



MONTSERRAT TOURISM MASTER PLAN, 2015- 2025



Final Report

29th April, 2016

GOVERNMENT OF MONTSERRAT

FINAL REPORT

29th April, 2016

Submitted by: Tourism Planning Associates

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1. INTRODUCTION

1.1 BACKGROUND

Some twenty 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 over a fifth 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, Montserrat's tourism industry was decimated and now accounts for around 4% of the economy (GDP).

Despite the reduction of available landscape, Montserrat still maintains its distinctive charm, based on its natural resources, 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.

1.2 PURPOSE OF ASSIGNMENT

The current Tourism Master Plan was formulated some twelve years ago in 2003, the purpose of which was to provide the strategic direction to reposition Montserrat's tourism sector. However, a number of factors renewed volcanic activity in 2010, the global financial crisis of 2006/8, worldwide decline in tourism travel, difficulties in attracting foreign direct investment..... combined to constrain the implementation of the Plan.

Reflecting this changed economic and business environment, the GOM commissioned TPA to:

- I. undertake a diagnostic review of the current Tourism Master Plan, which was developed, including determining if the strategies and actions are still relevant and making recommendations for amendment where they are not.
- II. Chart a way for the Tourism sector in Montserrat that will contribute to improving tourism sustainability in general, and the economic benefits for Montserrat's citizens in particular.
- III. Develop a clear mandate for a National Tourism Organisation (NTO) development and management of the Tourism sector, and clearly identify the best organisational structure for same.

1.3 WORK PROGRAMME

In undertaking the review of the current (2003) Tourism Master Plan and formulating a strategy for the way forward, extensive consultations were held with all stakeholders directly and indirectly associated with the tourism sector on Montserrat. In addition a comprehensive review of published and unpublished tourism related reports, policy papers and other documents was undertaken, among which was the Tourism Development Plan 3, 2012- 2022.

Three fieldwork missions were undertaken specifically (Aug 9-16, 2015); (Nov 1-9, 2015) and (Feb 7-14, 2016) in respect of the Tourism Master Planning exercise, during which product inspection trips were undertaken to all areas in Montserrat involving visits to nature sites, touristic attractions and facilities.

An important component of the consultations 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 Tourism Planning Workshops on 4th Nov, 2015; 8th Feb, and 11th Feb, 2016 under the aegis of the Premier's Office, which is responsible for tourism.

The deliberations and recommendations from these stakeholder consultations informed the elaboration of the Tourism Master Plan.

1.4 REPORT STRUCTURE

This Final Report is structured in six parts, viz:

- **Part I:** describes tourism to Montserrat today - tourism demand and visitor profile along with a product audit and review of the tourism sector, its natural resource base and patrimony, facilities and services, enabling environment and sector management.
- **Part II:** elaborates the vision and future direction for the tourism sector identifying areas for development and the related product development plans, as well as the product-market development opportunities.
- **Part III:** outlines growth objectives for the national economy. Reflecting the national economic objectives, three tourism development scenarios are outlined - low, medium and high growth scenarios, under which tourism becomes an increasingly important driver of national economic activity.
- **Part IV:** specifies the Tourism Master Plan strategy and action plans in respect of improvements to the economic infrastructure, development of amenities and visitor attractions, access transport, destination and product marketing etc., required to achieve the vision.
- **Part V:** outlines the necessary steps for Tourism Master Plan implementation, taking into account the lessons from experience of previous planning efforts.

1.5 RECOMMENDATIONS ON REORGANISED INSTITUTIONAL ARRANGEMENTS

The recommendations on the management of the tourism sector, involving the setting-up of a National Tourism Organisation, its mandate and organisational structure, are contained in a separate document.

1.6 SOURCES OF STATISTICAL DATA

Data on visitor arrivals and expenditures are based on statistics published by the Statistics Dept of the Ministry of Finance, Economic Development, Tourism & Culture. Data on the national economy are based on statistics published by the Statistics Dept of the Ministry of Finance, Economic Development, Tourism & Culture, and the Eastern Caribbean Central Bank.

Whereas the visitor arrivals data are derived from the immigration entry/exit cards that all visitors must complete on arrival and are thus soundly based, our understanding is that the figures on visitor expenditures are estimates, based on the results of a visitor exit survey carried out some years ago, and are thus less soundly based. Recognising this, our analysis and the way in which the statistical information is presented in this Tourism Master Plan facilitates its updating when new data become available.

2. EXECUTIVE SUMMARY

2.1 WHERE ARE WE NOW?

Natural and Cultural Resources

By any standards, Montserrat is a uniquely interesting island – the scenery is different, the scale is different, and the ambience is different from other islands in the Caribbean. Although small geographically, Montserrat possess unique natural and heritage attractions which include the Volcano, a diverse network of hiking trails, pristine dive sites, the St. Patrick's Day festival and other events.

Despite the general recognition of these natural attractions, Montserrat has not yet fully transformed this resource into a significant tourism industry. There are understandable reasons for this - Volcanic events of five years ago, the international financial crisis which began in 2008/9 and has dampened tourism investment to this day, inadequate access and shortage of capital. The net result is that the tourism sector is about the same size now as it was over a decade ago in 2002.

Size of the Tourism Sector and Performance

In 2015, just over 8,940 stay-over tourists visited Montserrat. In addition there were some 1,800 yacht visitors, 1,740 day-visitors and approximately 2,600 cruise ship visitors. Total expenditure by all visitors was an estimated EC\$22.9 million.

We estimate that about three-fifths (60%) of tourist arrivals come primarily for vacation/leisure purposes. However, this does not mean that all are non-Montserratian. In fact, a significant proportion are Montserratian related, as evidenced by the proportion of tourists staying in private homes.

Table 2.1: Breakdown of Tourists by Main Activity & Accommodation Usage for 2015

Motivation/Activity	Accommodation	Numbers*	%
(i) Visiting Friends & Relatives - general vacation	Private Homes	4,900	55
(ii) Business/Official/Conference	Paid serviced accommodation	2,200	25
(iii) Non MNI Related Vacation	Paid serviced accommodation	1,400	15
(iv) Other - study, sports groups	Mainly private homes/unserviced accommodation	440	5
TOTAL		8,940	100

*Source: Consultant's estimates *figures rounded*

Allowing for the above, we estimate that the number of non-Montserratian related stayover vacation visitors was 1,400 in 2015, a figure which has changed little in recent years. Similarly, the number of day-visitors is at the same level as in 2010, some 5 years ago. However, cruise ship visitor numbers have increased significantly in the last year, indicating the potential from this segment of the market.

Constraints to Growth

In 2012 we undertook a survey among tour operators, travel agents and Montserrat's market representatives in the major source markets, as well as holding consultations with tourism stakeholders on-island, to identify the constraints inhibiting the growth of tourism to the island. A similar consultative process was undertaken with representatives of the tourism industry at a Stakeholders' workshop on the 4th November, 2015. The constraints identified in 2012 are still valid today, viz:

- inadequate sea connectivity – ferry schedules, length of journey,
- shortage of 'market ready' accommodation – only 230 rooms available
- poor tourism infrastructure – airport terminal, road signage

- inadequate amenities and things-to-see-and-do - no waterfront or focal point on the island like Sandy Ground in Anguilla, St. Lawrence Gap in Barbados, and Gros Islet in St. Lucia where locals and visitors congregate to mix, dine and relax.
- Montserrat not known in the market place – no exposure in tour operators brochures

2.2 WHERE DO WE WANT TO BE?

Market Positioning

Market feedback is that Montserrat should strengthen its position as one of the few comparatively undiscovered ‘gems’ of the Caribbean and a 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. Its position needs to be re-enforced as ‘unspoilt, authentic, fun’, capitalising on its major appeals of:

- ‘Greenness’....natural unspoilt environment
- peace and tranquillity – get away from it all;
- safety and security;
- warm, welcoming, friendly people;
- affordable luxury;
- intimacy – a private hideaway – no mass tourism, and
- authenticity, with a distinctive cultural heritage.

There is a feeling of ‘harmony’ about Montserrat; the absence of traffic noise (pollution) conveying a sense of serenity. These are Montserrat’s core strengths which must be maintained and enhanced.

Vision

Arising from the deliberations of 4th November, 2015 Stakeholders’ workshop, a vision statement and guiding principles for Montserrat tourism 2025 was elaborated (see Ch 7), its essence being:

An exclusive private hideaway – authentic, peaceful, safe, unhurried. Affordable luxury accommodation would be provided in villas, small to medium sized resorts and guesthouses/inns, with culinary excellence available in a variety of eateries. The back-drop is unspoilt nature with a range of things-to-see-and-do.... exploring the Plymouth Volcano Reserve and GeoPark, walking/hiking in the Centre and Silver Hills, scuba diving and fishing in the Marine Reserve, yachting, golf, and joining in the fun of the many festivals. Through imaginative and sympathetic re-construction, Little Bay and Salem Heritage Village have become focal points – providing a sense of ‘place’ where visitors and locals congregate to mix, dine and relax.

2.3 REALISING THE VISION – A TOURISM STRUCTURE PLAN

Based on the location of existing and potential tourism products and their spatial relationship with the island’s ecological resource base and infrastructure, three Tourism Development Areas (TDAs) and associated Tourism Centres are recommended, as shown on Map 2.1 following.

Tourism Development Areas	Tourism Centres
North West Coast	Little Bay
West Coast	Salem
Highlands	St. John’s

Within each of these development areas, the plan specifies the most appropriate products to be put in place, taking into account the area’s geography, ecology and infrastructures.

Designation of tourism development areas provides the basis for integrated planning of the area so that it functions efficiently and is relatively self-contained. From the planning perspective the importance of having designated TDAs is that they:

- Help create critical mass – making it economic to provide a range of facilities and services in an area.
- Diversify the product offer in a way that can be promoted to different niche markets, thereby facilitating product branding.
- Allow different forms of tourism development to co-exist – designating particular areas for nature tourism only, other areas for more intensive use

Map 2.1 TOURISM STRUCTURE PLAN



The recommended spatial development of tourism on Montserrat is shown on Map 2.2, indicating that development is dispersed throughout the island rather than concentrated in one area, thus creating the opportunities for all residents to benefit from tourism. The map also shows the locations for the recommended developments of accommodation, visitor attractions and amenities and tourism products.

MAP 2.2 MONTSERRAT TOURISM 2025



KEY

- | | | |
|----------------------------|-------------------------------|------------------------|
| Dive Sites | Beaches | Hotels |
| Trails | Little Bay | Villas |
| 1. Baker Hill to Katy Hill | Windmill | Sports Complex |
| 2. Big River | Air Studio | Ferry Port |
| 3. Blackwood Allen | MVO | Moorings/Marina |
| 4. Dry Waterfall | MNT | Golf |
| 5. Duberry-Cassava | Little Bay a. Museum | Salem Heritage Village |
| 6. Jack Boy Hill | Little Bay b. Cultural Centre | Marine Park |
| 7. Jack Boy-Katy Connector | Airport | |
| 8. Katy Hill North | | |
| 9. Katy Hill South | | |
| 10. Oriole Walkway | | |
| 11. Rendezvous | | |
| 12. Rendezvous Beach | | |
| 13. The Cot | | |
| 14. Underwood | | |

2.4 GROWING TOURISM TO REALISE THE VISION 2015 -2025

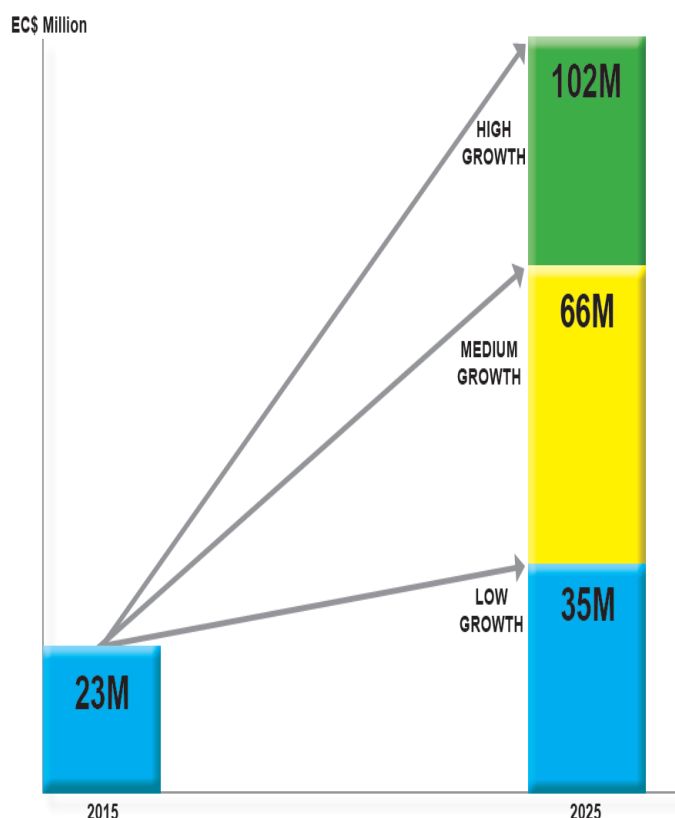
In 2015 tourism spending of EC\$ 22.9M represented approximately 13.5% of GDP (in gross terms). To realise the tourism vision for the island, the industry must be developed. Based on three economic growth scenarios for the national economy as outlined in Ch 12, three corresponding development scenarios for the tourism sector were projected and discussed with stakeholders (Stakeholder meetings convened during the week Feb 7 – 14, 2016), follows:

Scenario A is the **low growth** scenario consistent with a small improvement in present standards of living (in real terms) for residents of Montserrat. The 'low growth' scenario can be interpreted as what would be likely to happen if, with the exception of the new ferry, no initiatives were undertaken and tourism development continued to be constrained by lack of investment in infrastructure, amenities, products, destination marketing etc.

