning nationals and intra-Caribbean
  - Short stay
  - High use of tourist plant
  - Low environmental impact
  - Seasonal demand
  - High repeat
  - Unique festivals and events
  - Particular timing to avoid clashing with other regional events
  - Things-to-see-and-do
  - Good local food
  - Entertainment/local ambiance
  - Safety and security
  - Important potential, but
    - Problems of access capacity
    - Limited accommodation capacity
    - Cultural performances need
      - To be more widely promoted and developed outside main festivals

### N. Business Meetings
- **Small Companies**
  - Intra-Caribbean business
  - Persons and spouse/partner/family
  - Business/groups/clubs and associations
  - Highly profitable
  - Short stay 2 – 4 days
  - High use of tourist plant
  - Low environmental impact
  - Seasonal demand
  - Meeting facilities
  - Upscale accommodation
  - Restaurants
  - Entertainment
  - Things-to-see-and-do
  - Safety and security
  - Spouse/partner/family programmes and attractions
  - Important potential, but
    - Limited convention/meetings organisational expertise
    - Problems of air and sea access capacity
    - No convention facilities apart from Cultural Centre
    - Lack of entertainment/things to do
18. MONTSERRAT’S COMPETITIVENESS AND MARKET PLACE POSITION

18.1 MONTSERRAT’S MARKETS AND COMPETITOR GROUP

The relatively small physical size of the island, the topography and lack of white sand beaches and azure waters, points to Montserrat’s future market place position as being decidedly in the ‘Low Volume – High End’ tourism segment of the market. In this context, Montserrat’s competitor grouping would include destinations such as Anguilla, Bonaire, Dominica, Saba, St. Barts, St. Kitts & Nevis, St. Vincent & the Grenadines, Tobago – ‘high-end’ destinations that receive less than 100,000 stay-over arrivals yearly.

The evolution of tourism demand to these destinations is shown on Table 18.1.

Table 18.1: Stay-Over Arrivals to Select ‘High End/Low Volume’ Destinations

<table>
<thead>
<tr>
<th>Year</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anguilla</td>
<td>77,600</td>
<td>68,300</td>
<td>57,900</td>
<td>64,000</td>
<td>66,000</td>
</tr>
<tr>
<td>Bonaire</td>
<td>74,300</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Dominica</td>
<td>76,500</td>
<td>80,400</td>
<td>74,900</td>
<td>76,500</td>
<td>75,500</td>
</tr>
<tr>
<td>Montserrat</td>
<td>7,700</td>
<td>7,400</td>
<td>6,300</td>
<td>6,000</td>
<td>6,400</td>
</tr>
<tr>
<td>Saba</td>
<td>11,600</td>
<td>12,000</td>
<td>12,000</td>
<td>12,300</td>
<td>12,500*</td>
</tr>
<tr>
<td>St. Barts*</td>
<td>70,000</td>
<td>70,000</td>
<td>70,000</td>
<td>75,000</td>
<td>77,000</td>
</tr>
<tr>
<td>St. Kitts &amp; Nevis**</td>
<td>123,200</td>
<td>128,000</td>
<td>93,000</td>
<td>92,000</td>
<td>93,000</td>
</tr>
<tr>
<td>St. Vincent &amp; Grenadines</td>
<td>69,600</td>
<td>84,100</td>
<td>75,400</td>
<td>72,500</td>
<td>73,900</td>
</tr>
<tr>
<td>Tobago</td>
<td>63,000</td>
<td>56,000</td>
<td>38,000</td>
<td>34,000</td>
<td>34,000</td>
</tr>
</tbody>
</table>

**TOTAL SELECT ‘HIGH END/LOW VOLUME’**

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>438,300</td>
</tr>
</tbody>
</table>

**TOTAL TOURIST ARRIVALS TO CARIBBEAN (000’s)**

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20,640</td>
</tr>
</tbody>
</table>

Source: CTO and Consultant Note: figures rounded *consultants’ estimates ** World Bank

Total stay-over arrivals to the Caribbean have rebounded from the low point in 2009 (following the global financial crisis of 2008) to a record 20,640,000 in 2011. Preliminary indicators for 2012 suggest a further increase.

Although stay-over arrivals to the selected ‘high end – low volume’ destinations on Table 18.1 have also rebounded from the 2009 low, for most of them numbers are still below the pre global financial crisis peak recorded in 2007/8. A major reason for this is that these destinations rely to a significant extent on the European market, which has not yet recovered.

It should be noted that stay-over arrivals to these ‘high-end/low volume’ destinations are not the sum total of the high-end segment of the market. Many thousands of ‘high-end’ travellers go to luxury resorts located in designated “high-end” areas of larger destinations. For example, the West Coast area Barbados, where exclusive resorts such as Sandy Lane are located.
11.4 %
2009
8.6
0
2011
-3
EUR

Because of lack of published disaggregated data we have not been able to include all the ‘high-end/low volume’ destinations in the Caribbean. For example, data on tourist arrivals to Bonaire are not generally available. The salient points arising from the analysis of the market data in respect of the selected ‘high end – low volume’ tourism destinations are that:

- collectively, they attract between 2.5% and 3% of total stay-over arrivals to the Caribbean
- growth is likely to be in line with overall growth trends to the Caribbean from the main source markets
- not all the ‘high-end/low volume’ destinations have experienced consistent growth. The reasons vary – inadequate access, tired and rundown tourism product, lack of investment, safety issues.

18.2 MONTSERRAT’S MARKET PLACE POSITION

A number of elements go to make up a competitive tourism product, the key ones being:

- Direct and frequent access from source markets and/or hubs.
- Range of good accommodation and high standards.
- Variety of attractions, things-to-do-and-see.
- High quality infrastructure – ports, roads, utilities.
- Relative prices – good value for money.

Certainly, not every ‘high end’ – low volume’ destination ticks all these boxes (only St. Kitts & Nevis does) but none are as severely disadvantaged as Montserrat in respect of all the key elements which go to make up a competitive tourism product.

We contacted all the tour operators and market representatives indicated on the MTB website as representing/featuring Montserrat to discuss their views on Montserrat’s competitive position in the market.

Exposure in the market place

Of the 25 tour operators listed on the MTB web site, only 6 feature Montserrat, and 4 of these are on Antigua. The two overseas tour operators that feature Montserrat are Motmot Travel in the UK and Total Vacations in Canada. There is also a German tour operator (Caribicinseln) which features Montserrat, but is not listed on the relevant MTB webpage. We also looked at tour operators that specialize in Volcano vacations – Exodus, Virgin (which flies to Antigua), Discover the World and Bootsnull – but none feature Montserrat.
The implication is that Montserrat has no exposure in the marketplace. As there is no product on offer, any destination marketing or generation of awareness activities are largely ineffective.

**Montserrat’s image in the market at present**

In general it’s easier to say what Montserrat’s image is not, rather than what it is. Montserrat is not known for luxury - chic, health/wellness, culinary excellence, shopping – in fact, the destination is an unknown quantity except for the volcano. The image of the volcano is still in the forefront of many people’s minds.

**Niche markets or customer segments to be targeted**

- The experienced traveller – those who have ‘done’ the Caribbean and are looking for a more authentic ‘getaway’- no big resorts, no casinos, no loud blaring music
- The retired ‘baby boomers’ who have more time to take holidays and disposable income, making them ideal target for villa vacations
- Scuba diving – Montserrat has good dive sites
- Hiking – has a well developed network of trails
- Bird watchers
- Volcano enthusiasts and those generally interested in volcanoes

**Montserrat’s main constraints in attracting visitors from these market/customer segments**

- Totally inadequate ferry service – the vessel is inadequate, the journey time is too long, the service infrequent
- Air services using 6 seater-planes, which potential first time visitors are reluctant to use
- Virtually no ‘market ready’ accommodation for ‘high-end’ tourists. Only Olveston House and perhaps one other B&B establishment are considered by tour operators to be ‘market ready’ for their ‘high-end’ clients. Tropical Mansions is seen as being geared to the business traveller
- Few attractions, things-to-see-and-do for the general vacationer – no golf (particularly for villa tourists), no waterfront area, no focal point like Road Bay in Anguilla, Gustavia in St. Barts, St. Lawerence Gap in Barbados, where visitors and locals congregate.

**Image Montserrat should try to promote in the market so that it would be of appeal to the customer segments/niche markets Montserrat should target**

Montserrat should position itself as the next place to ‘really get away’ from it all, as many travelers are looking to avoid the overcrowded beaches and the ‘super size’ all inclusive resorts. It needs to be repositioned as ‘unspoiled, authentic, smart’, capitalizing on its

- Peace and tranquility
- Timelessness
- Safety and security
- Friendly and welcoming people

**Type of accommodation that would be preferred by the target markets**

- ‘Beach-chic’ beach resort
- Eco-lodge – complementing the network of walking/hiking trails
- B&B or Inns – Olveston House type or similar to inns on St. Kitts/Nevis
- Villas – high quality, with range of services.
It is important to note that it is the smaller sized accommodation units that are preferred by Montserrat’s target markets. In this respect it is worth noting that on St. Barts, most accommodation units have less than 20 rooms with only 3 hotels having more than 40 rooms.

Olveston House

Villa

Eco-Lodge
19. DESTINATION MARKETING – LESSONS FROM COMPARABLE DESTINATIONS

19.1 ST. HELENA

The islands of Montserrat and St Helena are situated in different regions of the world. Montserrat is just 37 square miles in size and is located in the Caribbean while St Helena is 47 sq miles and lies in the South Atlantic Ocean. Yet still they both share several things in common.

They are both Small Island Developing States as well as British Overseas Territories with populations under 10,000. St Helena’s population is only a little over 4,000 people, while Montserrat’s population has dwindled to about 5,000 since 1995, due to outward migration fuelled by the volcanic activities. A large number of its current residents are non-Montserratians.

St Helena is relatively unknown as a tourist destination. Regular access for Saint Helenians and visitors is currently on the RMS St Helena, a 128-berth combined passenger and cargo vessel (generally acknowledged as one of the world’s last remaining mail ships). In 2008, just 617 tourists, 256 business visitors and 781 VFR passengers visited St Helena on the RMS. There were additional visitors from occasional cruise ship calls (1,181 in 2008) and passing yachts (441 visitors in 2008). With no sheltered moorings, few cruise ships are willing to disembark their passengers there.

In Montserrat 2008 total arrivals amounted to 7,360, of which business visitors were 1,889 VFR 1,466 and there were 2,005 cruise passengers.

Both economies are characterised by extreme trade imbalances, a limited labour market and high transport costs. In St Helena, economic stagnation has been accentuated in recent years by a steady decline in population with offshore employment in Ascension, the Falklands as well as the UK. The St Helena Government (SHG) is the island’s main employer and this also holds true for Montserrat.

From a tourism perspective both islands are seeking to develop tourism as the key driver of economic growth but they are faced with similar challenges as far as access is concerned. In Montserrat there is limited air and sea access. In St Helena, access currently is only by ship, which comes from either Ascension Island (2 days sailing) or Cape Town (5 days sailing).

Both islands are also heavily dependent on the British Government, which provided resources for a new airport in Montserrat post Volcano and has committed to constructing an airport for St Helena. The latter is expected to be completed in late 2015. In addition, for both islands significant resources for rebuilding the tourism infrastructure, has been provided through DFID funded technical co-operation.

Like Montserrat, St Helena recognizes that semi-resident tourists can make a very large contribution to the economy despite being very small in numbers. Furthermore, compared to mainstream tourism, semi-resident tourists provide a more stable and sustainable income stream, allow for better integration into the community and often seek lower density accommodation.
This has been Montserrat’s experience, in that prior to 1995 there were some 400 villas on the island. A vast number of these were owned by expatriate retirees or semi retirees and they made a significant contribution to employment and the island’s tourism economy in general.

Both islands are actively engaged in developing capacity, skills and infrastructure, and in trying to build awareness of the destination in key markets, with existing and potential operators (both tour and cruise).

Equally both destinations have identified the diaspora as important contributors for the islands economic recovery.

**Outsourcing - The St Helena Model**

St Helena has no tourist office in the UK. However, there is a representative who performs primarily diplomatic and administrative functions. The Diplomatic representative makes office space available as needed to support the marketing function and provides input when requested.

The Government of St Helena recognized that some aspects of international promotion, particularly participating at tourism fairs as an exhibitor was outside its means. A conscious decision was taken that all marketing activities would be carefully targeted and focused on results delivery, and that the marketing and Public Relations functions in the UK and South Africa would be outsourced.

A Sales and Marketing Executive (SME) with a background in tour operations and destination marketing was recruited (on a 2 year contract) to work for 72 days per year on a call-down basis, as agreed with the Tourism Development Executive.

The SME works from a home base in the UK but has access to office facilities at the St Helena diplomatic office in London. While the primary focus was the UK market she is expected to travel overseas from time to time, and to assist ad hoc, in other markets such as France, Germany and South Africa.

The SME’s primary tasks are:

- To develop regular, pro-active contacts with existing operators to the island, and to provide additional support as needed in order to expand their product offerings and feature the island more prominently.

Small contributions are made for such initiatives as co-operative advertising, direct mail campaigns, and online activity. This allows St. Helena to “piggy back” on the tour operators larger and more wide ranging marketing activities and campaigns in a cost effective manner.

- To identify and strengthen relations with potential new operators, both by introducing them to the island and working with island suppliers to create and offer itineraries for their use.

This helps stimulate private sector development and build capacity amongst less experienced providers of goods and services by assisting them to develop these itineraries.

- To attend all the major travel exhibitions, and to meet and network with trade visitors at the show by “walking the floor” to set up meetings with potential operators and others interested in the island.
This ensures that the island had some presence at all the key exhibitions and fora, but in a cost effective and time efficient manner. Following participation at a holiday fair or exhibition, the SME follows up on the contacts with sales calls, personal visits and more detailed discussions and presentations. Using this strategy St Helena has been represented at a significant number of key trade shows (including World Travel Market, ITB and Indaba in South Africa) without the cost of exhibiting, and without the need for tourist board staff to travel abroad.

A log-frame outlines the specific targets which must be met by the SME and the wider tourism objectives. These include the number of new tour operators offering the island as a destination, and the number of cruise ship operators calling at the island. While there are overall targets for number of visitors, it has been recognized that it would be difficult to hold the SME against those given the issues St Helena has with access. St Helena is described as one of the more remote places on the planet.

The SME pays at least one annual visit to St. Helena in order to learn firsthand about the sector and engage with tourism operators and stakeholders. Ongoing dialogue takes place through email communications with the Tourism Director, and in addition there are regular monthly update telephone conferences. Reports on the marketing activities are submitted on a monthly basis. The monthly reports from the SME, which highlights contacts and relationships are scrutinized, and discussed in the monthly teleconference calls. If there is little or no progress in terms of getting operators to offer the product, this would be queried.

In addition to the activities of the SME, a medium term plan to heighten awareness of St Helena in key markets was developed. This involved appointing and working with a PR agency in the UK (and more recently in South Africa), and agreeing to a campaign of activities that would create interest and awareness in the key target segments.