Under this 'low growth' scenario for the economy, tourism is projected to increase its proportion of GDP (in gross terms) from 13.5% in 2015 to 17% by 2025. This implies total expenditure by all visitors increasing from an estimated EC\$ 22.9M in 2015 to approximately EC\$ 35M by 2025, in terms of constant 2015 money values. This represents an average growth rate of 4.3% yearly.

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 overcome the various constraints.

Under this 'high' growth scenario, tourism is projected to increase its proportion of GDP (in gross terms) from 13.5% in 2015 to 30% by 2025. This implies total expenditure by all visitors increasing from the estimated figure of EC\$ 22.9M in 2015 to just over EC\$ 102M by 2025, in terms of constant 2015 money values. This represents an average growth rate of about 16% yearly.



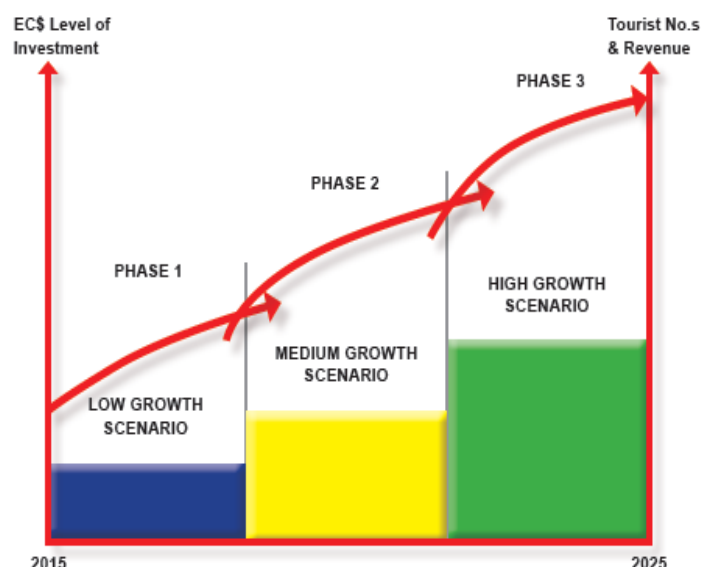
Between these high and low growth scenarios lie a number of possibilities, one of the more likely being, Scenario B, designated as the medium growth scenario.

Scenario B: Under the '**medium growth**' scenario for the economy, tourism is projected to increase its proportion of GDP (in gross terms) from 13.5% in 2015 to 25% by 2025. This implies total expenditure by all visitors increasing from the estimated figure of EC\$ 22.9M in 2015 to approximately EC\$ 66M by 2025, in terms of constant 2015 money values, representing an average growth rate of about 11% yearly.

2.5 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.

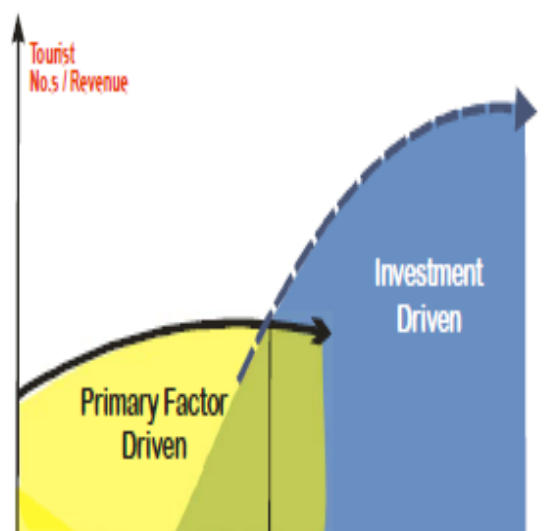
Initially, the industry will follow the Low Growth Scenario – at least until the new ferry is in services. With this significant improvement to the access situation, the platform will be established for moving to the Medium Growth Scenario involving the expansion of the tourism product - increased stock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



2.6 HOW DO WE GET THERE

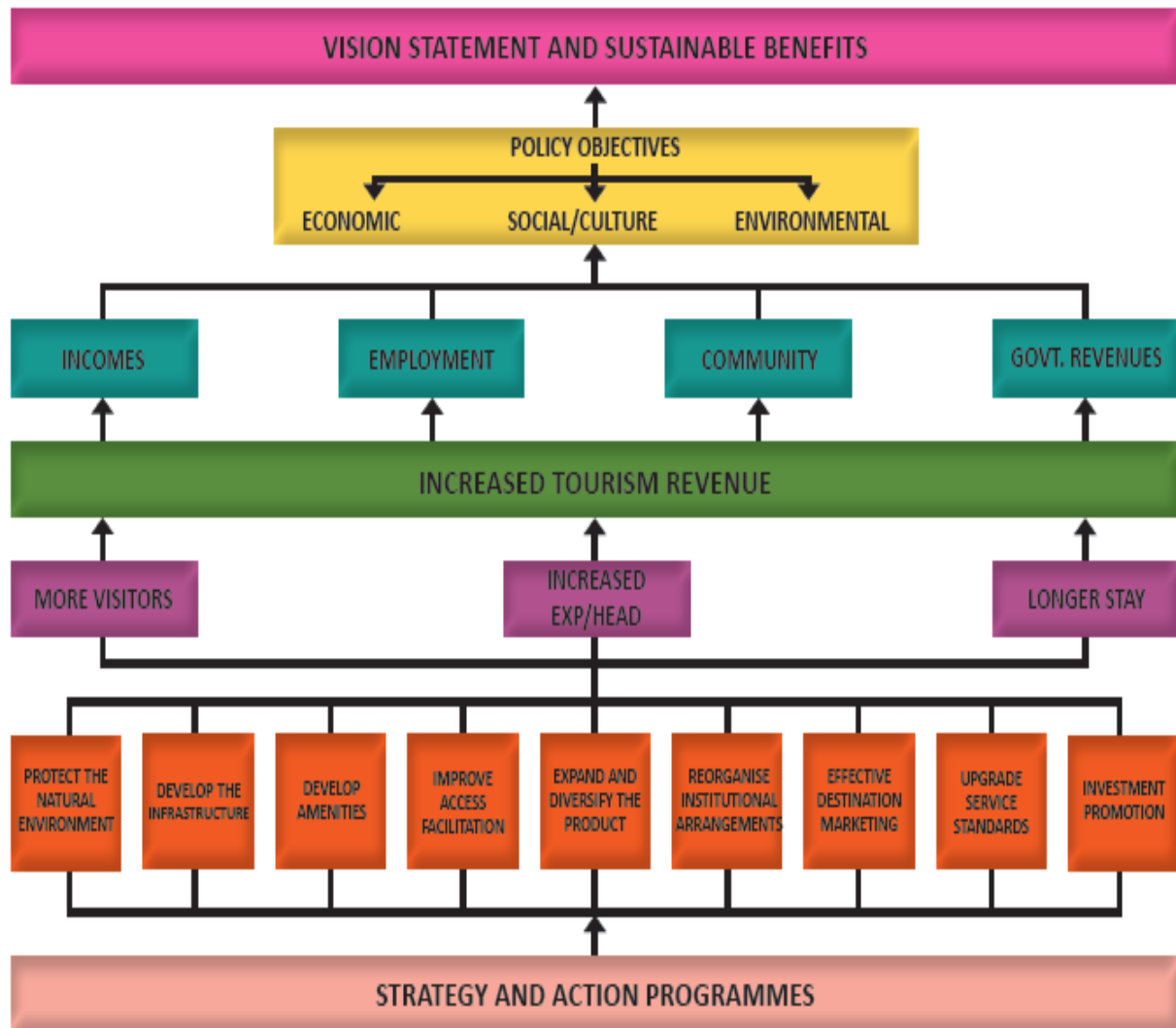
Currently, Montserrat attracts relatively few stay-over leisure tourists. This is because the leisure/activity segment of the tourism industry is totally dependent on its natural attractions as the motivation for tourists to visit. But the natural attractions, though unique in many ways, are not sufficiently strong in themselves to attract the numbers required to support a significant tourism sector. It is a **primary factor-driven** product strategy, characterized by low investment, limited 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 to be world class (unlike the Galapagos Islands, Egypt, Greece), face this problem. The strategy pursued by many destinations which do not have recognised 'world class' nature and cultural attractions, is to invest heavily in the product. These destinations have seen their tourism sectors prosper and grow. St. Barts and Ireland are such examples.



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.

- Protect and enhance the natural environment
- Develop and improve the infrastructure
- Expand and diversify the tourism product.
- Enhance visitor attractions and amenities.
- Upgrade quality and service standards.
- Improve access services and visitor facilitation
- Focused and cost-effective destination marketing.



- Reorganised and strengthen institutional arrangements.
- Investment promotion

2.7 WHAT ARE THE BENEFITS?

With the implementation of the TMP tourism will become the major 'driver' of the economy in three ways:

- Firstly, through the 'new' direct investment necessary to develop and expand the tourism product....capital investment in new accommodation, facilities, and infrastructure.... creating jobs and generating incomes in construction, wholesale trade and other services;
- Secondly, through the expenditures by the increasing number of visitors to the island, creating jobs and generating incomes in hotels, guesthouses, restaurants, retail; and
- Thirdly, through the induced new investment in enterprises providing goods and services to an expanding tourism industry.

resulting in a balanced and diversified tourism sector as shown on the following map, creating incomes, jobs, sustainable livelihoods, and higher standards of living for all on Montserrat.

PART I TOURISM TO MONTSERRAT TODAY

- 3. TOURISM DEMAND AND VISITOR CHARACTERISTICS**
- 4. TOURISM PRODUCT AND SECTOR REVIEW**
- 5. DESTINATION MONTSERRAT – WHAT THE MARKET THINKS**
- 6. SWOT ASSESSMENT**

3. TOURISM DEMAND AND VISITOR CHARACTERISTICS

3.1 TOTAL VISITOR ARRIVALS

Trends in visitor numbers since 2010 are shown on the following table. Just over 15,000 visitors were recorded in 2015, a significant increase compared with previous years, due almost entirely to the resurgence in the number of cruise ship visitors, as shown on the following table.

Table 3.1: Visitor Arrivals 2010 – 2015

Year	2010	2011	2012	2013	2014	2015
Stay-Over Visitors	5,981	5,395	7,310	7,201	8,804	8,944
Excursionists	1,726	1,997	2,606	1,520	1,749	1,740
Cruise Ship Visitors	878	1,114	840	364	184	2,591
Yacht Visitors	993	1,966	1,371	1,377	1,597	1,815
TOTAL VISITORS	9,578	10,472	12,127	10,462	12,334	15,090

Source: Statistics Dept, MoFEDT&C,

Prior to 2012 the number of stay-over visitors has averaged approximately 6,000. A significant increase in stay-over arrivals occurred in 2012 for the 50th Celebrations of Montserrat's Festival, and this impetus has been maintained to date.

Excursionist numbers have varied between 1,500 and 2,500 whereas yacht visitors have varied between 1,000 and 2,000 over the period.

The number of cruise ship visitors in 2015 was the highest recorded for some years, suggesting significant untapped potential in this segment of the tourism market.

3.2 STAY-OVER VISITOR ARRIVALS

Numbers of stay-over arrivals by source market for selected years are shown on Table 3.2.

Table 3.2: Stay-Over Arrivals by Source Market 2010 – 2015

Market	2010	2011	2012	2013	2014	2015
USA	1,665	1,527	1,950	1,775	2,041	2,326
Canada	404	320	505	516	678	540
U.K.	1,380	1,327	2,148	1,821	2,164	2,339
OECS	1,261	1,133			2,447	2,230
Other Caribbean	998	749			1,081	1,091
Other Countries	273	339	317	498	393	418
TOTAL	5,981	5,395	7,310	7,201	8,804	8,944

Source: Statistics Dept, MoFEDT&C,

The main markets are the US, UK and OECS which together account for just over three-quarters of all stay-over arrivals. An analysis of the Visitor Entry/Exit cards shows little change in the profile of stay-over tourists to Montserrat in recent years, the more salient findings being:

- Just over half (53%) of tourists arrive by sea, the balance arriving by air
- Just over half (52%) indicate 'leisure' as main purpose of visit; 12% come for business and a further 24% to visit friends and relatives;
- Almost 60% stay in private homes, the balance staying in other forms of accommodation....Hotel, Guest House, Apartment, Villa, B&B
- Older age profile of tourists with about 40% aged 50yrs or older; Very few (13%) under the age of 20 years old.
- 70% of stay-over arrivals come during the 7 months period, Nov through May
- Average length of stay of about 11 nightsthose from the UK staying an average of 15 nights; those from the US staying an average of 12 nights.

Combining information from the 2010/11 Visitor Exit Survey with Visitor Entry/Exit card information, an indicative estimate of the breakdown of tourist numbers by 'primary' activity engaged in and place of stay is shown on the following table.

Table 3.3: Breakdown of Tourists by Main Activity & Accommodation for 2015

Motivation/Activity	Accommodation	Numbers*	%
(i) Visiting Friends Relatives - general vacation	Private Homes	4,900	55
(ii) Business/Official/Conference	Paid serviced accommodation	2,200	25
(iii) Non MNI Related Vacation	Paid serviced accommodation	1,400	15
(iv) Other - study, sports groups	Mainly private homes/unserviced accommodation	440	5
TOTAL		8,940	100

*Source: Consultant's estimates *figures rounded*

3.3 EXCURSIONIST ARRIVALS

During the last five years, excursionist arrivals have numbered between 1,700 and 2,000, as shown on the following table.

Table 3.4: Excursionist Arrivals 2010 – 2015

Excursionists	2010	2011	2012	2013	2014	2015
Air	927	978			373	306
Sea	799	1,019			1,376	1,434
TOTAL	1,726	1,997	2,606	1,519	1,749	1,740

Source: Statistics Dept., MoFEDT&C,

An analysis of the Visitor Entry/Exit cards provides a profile of excursionists to Montserrat, the more salient findings being:

- main source markets are the OECS, UK and US, together accounting for about 80% of excursionist arrivals.
- Older profile of visitor
- 'Leisure' is main purpose of visit for 70% of arrivals
- 60% of excursionists arrive during the 7 months period, Nov through May

3.4 YACHTING ARRIVALS

Some 474 yacht arrivals were recorded for 2015, with 1,815 visitors, representing an average of just under 4 visitors per yacht. Over the years there has been no significant increase in the number of yacht arrivals to Montserrat

Table 3.5: Yacht Arrivals and Associated Visitors

Year	2010	2011	2012	2013	2014	2015
Yachts	216	352	327	346	368	474
Visitors (including crew)	993	1,966	1,371	1,377	1,597	1,815

Source: Statistics Dept., MoFEDT&C,

3.5 CRUISE SHIP PASSENGER ARRIVALS

The number of cruise ship calls and passengers increased significantly in 2015

Table 3.6: Cruise Ship Calls and Passenger Numbers

Year	2010	2011	2012	2013	2014	2015*
Cruise Ship Calls	4	3	5	4	2	10
Cruise Passengers	878	1,114	840	364	184	2,591

Source: Statistics Dept., MoFEDT&C,

4. TOURISM PRODUCT AND SECTOR REVIEW

As illustrated on the following diagram, Montserrat's tourism sector is composed of:

- 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 – destination marketing, research and statistics, product development, etc.

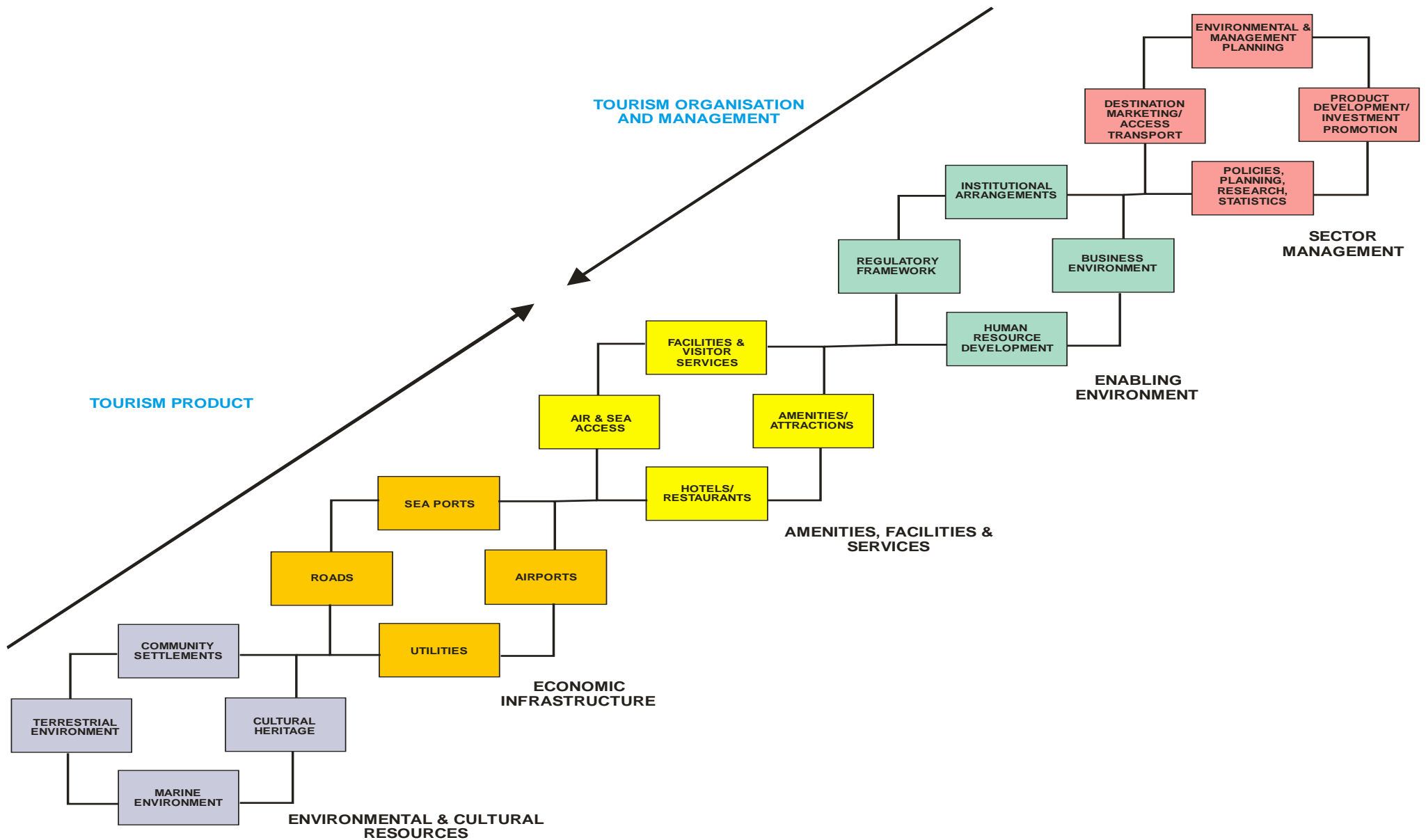
The primary tourism attractions, economic infrastructure, supporting facilities & services, enabling environment and sector management are interdependent in several ways:

- (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
 - efficient and competitive access
 - the enabling environment of appropriate institutions, regulations, etc
 - effective sector management covering policies and planning, destination marketing

Successful tourism requires many different elements to be in place before there is a 'competitive' product on offer in the marketplace, the key ones being:

- direct and frequent access
- range of good accommodation and eateries
- good quality infrastructure – ports, roads, utilities
- variety of attractions and things-to-see-and-do
- quality environment
- value for money

The implication is that a deficiency in any one component will undermine the capacity of Montserrat to meet the expectations of tourists.



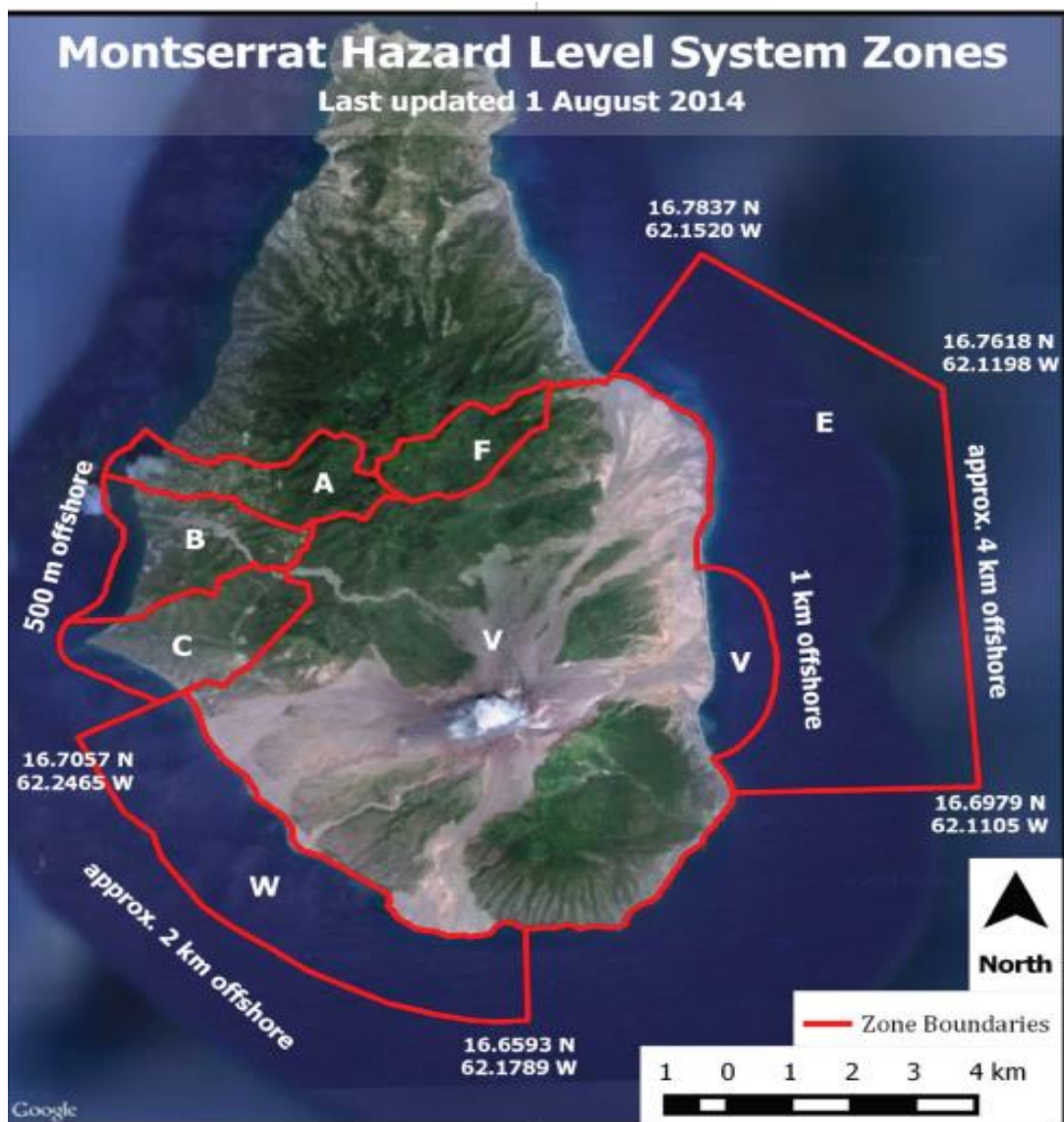
4.1 ENVIRONMENTAL AND CULTURAL RESOURCES

4.1.1 Terrestrial 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 *ghauts* spread downwards towards the coast.

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. Approval to visit Plymouth is considered on a case-by-case basis.