The PR plan focused on achievable targets with specific measurable objectives (eg: the number of articles published and where, the number of press contacts and who, etc). It also included a social networking strategy using Facebook and links with Saints living in the UK and Europe, and a revamped tourism website to make it more dynamic and interactive.

**Lessons from Experience**

There are important lessons to learn from the St Helena experience:

- Experienced tourism professionals (in the field and in head office) with a proven track record are critical to success
- Recognize what the market is and what can be effectively delivered
- Recognize what resources there are, and how those can be best utilized for maximum gain.
- Avoid scattergun approaches and focus tightly especially at the onset, and then broaden the scope as opportunities present themselves
- Don’t try to be everything to everyone – focus on what the destination does well or offers uniquely;
- Utilize local market expertise, especially experienced PR and either part-time or contract representation;
- Depending on who you are talking to, destination based people are not always the right people to use;
- It is crucial to make sure the destination is in sync with the picture that is being created
- It is vitally important to build networks and participation at exhibitions aren’t always necessary to do so;
- Identify and agree exactly what is to be achieved and ensure it is measurable
19.2 ANGUILLA

Several destinations, such as Anguilla, have opted to contract the National Tourist Office functions to one company. In Anguilla’s case the company contracted operates as the official Anguilla Tourism Office in the US. The office is staffed mainly by non-Anguillans but has been known to employ an Anguillan at times. These are usually Anguillan students studying tourism in the USA. The US office is also responsible for the Canadian Market and has recruited a travel professional there.

The Anguillian structure, as described above, is tantamount to a full scale operation of a North American Tourism Office for larger and better resourced destinations. This is reflected in the high operational costs and staff salaries and the consistent increase in budget allocations to support the operations. The Government of Anguilla bears the full cost of the operations of the USA office including equipment and supplies, rent of office space, utilities staff salaries, local courier services etc. This company does not appear to have other clients whereby cost sharing of essential services would be of benefit to all.

There are additional costs connected to participation in travel trade shows, sales activities and special promotions. Anguilla also has separately contracted e-marketing and Public Relations services to another company. The disconnect that arises from time to time between both companies has given rise to serious questions about the cost effectiveness of this approach.

In the UK and European markets, individual PR and sales representatives have been contracted.
20. NATIONAL GROWTH OBJECTIVES AND CHALLENGE FOR TOURISM

20.1 NATIONAL ECONOMIC CHALLENGE

Montserrat’s open economy is extremely vulnerable to changes in the external economic environment. This is reflected in the current difficult economic and fiscal situation.

Reflecting the Vision Pillars outlined in the Sustainable Development Plan 2008 – 2020, the Government of Montserrat (GoM) faces four major challenges to:

- support a thriving and viable population,
- increase standards of living for all Montserratian citizens,
- increase job opportunities and reduce unemployment, and
- stabilize and improve the public finances.

In order to grow the economy, the GoM is looking mainly to the private sector – principally tourism – both by generating higher levels of business in existing enterprises and by implementing new capital projects, which would benefit the construction sector.

20.2 GROWTH SCENARIOS FOR THE ECONOMY

Increasing living standards is key to supporting a thriving and viable population. Using GDP per head as an indicator of living standards, the citizenry of Montserrat have experienced reasonably stable standards of living over the last 5 years.

<table>
<thead>
<tr>
<th>Table 20.1: GDP per Capita at Constant 2012 Prices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
</tr>
<tr>
<td>GDP Current (EC$M)</td>
</tr>
<tr>
<td>GDP Constant (EC$M)</td>
</tr>
<tr>
<td>Population</td>
</tr>
<tr>
<td>GDP per capita (EC$’000)</td>
</tr>
</tbody>
</table>

Source: CSO Montserrat, ECCB and Consultants’ estimates

Going forward, three possible scenarios are:

- **Low Growth Scenario A:** maintain living standards at current levels
- **Medium Growth Scenario B:** increase living standards by an average growth rate of 0.5% yearly
- **High Growth Scenario C:** increase living standards by an average growth rate of 1% yearly

The increasing population and living standards implications for economic growth are shown on Table 20.2.
Table 20.2: Population and GDP Growth Targets

<table>
<thead>
<tr>
<th>Scenario</th>
<th>2012</th>
<th>2022</th>
<th>Avg Yearly Growth Rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Low Growth</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population</td>
<td>4,930</td>
<td>5,000</td>
<td>0.1</td>
</tr>
<tr>
<td>GDP per Capita (EC$)*</td>
<td>35,000</td>
<td>35,000</td>
<td>-</td>
</tr>
<tr>
<td>GDP EC$ (000s)</td>
<td>171,500</td>
<td>175,000</td>
<td>0.1</td>
</tr>
<tr>
<td>B. Medium Growth</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population</td>
<td>4,930</td>
<td>7,000</td>
<td>3.5</td>
</tr>
<tr>
<td>GDP per Capita (EC$)*</td>
<td>35,000</td>
<td>36,800</td>
<td>0.5</td>
</tr>
<tr>
<td>GDP EC$ (000s)</td>
<td>171,500</td>
<td>257,600</td>
<td>4.0</td>
</tr>
<tr>
<td>C. High Growth</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population</td>
<td>4,930</td>
<td>9,000</td>
<td>6.2</td>
</tr>
<tr>
<td>GDP per Capita (EC$)*</td>
<td>35,000</td>
<td>38,500</td>
<td>1.0</td>
</tr>
<tr>
<td>GDP EC$ (000s)</td>
<td>171,500</td>
<td>346,000</td>
<td>7.2</td>
</tr>
</tbody>
</table>

*at constant 2012 prices

**Scenario A** represents the continuation of present trends, implying a ‘stand-still’ situation for Montserrat’s economy over the next decade.

**Scenario B** represents a ‘medium’ growth scenario, with an average annual GDP growth rate of 4% over the next decade required to support a population of 7,000 people with an improving standard of living.

**Scenario C** reflects the targeted increase in population to 9,000 as indicated in the Montserrat Physical Development Plan 2012 – 2022 coupled with an increasing standard of living for Montserratians. An average GDP growth rate of just over 7% yearly is required.

20.3 CHALLENGE FOR TOURISM SECTOR

The strategic objective for the tourism sector is to further the creation of a higher standard of living and well-being for the people of Montserrat through the development of tourism on a sustainable basis, contributing to:

- Creation of job opportunities;
- Income generation;
- Tax revenues for government;
- Improved quality of economic and social infrastructure;
- Improved quality of environment; and
- Linkages with other sectors of the economy, principally construction.
21. TOURISM VISION AND GUIDING PRINCIPLES

Attracting more visitors to Montserrat will depend on getting a number of factors right – improved access, improved infrastructure, additional product, enhanced the amenities and facilities, targeted destination marketing. To succeed, tourism development must be grounded in the reality of what the island can support and secondly, must reflect what is unique about what Montserrat has to offer.

21.1 MONTSERRAT’S UNIQUENESS

Our fieldwork research, supported by the deliberations of the Stakeholder’s Workshop (30th May, 2012), and the interviews with tour operators and market representatives suggests that Montserrat’s uniqueness lies in its:

- Nature environment, unspoilt wilderness.
- Authenticity – old world charm – timeless character.
- Slow pace of life.
- Peace and tranquility.
- Safety, crime free.
- Friendly people.
- Exclusivity – a private hideaway.
- Intimacy – small population, uncrowded.

These are Montserrat’s core strengths which must be maintained and enhanced.

21.2 TOURISM VISION STATEMENT

Currently, Montserrat does not have a formal tourism policy statement. Based on the deliberations of the May 30th Stakeholders Workshop, the following vision statement emerged.

‘The Government of Montserrat sees tourism as a major driver of economic activity and wealth creation for the benefit of all Montserratian citizens, achieved through the sustainable development of the island’s touristic resources while protecting and enhancing the island’s natural and man-made environments and patrimony’

21.3 GUIDING PRINCIPLES

Tourism development will be guided by the following principles:

- Respect for the natural marine and terrestrial environments and support for their conservation and enhancement.
- A pristine physical environment.
- Respect and support for Montserratian cultural heritage.
- A safe and crime-free social environment.
- Provide a tourism experience that exceeds customer expectations in terms of friendliness, quality of environment, iconic attractions and distinctive patrimony.
- Provide a high quality tourism product in terms of physical and service standards.
- Provide attractive career opportunities for Montserratians.
22. TOURISM GROWTH SCENARIOS

22.1 PIVOTAL ASSUMPTIONS

Any consideration of growth scenarios will be predicated by a number of assumptions concerning the fundamental factors determining growth – market demand potential, supportive business environment, favourable climate for investment etc., Similarly in Montserrat’s case, but unlike most other ‘high-end, low-volume’ Caribbean destinations discussed in Ch 18 earlier, four specific factors will have a determining influence on the nature and pace of tourism development on the island.

These assumptions are in relation to the state of activity of the volcano, access transport services, port development at Carr’s Bay and the GoM and UK Government Memorandum of Understanding concerning the town and tourism development at Little Bay.

The Volcano

Firstly, it has to be recognised that while the volcano has now been quiet for over two years, there is always the possibility of another ‘event’.

Nevertheless, although the precise nature of any renewed activity cannot be determined, the direction of any associated pyroclastic flows is now more or less predictable and would not be expected to impact – except (depending on wind directions) for ashfall – on the Old Towne area and north of the Belham Valley.

In this respect the pivotal assumption is that the line of exclusion zone B is moved to coincide with what was the Belham Valley River. As a result, existing and potential properties located north of this changed boundary line would now be able to access mortgage financing and insurance.

Access Transport Services

a) New Ferry Service

The building and commissioning of an appropriately designed passenger and cargo ferry with adequate capacity and domiciled in Montserrat to serve the island’s economic security and emergency needs is under active consideration by the GoM. The timelines for its implementation are as follows:

(i) Prospectus issued by GoM by 30 Jun 2012
(ii) Call for Expression of Interest by 30th Oct 2012
(iii) Business Case preparation by 30th Dec 2012
(iv) DFID funding decision by 31st Jan, 2013
(v) 18 months construction and commissioning period – ferry in service by mid 2014

b) Twin Otter Service

As outlined in Ch. 7, earlier the existing air services using the 6 seater plane is considered inadequate. Arising from this the GoM is actively considering the leasing/part leasing of a Twin Otter aircraft to operate the route under management by an airline operating company. The timelines for its implementation are as follows:

(i) Prospectus issued by GoM by 30 Jun 2012
(ii) Call for Expression of Interest by 30th Oct 2012
(iii) Business Case preparation by 30th Dec 2012
(iv) DFID funding decision by 31st Jan, 2013
(v) Leasing agreement and selection of airline operating company by 30th June, 2013
c) Carr’s Bay Port Development

The planning for Carr’s Bay Port development is now underway, with provision of berthing facilities for the proposed new passenger ferry, cargo ships and the smaller sized cruise ships (up to maximum of 500 passengers). The timelines for implementation are as follows:

(i) Design options prepared by mid July, 2012
(ii) Economic assessment of the town and port by September 2012
(iii) Decision on optimum design by October, 2012
(iv) Final design completed by end Jan 2013
(v) Funding decision in Feb 2013
(vi) Contractor in place by end Jun 2013
(vii) Phased construction – port facilities in place by June 2016

d) Town and Little Bay Tourism Development

The planning for the town and tourism development (involving an hotel and residences along with a marina and fishermen’s village) is at the conceptual stage. Concept designs have been drawn up by the Montserrat Development Corporation.

Based on a memorandum of understanding (MOU) between the Governments of the UK and Montserrat, the Carr’s Port development is to proceed in parallel with the town and Little Bay tourism development. Although we have not seen the actual wording of the MOU, our understanding is that it states or implies that the construction of Carr’s port will proceed only on the condition of private sector investment being undertaken simultaneously in the development of the town and Little Bay tourism infrastructure. Research by the MDC indicates private sector investor interest, but, understandably as yet, no firm commitments.

An important point concerning the interpretation of the MOU is that the nature and extent of any private sector investor commitment has not been specified; ie no threshold or minimum amount of private sector investment either in the town or tourism infrastructure has been specified to be in place as a condition for work to begin on the construction of the Carr’s port development.

22.2 TOURISM GROWTH SCENARIOS, 2012 - 2022

Targeted to maintain and increase living standards for all Montserratians, three national economic growth scenarios were outlined in Ch. 20 earlier. Based on these economic growth scenarios, three corresponding tourism development scenarios have been developed, summarized on Table 22.1.

The first scenario - A, is the low growth scenario consistent with maintaining present standards of living (in real terms) for Montserratian citizens. The ‘low growth’ scenario can be interpreted as what would be likely to happen if no initiatives were undertaken and tourism development continued to be constrained by the shortcomings of the existing infrastructure.

Scenario C is the high growth scenario which can be interpreted as the rate at which tourism could expand if sufficient public and private sector capital investment was forthcoming to build and commission the proposed new ferry, lease a twin otter aircraft, construct Carr’s port, and develop the town hotel, residences and marina at Little Bay.

Between these lie a number of possibilities, one of the more likely being the commissioning of the ferry service, the leasing of a twin otter aircraft and construction of Carr’s Bay port, but without any major investment in the town or tourism infrastructure at Little Bay, at least until after 2022. This is designated at as the medium growth Scenario B.
22.2.1 Low Growth Scenario A

Under this scenario, none of the proposed initiatives takes place. Essentially, things continue much as they are. In consequence, the likely evolution of tourism on Montserrat would be as follows:

- Stayover arrivals to fluctuate between 6,500 and 8,000 over the period, mainly composed of Montserratians returning to visit family and friends
- Non-Montserratian stay-over arrivals between 2,500 and 3,500 yearly, visiting for:
  - general vacation
  - hiking tours and scuba dive
  - short breaks by sports, church, and other special interest groups
- Cruise ship visitors not exceeding 1,000 yearly, depending on number of vessels including Montserrat on their itineraries
- Yachting visitors and excursionists averaging 2,000 yearly, respectively.

Under this scenario, no expansion of the tourism sector is envisaged. Indeed, there is likely to be a contraction in overall tourism activity with the number of tourism operators decreasing.

22.2.2 Medium Growth Scenario B

Under this scenario the major economic infrastructure development is the construction of Carr’s Bay port which will accommodate cruise ship calls, the leasing of a twin otter aircraft from April 2014 and the commissioning in service of a new purpose built ferry from mid 2014. The product development initiatives designed to attract increasing numbers of stay-over tourists and excursions are illustrated on Map 22.1 and include:

- Construction/placement of moorings and required on-shore facilities at Little Bay to attract yachting visitors
- Development of Little Bay waterfront area, with restaurants /bars creating a focal place for visitors and residents alike
- Rehabilitation and up-grade of the Vue Pointe hotel, catering to the vacation, business and small conference/meetings segments of the market
- Development of a 9-hole golf course at Blakes Estate, with 75 associated villas
- Development of a 20-room ‘boutique’ hotel at Rendezvous Bay
- Development of a 20-room eco-tourism mountain resort, linking with the hiking product
- 100 new rooms in additional villas, B & B/guesthouse and apartments.
- Development of Visitor Attractions
  - Volcano Interpretation Centre
  - AIR Studios
  - Museum & Heritage Park
  - Expansion of MVO
  - Sugar Mill.
- Development/Enhancement of Amenities
  - Marine park
  - Salem ‘character’ village with plaza, bars/restaurant creating a focal place for visitors and locals.