Map 4.1: Exclusion Zone



Protected Areas

There are two 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 galliwasplizard 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; and
- 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.

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

4.1.2 Marine Environment

The reef and marine system appears to be very healthy. Coral Cay Conservation (CCC) is managing the ‘Montserrat Ridge to Reef Conservation Project (MRRCP)’ which has been designed to support the sustainable use of Montserrat’s natural resources. The programme encompasses scientific surveys of coral reefs and other marine resources, as well as terrestrial species and habitats, focussing primarily in the Centre Hills.

CCC is conducting enhanced reef check surveys around the island to provide an overview of the current status of the coral reefs of Montserrat and map marine habitats. With preliminary research findings to date suggesting that the coral reefs are healthy and growing, the emerging issue is how to protect this pristine marine environment.

Recently, the Waite Institute has initiated ‘The Blue Halo Initiative’ on Montserrat, a programme focused on developing and implementing science-based, community-driven coastal policies and practices

4.1.3 Cultural Heritage

Although known sites of archaeological and cultural heritage are relatively few in North Montserrat, new interesting sites are being discovered and subject to investigation.

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 a previous development plan (TDP 2), measures were 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.

4.1.4 Settlements and Communities

Settlements

Montserrat's population 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.

Communities

The more active geographic community groups are concentrated in Davy Hill, Lookout, Cudjoe Head, Brades, and St. Peters. In addition, there are community groups which are not geographically specific, including church groups, sports groups, Rotary, Spanish-speaking groups, and an increasing number of groups speaking French patois.



4.2 ECONOMIC INFRASTRUCTURE – PORTS, ROADS, UTILITIES, TELECOMMUNICATIONS

4.2.1 Airport Facilities

The John A. Osborne Airport has a runway length of 600m (1,968ft) in length, capable of accommodating the 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 cafe.



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.

Issues and Constraints

Existing capacity bottlenecks in the inward immigration area restrict the number of flights per hour to three for six-seater planes (compared with a theoretical runway capacity of 30 flights per hour). Currently, there is only one immigration officer to handle arrivals and departures. Capacity could be increased through digitalization of passport processing.

Other constraints are the limited facilities for screening outbound baggage and the customs procedures for inbound baggage.

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. This is most noticeable in the unkempt appearance of the car park

The airport terminal is also in need of maintenance. Cracks are apparent on the access stairs to the roof of the terminal building.

Airport not fully utilized

Limiting the airport to day use only, means an underutilized asset. Especially in the winter months, Fly Montserrat cannot land after 5.45 pm, which makes getting afternoon arriving passengers from Antigua to Montserrat challenging. The relatively low cost of certifying the airport for night use would improve the passenger experience to Montserrat as well as making the airport more viable, and eliminating the necessity of night stops in Antigua.

4.2.2 Seaport Facilities

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.



Issues and Constraints

The current jetty was originally built 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.



4.2.3 Roads

In general, the road system is good and reasonably well maintained.

Some access roads to beaches and other attractions are in need of improvement, particularly the roads to Isles Bay beach, Garibaldi Hill, Silver Hills and between Blake's Estate and Jack Boy Hill.

Compared with some other islands (e.g. Saba), the view of the roadside for the passing motorist often appears somewhat 'unkempt' 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.

4.2.4 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.

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.

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 enter service in early 2016.

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, primarily geothermal.

DFID is supporting the drilling of a third geothermal well in 2016, intended to increase the potential yield of geothermal energy available on the island. The possible yield from the two wells drilled in 2013 is estimated at about 1.5MW each.

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.

However, if tourism demands were to increase significantly, some 'water demand management measures' could be needed. Very large establishments with high water consumption, including tourism establishments, might need to have backup water resources to cater for their needs in times of shortage.

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 inflammable items. The landfill currently does not have enough cover material and is unsightly for users of the Katy Hill trail network.

4.2.5 Telecommunications

Montserrat has a modern and recently liberalized telecommunications infrastructure. Land line, mobile phone, internet and island-wide Wi-Fi internet services are provided by two companies, FLOW and Digicel. 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 was formerly a landing point for the East Caribbean Fibre System (ECFS) fibre optic submarine communications cable, with links to other islands in the eastern Caribbean. These links were severed in 1997. Currently, Montserrat depends upon a micro wave

satellite connection to Antigua (operated by FLOW). As a result, telecommunication costs are comparatively high and the speed of transmission slow.

However, the situation is expected to improve significantly with the laying of new fibre optic cables linking Montserrat to Antigua and other islands by mid 2016.

4.3 ACCESS SERVICES, ACCOMMODATION AND VISITOR ATTRACTIONS

4.3.1 Air and Sea Access Transport Services

Visitor arrivals by mode of transport are shown in Table 4.1.

Table 4.1: Visitor Arrivals by Mode of Transport, 2007 - 2015

Mode of Transport	2007	2008	2009	2010	2011	2012	2013	2014	2015
A. Air									
Stay-over arrivals	7,667	6,800	5,599	5,070	4,067	4,128	4,454	4,074	4,108
Excursionists	903	784	617	799	978	1,268	360	373	306
Total A	8,570	7,584	6,216	5,869	5,045	5,396	4,814	4,447	4,414
B. Sea									
Stay-over arrivals	79	560	712	911	1,328	3,182	2,747	4,730	4,836
Excursionists	65	175	407	927	1,019	1,338	1,160	1,376	1,434
Total B	144	735	1,119	1,838	2,347	4,520	3,907	6,106	6,270
Total A + B	8,714	8,319	7,335	7,707	8,720	9,916	8,721	10,553	10,684

Source: Statistics Dept., MoFEDT&C,

Currently, the split between air and sea modes of transport for stay-over arrivals is about 50:50.

However, as shown on Table 4.1 above, the numbers of tourists arriving by air has declined from just under 8,000 in 2007 to around 4,100 in 2011 and has remained more or less at this level since then. A major reason for the drop in arrivals by air was the cessation by Winair of its services to Montserrat in 2011. The other reason has been the reduced schedule provided by ABMAIR (a sister company of SVG Air).

In 2011 an all-year round ferry service (as opposed to 7 months in 2010) was introduced. As a result, tourist arrivals by sea increased significantly in 2012 (also boosted by the 50th Celebrations of Montserrat's Festival), and have increased since then.

The number of excursionists arriving by air has decreased over the years, whereas those arriving by sea have increased.

Generally speaking, 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.

4.3.2 Air Access

Scheduled Air Services

Scheduled air services are provided by Montserrat Airways and ABMAIR. Between them they provide 4 flights daily in each direction between Antigua and Montserrat.

Table 4.2: Scheduled Air Services (Sept, 2015)

Carrier	Type of Aircraft	Capacity (No. of seats)	Arriving from	Departing to	Frequency
Montserrat Airways Limited	BN2 Islander	9	Antigua (scheduled)	Antigua (scheduled)	6 movements daily (average)
ABMAIR	BN2 Islander	9	Antigua (scheduled)	Antigua (scheduled)	2 movements daily

Passenger Movements

Table 4.3: Passenger Movements

Year	2010	2011	2012	2013	2014	2015
No. of Aircraft movements	2,837	3,738				
No. of Arriving Passengers	10,880	8,821	8,899	7,831	6,574	6,465
No. of Departing Passengers	11,180	9,789	9,396	9,106	7,185	7,431

Source: Statistics Dept, , MoFEDT&C.

Comparative Air Fares

The airfare for the trip from Antigua to Montserrat is US\$116.0 (about EC\$300), including taxes and other charges. As shown on Table 4.4, airfares to short haul destinations vary widely. Excluding both the premium and promotional fare, an 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.

That the Antigua – Montserrat fare is reasonably competitive is partly due to the seat guarantees provided by the GoM. However, in this respect it is worthwhile noting that other intra-Caribbean routes also receive subsidies/seat guarantee

Table 4.4: Comparative (One-Way) Air Fares (US\$), 2015

Hub	Fare (US\$)			Flight Time (Min)	Fare /Minute (\$)
	Base Fare*	Taxes/Charges	Total		
A. St. Maarten To:					
St. Barts (SBH)	95.0	61.9	156.9	15	10.5
Saba	65.0	47.9	112.9	15	7.5
B. Antigua To:					
Barbuda (BBQ)**	n/a	n/a	64.8	20	3.2
Montserrat**	n/a	n/a	116.0	20	5.8
Dominica	150.0	70.0	220.0	40	5.5
St.Kitts	72.3	73.0	145.3	30	4.8
C. Other:					
Dominica - Guadeloupe	85.0	23.9	108.9	30	3.6
St. Lucia – Martinique	109.0	75.4	184.4	25	7.4

*Sources: WINAIR and LIAT websites as at Sept 2015 **Fly Montserrat*

It is recognised that the fare per minute of flight time does not give the whole picture when looking at comparative fares between destinations. Factors such as size of aircraft, airport landing charges and subsidies etc, are not taken into account. Nevertheless, from the passenger perspective, it is the fare and time taken which matters. In this context the fare structure to Montserrat is competitive.

Air Access Issues

Based on the findings of previous studies (Access Strategy Report, 2011); discussions with tour operators and market representatives in 2012 and recent stakeholder meetings (August, & November, 2015; February, 2016) with stakeholders in Montserrat, 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
 - Fly Montserrat and SVG services not included in the major airlines' GDS (Global Distribution Systems) or the LIAT network.

4.3.3 SEA ACCESS

Passenger Movements

Table 4.5: Passenger Movements

Year	2010	2011	2012	2013	2014	2015
No. of Ferry-Boat movements	218	458	460			
No. of Arriving Passengers	3,174	4,676	7,116	7,595	10,953	12,013
No. of Departing Passengers	2,981	3,975	5,020	7,836	9,842	11,134

Source: Statistics Dept, , MoFEDT&C,

Scheduled Services

Since 2011/2012, the ferry service operates all year round

Table 4.6: Scheduled Sea Services

Operator	Type of Ferry Craft	Capacity (No. of seats)	ANU-MNI	Frequency
M&M Transportation	Monohaul passenger ferry	120	Sun, Wed & Fri Thur & Sat Mon & Tues (except December 15 – January 15 and St. Patrick's week when it runs 6 days weekly.)	0900 & 1900 1800 No service

The journey takes about 90 minutes.

Fares

The fare is EC\$ 150 (approx. US\$ 55.5) one-way

Ferry Access Issues

- infrequent service
- very slow making the journey - one way 90 minutes
- Although possible to make a day trip from Antigua to Montserrat three days during week (Sun, Wed and Fri) the departure timings from both Antigua and Montserrat leave very little time to see the island. The ferry departs at 0900 from ANU and arrives in MNI at 1030. The return trip departs at 1630, which means an excursionist has only about 4 hours on island as passengers are asked to check-in 90 minutes in advance of the departure time. Moreover, it should be noted that the departure time of the ferry (0900) from Antigua does not facilitate cruise ship passengers wishing to travel to Montserrat, as they rarely disembark the cruise ship before 0830/0900.
- Passengers have expressed numerous other complaints about their treatment and the quality of service.

New Ferry Service

A new hybrid (passenger and cargo) ferry that would reduce travelling times to/from Antigua is planned to be in-service from early 2018.

4.3.4 TOURIST ACCOMMODATION, FACILITIES AND SERVICES

The following overview of the tourism sector is based on the Visit Montserrat Road Map & Guide and the Consultant's own fieldwork.

Table 4.7 Structure of the Montserrat Tourism Sector Facility/Service, 1994-2015

Facility/Service	1994		2002		2012		2015	
	Units	Bedrooms	Units	Bedrooms	Units	Bedrooms	Units	Bedrooms
Hotels	3	116	1	16	1	16	1	16
Guesthouses/B&B		178	5) 65)	222	11	48	7	42
Apts & Villas		1,123						
- Apartments					18	37	16	32
- Villas					58	146	52	140
Other	-	-	-	-	1	2		
Sub-total	n.a.	1,417	71	240	89	249	76	230
Restaurants			10		16		13	
Snakettes							19	
Craft/Gift shops			7		5		14	
Car Rental			12		15		15	
Taxi/Guide			32		31		26	
Ground Tour Companies			7		1		1	

Source: Tourism Division and Consultant's estimates

Accommodation

Currently, the total saleable accommodation capacity is estimated to be 230 rooms, about the same as in 2002, but less than one-sixth 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 172 in 2015.

Due to volcanic activity in October 2002, the exclusion zone was extended to include a large number of villas as well as the 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.

On the basis of an average annual room occupancy rate of between 35% and 45% (as currently being achieved in Dominica and Saba), for 'market ready paid-serviced' accommodation, the maximum 'effective' number of stay-over visitors that can be accommodated per year is about 4,500 (on the assumption of 1.6 sleepers per room and average length of stay of 11 nights). As Montserrat currently receives about 3,300 stay-over visitors staying in 'paid-serviced accommodation', the possibility of significantly increasing the number of stay-over arrivals is severely constrained by the shortage of accommodation plant.

Restaurants

The Visit Montserrat Road Map & Guide lists 13 full service restaurants (excluding snakettes and takeaway outlets). Of these, approximately only half could be considered to be of tourist standard. Décor is simple - 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.

Meetings and Conferences

Currently, the only venue where significant conference/meetings can be convened is the Cultural Centre. The auditorium at the Cultural Centre 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.

However, the size and layout of the rooms at the Cultural Centre are, understandably, not really suitable for the small (regional) conference/meetings market.

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. With few visitors, 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.



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, most with only one vehicle.

Taxis: 26 listed taxi-guide services (which is more than adequate to cater for current visitor numbers) of which the majority are members of the Tour and Taxi Association. Tariffs are high; the quality of vehicles often poor; and the quality of guiding varies.

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.

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 access.

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. The most 'active' ground tour operator on Montserrat is R T Travel & Tours

Sport/Recreational Facilities

Montserrat now has some good standard sport/recreational facilities. An indoor sports facility (gym, basketball), has been constructed close to the Cultural Centre at Little Bay. A well appointed football stadium is at Blakes and, there are plans to have a 24 room hotel in which to accommodate visiting teams. Salem has good cricket grounds with pavilion and player facilities. And there is also a cricket pitch at Little Bay, which is now also used for athletics. Salem also has tennis courts.



Visitor Information and Facilitation

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).

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. However, this can be inconvenient for visitors arriving by sea (ferry passengers and yachts people), who may not have the necessary local currency to hire a taxi to the bank. Additionally, there can be congestion at the banks, especially when large numbers arrive from Guadeloupe and wish to obtain local currency.

Medical Services: medical services are provided at the Glendon Hospital in St John's, which has limited facilities. The planned redevelopment and expansion of the facility has been delayed.

For serious conditions, patients have to travel to Antigua (or further afield), either by ferry or by air. In this regard, it should be noted that despite the lack of facilities for night landings, emergency evacuations by air are possible. Fly Montserrat has made a number of such emergency flights.

For divers, the nearest recompression chambers are in Dominica or Saba.

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).

4.3.5 VISITOR ATTRACTIONS AND THING-TO-SEE-AND-DO

As illustrated on the following map, Montserrat has a range of things-to-see-and-do....including hiking, scuba diving, fishing, tours to the volcano, botanical gardens, museum and festivals. According to Planetware, the 12 Top-Rated Tourist Attractions in Montserrat are:

Soufriere Hills Volcano	Woodlands Bay
Rendezvous Bay	Little Bay Waterfront
Montserrat Volcano Observatory	Montserrat National Trust
Montserrat Hiking Trails	Runaway Ghaut
Centre Hills Tropical Rain Forest	Scuba Diving
Montserrat Cultural Centre	Montserrat Festivals

Montserrat has, of course, many more attractions than those listed above. These are outlined in Annex 26.

Map 4.1 Montserrat's Tourism Resources



KEY

■ Dive Sites

Trails 14

1. Baker Hill to Katy Hill
2. Big River
3. Blackwood Allen
4. Dry Waterfall
5. Duberry-Cassava
6. Jack Boy Hill
7. Jack Boy-Katy Connector
8. Katy Hill North
9. Katy Hill South
10. Oriole Walkway
11. Rendezvous
12. Rendezvous Beach
13. The Cot
14. Underwood

● Beaches

☾ Little Bay

★ Windmill

● Air Studio

● MVO

● MNT

● Little Bay

a. Museum

b. Cultural Centre

✈ Airport

■ Hotels

■ Villas

● Sports Complex

🚢 Ferry Port

Centre Hills Tropical Rain Forest

Montserrat is one of the few islands in the Caribbean which has a tropical rain forest. In the Commonwealth Caribbean only Dominica can boast of having a tropical rain forest. As describe in Planetware.com, most of Montserrat's 34 species of land birds and large numbers of migrant songbirds make this area their home, including Montserrat's national bird, the Montserrat Oriole, the rare Forest Thrush, the Bridled Quail Dove and the Mangrove Cuckoo. The Centre Hills is also home to many species of reptiles and amphibians.

Montserrat Cultural Centre

The Montserrat Cultural Centre is a multi-purpose performing arts centre, created by the ex-Beatles producer, Sir George Martin. The Wall of Fame features bronze handprints of famous musicians who recorded music on Montserrat during the 1980s, including Elton John and Paul McCartney.

Woodlands Beach

Woodlands Beach has a covered picnic area on the cliff above the beach and other amenities. It is also a good place from which to spot migrating whales.

Little Bay Beach and Waterfront

Little Bay is popular with locals as well as visitors, and has a number of beach bars, restaurants and snackettes. The waters are calm and it's a safe place for swimming. However, the showers and changing areas are in need of upgrading; there is also need for more attention to landscaping and physical enhancement of the dining environment, etc.



Montserrat 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 *Rondeletia Buxifolia*, which belongs to 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 to trace their Montserrat roots); and a small gift shop.



Amerindian Garden



Botanic Garden

Scuba 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 areas stretch from Old Road Bluff in the west around the northern shore line 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 13 are permanently moored dive sites. Currently, only 5 of the moored sites are functioning, due to inadequate maintenance.

Dive visitors are also taken to sites around Redonda (officially part of Antigua & Barbuda).



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.

Montserrat National Museum

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

Montserrat 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 of Montserratians 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.

4.4 ENABLING ENVIRONMENT

4.4.1 Tourism HRD and Training

Montserrat suffers from 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.

The challenge facing the sector 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 trainers covering all aspects of service...from cookery to customer care.

4.4.2 Institutional Arrangements

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.

Ministries/Departments	Role
Office of the Premier	<ul style="list-style-type: none">• tourism• culture• customs & immigration
Finance, Economic Management	<ul style="list-style-type: none">• national planning, budgets• statistics
Agriculture, Lands, Housing & Environment	<ul style="list-style-type: none">• physical planning• marine
Education, Health & Community Services	<ul style="list-style-type: none">• training• youth affairs & sports
Communications & Works	<ul style="list-style-type: none">• infrastructure• airport, seaport

Tourism Division

Tourism comes under the responsibility of the Premier's Office – there is no Ministry for Tourism as such. With the dissolution of the MTB, the staff (3) have been designated as constituting a tourism unit within the Premier's Office.

The Tourism Division has assumed the role/responsibilities of the former MTB in undertaking:

- Advertising & PR activities
- Production and distribution of collaterals
- Organisation of journalists' visits
- Participation at tourism fairs
- Administration of the web site: www.visitmontserrat.com
- Visitor information services
- Facilitation of cruise ship calls
- Maintenance of amenities, sites and attractions

Montserrat Arts Council

Broadly speaking, the mandate of the Arts Council 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 Council 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 of folklore, stories, songs, sayings, games. The Council also publishes a quarterly newsletter.

The Council has 4 staff members. The most senior officer is the Culture Coordinator. The other posts are Events Coordinator; Cultural Officer and Clerical Officer.

State-Owned Enterprises and Organisations

With the dissolution of the MDC, the State Owned Enterprises (SOE's) relevant to tourism are the:

- Montserrat National Trust (MNT),
- Montserrat Volcano Observatory (MVO) and the
- Montserrat Port Authority

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.

The MNT is responsible for the management of the Museum at Little Bay (its office, museum and gift shop) and the maintenance of a number of trails. However, its operations are severely constrained by lack of resources.

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. As mentioned earlier, the MVO also functions as an interpretative centre for visitors.

Montserrat Port Authority

The Montserrat Port Authority is responsible for the operation and management of Little Bay port.

Private Sector

The active associations relating to tourism are the

- Montserrat Chamber of Commerce
- Montserrat Tour and Taxi Association

4.4.3 Laws and Regulations

The formation of institutional structures and the execution of tourism policy and strategy by these structures requires enabling legislation. The scope of such legislation is dictated by the needs of tourism development as defined by policy objectives and strategy, and the range of executive functions required to implement these.

There are three main areas to be addressed:

- the enabling legislation for the national tourist organisation
- the regulatory framework for the industry; and
- environmental legislation

Legislation for a National Tourist Organisation

The need to have appropriate enabling legislation for a national tourist organisation is self-evident. The organisation must have a legal basis for its existence and the powers, rights and obligations which it exercises.

The former MTB was established under the Ordinance of 1993, which was repealed and the staff assigned to the (former) Montserrat Development Corporation. Following the dissolution of the MDC, the staff were assigned to the Office of the Premier.

Regulations for the Industry

The purpose of regulatory legislation is to:

- provide an environment in which business may be carried out within the framework of law
- provides mechanisms for arbitration in the event of disagreement
- provide consumer protection
- ensure health and safety

To be effective, legislation must be transparent, equitably enforced, relevant and conducive to the development of business.

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 etc), travel agents and 'ground' tour operators. The MTB ordinance (now repealed) provided for the enactment of the registration and grading of hotel and other tourist accommodation and facilities catering for tourists;

4.4.4 Business Environment

Montserrat's tourism sector is composed of small and medium sized enterprises (SMEs). Given the nature of the Montserratian tourism product, SMEs are likely to continue to dominate in the future. Consequently, it is very important that a business climate conducive for SMEs is established.

Fiscal incentives

Fiscal incentives are available to hotels under the 'Hotel Aids Ordinance'. In the main, these comprise of

- 5 year income tax exemption period
- capital allowances
- exemption from customs duties on imports of building materials and equipment

Although other tourism sub-sectors do not qualify for these fiscal incentives, they can qualify for a package of incentives under the Micro & Small Business Development Act, 1999.

Small Enterprise Support

The purpose of the Micro & Small Business Development Act, which now includes services, is to facilitate the establishment of small enterprises as a means of encouraging self-employment, income generation, import substitution, exports, foreign exchange earnings and savings. An enterprise declared as a small business under the Act can qualify for exemption from income tax on the income derived from that enterprise;

exemption from customs duties, consumption tax, customs service tax; funds and technical assistance made available by Government for the development of Micro & Small businesses.