Under this scenario, stay-over arrivals are projected to increase to about 20,000 by 2022, which would also reflect a revival in the residential/villa market.
22.2.3 High Growth Scenario C

The key features of this high growth scenario is the significant public and private sector investment involving:

- Leasing of twin otter from April 2014
- New purpose built ferry in service from mid 2014
- Carr’s Bay port and town at Little Bay
- 150-room 5* hotel and 20 associated residences at Little Bay

Chart 22.1: High Growth Scenario C

- Marina and fishermen’s village at Little Bay
- 18 – hole golf course at Blake’s Estate with 140 associated villas
- 30-room ‘boutique’ hotel at Rendezvous Bay
- Rehabilitation and up-grade of the Vue Pointe hotel, catering to the vacation, business and small conference/meetings segments of the market
- Development of the dive product (ship wreck reef)
- 25-room eco-tourism mountain lodge
- 120 new rooms in additional villas, B&B/guesthouses and apartments.

- Development of Visitor Attractions
  - Volcano Interpretation Centre
  - AIR Studios
  - Museum & Heritage Park
  - Expansion of MVO
  - Sugar Mill
  - Activity Centre in Centre Hills.

- Development/Enhancement of Amenities
  - Marine park
  - Salem ‘character’ village with plaza, bars/restaurant creating a focal place for visitors and locals.

Under this scenario, stay-over arrivals are projected to increase to about 35,000 by 2022.
22.3 TOURISM GROWTH PROJECTIONS

Tourism growth projections are outlined on Table 22.1 in respect of the three tourism development scenarios, based on the following assumptions:

- Stay-over visitors spending increasing from an average of EC$ 2,500 per person in 2012 (excluding air fares and/or sea ferry fares) to EC$ 3,000 per person in 2022, in terms of constant 2012 prices, reflecting a higher tourism product quality offering.
- Yacht visitors spending increasing from an average of EC$ 200 per person in 2012 to EC$ 250 per person in 2022, in terms of constant 2012 prices, reflecting a higher tourism product quality offering.
- Excursionist visitors spending increasing from an average of EC$ 300 per person in 2012 (excluding air fares and/or sea ferry fares) to EC$ 350 per person in 2022, in terms of constant 2012 prices, reflecting a higher tourism product quality offering.
- Cruise ship visitors spending increasing from an average of EC$ 250 per person in 2012 to EC$ 300 per person in 2022, in terms of constant 2012 prices, reflecting a higher tourism product quality offering.
- ‘bed nights’ refer to bed-nights in paid serviced accommodation, which represents just under 40% of all visitor bed-nights in 2012. For Scenario A, this remains relatively unchanged during the period 2012 – 2022. For Scenarios B and C, this proportion increases to 66% and 70% respectively, as most of the projected growth in demand will be for paid serviced accommodation.
- Room occupancy rates are based on an average of 1.8 sleepers per room.
- Average length of stay falls marginally from about 13 nights in 2012 to 12 nights in 2022, under Scenario B and about 11 nights under Scenario C, reflecting increasing numbers of vacationers who have a shorter length of stay than those visiting friends and relatives.
- Estimates of direct employment are indicative and based on similar ratios used by destinations such as Anguilla, Saba, Dominica, relating job numbers generated in hotels, guesthouses, restaurants, car rental, tour operators to bed-nights sold in paid serviced accommodation.
## Table 22.3: Tourism Growth Scenarios

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>Numbers</th>
<th>Spending (EC$000s)</th>
<th>2012</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>A. Low Growth Scenario</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total stay-over visitors</td>
<td>7,250</td>
<td>8,000</td>
<td>18,150</td>
<td>24,000</td>
</tr>
<tr>
<td>VFR</td>
<td>3,280</td>
<td>3,500</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td>1,350</td>
<td>1,450</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacation</td>
<td>2,260</td>
<td>2,500</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>360</td>
<td>400</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yacht Visitors</td>
<td>2,000</td>
<td>2,500</td>
<td>400</td>
<td>625</td>
</tr>
<tr>
<td>Cruise Visitors</td>
<td>600</td>
<td>1,000</td>
<td>150</td>
<td>300</td>
</tr>
<tr>
<td>Excursionists</td>
<td>2,000</td>
<td>2,000</td>
<td>600</td>
<td>700</td>
</tr>
<tr>
<td>Bed-nights in paid serviced accomm</td>
<td>2,000</td>
<td>44,100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rooms @ 25% room occupancy</td>
<td>250</td>
<td>270</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rooms @ 40% room occupancy</td>
<td>-</td>
<td>170</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Employment in Tourism</td>
<td>100</td>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>B. Medium Growth Scenario</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total stay-over visitors</td>
<td>7,250</td>
<td>20,000</td>
<td>18,150</td>
<td>60,000</td>
</tr>
<tr>
<td>VFR</td>
<td>3,280</td>
<td>5,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td>1,350</td>
<td>3,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacation</td>
<td>2,260</td>
<td>11,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>360</td>
<td>1,000</td>
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<td></td>
</tr>
<tr>
<td>Yacht Visitors</td>
<td>2,000</td>
<td>10,000</td>
<td>400</td>
<td>2,500</td>
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<tr>
<td>Cruise Visitors</td>
<td>600</td>
<td>3,000</td>
<td>150</td>
<td>900</td>
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<tr>
<td>Excursionists</td>
<td>2,000</td>
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<tr>
<td>Bed-nights in paid serviced accomm</td>
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<tr>
<td>Rooms @ 25% room occupancy</td>
<td>250</td>
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<tr>
<td>Rooms @ 40% room occupancy</td>
<td>145</td>
<td>610</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Employment in Tourism</td>
<td>100</td>
<td>500 to 700</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>C. High Growth Scenario</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total stay-over visitors</td>
<td>7,250</td>
<td>35,000</td>
<td>18,150</td>
<td>105,000</td>
</tr>
<tr>
<td>VFR</td>
<td>3,280</td>
<td>7,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td>1,350</td>
<td>5,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacation</td>
<td>2,260</td>
<td>21,250</td>
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<tr>
<td>Other</td>
<td>360</td>
<td>1,750</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yacht Visitors</td>
<td>2,000</td>
<td>20,000</td>
<td>400</td>
<td>5,000</td>
</tr>
<tr>
<td>Cruise Visitors</td>
<td>600</td>
<td>6,500</td>
<td>150</td>
<td>1,950</td>
</tr>
<tr>
<td>Excursionists</td>
<td>2,000</td>
<td>25,000</td>
<td>600</td>
<td>8,750</td>
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<tr>
<td>Bed-nights in paid serviced accomm</td>
<td>2,000</td>
<td>263,500</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rooms @ 25% room occupancy</td>
<td>250</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rooms @ 40% room occupancy</td>
<td>145</td>
<td>1,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Employment in Tourism</td>
<td>100</td>
<td>1,000 to 1,200</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

n/a: Not applicable
23. INDUSTRY GROWTH PATH AND STRATEGY

23.1 INDUSTRY GROWTH PATH

It should be noted that the low, medium and high growth scenarios are not mutually exclusive. Over time, and depending on both external and internal conditions, the low growth scenario could evolve into the high growth scenario as illustrated on the following diagram.

Initially, the industry will follow the Low Growth Scenario – at least until the new ferry and the twin otter are in services. With these significant improvements to the access situation, the platform will be established for moving to the Medium Growth Scenario involving the expansion of the tourism product - increased stock of accommodation, more things to-see-and-do etc. With the growth momentum generated, the stage is set for moving to the High Growth Scenario.

To achieve the targeted expansion of the tourism sector over the next decade, Montserrat will have to

➢ Move to an investment driven strategy

Currently, Montserrat is a relatively low spend destination. This is because the tourism industry is totally dependent on its natural attractions as the motivation for tourists to visit. But the natural attractions, though unique in many ways, are not sufficiently strong in themselves to attract the numbers required to support a significant tourism sector. It is a primary factor driven strategy and characterized by limited investment, insufficient accommodation and medium to low quality product.

Montserrat is not alone in this regard. All destinations, where the core products are nature and culture based but are not considered world class, (as the Galapagos, Egypt, Greece), face this problem. The strategy that many destinations which do not have ‘world class’ nature and cultural attractions have pursued, is to invest heavily the product. These destinations have seen their tourism sectors prosper and grow. Ireland is such an example.
To move on to the next stage of development requires an **investment driven strategy**, with sustained investment in all aspects of the industry – infrastructure, access transport, amenities and attractions, accommodation, destination marketing, human resource development etc.

### 23.3 LINKING STRATEGY TO SUSTAINABLE BENEFITS

The wider objective of the growth strategy is to obtain sustainable benefits for the people of Montserrat by generating additional economic activity.

The fundamental mechanism to achieve this wider objective is by increasing tourism revenue. Without an increase in revenue there can be: no growth in income; no improvement in employment, or Government tax revenues; and no possibility of improving community benefits from tourism.

The process of securing these sustainable benefits from tourism revenue is shown on the following chart. To increase tourism revenue there must either be:

- More visitors.
- Increased per capita spending by visitors.
- Longer stays.
- or some combination of the above.

To get more visitors, persuade them to stay longer and spend more money requires the implementation of seven strategic initiatives to deal with the issues confronting Montserrat’s tourism sector, viz:

- Expand and diversify the tourism product.
- Enhance tourism attractions and amenities.
- Upgrade quality and service standards.
- Improve access services and visitor facilities.

- Focused and cost-effective destination marketing.
- Reorganised and strengthen institutional arrangements.
- Better sector management.
VISION STATEMENT AND SUSTAINABLE BENEFITS

POLICY OBJECTIVES

ECONOMIC

SOCIAL/CULTURE

ENVIRONMENTAL

INCOMES

EMLOYMENT

COMMUNITY

GOVT. REVENUES

INCREASED TOURISM REVENUE

MORE VISITORS

INCREASED EXP/HEAD

LONGER STAY

Expand & diversify tourism product

Enhance tourism attractions & amenities

Upgrade quality and service standards

Reorganise & strengthen institutional arrangements

Focused & cost effective marketing

Access services & visitor facilities

Better sector management

STRATEGY AND ACTION PROGRAMMES

MONTSERRAT TOURISM DEVELOPMENT PLAN 2012 – 2022
24. EXPAND AND DIVERSIFY THE TOURISM PRODUCT

24.1 ACCOMMODATION

Montserrat has neither the natural assets nor the infrastructure to develop a large scale beach resort product, which is the hallmark of destinations such as Barbados, St. Maarten, Jamaica.

However, Montserrat does have the potential to develop the smaller scale beach/mountain resort product – 4* and 5* quality hotels in the 20 to 40 room category, environmentally sensitive, designed so as to be non-intrusive, with limited facilities (swimming pool, tennis, gardens). The concept is of seclusion, luxury standards, high quality service, excellent food and relaxation provided in a property designed and operated in harmony with the surrounding environment.

Between these two is the medium sized resort property – 100 to 200 rooms. To be commercially successful as a stand-alone product, these properties have to have an excellent beach front and a wide range of top quality facilities to include an 18-hole championship golf course, a number of good restaurants, top quality service and good access. An example of this type of product is the Four Seasons Resort on Nevis – 196 rooms + suites, excellent beach, 18-hole golf course and other facilities. Access is by private launch (or charter flight) from St. Kitts.

In addition to the small/medium sized resort, there is also considerable potential for the B&B/ Inn accommodation product, such as Olveston House.

Developing resort properties takes time – identifying the appropriate site, design concepts, planning permission, funding, construction & landscaping, fitting out, staffing, etc – perhaps two to three years depending on the size of the property.

In the meantime, with less than 250 rooms, Montserrat is critically short of accommodation. In the short term, the most cost-effective way of augmenting the accommodation stock is to re-open Vue Pointe. Rehabilitation would take about 9 months resulting in a ‘market – ready’ product of about 20 rooms, with facilities for the small meetings market. To effect this would necessitate a redrawing of the Exclusion Zone B boundary, thereby facilitating qualification for insurance and loan finance and funding support (soft loans, development equity).

24.2 EXCURSIONISTS/DAY-TRIP PRODUCT

There is undoubted potential for developing the excursionist product – primarily day trips from Antigua and St. Kitts & Nevis and cruise ship calls to Montserrat. Although carried out in 2003, a number of the findings from a survey among day-visitors to Montserrat concerning their experience are relevant today. When asked how a day-trip to Montserrat could be improved, the suggestions included:

- Good interpretation of the volcano before viewing
- Closer viewing of the volcano
- More tourism attractions
- More stopping points
• Place to stop and swim/wash off ash
• Improved road conditions

A number of the visitor attractions coming on stream and those recommended in Ch 25 following will address these suggestions, resulting in an attractive excursionist product offer. When developed the list of visitor attractions will include:

• Volcano Interpretative Centre
• The Museum and Heritage Park
• Presentations at the MVO
• Guided tours in the Plymouth area
• Sugar Mill
• Botanic and Amerindian Gardens
• AIR Studios
• Shopping stop at the Public Market, as well as at craft shops
• Character village at Salem
• Little Bay Waterfront – swim, refreshments, shops

24.3 RESIDENTIAL TOURISM

Residential tourism (including both owners and those renting villas) has long been an important part of the tourism industry in Montserrat, but has shown a decline since its pre-1995 heyday. One of the main benefits for the island is that spending by such visitors impacts more directly on the local economy as they shop locally, eat locally and employ builders, gardeners, pool and maintenance workers, security guards, and domestic helpers. Potential drawbacks are possible inflationary effects on property values and prices, and a low tax yield.

Other countries in the Caribbean are seeking to capitalize on this growing industry by offering various incentives, including residence status and tax concessions for approved investments, particularly in property. In order to attract more retirees and other residential tourists to Montserrat, it would be necessary to ensure that the taxation and other inducements being offered are at least comparable with those available in other countries.

24.4 DIVING

Currently, Montserrat is not included in lists of the best diving destinations in the world and presently attracts comparatively few divers. Nevertheless, diving is an important resource, currently subject to very limited use, with the potential to be exploited further. There are 16 dive sites with moorings around the island’s north-west coast, for which the MTB is nominally responsible. Redonda (considered to be a very good site) is also used by divers from Montserrat. A bi-annual reef check shows that deterioration is about the same/a little worse than the world average.

Artificial ‘reef balls’ with attached sculptures have been installed off Woodlands Beach for reef development, with financial support from the TCF. There are two PADI-registered dive operators located at Little Bay, but, because of low demand, boat tours and kayaking are now more important for their businesses than diving.

A number of features affect the quality of the existing dive product, such as a lack of easy access points to the water; boat launching areas and jetties; and of beach/waterside facilities, such as water, toilets and showers.