4.5 SECTOR MANAGEMENT

4.5.1 Destination Marketing

Marketing Budget

In 2011, the former MTB had a budget of about EC\$2M, of which approximately 70% was spent on advertising, PR and other promotional activities; the balance of 30% was spent on product development (such as contribution to the MNT for upkeep of hiking trails) training and administration.

With the dissolution of the MTB, the destination marketing budget has been cut-back to a figure of about EC\$ 180,000, which can only cover short term interventions and severely limits the amount of promotional activities that can be undertaken. However, it should be noted that these monies have been used to generate considerable favourable publicity for Montserrat, in the US and other markets.

Market Representation

Also with the dissolution of the MTB and the budget cut-back, Montserrat no longer employs PR representatives in Guadeloupe, UK and Germany. Contracted assistants are used on a temporary basis in Antigua and the US.

Collaterals

Effective marketing requires a range of destination collateralsbrochures, guides, product sheets, press kits and other promotional literature....both in hard copy and downloadable from the country's website. Montserrat no longer has sufficient collaterals.

Montserrat's Website

Today, a tourist destination's website is probably one of its more important marketing tools to raise awareness and attract visitors, particularly for the smaller destinations which don't have big marketing budgets. For Montserrat, this is especially 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.

Montserrat's web site is simple, with many attractive images. However, there are a number of significant shortcomings which need to be addressed, the more important being:

- Some of the images are ambiguous such as the broken, rusting dump truck which suggests Montserrat doesn't care about either environmental degradation or scenic beauty
- Very little information provided on the island's attractions etc...viewer has to go elsewhere to find information on, for example, the ferry timetable
- No map of Montserrat showing points of interest, place names, roads,etc.
- Tag lines (Be Spellbound by the Gritty; Be Soothed by the Green; Go Off the Grid etc) are ambiguous and not immediately reflecting or identifying with Montserrat's appeals.

These issues are currently being addressed and a revised website is being designed.

4.5.2 Policies, Planning and Research

Policies

Montserrat does not have a set of policy guidelines for the tourism sector.

Planning

Over the last decade or so a number of development plans have been prepared for the tourism sector including the Tourism Master Plan 2003; and three Tourism Development Plans (TDPs 1, 2 and 3).

The TDP 2 covered the period 2008 to 2012, the main components of which covered:

- Capacity building
- Visitor access improvements
- Visitor attractions
- Destination marketing
- Tourism Challenge Fund.

To a large extent TDP 2 was implemented according to plan. Four capacity building programmes were completed and there were significant improvements to visitor access and facilitation. Some eight visitor attractions improvements were undertaken and all the destination marketing activities were implemented, including the production of collaterals, appointment of representative agencies, participation at tourism fairs, upgrading of website and travel trade promotions. The Tourism Challenge Fund supported 26 projects, of which between 30% and 40% were considered successful, a result regarded as being a good outcome by funding agencies.

TDP 3, covering the period 2012 – 2015, was prepared but not implemented due to changed circumstances and lack of support funding.

Market Research

With the exception of the information derived from the Entry/Exit cards, no market research has been undertaken in recent years to generate data on the characteristics of visitors to Montserrat...what they do, spend, composition of party etc.

Although web statistics can provide very useful information on viewers, effectiveness of promotional campaigns etc., they are not collected. A Google analytics statistics tracker was set up for www.visitmontserrat.com but has not been used.

4.5.3 Product Development

With support funding under TDP 2, considerable product development activities were carried out. The quality of certain visitor attractions were improved, notably the Woodlands Beach facility, the rejuvenation of the hiking trails, the Amerindian Garden at the Botanic Garden, and the construction of the National Museum at Little Bay.

The operation of the Tourism Challenge Fund supported the start-up of a new airline (Fly Montserrat); the opening of Olveston House guest house; the annual Literary Festival and the rejuvenation of the marine habitat at Woodlands Beach.

As TDP 3 did not go ahead, product development has been at a standstill since 2012. Moreover, it should be noted that, despite the efforts of the now defunct Montserrat Development Corporation, no new foreign or local direct investment has been attracted to the tourism sector in recent years.

4.5.4 Environmental Management

One of Montserrat's core attractions is its natural environment, particularly the Central Hills Forest Reserve, the Silver Hills Forest Reserve and the reef and marine system. There are a number of concerns about current environmental management ranging from the need to strengthen the regulatory framework to protecting the marine environment.

5. DESTINATION MONTSERRAT – WHAT THE MARKET THINKS

In 2012 as part of the Consultants' (CHL) fieldwork, all the tour operators and market representatives indicated on the MTB website as representing/featuring Montserrat were contacted to discuss their views on Montserrat's competitive position in the market. Their views are still relevant today.

5.1 EXPOSURE IN THE MARKET PLACE

Five years ago Montserrat was featured by a handful of tour operators worldwide, 4 on Antigua; 1 in the UK (Motmot Travel); 1 in Germany (Caribicinseln); and 1 in Canada (Total Vacations). Now, Montserrat is only featured by the Antiguan operators and Motmot Travel in the UK.

The implication is that, in effect, Montserrat has no exposure in the marketplace. As there is no product on offer, any main-stream destination marketing activities using traditional channels of distribution are largely ineffective.

With the cutback in the marketing budget, there is an almost complete lack of awareness of Montserrat in the marketplace. However, this is now being addressed.

5.2 MONTSERRAT'S IMAGE IN THE MARKET

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. However, the image of the volcano is more a vague memory than something that is in the forefront of many people's minds. Also, without any flagship or branded hotel/resort the image has suffered.

5.3 NICHE MARKETS OR CUSTOMER SEGMENTS TO BE TARGETED

According to those interviewed, Montserrat should target the following niche markets:

- 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 – Montserrat has a well-developed network of trails
- Bird watchers
- Volcano enthusiasts and those generally interested in volcanoes

5.4 MONTSERRAT'S MAIN CONSTRAINTS IN ATTRACTING VISITORS FROM THESE MARKET/CUSTOMER SEGMENTS

Based on the responses, Montserrat's major constraints to generating visitor traffic may be summarised as follows:

- Totally inadequate ferry service – the vessel is inadequate, the journey time is too long, the service infrequent
- An air services using 6 seater-planes - potential first time visitors are reluctant to use them because of concerns about size/safety
- Insufficient 'market ready' Hotel/Guesthouse accommodation for 'high-end' tourists. Only Olveston House and a few Guesthouses/B&B establishments 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.
- Good quality villas available, but not enough of them

- 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. Lawrence Gap in Barbados, where visitors and locals congregate.
- No compelling reasons to visit Montserrat

5.5 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

The market representatives were unanimous in their opinion 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', capitalizing on its

- Peace and tranquillity
- Timelessness
- Safety and security
- Friendly and welcoming people
- Undiscovered
- Affordable luxury
- 'Greenness' '....natural, unspoilt environment

5.6 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 Inns similar to those on St. Kitts/Nevis
- Villas – high quality, with a range of services.

The market representatives emphasised that it is the smaller sized accommodation units that would be 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 on Montserrat

5.7 VALUE FOR MONEY

Because of the lack of any market research in recent years, there are no current indicators as to whether Montserrat offers the visitor 'value for money'.

The issue of value for money was addressed in the MTB 2010/2011 Visitor Exit survey and the findings were that, overall visitors rated Montserrat as being good value for money (scoring 3.9 out of 5). Accommodations were rated as very good value (scoring 4.2 out of 5), followed by meals and drinks (3.9). The ratings were consistent across the three main geographic markets. Accommodation rates, particularly for villas and guesthouses, were very competitive compared to similar offerings in other Caribbean islands.

6. SWOT ASSESSMENT

Based on the review of the tourism product as outlined in Ch 4, along with the feedback from the stakeholders' meetings held in August and November of 2015 and in February 2016, the competitive strengths and weaknesses of Montserrat tourism are summarized in respect of:

- Access Transport
- Infrastructure
- Tourism product
- Environmental Management
- Skill Levels and Training
- Sector Management
- Destination Marketing

Access Transport Services

- Strengths and Opportunities
 - two airlines providing scheduled services
 - basic sea ferry service
 - possible to interline with international carriers, but expensive
- Weakness and Threats
 - smaller aircraft (Islander) off putting for potential tourists
 - quality of ferry service poor; vessel inadequate; journey time too long; service infrequent; poor customer service

Infrastructure

- Strengths and Opportunities
 - simple road network in good condition
 - basic airport infrastructure
 - good utilities services
 - reasonable telecommunications/internet service
- Weakness and Threats
 - particular roads in need of repair
 - road markings inadequate in places
 - airport terminal needs upgrade/maintenance
 - no breakwater to protect from sea surges

Tourism Product

- Strengths and Opportunities
 - space for product expansion
 - good cuisine in a number of eateries
 - good quality residential (villa) tourism product
 - range of eco –tourism product possibilities
 - established and popular festivals
 - safe and secure environment for residents and visitors
- Weakness and Threats
 - inadequate supply of accommodation
 - insufficient things to-see-and-do
 - no focal points/'peoples places'
 - insurance a problem for properties in day-time exclusion zones

Environmental Management

- Strengths and Opportunities
 - good year round climate
 - pristine environment in many places
- Weakness and Threats
 - fly-tipping
 - poor planning
 - marine environment under threat

Skill Levels and Training

- Strengths and Opportunities
 - closely knit and resilient community
 - friendly service
- Weakness and Threats
 - shortage of trained personnel
 - capacity of training institutions inadequate to meet present and future needs

Sector Management

- Strengths and Opportunities
 - skilled and experienced cadre of ministry officials
 - many of necessary laws and regulations in place
- Weakness and Threats
 - no tourism policy
 - no national tourism organisation
 - inadequate regulatory framework
 - immigration/customs procedures cumbersome

Destination Marketing

- Strengths and Opportunities
 - niche market appeal
 - large excursionist markets nearby
 - cruise market significant potential
- Weakness and Threats
 - inadequate budget for destination marketing
 - no collaterals
 - no representation in markets
 - poor website
 - inadequate use of e-marketing

PART II TOURISM VISION AND DEVELOPMENT PLANNING FRAMEWORK

- 7. TOURISM VISION AND GUIDING PRINCIPLES**
- 8. TOURISM DEVELOPMENT STRUCTURE PLAN 2025**
- 9. DEVELOPMENT PLANNING – LESSONS FROM RECENT EXPERIENCE
AND A COMPARABLE DESTINATION**
- 10. MARKET AND PRODUCT DEVELOPMENT POTENTIAL**

7. TOURISM VISION AND GUIDING PRINCIPLES

7.1 MONTSERRAT'S UNIQUENESS

Our fieldwork research, supported by the deliberations of the Stakeholder's Workshop (4th Nov, 2015), and the feedback from tour operators and market representatives suggests that Montserrat's uniqueness lies in its:

- 'greenness'natural unspoilt environment
- peace and tranquillity – get away from it all;
- safety and security;
- warm, welcoming, friendly people;
- affordable luxury;
- intimacy – a private hideaway – no mass tourism, and
- authenticity, with a distinctive cultural heritage.

There is a feeling of 'harmony' about Montserrat; the absence of traffic noise (pollution) conveying a sense of serenity. These are Montserrat's core strengths which must be maintained and enhanced.

7.2 A VISION FOR THE DEVELOPMENT OF TOURISM ON MONTSERRAT 2025

The workshop deliberations also addressed the issue of 'what kind of Montserrat do we want'. Based on the feedback from the stakeholders, the following vision statement for the development of tourism on Montserrat by 2025 was elaborated.

VISION STATEMENT

The foundations of Montserrat's rejuvenated tourism industry were established in 2016 with a development programme to put in place the necessary supporting access transport and economic infrastructure on the one hand and on the other, a rehabilitation and product development programme to encourage and support existing and emerging tourism enterprises.

Key to kick-starting the sustainable growth achieved over the last decade was the DFID funded construction and commissioning of a dedicated 'state of the art' fast ferry between Antigua and Montserrat. With the journey time cut to less than an hour it made possible a schedule facilitating both stay-over and excursionists visiting the island. Passenger terminal facilities in Antigua and Little Bay were improved and immigration procedures streamlined.

Recognising that rough seas could disrupt the ferry schedules, a breakwater was constructed in 2017 at Little Bay providing not only protection from these sea surges but also enabling the development of a marina and associated yachting facilities. Montserrat is now an important yachting destination. The breakwater also facilitated the development of a fishing village, which is not only a tourist attraction in itself, but is a centre for fishing expeditions and sea sightseeing trips.

The impetus to the growth in visitor numbers as a result of the new ferry and expanded tourism product generated demand for increased air access capacity, which was provided by a larger sized aircraft (twin-otter) on the routes to Montserrat. To cater for the increased air passenger traffic, the airport terminal was given a 'face-lift' and upgraded to include improved baggage handling, night time landings, hanger and fuel supply, and improved visitor facilitation.

With foresight, the Government recognised that the key to developing tourism in an integrated way was to designate Tourism Centres which would act as focal points and 'people places' for both residents and tourists to meet, relax and enjoy Montserrat's unique ambience of peace and harmony. The designated Tourism Centres are at Little Baynow a key waterfront attraction, with beach, boardwalk, eateries, marina and fishing village; Salem....now an established heritage village, with an attractive people's plaza containing eateries, retail outlets, and which also doubles as the focal point for a number of festivals, including the now well established and popular Afro-Caribbean Music Festival. Plymouth's Clock Tower, rescued from the ruins of old Plymouth is the centre piece of Salem's plaza, which is not only

of interest to visitors, but also a link with the past; and St. John's, which over the years has emerged as a 'Sports Village'....a focal point from which to start hiking in the Centre Hills, play golf at Blakes Estate, enjoy football games at the stadium.

Festivals continue to be a big tourist draw. Our Carnival is a major 'get-together' for the Montserratian diaspora, and now attracts not just first generation Montserratians, but second generation. The St. Patrick's Festival (a week-long celebration highlighting Montserrat's Irish heritage and local culture) has gone from strength to strength. Twinning with the St. Patrick's festivals in the Boston/New York Irish communities has given a whole new dimension to the celebrations with Irish/American bands and associated families/friends now coming to Montserrat for the festivities and Montserratian bands participating in the Boston/New York festivals. The Afro-Caribbean Music Festival has developed into a truly international event, with musicians and bands attracted not only from the Caribbean Basin Area and the US, but also from countries in Africa.

Early on it was recognised that shortage of financial resources was inhibiting investment in accommodation and visitor amenities. This was addressed by two imaginative Tourism Growth Funds, financed by DFID, which supported:

- a. the private sector to improve and rehabilitate existing and/or develop new accommodation on island, and
- b. tourism product enhancement to improve/develop tourism amenities and facilities on island.

The **Tourism Accommodation Growth Fund** provided the impetus to the rehabilitation of many villas which are the main stay of the accommodation sector, along with the rehabilitation of the Vue Pointe hotel which provides not just accommodation but also facilities for the small corporate meetings market. The stock of hotel accommodation has been further augmented by boutique hotels and associated villa developments at Rendezvous Bay, Woodlands, Blakes Estate, a health and wellness spa and an eco-tourism lodge bordering the Central Hills.

The **Tourism Product Enhancement Fund** has been key to the transformed range and quality of visitor amenities and facilities available on the island. With support from this scheme Montserrat now has:

- a. Salem Heritage Village, with a central plaza, quality eateries and bars
- b. Beautification and enhancement of Little Bay Beach and Waterfront, providing a sense of place for Montserrat, akin to St. Lawrence's Gap, in Barbados
- c. Beautification and enhancement of Carr's Bay Waterfront
- d. A nine hole golf course in the Fox's Bay area
- e. An eighteen hole golf course at Blakes Estate
- f. A Volcano Interpretative Centre at the MVO
- g. Series of interpretative panels on the old Plymouth and viewing platforms
- h. The Botanic Garden transformed to a Biopark, showcasing Montserrat's flora and fauna
- i. Improved exhibition at the Montserrat Museum and Heritage Park
- j. Montserrat hiking trails network
- k. Marine Park, with a network of protected dive sites
- l. Plymouth Volcano Reserve, with a network of walks for sightseeing, and
- m. GeoPark, showcasing Montserrat's unique geological resources

Underpinning the development of the tourism sector have been the improvements to the economic infrastructure on the island, particularly:

- a. The upgrading and expansion of the hospital, necessary not just for citizens, but also for the villa residential market,
- b. The restoration of the fibre optic cables in 2016 providing massively improved internet and telecommunications,
- c. Geo-thermal energy coming on-stream which has provided an indigenous source of energy at economic prices,
- d. Road improvements.....including signage, laybys for photo opportunities, and better visibility.

Arising from these developments, villa/residential tourism and golf is big business once again, but these days just as many go hiking, trekking, fishing and diving at the numerous pristine dive sites. Yachts' people are attracted to the marina at Little Bay which provides a sheltered haven.

A substantial number of day-visitors are attracted to Montserrat not only for the Volcano tours, but also to view the Biopark, which showcases the flora and fauna of Montserrat's tropical rain forest. The small cruise ship market has also returned which has boosted the market for handicrafts and along with the excursionists, has provided income and employment opportunities for the island's communities.

Population and employment have slowly risen but the crime and drug problems usually associated with tourism growth have been avoided. The range of programmes for protecting and nurturing the island's cultural patrimony have served not only to interest visitors, but also, together with associated educational and health programmes, have encouraged the return of investors and younger Montserratians to the island.

All in all, Montserrat, in the year 2025 is a great place to live. It has a stronger economy with less dependence on the British Government. It has good access, the island is well planned, its nature fully protected.

Tourists love Montserrat's clean, tranquil and peaceful atmosphere, the sense of safety and security which the island has managed to retain throughout the last 30 turbulent years. Above all, tourists love the slow, easy pace-of-life. Montserrat's slogan reflects its lifestyle –

Come to Montserrat, We Have Time For You.

7.3 MAIN POLICY GUIDELINES

Arising from the deliberations of the 4th November, 2015, Montserrat will be guided by several principles to shape how tourism is developed and managed to achieve the country's Vision for the sector. These guiding principles are as follows:

- (i) tourism policy and development programmes will be integrated with national economic, social and cultural policy;
- (ii) all tourism activity will be designed to improve the quality of life enjoyed by Montserrat's citizens;
- (iii) development of the tourism sector will be market-driven and private-sector-led;
- (iv) focus will be on 'low volume, high yield' tourism within the parameters of the island's absorptive capacity;
- (v) Government will foster a positive pro-business environment for the tourism sector; ;
- (vi) tourism sector planning and management will be based on partnerships and collaboration;
- (vii) local communities will play a meaningful role in the tourism sector, one that ensures economic, social and cultural benefits to each participating community;
- (viii) maintain and enhance Montserrat's pristine environment;
- (ix) tourism policies, programmes and standards to conform with the principles and directions required of the tourism sector arising from 'Green Globe and/or other certification programmes;
- (x) ensure safe and crime – free social environment for all, both visitors and residents alike.
- (xi) respect and support for Montserratian cultural heritage
- (xii) Provide a tourism experience that exceeds customer expectations in terms of friendliness, quality of the environment, iconic attractions and distinctive patrimony
- (xiii) Provide attractive career opportunities for Montserratians

The guiding principles are further developed and elaborated in the new National Tourism Policy Statement 2025.

Map 7.1 Montserrat Tourism Vision 2025



KEY

- | | | |
|----------------------------|-----------------------------------------------|------------------------|
| Dive Sites | Beaches | Hotels |
| Trails | Little Bay | Villas |
| 1. Baker Hill to Katy Hill | Windmill | Sports Complex |
| 2. Big River | Air Studio | Ferry Port |
| 3. Blackwood Allen | MVO | Moorings/Marina |
| 4. Dry Waterfall | MNT | Golf |
| 5. Duberry-Cassava | Little Bay
a. Museum
b. Cultural Centre | Salem Heritage Village |
| 6. Jack Boy Hill | Airport | Marine Park |
| 7. Jack Boy-Katy Connector | | |
| 8. Katy Hill North | | |
| 9. Katy Hill South | | |
| 10. Oriole Walkway | | |
| 11. Rendezvous | | |
| 12. Rendezvous Beach | | |
| 13. The Cot | | |
| 14. Underwood | | |

8. TOURISM DEVELOPMENT STRUCTURE PLAN 2025

8.1 TOURISM DEVELOPMENT CONCEPT

Three planning concepts are applied to the future development of tourism on Montserrat.

(i) **Tourism Development Areas (TDA)**

A TDA is an area that contains tourist attractions, accommodation and other tourist facilities and services, all well serviced by a road network. Designation of tourism development areas provides the basis for integrated planning of the area so that it functions efficiently and is relatively self-contained. From the planning perspective the importance of having designated TDAs is that they:

- Help create critical mass – making it economic to provide a range of facilities and services in an area.
- Diversify the product offer in a way that can be promoted to different niche markets, thereby facilitating product branding.
- Allow different forms of tourism development to co-exist – designating particular areas for nature tourism only, other areas for more intensive use.

It is important to emphasise that the designation of TDAs does not imply administrative zoning in any form. The TDAs are simply the frameworks for effective physical planning.

(ii) **Tourism Centres.....Poles of Attraction**

Within a TDA, it is desirable to designate or establish Tourism Centres or Poles of Attraction. The purpose is to provide a concentration of facilities, services and information for tourists. This makes it easier for the public and the private sectors to develop these facilities and services.

(iii) **Dispersed v Concentrated Development**

It is very important for Montserrat to develop a product which effectively integrates the attraction component, as well as a variety of events and activities, with the provision of accommodation. Currently, most of the island's accommodation and attractions are located towards the south of the island, as shown on Map 8.1.

A question that arose during stakeholders meetings was whether development should continue to be concentrated towards the south of the island or generally dispersed throughout the island, particularly towards the North.

While recognising the validity of this argument, two factors have to be borne in mind when considering the issue of concentrated versus dispersed development on Montserrat. The first factor is the need to maintain and strengthen the 'core values' of Montserrat which emerged from the 'visioning' workshop (Nov 4, 2015) with stakeholders. As outlined in the previous chapter, these core values include the need to maintain an authentic natural setting.

The second factor is that the development of tourism facilities and attractions is private sector driven. Developers will only locate facilities and attractions in areas they consider to be attractive to potential clients and are financially viable.

That said, a dispersed development approach is considered the most appropriate strategy for Montserrat's tourism sector.

Map 8.1 Spatial Distribution of Montserrat's Tourism Facilities



KEY

■ Dive Sites

Trails

1. Baker Hill to Katy Hill
2. Big River
3. Blackwood Allen
4. Dry Waterfall
5. Duberry-Cassava
6. Jack Boy Hill
7. Jack Boy-Katy Connector
8. Katy Hill North
9. Katy Hill South
10. Oriole Walkway
11. Rendezvous
12. Rendezvous Beach
13. The Cot
14. Underwood

● Beaches

☾ Little Bay

★ Windmill

● Air Studio

● MVO

● MNT

● Little Bay

a. Museum

b. Cultural Centre

✈ Airport

■ Hotels

■ Villas

● Sports Complex

🚢 Ferry Port

8.2 TOURISM DEVELOPMENT AREAS AND CENTRES

Based on the location of existing and potential tourism products and their spatial relationship with the island's ecological resource base and infrastructure, three Tourism Development Areas (TDAs) and associated Tourism Centres are recommended, as shown on Map 8.2.