Artificial Reef

Unlike other destinations, Montserrat has no offshore wrecks. Proposals have been put forward for the sinking of an ex-US Navy ship to serve as an artificial reef.
The benefits from this venture would include the creation of additional marine habitats and increased economic development, by attracting divers to the island and fuelling spin-offs for hotels, guest houses, restaurants, etc. The best location would be off Rendezvous Beach where the sand is deep enough. Similar projects in the United States (e.g. Florida) attract large numbers of sport and ‘techie’ divers, as well as ex-Navy veterans (particularly for memorial services held at the time of first sinking). The first step is to assess the project’s feasibility and viability.

There is also the potential to improve the quality of diving sites through the creation of a marine reserve.

**Content**

The project will:

- provide launching and support facilities at Little Bay (this is most likely to be achieved through the development of the new port product);
- conduct a study of carrying capacity and detailed mapping of reefs or sonar scanning of reefs.
- prepare an underwater DVD;
- establish a monitoring programme for the dive sites;
- assist the private sector in enhancing the image of Montserrat as a dive destination through effective marketing and promotions, including the development of a well-advertised keenly priced dive package (ferry transport, boat dive, lunch, etc.); and
- conduct a feasibility study regarding the sinking of a decommissioned ship to create an artificial reef off the coast of Montserrat. The feasibility study would typically cover:
  - what is the best reef location to meet the desired project outcome and provide the best value?
  - what size and type ship will best meet the project objectives?

Depending upon the findings of the initial study, a more detailed cost/benefit economic analysis could then need to be carried out.

**Estimated Cost**

- Provision of launching and jetty support facilities at Little Bay: EC$ 150,000;
- Study of carrying capacity, detailed mapping/sonar scanning of reefs and preparation of underwater DVD: EC$ 100,000
- Establishment and implantation of monitoring and maintenance programme for dive sites: EC$ 50,000;
- Marketing and Promotion: EC$ 50,000
- Ship Sinking Feasibility Study: EC$ 200,000 for initial studies. The cost for a turn-key project to purchase, clean and deliver the vessel to the chosen site in Montserrat would be around US$ 5 to 7 million; and
- Undertake full community awareness and participation programme: EC$ 50,000.

**Action**

MTB to draw up Terms of Reference for the recommended artificial reef Feasibility Study.
24.5 YACHTING

**Objective**

To develop Montserrat as a major yachting centre in the Lesser Antilles through the provision of a marina, mooring buoys and other facilities and amenities for yachts.

**Context**

Conveniently located in the middle of the chain of eastern Caribbean islands, Montserrat is an ideal halt for sailing vessels cruising the Caribbean the ideal stop-off point between Nevis, Guadeloupe and Antigua. Despite its strategic location, the yachting sector in Montserrat is underdeveloped compared with neighbouring destinations. The most popular anchorage is Little Bay, and to a lesser extent Isles Bay and Rendezvous Bay, which is visited by fewer than 400 yachts per year.

Currently, there is no protection for yachts anchoring in Little Bay (which is exposed to high seas, particularly in the peak tourism season), with no safe storm storage areas. Montserrat also loses yachting business because it lacks the infrastructure needed to support a thriving yachting industry, namely, marinas, boatyards. It also suffers from adverse publicity regarding allegedly unwelcoming treatment at Customs and Immigration and high clearance fees. The latter is now being addressed by the Montserrat Customs & Revenue Service through a new customer service charter for customs and immigration officers.

Shamrock Moorings Plus was established to provide a full-service mooring operation on Montserrat, offering safe mooring for vessels not exceeding a maximum weight of 10 metric tons or maximum length of 45 feet (plus anchorage options) for visiting sailboats and yachts at Little Bay and Rendezvous Bay, together with convenient amenities such as ice delivery, garbage removal, laundry, and boat bottom cleaning services. This project (which received financial support from the MTB through the Tourism Challenge Fund) would have been the first and only mooring business of its kind on Montserrat. However, the proprietor was instructed by the Port Authority to remove some mooring buoys that he had placed in Little Bay on the grounds that they were a potential interference with shipping lanes, which he has contested, and the project is currently stalled.

The Little Bay/Carr’s Bay port development plan also includes provision of facilities for mooring pleasure vessels, which presumably includes yachts.

**Content**

The main recommendations are for (a) development of a marina and ancillary services and (b) the installation of mooring buoys and other and other facilities/amenities for yachts facilities at Little Bay and, to a lesser extent at Rendezvous Bay; and (c) increased promotion.

(i) Marina

At present, there is no marina but provision is made in the latest draft of the Little Bay Master Plan for a “possible marina and boat service facilities, plus safe storage facilities” near where the existing jetty is located. Like the new proposed port at Carr’s Bay, the marina is only shown illustratively and has not yet been designed by any port/ marina engineers, and will require a breakwater of some sort.
Marinas are most often developed as part of mixed ventures, such as hotels or resort communities, which largely depend upon tourism demand rather than yachts to be successful. This means that development of the marina is tied in to the timing of the proposed hotel/resort developments at Little Bay.

(ii) Moorings and Other Facilities

At present visiting yachts have to anchor in Little Bay (or Rendezvous Bay/Isles Bay) where they can be exposed to rough seas. There are no moorings and no suitable or acceptable bathroom/shower facilities or amenities such as ice delivery, garbage removal, laundry, and boat bottom cleaning services.

The following actions are recommended in addition to the proposed marina and boat services facilities:

- Placement of mooring buoys;
- Clean washing and shower facilities;
- Encouragement of amenities such as such as ice delivery, garbage removal, laundry, and hull cleaning services;
- Clubhouse/boathouse for the Montserrat Yacht Club; and
- Increased marketing of Montserrat to the yachting fraternity.

Estimated Cost

Marina: to be determined
- Moorings buoys washing, shower and other facilities and amenities (such as, ice delivery, garbage removal, laundry and other facilities: EC$ 100,000
- Clubhouse/boathouse for the Montserrat Yacht Club
- Marketing and promotion: EC$50,000.

Action

Investors should continue to be actively sought for the development of a marina, hotel and complementary facilities at Little Bay. MDC has the main responsibility.

Shamrock Moorings to be encouraged in its efforts to provide moorings and other facilities and amenities at Little Bay.

24.6 GOLF DEVELOPMENT

Objective

The objective is to assess the feasibility of the re-development of golf tourism in Montserrat.

Context

Prior to Soufriere's second eruption, which covered the Belham Valley in rubble and ash, the Montserrat Golf Club offered 11 holes (from nine tees) and a number of tennis courts.

As part of the work undertaken for the National Tourism Strategy and Plan (Government of Montserrat, May 2003), a physical and indicative least-cost financial feasibility assessment of re-establishing golf at the most preferred or optimum site was undertaken, taking into account the various constraints of access, threat from volcanic activity, etc.

As part of this study, a golf ‘audit’ was carried at identified sites.
The audit’s findings were that, there were only two realistic possibilities - Waterworks Estate and Belham Valley -, where golf could be developed, with Waterworks seen as the only site where a regional or world class facility could be developed which could accommodate an 18 hole golf course. This development would be a serious driver of tourism activity which would require adjacent residential development of approximately 350 villas and other leisure facilities to make the project viable.

The Consultant also assessed other possible sites where golf could be developed (including Blake’s Estate and Old Quaw), but because of factors such as access, ground water, terrain etc., conclude that they would be more expensive to develop. He came down in favour of Waterworks – but, while not in the exclusion zone, its proximity to the Volcano made it a high risk site. In the meantime, residents have developed a pitch-and-putt “fun” layout at Old Towne, while others are seeking to create 2/3 full holes at Belham Valley.

However, new information suggests that it might be worthwhile re-visiting this subject and an updated golf ‘audit’ should be carried out to assess the feasibility of the development of golf at Blake’s, Silver Hills or Old Quaw (where the existing road is due to be completed), but particularly Blake’s. The reasons are:

- Under the PDP Policies RL4 and TE2, land is allocated for the private development of a golf course on what is described as ‘very attractive landscape’ at Blake’s estate (with the proviso that proposals must ensure that affordable local access to the golf course is prioritized);
- Electricity is now available at Blake’s both at the football ground (which has flood lights) and will presumably be provided to the old plantation house;
- Rainfall could be channelled to, and stored in, artificial lakes (as in many golf courses) to provide adequate water;
- Villa emphasis will switch to the north when the Little Bay development is completed; and
- The owner is already interested in a golf-cum-villa development on this site.

Content

The project is for a Consultancy for a golf feasibility study.

The Consultant would provide the following services:

(i) Site Suitability/Feasibility Report

- Identification and appraisal of whether the physical elements of possible sites for golf course development, such as, land area, topography, soils, geology, vegetation, drainage and water availability;
- Examination of other restraints, such as legal and environmental restrictions, surrounding land use, local infrastructure and location of services; lack of suitable water, the need to conserve important natural habitats and public rights of way;
- Estimate of the amount of land required under different scenarios: golf course only or golf course plus real estate development;
- Preparation of preliminary routing and concept site plans for the preferred site(s), showing graphically how a golf facility can be accommodated on the net available land;
- Preparation of indicative estimates of construction costs for the specific project;
- Based on the routing plan and project costs, determination of what form of golf facility (with how many holes) can be feasibly built; and
- Outline of the local process for development approval.
(ii) Market and Economic Study

Depending upon the outcome of the initial site suitability/feasibility study, a more detailed market and economic study would be carried out, covering:

- Estimate of potential demand from the following markets: local residents, stayover tourists, cruise visitors, regional visitors (from neighbouring islands); and non-golf customers (e.g. family members);
- Estimate of potential revenues and operating costs for different types of development /operation: publicly owned course (as in Martinique, Barbados Golf Club) or private golf/real estate development;
- Estimate of the overall financial feasibility of the project under different ownership/development scenarios; and
- Financial considerations: approximate development cost, annual operating costs; revenue projections; and project financing.

Estimated Cost

Consultancy study: EC$120,000 including professional fees, travel and per diems.

Action

MTB to prepare terms of reference and a short-list of suitable consultants.

24.7 HIKING

The recommended hiking trails are for the most part well maintained, but can be slippery and in need of clearing after storms and heavy rain. Some signs need correcting or re-siting. The Rendezvous Beach (which crosses private land) was not upgraded under TDP2 and is now quite hazardous in places. Circular loops are needed so that users have the option of not having to re-trace their steps to the beginning of their hike.

What is required are:

- Updated guide of the trails, showing loops, linkages
  - cost EC$ 25,000
- New trails (circular loops):
  - cost EC$ 25,000
- Maintenance of trails: EC$80,000 per annum.

24.8 SOFT ADVENTURE

Provision is made in the Physical Development Plan for the development of a High Wire ‘Forest Experience’ affording a ‘short but intense trip’ through the Centre Hills at the canopy level. This would be based on wire walks, zip lines, rope swings and climbing obstacles. It would be a natural supplement to the island’s already well developed and popular hiking trail network, but may have to depend on cruise visitors (who will not visit Montserrat in sufficiently large numbers until the new port is completed). Mountain Biking is also a growing adventure sport that is ideally suited to the island’s rough trails.

24.9 HEALTH AND WELLNESS

While North Montserrat is a good place to relax and rejuvenate, a Health & Wellness product doesn’t exist. What would be required is a ‘flagship’ resort spa to act as a catalyst for the further development of this product. Examples of suitable partners include Banyan Tree, Six Senses, and W Hotels (part of the Starwood Hotels & Resorts group).
24.10 MEDICAL SCHOOL

Before the volcano activities commenced, Montserrat had a thriving offshore medical school located in Plymouth. While it is unlikely that a facility on this scale could ever be developed, it is possible that, with continued more settled conditions in the north, a smaller facility could be attracted. Interest has already been shown by a number of medical schools in the United States.
25. ENHANCE TOURISM ATTRACTIONS AND AMENITIES

25.1 VOLCANO INTERPRETATION AND VIEWING

Objective

To maximize the tourism and educational potential of the volcano and make it a ‘must see’ visit or attraction.

Context

The Volcano is the central reality of Montserrat and is one of its main attractions. Interpretation, and exploitation of this unique phenomenon, must form a central feature for any visitors to the island, either on excursion or for a longer period. At present, the high points are visits to the Montserrat Volcano Observatory (MVO) for viewing and learning about the volcano, providing not only a viewing platform but also a small cinema for viewing the DVD, a gift shop and refreshments. Unfortunately, the space allowed for visitors is limited to about 20 persons at any one time and insufficient for large numbers. Access by road needs to be improved both surface and widening.

Other vantage points for viewing areas devastated by the volcano are Garibaldi Hill and Richmond Hill (with views of Plymouth and its environs), and Jack Boy Hill (with views of the former Bramble Airport.

In addition, after some considerable delay finding a site, the MDC has agreed to make available a lot within the Heritage Park (which already hosts the National Museum, the National Library and Archives and an archaeological heritage site) at Little Bay for a new Volcano Interpretation Centre (VIC) which combines the Volcano Social History Centre and the MVO Visitor Centre into one interpretation centre. This site is seen as the most suitable of all the sites previously considered, including the MVO site. Construction is expected to commence when the final design concept is approved. The MVO also has a critical role in determining access, and the conditions of access, to the various exclusion zones, including Plymouth. The zone boundaries have an important bearing on those seeking insurance or financing for new projects, including tourist accommodation. It can also attract more academic researchers and in time perhaps part of university volcanology courses, with the practical semesters taking place in Montserrat (perhaps in association with the Community College or the UWI Open Campus).

Content

More space needs to be provided for the MVO to accommodate guided tour visitors. The access road also needs to be widened and improved. Funding is required to ‘fit out’ the MVO and the VIC, including the design and production of interpretative materials and displays.
When permitted under access regulations, tours to Plymouth and visits to the devastated area need to be made a highlight of any visit to Montserrat (and a ‘must-see’ for visitors to neighbouring islands, particularly Antigua). The boundaries of the existing Centre Hills protected area should be extended to include Plymouth and environs, with access strictly controlled and monitored, and only with a tour guide. A fee should be levied in addition to the tour price. Road access should remain more or less as it is (and become a not a sanitized tarred road) to add to the sense of adventure.

The viewing sites at Richmond Hill and Garibaldi Hill need to be developed, and further enhanced at Jack Boy Hill, as follows:

- Garibaldi Hill site development: shelter, viewing platform, toilets, litter bins, interpretation panel, telescopes, refreshment outlet and access road improvement;
- Richmond Hill site development: shelter, viewing platform, toilets, litter bins, interpretation panel included in signage, costs, binoculars, refreshment outlet, combined with possible restoration of the old sugar mill at this site.
- Jack boy Hill: need to address litter and landfill issues, snackette opening arrangements, and water supply to the toilet block.

Volcano Interpretative Centre:

**Estimated Cost**

- Interpretation at Volcano Interpretation Centre: EC$ 300,000 (construction cost to be determined);
- Garibaldi Hill site development– EC$ 100,000
- Richmond Hill site development - EC$ 50,000
- Tours to Plymouth, including training of tour guides and preparation and printing of visitor information maps: EC$ 200,000

**Action**

MTB should be allocated responsibility for operation and maintenance of the viewing sites, and the further development of tours to the devastated areas, particularly Plymouth, in consultation with the MVO.

### 25.2 LITTLE BAY WATERFRONT ENHANCEMENT

**Objective**

As indicated earlier, Montserrat needs a focal point – a place where one can eat, drink, sit, relax and meet people in an attractive environmental setting. Little Bay has the potential for providing such a physical setting, as the bay itself is visually interesting, distinctive, comfortable and inviting.

**Content**

As outlined in Ch. 22, a tourism development concept has already been proposed for Little Bay, involving an hotel (100 – 150 rooms), related residencies, marina and fisherman’s village. This project is still at the drawing board stage and is unlikely to be fully rolled out for a number of years. In the meantime, present users are faced with inadequate and deteriorating facilities and amenities, and a generally ‘scruffy’ environment.

Recognising that the proposed development may take some time to come to fruition, we are recommending a number of easily implementable and comparatively inexpensive short-term improvements pending the full roll-out of the Little Bay Master Plan – by developing a waterfront destination, providing an amenity for both tourists and locals.
Content

An illustrative plan is shown on Figure 25.1, which incorporates the existing restaurants and bars. The proposed short-term enhancement and improvement programme includes the following elements:

- Landscape restoration and enhancement (including clearance of litter and eyesores);
- Provision of shade trees and shrubs, with picnic tables, benches, etc;
- Toilet and washing facilities;
- Better arrangements for car parking;
- Raised boardwalk at back of beach;
- Improved pier/jetty for fishing, and dive boats and yachts;
- Promotion of Little Bay as weekend entertainment and culinary (fish fry) venue for locals and visitors e.g. like Oistins in Barbados or Gros Islet in St. Lucia.

Figure 25.1: Little Bay Waterfront Enhancement

Estimated Cost

- Design: EC$50,000
- Landscaping/boardwalk: EC$200,000
- Plazas, car parking: EC$300,000

Action

- Government approach, stakeholders’ meeting

25.3 MUSIC HERITAGE – REHABILITATION OF AIR STUDIOS

Objective

Promotion of Montserrat’s music heritage as an important potential tourist attraction through rehabilitation of AIR studios and other measures.

Project Context

Montserrat has a unique place in the music heritage of the region. Associated Independent Recording (AIR) Studios was established in Montserrat in 1979. For more than a decade after its opening, this was one of the world’s most famous recording studios playing host to classic recording sessions by all the rock stars of the time. This saw Montserrat gain international recognition through its regular stream of rock star visitors. This ended in 1989, when the recording studios were closed after being damaged by Hurricane Hugo, followed in 1995 by the effects and aftermath of the first volcanic eruption.
Since then, Sir George Martin has helped raise funds for victims and their families on the island, including a star-studded concert at the Royal Albert Hall which helped fund the building of the new National Cultural Centre. AIR Studios Montserrat remains closed, but that in London continues in operation. Montserrat is also the birthplace of one of the Caribbean’s most famous soca and calypso musician, the late Alphonsus Cassell (who performed under the stage name Arrow). The island also has a fast disappearing heritage of popular folk music – some stemming from its links with Ireland.

The wider dissemination of this musical history could be made into an important potential tourist attraction.

**Content**

The Master Plan for Little Bay includes provision for a Music Heritage Centre - seemingly as part of the Cultural Centre - which would be a place of particular interest for tourists, with musical memorabilia from top international musicians who have been involved in music in Montserrat, including those who made recordings at AIR Studios. This has yet to be provided but Sir Paul McCartney and Elton John are amongst the music industry legends who have had their hands cast in bronze for a new ‘Wall of Fame’ exhibit within the Cultural Centre.

The Cultural Centre would appear to be the logical place to develop the proposed Music Heritage Centre, especially if it is to include reference to Arrow and other local musicians, and to the island’s heritage of popular folk music. Equally, it could be located in restored AIR Studios. The latter location would be more interesting for members of fan clubs who might wish to see the actual place where such seminal recordings were made. Membership of such clubs, although ageing, run in to the thousands in the United Kingdom alone.

It is therefore recommended that consideration be given to the possible restoration of AIR Studios as a place of pilgrimage for rock music fans, including not only the recording studio itself but also the entire building in which it is housed (plus the outside swimming pool).

In order to attract such visitors, much more needs to be provided including the ability to play back the original recordings, or watch live performances of their chosen superstars.

The project components (if at AIR Studios) are as follows:

- Discuss with current owners or lessees the renovation/refurbishment of recording studio and other buildings for promotion to members of fan clubs, etc.;
- Survey fan club membership to ascertain levels of interest, and age structure of membership, etc.;
- Determine outline costs of restoration, plus any additions;
- Identify possible funding sources; and
- Carry out a detailed cost benefit feasibility study.

**Estimated Cost:**

Feasibility Study: EC$ 120,000
Rehabilitation: to be determined.

**Action**

MTB to establish representative committee;
Discuss project with owners of Waterworks Estate and the Martin family; and
Prepare Terms of Reference for feasibility study.

### 25.4 ARTS AND CRAFTS

**Objective**

The objective is to ensure that the continuance and revival of arts and crafts skills, especially those specific to Montserrat, are encouraged by providing a place that would provide a permanent focal point for the sale of arts and crafts.

**Project Context**

Before the volcanic eruption, Montserrat had a history of producing quality souvenirs (such as, Montserrat tapestries and Sea Island cotton products). In the past, there was a centre building where producers of arts and crafts could display their items which they had made themselves – over 50 producers came there on a regular basis. Now the market has declined, and a dedicated centre is no longer available, except on special occasions (e.g. Christmas and New Year for the diaspora market) when the new Public Market building is used, but is otherwise not popular. The main market now is the Caribbean visitor (who likes the craft items for their collections as well as the preserves, guava jelly, breadfruit items). Europeans and American tend to prefer jewellery items.

In addition to a place that would provide a permanent focal point for the sale of arts and crafts, there is also need to broaden the range, quality, packaging and marketing of craft being produced.

**Content**

The project has two principal components:

- The provision of a permanent display centre for producers of local arts and crafts; if this is to be a new Craft Marketing (rather than a space within the Public Market), it should ideally be situated close to the proposed new cruise and ferry terminal at Carr’s Bay; and
- A training component to guarantee production of quality goods for the Centre together with training in design, packaging and marketing of products.

Technical assistance would be required to design the centre which would also require a full-time manager (or this role could be performed by volunteers).

**Estimated Cost**

Design of Arts & Crafts Centre including technical assistance for design of facility, including training component: EC$ 400,000
Construction of Arts & Crafts Centre (if not in public market): to be determined.

MONTSERRAT TOURISM DEVELOPMENT PLAN 2012 – 2022
Technical assistance: EC$ 100,000

**Action**

MTB would oversee design of the new display facility (and construction if it were decided to build a new craft centre on land allocated for this purpose by the Government). Operation of the facility would be in the hands of an elected Management Committee which would provide rental space for licensed small vendors.

### 25.5 MARINE RESERVE

**Objective**

The objective of the project is to improve the management of Montserrat's coastal zone by providing a greater understanding of the marine resource among the local community, together with the conservation and management issues implicit in increasing usage.

**Context**

Tourism depends absolutely on maintaining the integrity of the terrestrial and marine environment. While the terrestrial environment is in the process of being better managed through the Centre Hills Management Plan, the marine environment remains largely unprotected. The reef and marine system faces a number of threats, particularly from fishing activities and sedimentation. In some areas, a rapid deterioration has occurred in the condition of the reef (e.g. south of Woodlands Bay and from Woodlands bay to Little Bay. This is attributed to volcano-related sedimentation and fishing activity on the remaining healthy reefs, which are now beginning to threaten the health of the marine system at Little Bay, Rendezvous Bay and locations further north.

To halt this decline and to sustain the reef environment, many countries are designating Marine Protected Areas which can, when well-managed, conserve diversity, sustain fisheries, and promote ecologically sensitive tourism. Montserrat is one of the few territories in the Caribbean region that does not at present have a marine park or reserve (the others being Haiti and Puerto Rico).

The importance of a healthy marine environment to the tourism industry is well recognized. Both the diving and yachting sectors have become increasingly demanding in their requirements for a high level of environmental quality, with many prepared to pay a premium to experience an attractive, clean, pollution free and well managed coastal and underwater environment. Montserrat has the potential to offer all these attributes but will be much improved by taking steps to address conservation and management issues, including the establishment of marine protected areas and zoning of activities, and the conduct of marine environmental awareness programmes.

**Content**

The aim should be to establish an integrated coastal zone management programme for the island. However, this is a long term programme. In the short-term, a marine reserve needs to be established.

Opinions differ on where this should be located, but seem to favour the recommendation of a DFID-supported study carried out for the Caribbean Natural Resources Institute (CANARI)* that the area from north of Rendezvous Bay to Marguerita Bay

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for the marine reserve, based on a zoning system comprising three main zones: fishery zones dedicated to fishing and stock enhancement; marine reserve zones dedicated to education, research, conservation and recreation, with no fishing or collecting allowed in the reserves; and a marine preserve dedicated as an environmental safety zone to protect reefs and fisheries, with no fishing, diving or other activities in the preserve apart from monitoring by park personnel.

Establishment of the marine reserve will entail the following measures:

- Preparation of plan, designation of area;
- Marine zoning to accommodate different uses and activities;
  - fishing management;
  - reef marking and establishment of dive and possible yachting moorings;
  - solid waste management;
  - effluent discharges;
  - impact of sand mining; and
  - recreation and tourism.
- Marine environmental awareness campaign comprising
  - media coverage (radio, television and newspaper);
  - publications and audio-visual productions (production, distribution and presentations);
  - schools programme (promotion of the marine reserves, involvement of students and teachers);
  - dive and snorkel programme (awareness, reef/fish identification, litter patrols); and
  - community awareness programme.
- Appointment of Programme Manager; and
- Recruitment of Technical Assistance (marine and development specialist; marine biologist/coastal planner coordinator; and scuba dive specialist).

**Cost Estimates**

- Pilot Marine Protected Area EC$ 125,000
- Identification and documentation of dive sites and moorings: EC$ 125,000
- Marine Environmental Awareness Campaign EC$ 50,000 (materials, publishing, workshops, interpretation, etc.)
- Technical Assistance/Programme Manager EC$ 300,000:

**Action and Management**

The Department of Environment and Fisheries Department to spearhead the establishment of the Marine reserve in consultation with MTB, MNT and other public sector and private sector stakeholders. Support to be sought from research/aid agencies to develop management and operational guidelines for marine conservation and to implement the marine environmental awareness campaign.

### 25.6 HISTORIC SITES AND ATTRACTIONS – RESTORATION OF OLD SUGAR MILL

**Objective**

To enhance and promote Montserrat’s cultural and heritage tourism through the restoration of an old sugar mill to full working order, at a site to be determined.

**Context**

One of the features of the Montserrat landscape is the large number of abandoned or disused sugar mills that dot the countryside as reminders of the once dominant role played by sugar cane cultivation in the island’s economy and life. Together with other sites of historic interest, these are listed in Appendices G (1) and G (2) of the draft PDP, based on
research carried out by Professor John Cherry of Brown University and his team.

Similar mills have been restored and have become major tourist attractions in other Caribbean destinations, notably Antigua (Betty’s Hope) and Barbados (Morgan Lewis) attracting large numbers of visitors from their admittedly larger ‘populations’ of both cruise stay-over tourists, as well as domestic visitors.

At Betty’s Hope, one of the two windmills, as well as cane crushing machinery and sails, were restored and, after re-commissioning, the mill is now operated for demonstration purposes on special occasions, while the sails are kept mounted throughout the year. Fundraising was coordinated by the Betty’s Hope Trust. In Barbados, restoration of the Morgan Lewis Windmill was begun by the Barbados National Trust in 1997 with financial support provided by American Express for initial emergency repairs. The mill was reopened in 1999 and, with all its original working parts having been preserved intact, the sails were able to turn, and cane ground again, after the project was completed. There is a museum of sugar mill and plantation artefacts, and an exhibition of old photographs around the interior of the mill wall.

In Montserrat, there are a number of possible mills that could be restored to join Betty’s Hope and Morgan Lewis as major tourist attractions. These include Richmond Hill (formerly home of the National Museum), Fogarthy’s, Waterworks and others on the MNT list of protected monuments.

Content

Recruitment of a specialist consultant(s) to perform the following tasks:

- Identification and appraisal of the physical elements of possible sites for development of a restored sugar mill in Montserrat (such as, land area, topography, soils, geology, vegetation, drainage, etc.);
- Determination of the present location, ownership and condition of related machinery and sails;
- Examination of constraints such as legal and environmental restrictions, surrounding land use, local infrastructure and location of services; and the need to conserve important natural habitats and preserve public rights of way;
- Preparation of preliminary concept plans for the preferred site, showing graphically the components and design elements; and
- Preparation of an estimate of construction costs for the specific project.
• Conduct of a market and financial analysis, including evaluation of existing similar attractions in Antigua, Barbados and elsewhere in the Caribbean in terms of visitor numbers, seasonality, and profitability; estimate of potential revenues and operating costs; and preparation of financial estimates: approximate development cost, annual operating costs; revenue projections; and project financing.

**Estimated Cost**

Consultancy: EC$120,000

**Action**

Terms of Reference for consultancy to be prepared by MTB.

25.7 **BOTANIC GARDEN**

**Objective**

To further develop the Botanic Garden as a major tourist attraction, particularly for touring visitors.

**Context**

The former Botanic Garden, located in Plymouth, was a casualty of the volcanic eruptions and their side effects. In 2005, the Montserrat National Trust decided to create a new garden at Olveston to provide a resource for the islanders and as an attraction for overseas visitors.

A key role of the Botanic garden is to provide a link with the Centre Hills by displaying some of the native and endemic species found there. The endemic shrub, *Rondeletia buxfolia*, which belongs to the coffee family, has been established at the garden boundary as a demonstration hedge. Other features include a medicinal plant garden, a ghaut habitat (representing the vegetation found in the island's steep-sided valleys), an orchid house and an Amerindian garden. The Royal Botanic Garden at Kew has supported the development of the garden by providing technical expertise and advice, from the initial preparation of the master plan through to the installation and mapping of garden features and facilities. Considerable financial help was provided under TDP2 for implementation of the plan.

The Botanic Garden receives comparatively few visitors and is not generally included in standards island tours, despite having a gift shop, rest rooms, food and beverages, artistic and other displays. The restricted opening hours and lack of full-time staff may be a contributory factor. There is need to focus on its appeal to visitors as well as its important function as education and training for children and other residents of Montserrat, and scientific research.

**Content**

The following initiatives are recommended as part of an overall plan for the recreational enhancement of the Botanic Garden: which currently now has rather limited appeal for the non-specialist visitor:

- Construction of a gazebo-type structure for use for civil wedding and other similar ceremonies The preferred site is at the Bamboo Grove section of the Garden;
- Expansion of the plant nursery (which has capacity to generate returns) and herbarium;
- Enhancement of the range and quality of items on sale in a larger gift shop;
• Addition of an aviary and small ‘zoo’ to house the island’s fauna: (iguana, agouti, the endemic Montserrat anole and Montserrat galliwasp (both lizards) and possibly the Mountain Chicken (one of the largest frogs in the world); and

• Seek funding for the appointment of a Curator for the Garden.

The MNT would also provide encouragement and direction for the establishment of a Tree Canopy Trail and a Biodiversity Park in the Centre Hills.

Estimated Cost

EC$ 500,000

Action

In order to help implement the plans, a visitor fee should be charged - as, for example, in the Botanic Garden in Kingstown (St. Vincent) where a survey found that visitors to the Gardens (numbering 18,000 in 2011) would be willing to pay an average of $8.10 as locals and $22.10 as foreigners.

25.8 CHARACTER VILLAGES

Montserrat has a number of village centres which could be made attractive to tourists based on their vernacular style of architecture, lay out of buildings and spaces, and community atmosphere. The Physical Development Plan contains proposals for the creation of ‘Character Areas’ in Cudjoe Head; St. John’s; St. Peter’s and Salem Villages which would lead to the emergence of a more vibrant atmosphere in these areas for those who live there as well as tourists.

Implemented, this could result in Salem becoming the second (after Little Bay) ‘pole of attraction’ on the main tourism route, with a wealth of adjacent attractions (MVO, Garibaldi Hill, National Trust/Botanic Garden, Isles Bay Beach, and, possibility, a restored AIR Studios and Richmond Hill sugar mill) in addition to the village itself.
26. UPGRADE QUALITY AND SERVICE STANDARDS

The long-term sustainability of the tourism industry of a destination is largely dependent upon its ability to provide high quality products and services, which are benchmarked against world class standards.

26.1 INDUSTRY REGULATIONS

There are many pieces of legislation which have an impact on tourism but which are not specifically enacted for the benefit of tourism alone. These include laws in such areas as taxation, customs and immigration, transport, public safety, health environment and planning etc. Legislation in these fields is properly the responsibility of the relevant ministries and departments and not of the ministry responsible for tourism. However, it is appropriate that the tourism sector should have a consultative input into those aspects of legislation in other fields which have an impact on tourism.

With regard to tourism, the regulatory framework usually covers the accommodation sector (definition and operational standards for hotels, guesthouses, restaurants, tour operators, taxis, etc).

Under TDP2, an “audit of current legislation” was carried out and CTO’s Caribbean Tourism Legislation database used to identify any gaps. A package of relevant tourism legislation from various Caribbean countries was collected and forwarded to the Attorney General so that a legal draftsman could write the relevant tourism legislation. However, the AG’s office has not yet been able to complete the legislation due to a heavy work schedule. The completion of the tourism legislation drafting is therefore still dependant on the AG’s workload. (TDP2 Annual Review, June 2010).

26.2 CURRENT SITUATION

Although the MTB Act provides (inter alia) for the registration and grading of hotel and other tourist accommodation and facilities catering for tourists, much of tourism sector is currently largely unregulated. It is not necessary for operators of the tourism product and services to be registered and licensed, or adhere to any system of standards or codes of practice, apart from conforming to the various laws and regulations covering hygiene, safety, etc.

A previous report on tourism training and product development recommended the setting up a formal registration, grading and regulation system for the island. While formal registration of a property with the MTB may be appropriate, the setting up of a grading and classification is too elaborate and costly in terms of resources for a tourism sector which has only one hotel at present. In addition, there is no international standard classification and hotel associations (including CHTA) are opposed to such standardization. For these reasons, we endorse the NTS&P’s recommendation that proposals for grading and classification should be put “on-hold” for the time-being. However, in order to ensure the orderly development of the tourism product, we strongly believe that a comprehensive system of registration and licensing should be established.

Having reviewed the situation, we are also of the opinion that unquestionably the Montserrat tourism sector would benefit from having a system for establishing and monitoring quality standards. This is for a number of reasons, the main ones being:

- Maintain and encourage continual improvement in standards – highly important if the future of Montserrat tourism is to be up-market;
Send the right signals to the market – giving assurance to the potential customer in the sense of providing him/her with an indicator or measure of quality of the operation and its services, sight unseen;

Provide operators industry with clear benchmarks against which they can measure their performance and those of their competitors; and

Assist the MTB in offering a range of products, all operating to a satisfactory standard, to the consumer and the travel trade.

26.3 QUALITY STANDARDS

For understandable reasons, development of tourism quality standards in Montserrat has lagged behind that in some other Caribbean countries. For example, in Dominica, where Codes of Practice/Specifications have been established for eleven sectors:

- Codes of Practice for Food and Beverage Preparation, Storage and Sale; Travel Agencies; Tour Guides, Tour Operators; and Vending Craft and Merchandise
- Specifications for Accommodation Facilities; Camp Grounds; Rented Vehicles; Tourism Taxi Services; and Water Sports.

In addition, the tourist board has two Quality Assurance officers whose task is to ensure compliance with the standards, classifications and ratings established under the Act.

In St. Lucia, standards have been prepared for the accommodation; food and beverage; vending; water based tourism, and ground transportation sectors. These are minimum standards and no operations can be registered unless the licensing body is satisfied that it conforms to the requirements of these minimum standards. Once registered, the establishment or operation is closely monitored to ensure that all services provided for patrons are in keeping with these minimum requirements. At the regional level, the CARICOM Regional Organisation for Standards and Quality (CROSQ) is responsible for the development and regional standards for the sustainable production of goods and services (including tourism services) in the CARICOM Single Market and Economy (CSME).

Montserrat can draw on, and benefit from, the work on standards that has already been done in these and other countries, but this needs to be backed-up by a credible inspection and enforcement regime. MTB (with more staff) would have to take on a more pro-active role in visiting tourism establishments and undertaking on-the-spot quality assessments. However, in practice, many of the necessary inspections could be outsourced e.g. vehicles to the Police; food preparation to the relevant food and hygiene authority; dive operations to the marine authorities, etc. This allows those responsible for Quality Assurance to devote more resources to compliance and provision of industry support.

Implementing a licensing and standards system is a complex and lengthy task which requires the backing of the industry, trained and proficient inspectors and regular, impartial monitoring. It is recommended that a ‘quality standards’ expert be retained to develop a programme of standards for Montserrat working in conjunction with a technical committee made up of representatives of MTB and other relevant stakeholders. These will be minimum standards to be observed by all tourism-related operators in the relevant sectors.

We are not at this stage recommending the immediate introduction of a classification or grading system which might in any case be sub-contracted to respected external rating agencies. For example, the Barbados Tourism Authority - with
the support of local hoteliers – uses the American Automobile Association (Triple A) rating as the national standard for the local accommodation sector, initially for hotels and, eventually, for other accommodation facilities, such as apartments and villas.

26.4 SERVICE STANDARDS

As already stated in Ch. 10, the main challenges with regard to human resource development in the tourism sector are to (i) increase the effectiveness of the HRD support system; and (ii) substantially increase through tourism education and awareness programmes the number and proportion of Montserratians in the tourism workforce both as entrepreneurs/employers, employees and service providers.

Training needs include:

- Train-the-trainer modules targeted at existing owners/managers;
- Basic training modules for existing hotel and other accommodation staff covering in particular housekeeping, food and beverage service, and kitchen staff;
- Environmental best practice training programme for the private sector tapping into regional training programmes and modules, where available;
- Training courses for taxi drivers, customs & immigration officials, police, etc; and
- Training for MTB staff e.g. with regard to marketing, quality standards and statistical processing (which could be provided via CTO or CHTA).

As referred to previously in section 10.3, the difficulty is “how to provide the necessary training interventions when the numbers are going to be so small, and, with few new entrants, will fall substantially after the initial retraining of existing staff”. There are not enough teachers – not even for priority areas.

While short courses (including those provided under TDP2) are useful, more in-depth interventions are also required to upgrade levels of skill.

It is recommended that proposed training needs assessment to be carried out on behalf of the Department of Education should pay particular attention to tourism training priorities and how the identified needs of that sector should best be met (e.g. whether through formal courses or through in-house training).

Montserrat could also benefit from plans to extend the reach of the Antigua and Barbuda Hospitality Training Institute (ABHTI) to the wider OECS tourism and hospitality community.
27. SEAMLESS AIR AND AIR-SEA INTERMODAL ACCESS AND VISITOR FACILITATION

Some 15,000 stay-over arrivals and 20,000 excursionists are targeted by 2022 under the medium growth scenario B. Under the high growth Scenario C, some 35,000 stay-over arrivals and 25,000 excursionists are projected by 2022. To achieve this increase there will need to be seamless air connections at the gateway(s) and air-sea intermodal access between the islands in the region and Montserrat. The essence of this is an improved quality of service and minimized elapsed time for the passenger between arrival at V.C. Bird International Airport or Heritage Quay and Montserrat. The key elements of this are:

27.1 SEA-BRIDGE CONNECTIVITY
- Morning schedules from Antigua to facilitate excursionists and cruise ship passengers making day trips to Montserrat – may necessitate later departure on certain days to facilitate cruise ship passengers who normally don’t disembark the cruise ship until 0900-0930.
- Afternoon schedules from Antigua to facilitate arriving international and regional tourists destined for Montserrat.
- Afternoon departure schedules from Montserrat to facilitate departing stay-over tourists make their regional/intercontinental connections and returning excursionists (including cruise pax).
- Introduce special range of fares to stimulate different niche markets – groups, sports clubs etc.
- Establish service to Guadeloupe, tapping the large resident and stay-over visitor market.
- Seek support at the OECS level for a sub-regional ferry service initiative which will connect the Leeward islands with the Windward islands through Guadeloupe and develop intermodal links with LIAT for through-travel.
- Appoint a full time tourism/marketing/promotions representative in Antigua to actively canvass and work collaboratively with tour operators and carriers to meet minimum load factor targets on the ferry.

27.2 AIR-BRIDGE CONNECTIVITY
- Twin Otter schedules to be included in the airline GDS to facilitate advance bookings.
- Twin Otter schedules to be included in LIAT network.
- Schedules from/to Antigua to link with arriving/departing regional/intercontinental flights.
- Provide a condition-based subsidy only for a limited number of scheduled flights to operate in St. Kitts and Guadeloupe’s gateways during specific periods in the year, for a maximum period of two years. This will provide support for the development access through these alternative gateways. The subsidy support must be based on a strong tourism-led marketing programme.
- Spearhead efforts for a study to be sponsored by the Organisation of Eastern Caribbean States (OECS) on passenger facilitation at regional hub airports. Initiate action for funding the recommendations to ensure long term sustainability of quality service.
- Appoint a full time tourism/marketing/promotions representative in Antigua to actively canvass and work collaboratively with tour operators and carriers to meet minimum load factor targets on the airlines.
27.3 VISITOR FACILITATION

- Agreement with Government of Antigua for departure tax exemption for day trips to Montserrat
- LIAT interline arrangements for seamless transfer at V.C. Bird International airport for flights to/from Montserrat
- Collaborate with the Government of Antigua for the removal of intransit security screening in order to enhance facilitation
- Reduce the check-in processing times for both air and sea passengers
  - in Montserrat, introduce two lines for processing arrivals (visitors and residents)
- In cooperation with Government of Antigua, provide appropriate landside facilities for processing and accommodation of ferry passengers at the Heritage Quay.
28. FOCUSED AND COST EFFECTIVE DESTINATION MARKETING

28.1 STRATEGIC APPROACH

Montserrat’s overall destination marketing strategy must be based on seven fundamental factors.

The **first** is that Montserrat has limited resources to undertake general marketing campaigns. Consequently, in the short/medium term, the strategy should be to concentrate resources on fewer markets, targeted promotions within these markets and minimize overheads and other administrative costs.

The **second** is that Montserrat must begin to re-establish its position in the market as an exclusive, high quality destination, differentiated from competitors through its offering of a unique holiday/vacation experience in a natural environment. However, it must be emphasized that this will not be achieved by marketing alone. The product must reflect a 5* experience which means increased investment in all aspects of the tourism product offering – accommodation, infrastructure, amenities, standards, heritage etc.

The **third** is that Montserrat must allocate greater resources and effort to web-marketing. During the past decade, the internet has brought about a pronounced shift in how people purchase travel and tourism products. It has been estimated that the global number of users of the internet has grown from 16 million in 1995, through 361 million in 2000 to reach about 2.0 billion in 2010.

The **fourth** factor is that destination marketing must be market research driven. A key characteristic of successful tourism destinations is the emphasis that they place on understanding the customer and how to meet their needs. Significant resources are spent on knowing the customer and what their requirements and perceptions are of the destination post and pre visit. Similarly, knowing the market distribution channels – how best to reach the customer, understanding the trade channels – tour operator, travel agents etc – and especially today, understanding the web-based technologies can be used only to communicate with customers, but also to provide market research information is essential.

A **fifth** factor is ‘leveraging’ the MTB’s promotional budget by engaging in joint advertising campaigns with market intermediaries (traditional and on-line tour operators, airlines etc) as well as destinations such as Antigua, Dominica to get wider market exposure than otherwise possible.

The **sixth** factor is the strengthening of marketing ‘know-how’ and skills within the Montserrat Tourist Board, particularly in respect of destination marketing, web-marketing and marketing planning/research.

The **seventh** factor is that Montserrat is an off-line destination. The implications of this is that not only must there be the high standard seamless inter modal air-sea access as described in Ch. 27 earlier, but the transfer itself must be promoted as re-enforcement of the exclusiveness of the product.
28.2 TARGET MARKETS AND PRODUCTS

A ‘golden’ role in destination marketing is to concentrate promotional activities in the source markets with which there is direct/good access. With the planned improvements to the access transport infrastructure and services, Montserrat should focus on the following source markets and products in the short/medium term.

<table>
<thead>
<tr>
<th>Markets Products</th>
<th>Antigua</th>
<th>St. Kitts Nevis</th>
<th>Guadeloupe</th>
<th>OECS</th>
<th>UK</th>
<th>US</th>
<th>Can</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Day-Trips</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>2. W’end Events</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>3. MICE*</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>4. Yachting</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>5. Volcano</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>6. Hiking/trail</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>7. Scuba diving</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>8. Leisure/villa/B&amp;B*</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

*assuming

28.3 TRAVEL TRADE INTERMEDIARIES

Overseas Tour Operators

Initially, while the supply of product (the stock accommodation, range of things to-see-and-do etc) is limited, Montserrat should concentrate on supporting the efforts of no more than 3 or 4 tour operators in any source market.

- Motmot Travel, Dive Quest and specialist ‘Volcano’ and villa tour operator in the UK.
- Total Vacations in Canada and specialist operators in dive, hiking, volcano and villas.
- Carib World Travel, D & J Forwarders & Tours, Jenny Tours and Ondeck Sailing in Antigua.

And, of course any tour operators who, independently, include Montserrat in their tour programme, such as Caribicinseln in Germany.

Montserratian Ground Tour Operators

There is only one ‘active’ ground tour operator on Montserrat at the moment – RT Travel & Tours. But more are likely to become ‘active’ in the medium to long term.

The promotional activities of the Montserrat tour ground operators should be strengthened and supported. Montserrat ground tour operators can spearhead the development of:

- Different segments of the market – FIT, group travel etc.
- Niche product markets – MICE, weddings etc.
- Non-traditional markets – Germany, Guadeloupe.

Montserratian ground tour operators should be encouraged to establish web sites, confidential tariffs, provide the ‘meet-and-greet’ services, make overseas promotional trips etc. The cost of these promotional trips (air fares, expenses) could be initially supported by the MTB in the context of a promotional programme specifying targeted results etc. With the strengthening of the ground tour operator sector within a time frame of 3 to 4 years, support could be reduced.
28.4 DEVELOP E-MARKETING, E-DISTRIBUTION AND E-COMMERCE

The creative use of technology is crucial to the development of tourism to Montserrat. The internet provides the technology platform for Montserrat to establish itself in niche markets on an equal footing with its competitors at comparatively modest costs.

Adequate resources must be allocated for this activity – not only for the development and management of the web site, but equally important, to recruit the necessary skills to manage, maintain and further develop the site.

Priorities are:

- Re-construct web-site more as vacation planner rather than information source
  - map of island highlighting visitor attractions
  - list and link product packages
  - list and link Montserratian foreign tour operators who feature these packages in their brochures
  - list and link ground tour operators who have packages
  - show how to get to Montserrat; links to the airlines and travel bookers
  - slide show on products.
- Develop online reservation capability.
- Sell advertising space (banners, pop-ups, etc).
- Establish forums to interact with existing and potential customers – blog sites etc
- Achieve search engine optimization.

Driving Customers to the Sites

Promoting the web-site is fundamental. Referencing the web-site in generic advertising, publicity and PR activities, while very important, is not sufficient. Focused web promotion is necessary and the allocation of a dedicated web-marketing budget is recommended.

28.5 PROMOTIONAL ACTIVITIES

In the selected markets a mix of promotional activities will need to be undertaken, to include:

- advertising
  - limited general advertising in specific print media, which have long shelf life
  - niche market media
  - selected web sites (e.g. Total Vacations, Canada)
- educational trips for journalists, travel writers
  - print media
  - Audubon, National Geographic
- purchasing tours for overseas tour operators
  - one or two market per year, depending on new product development
- collaterals
  - hiking trails guide in addition to existing range of collaterals
- public relations/representation
  - press releases, advertorials
  - press trips
- participation at holiday fairs/trade shows
  - when supply of 'market ready' product sufficiently big to justify participation.
28.6 JOINT PROMOTIONS WITH ANTIGUA, DOMINICA

The MTB could leverage its promotional budget through a structured approach to joint marketing efforts between the MTB and

- Dominica, offering eco-tourism products
  - walking/hiking; scuba diving
- Antigua, with Montserrat being promoted as an ‘add-on’ to a vacation on Antigua.

The possibility of joint promotions would need to be discussed directly between the MTB and the national tourism organisations on Dominica and Antigua.
29. REORGANISE AND STRENGTHEN INSTITUTIONAL ARRANGEMENTS

29.1 INSTITUTIONAL FRAMEWORK

Currently, as outlined in Ch 12 earlier, the airport and the jetty at Little Bay come under the responsibility of the Ministry of Communication & Works. There is no airport or seaport authority responsible for the management of the access infrastructure.

Under Scenarios B and C, with the planned development of a seaport at Carr’s Bay and the commissioning of a sea ferry and Twin Otter, there will be a need to have dedicated organization responsible for overall management of access transport to and from Montserrat covering both the infrastructure and services. This is the lesson from the experience of other islands in the Caribbean (and in countries worldwide) where the responsibility for access transport is usually vested in separate or joint air and sea port authorities. These authorities are usually state owned enterprises, but operate on a commercial basis and have, subject to government approval, the statutory powers to raise funds by way of loans, debentures or other means, in addition to revenue generation by way of departure and other forms of passenger taxes and freight charges.

We recommend the establishment of a Montserrat Air & Sea Ports Authority, with responsibility for access transport infrastructure (airport and seaport) and services. This implies that the Authority will be proactive in promotion of air services, ferry services and cruise ship calls to Montserrat.

29.2 MONTSERRAT TOURIST BOARD’S STATUTORY FUNCTIONS AND OPERATIONS

The MTB’s statutory position was reviewed in Ch 12 earlier. Essentially, the Act setting up the MTB is a sound piece of legislation which should stand the test of time in that it is flexible enough to deal with any changed circumstances which may require the MTB to undertake different activities for the development of tourism.

However, one of the operations of the MTB – the Culture Unit - is anomalous, in that the MTB is responsible for the operations of the Unit, but does not have the statutory function to do so. We recommend that this situation is regularized by means of an amendment to the 1993 Act setting up the MTB, which would empower the MTB with responsibility for cultural affairs.

29.3 ORGANISATION AND OPERATIONS OF THE MTB

One of the important lessons from the performance of TDP2 is that the organization and operations of the MTB must reflect not just the issues confronting the tourism sector, but also the scale of the industry itself. The implication is that the organizational structure and operations of the MTB, going forward, must reflect the growth path of the tourism sector.

29.3.1 MTB organization and operations under Scenario A – low growth scenario

Scenario A assumes the continuation of the present situation, with no significant initiatives being undertaken, resulting in low growth over the next decade. Excluding business travel, non
Montserratian related visitor arrivals would not be much more than 3,000 in any one year, with the stock of accommodation about 300 rooms, most of which would be villas/apartments.

Under these circumstances, the MTB’s operations would be extremely limited and consist primarily of:

- Website management,
- Production of limited range of collaterals,
- Facilitating journalists visits,
- Servicing enquiries, and
- Culture Unit

with responsibility for maintenance of the hiking trails and the upkeep of the visitor facilities at Woodland’s Bay, etc being devolved to the Montserrat National Trust.

To undertake these functions, minimal staffing would be required – a Manager and an Assistant/Secretarial support.

29.3.2 MTB organization and operations under Scenarios B and C – medium and high growth

Under Scenarios B and C, significant initiatives are undertaken – dedicated ferry, twin otter, port and town at Carr’s Bay, tourist resort at Little Bay, marina and fishermen’s village, along with the development of additional visitor attractions (Volcano Interpretative Centre, sugar windmill, AIR Studios etc). Stay-over arrivals (excluding those visiting friends and relatives) are projected to be 15,000 under Scenario B and 28,000 under Scenario C by 2022. The stock of accommodation is projected to be just over 600 rooms under Scenario B and about 1,000 rooms under Scenario C.

With an industry scale a multiple of its present size, the MTB’s organizational structure will obviously need to be more elaborate, the range of operations more extensive and a greater staffing complement employed. That said, it is important to keep the projected scale of the tourism industry in context. In many countries, 600 rooms is just one resort; Saba receives about 12,000 stay-over arrivals yearly and the Saba Tourist Bureau is staffed by 3 people, including secretarial support; Anguilla receives about 65,000 stayover arrivals yearly and the Anguilla Tourist Board has a staffing complement of 7.

Organisational Structure and Staffing Complement

For the MTB, we recommend the following organizational structure and staffing complement.

Management: A general manager or chief executive must be appointed. Ideally, the person appointed should have a successful track record of tourism management, covering all aspects of policy making, marketing, product development, gained from experience not just in Montserrat, but also overseas. Additionally, the person should have proven leadership qualities, ability to clearly articulate the tourism vision and range of contacts in the international tourism industry. And Montserratian, as he/she will be representing the country.

Product Development: As the MTB will have responsibility for overseeing the implementation of the product development initiatives, the posts of a Product Development Coordinator and Assistant will be necessary.

Culture Unit: Staffing as at moment – Culture Coordinator, Events Coordinator and Officer.

Finance & Administration: As the MTB does not generate revenue, the positions of Finance & Administrative Controller and Assistant are the recommended posts.
Marketing: Irrespective of the extent to which the destination marketing function is contracted out to an external destination management company or agency, there is still the need to have a coordinator at head office with responsibility for the overall direction of the marketing effort, allocation of budgets between markets and activities, dealing with policy issues and so on. Consequently, we recommend the position of a Marketing Coordinator.

There is need also for a Web-Master, responsible for liaising with the website administrators, reviewing content and customer relations management (CRM) and on-going review of the site’s performance related to the marketing activities (using Google statistical analytics).

With regard to the organization of the marketing activities in the major source markets (Antigua, UK and US), the options for the MTB are to:

- employ staff directly to undertake the work (ie staff either directly or contractually employed by the MTB) in the markets
- contract ‘out’ this function in each of the markets to destination management companies/agencies
- contract ‘out’ this function to one destination management company which would have responsibility for all markets (and possibly the head office function as well)

**Employing Staff Directly**

The lessons from the experience of other Caribbean countries (and indeed other countries worldwide) is that for a small sized destination (small numbers of tourists and small stock of accommodation), this is not a cost-effective option. Overhead and administrative costs are high and can only be justified by large numbers of tourists from the particular source market(s).
For this reason, only large destinations (e.g. UK, Ireland) benefit from having their own operations in source markets.

**Contracting 'out' to Destination Management Companies/Agencies in the Individual Markets**

The lesson from the experience of other Caribbean countries (particularly the smaller destinations) is that this is the most cost-effective option. Countries such as Anguilla or Dominica contract destination management companies or PR agencies to represent them in the source market(s), undertaking marketing activities - placement of advertising, organizing advertorials, organizing journalists visits, responding to consumer queries, printing of collaterals, participation at tourism fairs etc. The usual contractual arrangement is a representative fee and a budget for marketing activities.

Under TDP 2, Montserrat adopted this approach. PR companies were appointed in Anguilla, Guadeloupe, UK, Germany and the US, at an agreed fee (around US$ 6,000 per month) and with a marketing budget for promotional activities. From Montserrat's experience, the results, as outlined in Ch 14, were disappointing. However, in our view the poor results were less to do with the approach of contracting individual representative companies in the source markets and more to do with the inadequacies of the access transport situation, the lack of 'market ready' product and, particularly, the lack of adequate overall direction, supervision, setting of targets and assessing performance of the representative companies appointed by the MTB. Although an assessment of the activities of these companies/agencies in relation to the MTB is outside the scope of this study and it is recognized that the representative companies worked diligently and professionally on behalf of Montserrat, there was no SMART (specific, measurable, achievable/agreed, realistic/relevant, tangible/timely) framework to guide the efforts.

Other countries have had more favourable experiences with this approach – St. Helena being one of them. As described in ch 19 earlier, St.Helena appointed an individual on a contract basis for a specific number of days in the year to undertake specific travel trade promotions in the UK and other European countries – getting St. Helena exposure in tour operator programmes, participation at holiday fairs and exhibitions. It works because:

- the representatives activities were part of a structured marketing plan for the market
- the activities focused on a small number of achievable and measurable targets – the SMART principles
- the representative only dealt with one component of the marketing mix – trade promotions. Public relations, getting favourable publicity in the media etc was undertaken by and independent PR consultant under a separate contract with the Government of St. Helena.

**Performance Based Marketing Contracts**

From a national tourism organisation (NTO) standpoint, the ideal arrangement would be a performance based contract with a destination management company which related tourism numbers/revenue to the fees for the company’s services. The fee structure could be either a straightforward fixed amount or a basic fee with a performance related element. This, indeed is the norm with many commercial companies, including tourism operators, such as the larger hotels.

Can this work with national tourism organisations? The answer appears to be no, as (so far as we are aware) no NTO worldwide has this such performance based contracts with their overseas market representatives. The reasons for this are both conceptual and practical.
At the conceptual level, this issue is that an NTO does not ‘sell’ anything. It has no control over the accommodation being offered, the room rates, the airlines and associated air fares, how the guest is treated, etc. In destination marketing an NTO’s role is creation of awareness and interest in the destination. It is the private sector that makes and closes the ‘sale’.

Another issue is that much of the marketing effort of an NTO is in branding, strengthening of an image – which properly should be regarded as ‘investment’, with a payback over a number of years rather than ‘current’ spending expecting an immediate return.

There are also practical issues, chief among them is measuring the performance related targets – total tourist numbers, including business, VFR? Or vacation tourists only? Or first time vacation tourists only? Depending on the target group selected, the problem becomes one of measuring them. Generally speaking, the breakdown of visitor arrivals by purpose of visit is determined either by the immigration cards or visitor exit surveys or some combination. And here there are myriad problems concerning the accuracy of the figures ranging from visitors not indicating their correct purpose of visit (eg a business visitor stating that the reason for the visit is vacation to avoid questions as to who he/she is doing business with) to the statistical variations arising from small samples.

It would appear that the best that can be done is to have performance based contracts follow the SMART principles-essentially, specific targets that can be measured unambiguously.

Contract the marketing activities to one destination Management Company covering all markets and the head office marketing function.

Assuming the contract was structured along SMART principles, there are a number of advantages from an organisational standpoint, viz:

- assured minimum level of performance
- no HR/staffing issues
- stricter budgetary control

However, there are significant drawbacks, among which are:

- image of destination outside the control of the national government. Since the destination management company would be dealing with potential visitors (through enquiries), with the media, with travel trade intermediaries etc, the image of the country would be determined by the way the company operated
- exceptionally high cost – salaries and associated overheads would generally be higher than those in the NTO, in addition to which would be a profit margin
- not necessarily higher performance than direct contracting in individual markets since there are few, if any, destination management companies with the required competencies in all source markets

Recommended Approach for MTB

Based on the foregoing, we recommend the contracting out of the destination marketing function to destination marketing representatives in the individual markets (Antigua, UK, US) based on the SMART principles, underpinned by a coherent marketing plan.
As it would neither be cost-effective nor practical to contract out the marketing function to just one company/agency covering all source markets, this underlies the need for a marketing coordinator at head office.

29.3.3 Building and Strengthening Capacity within the MTB

As pointed out in Ch 12 earlier, the MTB is critically short of technical expertise in all areas.

This is not unique to the MTB – it reflects the situation on the island, which is understandable in the light of the forced emigration of Montserratians in the aftermath of the destruction of the island.

The need for technical assistance is accepted. However, the MTB’s experience with technical assistance has not been all beneficial. In particular, the technical assistance under TDP 2 did not result in increased capacity in the MTB – either at the individual level or at the organisational level. We are reluctant to recommend a replication of this situation for TDP 3.

In the long run, the MTB cannot be run by a cadre of technical advisors – however well intentioned. Montserratians must be appointed to the designated posts in the MTB and, recognising that all will not have the requisite skills and experience, their capacities will have to be built up over time. There is no short cut to building capacity in the MTB.

Recognising this and the need to have sound, technical advice in implementing TDP 3 and the 5-Year Business Plan, we recommend the appointment of a technical advisor to the organisation, who must have a successful track record in tourism management to include marketing, product development, access transport, etc, as well as the ability to impart his/her knowledge to MTB staff. Modalities for ensuring ‘know-how’ transfer must be part of the technical advisor’s contract.
30. BETTER SECTOR MANAGEMENT

30.1 TDP 3 AND 5-YEAR BUSINESS PLAN COORDINATION GROUP

One of the key lessons from the implementation of TDP 2 is the need to ensure good communications and coordination of activities between those involved in the provision of sea and air access transport, product development, marketing and ground services (accommodation facilities, immigration & customs, taxis etc). Because, as outlined in Ch. 13 earlier, all these elements are so interrelated in the provision of a competitive tourism ‘offer’, a deficiency in one or two elements can result in an inadequate quality of service in terms of meeting visitor expectations and a perception of poor value-for-money.

Good communications and coordination of activities are required between all relevant stakeholders. To ensure the implementation of the TDP 3 and 5-YEAR BUSINESS PLAN is conducted in a coordinated and timely manner and to ensure that the key components are implemented in accordance with the plans, we recommend the setting up of a special purpose group – the TDP Steering Group.

The Group would be composed of key stakeholders, with the Chairperson being the PS responsible for tourism, thereby ensuring high level representation within Government. The specific brief of the TDP Steering Committee should include the following:

- Advise the Government on the implementation of the TDP3.
- Publish a report on its work and on progress with the implementation of the TDP3 at six monthly intervals.
- Ensure that the TDP3 Action Plan is seen as an integrated set of actions requiring a coordinated and partnership approach across departments, agencies and the private sector.
- Discuss with lead actors their operational plans for, and commitments to, the implementation of actions falling within their remit including key indicators against which performance will be measured.
- Highlight any constraints to progress and recommend how these might be addressed and by whom.
- Monitor progress and to recommend any changes that should be made to the TDP3 Action Plan in the light of experience and evolving circumstances as it is rolled out.

30.2 TOURISM DEVELOPMENT FUND

The operation of the Tourism Challenge Fund under TDP 2 was considered successful as without it, a number of tourism enterprises (e.g. Fly Montserrat, Olveston House), which are making a significant contribution to the tourism sector, would not have materialized.

Although the Tourism Challenge Fund has now come to an end, there is still the need to encourage investment in the sector. Recognising that the usual incentive of tax holidays won’t work on Montserrat, (simply because the difficult business environment means that SMEs don’t earn enough profit for this type of incentive to be attractive to potential investors) on the one hand, and on the other, the desire of Govt/DFID to move away from grant aid, we recommend the setting up of a Tourism Development Fund which could undertake feasibility studies, provide soft loans, take equity stakes etc in SMEs.

MONTSERRAT TOURISM DEVELOPMENT PLAN 2012 – 2022
While the fund could be located within the MDC, best practice with similar type schemes is that it should be administered through the banks, which would facilitate application of sound financial procedures and practice.

### 30.3 TOURISM SECTOR MARKET/ACCESS MODEL

An important lesson from the implementation of TDP 2 is the need to have some mechanism for ensuring that expenditures on marketing activities to create demand for travel are synchronised with the access transport capacity and services and both are in sync with the supply of the tourism product (particularly accommodation) and the supply of skilled labour. In the absence of such a mechanism there was a considerable waste of resources and effort on all sides.

To provide such a mechanism which would demonstrate the interdependencies between marketing, access, accommodation supply and labour requirements, we recommend the construction of a model which would simulate the operation of the tourism sector in respect of these factors. Whereas use of such a model would not provide answers to specific questions such as how much should be spent on marketing or how many seats should be provided on a particular air route, the model would nonetheless provide indicators with regard to capacity bottlenecks or excess supply or misallocation of marketing resources and prompt timely action to address these issues.

The model would also have the capability of simulating different tourism growth scenarios and showing their implications for marketing, access transport, accommodation supply, labour, and economic infrastructure. In this regard it would assist the regular updating of the TDP 3 and MTB 5 - year Business Plan.

Using Microsoft Excel, the model would be a simple and practical management tool, easy to understand and up-date regularly, without the need for extensive data collection or complex statistical algorithms.

### 30.4 TOURISM AND ENVIRONMENTAL AWARENESS

The growth and expansion of the tourism sector will need to be underpinned by a broad tourism and environmental awareness programme if it is to be successful. Although the environment can be protected to some extent by legislation and regulations, these are reactive measures. The ideal situation is one where people have an appreciation and positive interaction with the environment.

It is also important to sensitise communities and the population in general to the nature of tourism – how tourism benefits the country, how individuals and communities can benefit from tourism, etc – in order to manage expectations.

While the objective of spreading the economic benefits from tourism to communities is a valid one, this aim is neither easily nor equally achieved for all communities. As a result there is a danger of unrealistic expectations turning into disillusionment for some communities or mistrust of tourism as a strategy for economic development.

The elements of this programme would include:

- Leaflets on the value of tourism to Montserratians and to communities.
- Leaflets on how to treat tourists.
- Regular ‘clean-up’ campaigns
  - annual ‘tidy communities or villages’ competition
- Radio tourism programme.
- Tourism awareness week.
- Tourism Awareness courses directed to various stakeholders (secondary tourism suppliers, schools, customs & immigration etc).
- Booklet on careers in tourism for Montserratians.

MONTSERRAT TOURISM DEVELOPMENT PLAN 2012 – 2022
31. TDP3 AND 5-YEAR BUSINESS PLAN

The development of Montserrat's tourism sector will not simply happen. It has to be stimulated and directed, and the activities of the various tourism and tourism related organisations coordinated.

TDP Steering Group

There are a number of ministries, departments and state owned organisations along with operators in the private sector with responsibilities and active participation in tourism. The numerous actions that have been identified in this TDP will involve many entities in their implementation. In order to ensure that the implementation process is conducted in a coordinated and timely manner, and to ensure that key actions actually are implemented, it is recommended that a special purpose committee be created - the TDP Steering Group, as described in Ch. 30 previously. This should be a high-level group, meeting on a monthly basis, working to a tight terms of reference and within a defined life span with the overall goal of monitoring, promoting and energising the implementation process.

The Chairperson should be the PS with responsibility for tourism and membership of the Group should include the:

- MTB.
- Fly Montserrat.
- SVG.
- Ferry Company.
- Sea & Air Port Authority
- MNT
- MDC
- MVO
- Tour and Taxi Association
- RT Travel & Tours

Although the Group will not need an organisational structure, it should be serviced by the MTB (organisation of meetings, minutes of meetings, etc). Costs will be minimal as no staff or other overheads are envisaged.

Action Plan

A summary list of the actions to be taken in implementing the TDP3 and 5-Year Business Plan is set out in Table 31.1. This includes all of the costed actions to be taken during the period (2013 – 2018) with regard to product development, infrastructure, human resources, marketing and institutional strengthening. Certain elements of the plan require a first stage analysis, design and plan formulation before costings can be determined – for example the proposed waterfront improvements to Little Bay cannot be costed until a design plan is prepared. A number of proposed capital developments are also dependent on the outcome of feasibility studies which are to be undertaken as the next step – the restoration of a sugar mill for example.

We see the Action Plan being implemented in three phases:

Phase I: Organising for Growth: April 2013 – Mar 2014
Phase II: Growth Take-Off: April 2014 – March 2016
Phase III: Rapid Growth: April 2016 – March 2018
## Table 31.1: Implementation Plan

|----------------------------------------------------|------------------------------------------------------|----------------|--------------|-----------------------------------------------|----------------|--------------|-----------------------------------------------|----------------|--------------|
| A. Arrangements for TDP3 & MTB Business Plan Implementation | • Govt. Approval of TDP3 & MTB Business Plan  
• Publications of Documents  
• Set-up TDP3 Steering Group | - (on web site) | GOM  
GOM  
GOM | • On-going review of TDP3 & MTB Business Plan  
— monthly meetings  
— publication of minutes | - | Steering Group | • On-going review of TDP3 & MTB Business Plan  
— monthly meetings  
— publication of minutes | - | Steering Group |
| B. Reorganise and Strengthen Institutional Arrangements | • Amend Tourism Act (1993 Ordinance) to include culture/heritage  
• Establish Air & Sea Port Authority  
• Appoint MTB Director  
• Appoint Product Development Coordinator  
• Appoint MTB web master | - | GOM  
GOM  
MTB  
MTB | • Appoint MTB Marketing Coordinator  
• Appoint Technical Advisor to MTB | - | MTB  
MTB  
MTB | | - | MTB  
MTB  
MTB |
| C. Economic Infrastructure | • Improve road markings  
• Maintenance repairs to airport terminal & landscaping | 150 | MC&W | • Hanger & fueling facilities at airport  
• Twin Otter leased from April 2014  
• New ferry in service from June 2014 | 200 | MASPA | |
| D. Air & Sea Access and Visitor Facilities | • Promotional support for developing St. Kitts/Montserrat route  
• Agreement with Govt. Of Antigua for departure tax exemption for day-trips to Montserrat  
• Appropriate landside facilities for ferry pax at Heritage Quay, Antigua  
• Reduce check-in processing for air & sea pax in Montserrat  
• Streamline immigration procedure for yachts | MTB (budget)  
- | FM/ MTB  
- | • Appoint marketing rep on Antigua to support sea and air carriers  
• Condition based subsidy to develop St. Kitts and Guadeloupe air route  
• Ferry service to Guadeloupe  
• Seek removal of security screen V.C. Bird Int Airport for transit pax to Montserrat | MTB (budget)  
600 | MASPA  
GOM/GOA | | MTB  
MTB  
GOM/GOA | |
### Component: Organising for Growth 2013 – 2014

**Phase I: Milestones**

<table>
<thead>
<tr>
<th>Cost (EC$000s)</th>
<th>Resp. Agents</th>
</tr>
</thead>
<tbody>
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**Phase II: Milestones**

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**Phase III: Milestones**

<table>
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<tr>
<th>Cost (EC$000s)</th>
<th>Resp. Agents</th>
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</thead>
<tbody>
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</tbody>
</table>

### E. Expand & Diversify Tourism Product

#### (i) Accommodation
- Review regulations/incentive to attract residential tourism (villas)
- Increase supply of accommodation – attract investment

#### (ii) Excursionist Product
- Improve excursionist product

#### (iii) Scuba diving
- Jetty & facilities at Little Bay
- Monitoring of sites

#### (iv) Yachting
- Moorings, on-shore facilities
- Club house/boathouse

#### (v) Golf
- Feasibility study for location of course & real estate

#### (vi) Hiking
- Maintenance of trails/signage

### F. Enhance Tourism Attractions & Amenities

#### (i) Volcano
- Construction of Volcano Interpretation Centre (VIC)
- Garibaldi & Richmond Hill Development

#### (ii) Little Bay Waterfront
- Design plan & works

#### (iii) Other Beaches
- On-going maintenance

#### (iv) AIR Studios
- Feasibility and design study for rehabilitation of building

#### (v) Sugar Mill
- Survey, feasibility and design of rehabilitation of mill

#### (vi) Botanic Gardens/ Biodiversity Park
- Design plan for improvements to gardens

### Notes:
- MVO: Montserrat Volcano Observatory
- MNT: Montserrat National Trust
- MTB: Montserrat Tourism Board
- DOE: Department of Environment
## Component

### Organising for Growth 2013 – 2014

<table>
<thead>
<tr>
<th>Phase I: Milestones</th>
<th>Cost (EC$000s)</th>
<th>Resp. Agents</th>
</tr>
</thead>
<tbody>
<tr>
<td>(vii) Character Village</td>
<td>Design plan for Salem</td>
<td>30</td>
</tr>
<tr>
<td>(viii) Arts &amp; Crafts</td>
<td>Feasibility/design study for Arts Craft Centre at Public Market</td>
<td>30</td>
</tr>
<tr>
<td>(ix) Marine Reserve</td>
<td>Design/plan for marine reserve</td>
<td>30</td>
</tr>
<tr>
<td>(x) Plymouth Volcano Reserve</td>
<td>Design/plan for ‘reserve’</td>
<td>50</td>
</tr>
<tr>
<td>G. SERVICE AND QUALITY STANDARDS</td>
<td>Survey of training needs</td>
<td>120</td>
</tr>
<tr>
<td>H. DESTINATION MARKETING</td>
<td>Web site restructuring/development</td>
<td>70</td>
</tr>
<tr>
<td></td>
<td>Collaterals</td>
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<tr>
<td></td>
<td>Market Representation</td>
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<td></td>
<td>Promotional Activities</td>
<td>Support to develop gateway for St. Kitts &amp; Nevis</td>
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<td>Joint Promotions</td>
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<tr>
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<td>Research</td>
<td>VES, Excursionist, Yacht Surveys</td>
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### Growth Take-Off 2014 – 2016

<table>
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<th>Phase II: Milestones</th>
<th>Cost (EC$000s)</th>
<th>Resp. Agents</th>
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</thead>
<tbody>
<tr>
<td>(vii) Character Village</td>
<td>Works to create plaza/focal point</td>
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<tr>
<td>(viii) Arts &amp; Crafts</td>
<td>Outfitting of Arts &amp; Crafts Centre</td>
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</tr>
<tr>
<td>(ix) Marine Reserve</td>
<td>Training courses for craft producers</td>
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</tr>
<tr>
<td>(x) Plymouth Volcano Reserve</td>
<td>Legal framework</td>
<td>- GoM</td>
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<tr>
<td>G. SERVICE AND QUALITY STANDARDS</td>
<td>Short-term tourism training courses</td>
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<tr>
<td>H. DESTINATION MARKETING</td>
<td>Prepare 1-3 year rolling marketing plan</td>
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<td>On-going development</td>
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<tr>
<td></td>
<td>Redesign/printing</td>
<td>200</td>
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<tr>
<td></td>
<td>Appoint representatives/agencies in Antigua, UK, US</td>
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<tr>
<td></td>
<td>General promotional activities – adv, educational, tour operators</td>
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<tr>
<td></td>
<td>General promotional activities – adv, educational, tour operators</td>
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<td>Joint promotions with Antigua, Dominica, CTO</td>
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<td>VES, Excursionist, Yacht Surveys</td>
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### Rapid Growth 2016 – 2018

<table>
<thead>
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<th>Phase III: Milestones</th>
<th>Cost (EC$000s)</th>
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<tbody>
<tr>
<td>(vii) Character Village</td>
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<td>(viii) Arts &amp; Crafts</td>
<td>Legal framework</td>
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<td>- GoM</td>
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<tr>
<td>(x) Plymouth Volcano Reserve</td>
<td>Legal framework</td>
<td>- GoM</td>
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<tr>
<td>G. SERVICE AND QUALITY STANDARDS</td>
<td>Legal framework registration of all tourism enterprises</td>
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<tr>
<td>H. DESTINATION MARKETING</td>
<td>Establish Quality Standards</td>
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<td>-----------</td>
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<tr>
<td>I. SERVICE AND QUALITY STANDARDS</td>
<td>Survey of training needs</td>
<td>120</td>
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<td></td>
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<tr>
<td>(i) Tourism Development Fund</td>
<td>Establish objectives and mechanisms for fund support to enterprises (loans, equity, grants)</td>
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<tr>
<td>(ii) Tourism &amp; Environ Awareness</td>
<td>Campaign to increase awareness</td>
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<tr>
<td>(iii) Tourism Sector Model</td>
<td>Construction/ testing of model</td>
<td>120</td>
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<tr>
<td>J. DESTINATION MARKETING</td>
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<tr>
<td>(i) Web Site</td>
<td>Web site restructuring/ development</td>
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<td>(ii) Collaterals</td>
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<td>Support to develop gateway for St. Kitts &amp; Nevis</td>
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