Tourism Development Areas	Tourism Centres
North West Coast	Little Bay
West Coast	Salem
Highlands	St. John's

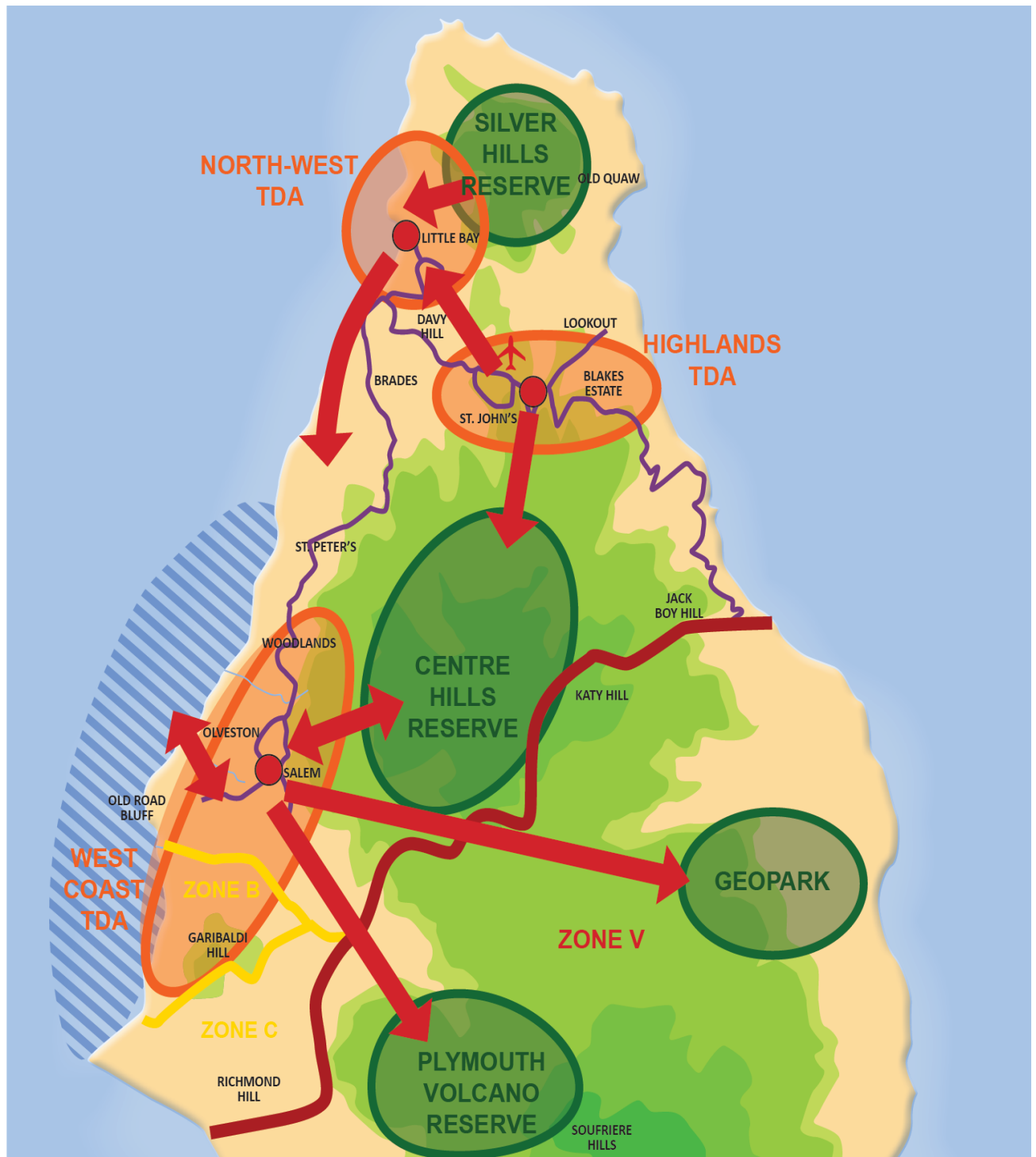
Within each of these development areas, the plan specifies the most appropriate products to be put in place, taking into account the area's geography, ecology and infrastructures as outlined in the following sections.

Boundaries of the TDAs will be defined along either administrative units or major topographical features. They will be areas in which Government policies and procedures on development of tourism and possible planning and development controls will apply to integrate tourism into the local environment and ensure the overall quality of the tourism products in the TDAs are maintained and enhanced.

It is recommended that for each TDA, an Action Plan is drawn up, the objectives of which are to:

- Protect and strengthen the existing product.
- Improve landscape and village/community scope features.
- Improve overall visitor experience.
- Enhance existing visitor attractions
- Develop new visitor attractions
- Indicate the limits of development
- Facilitate community involvement in developing tourism

Map 8.2 Montserrat Tourism Development Structure Plan



KEY

- | | |
|-------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ● Tourism Centre | — Roads |
| Tourism Development Area | Marine Park |
| Protected Areas | |

8.3 NORTH WEST COAST TDA

8.3.1 Tourism Product

The tourism product of the North West Coast TDA is characterised by:

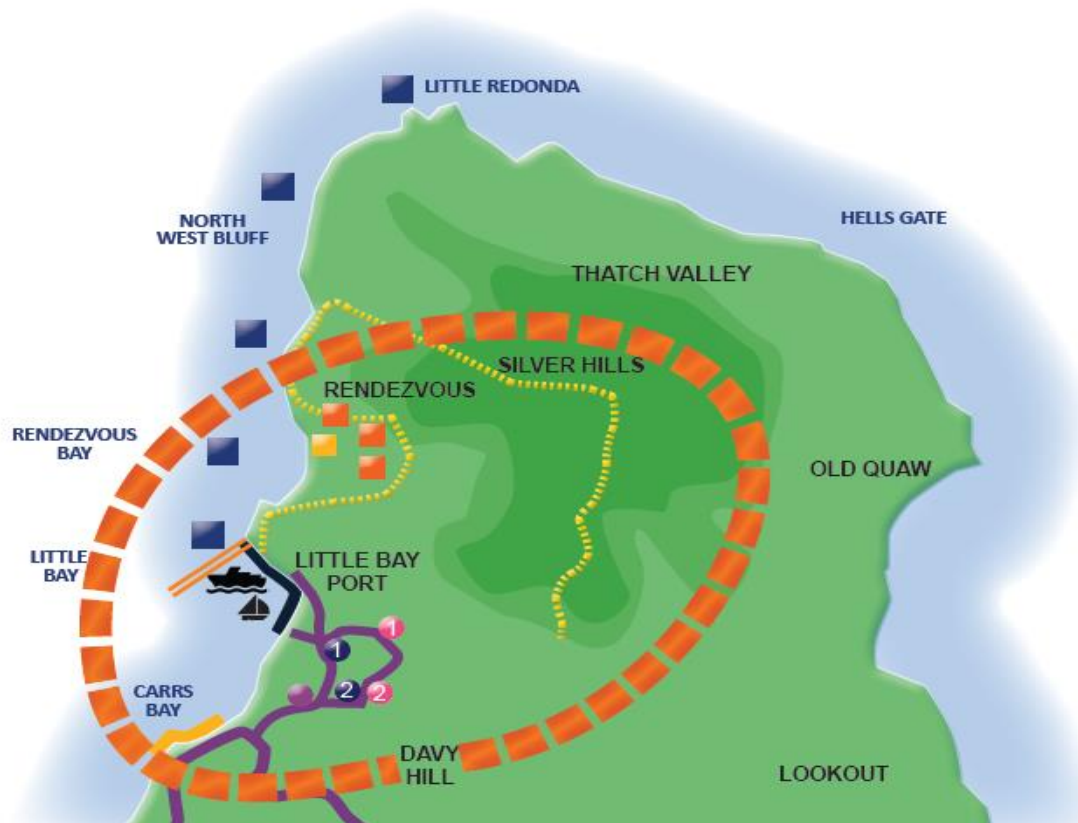
- The Silver Hills Forest Reserve, covering some 75 acres of dry forest, much of which is of outstanding landscape value, with a number of hiking trails.
- Rendezvous Bay, with one of Montserrat's more attractive beaches
- Dive sites at North West Bluff and Rendezvous Bay
- Little Bay beach, ideal for swimming
- Carr's Bay, heritage site
- Marine village with a number of restaurants/cafes
- Dive shops
- Jetty for the ferry and passenger terminal
- Multi purpose Sports Complex
- Cricket playing field
- Cultural Centre
- Museum

Currently, there are no accommodation facilities in the TDA.

8.3.2 Development Concept













For the North West Coast TDA, the proposed development concept is to establish the area as a 'top end' tourist destination, capitalising on its outstanding marine resource, with Little Bay as the Tourist Centre, as illustrated on Map 8.3.

Map 8.3 North West Coast TDA



NORTH WEST TDA

KEY:

	Dive Sites		Little Bay Playing Field
	Hiking Trail		Multi- Purpose Sports Complex
	Hotels		Museum
	Villas		Cultural Centre
	War Memorial		Carrs Bay Waterfront
	Breakwater		Little Bay Waterfront

The development initiatives and actions include:

Public Sector Infrastructure Investment

- Provision of a breakwater at Little Bay to provide shelter for the ferry and sheltered moorings for yachts
- Development of a marina
- Development of a road from Sweeney's/Gerald's to open up Rendezvous Bay area

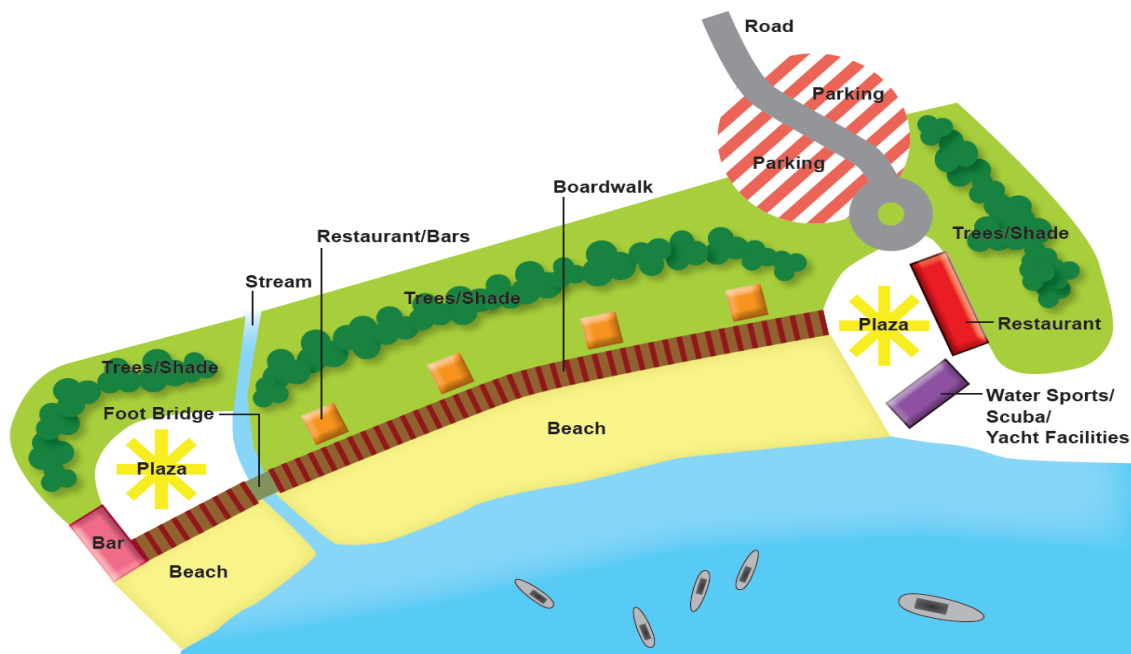
Private Sector Product Investment

- Development of a 30-room flagship 'boutique' hotel at Rendezvous Bay, with emphasis on health and wellness, taking advantage of both the beach and marine resource as well as the Silver Hill Forest reserve with its hiking/ walking trails.
- Development of villas, associated with the boutique hotel in the Rendezvous Bay area
- Provisioning services for yachts visitors

Public Sector Product Investment

- Enhancement and development of Little Bay waterfront area, with boardwalk, restaurants /bars and attractive landscaping..... creating a 'peoples place' for visitors and residents alike.
- Placement of moorings and construction of required on-shore facilities at Little Bay to attract yachting visitors
- Improve changing/showering/toilet facilities at Little Bay beach
- Enhancement of Carr's Bay waterfront, with planting of palm and coconut trees etc
- Improved museum exhibition space to showcase Montserrat's historical records and artefacts

Map 8.4 Little Bay Waterfront.....a 'Peoples Place'



8.4 WEST COAST TDA

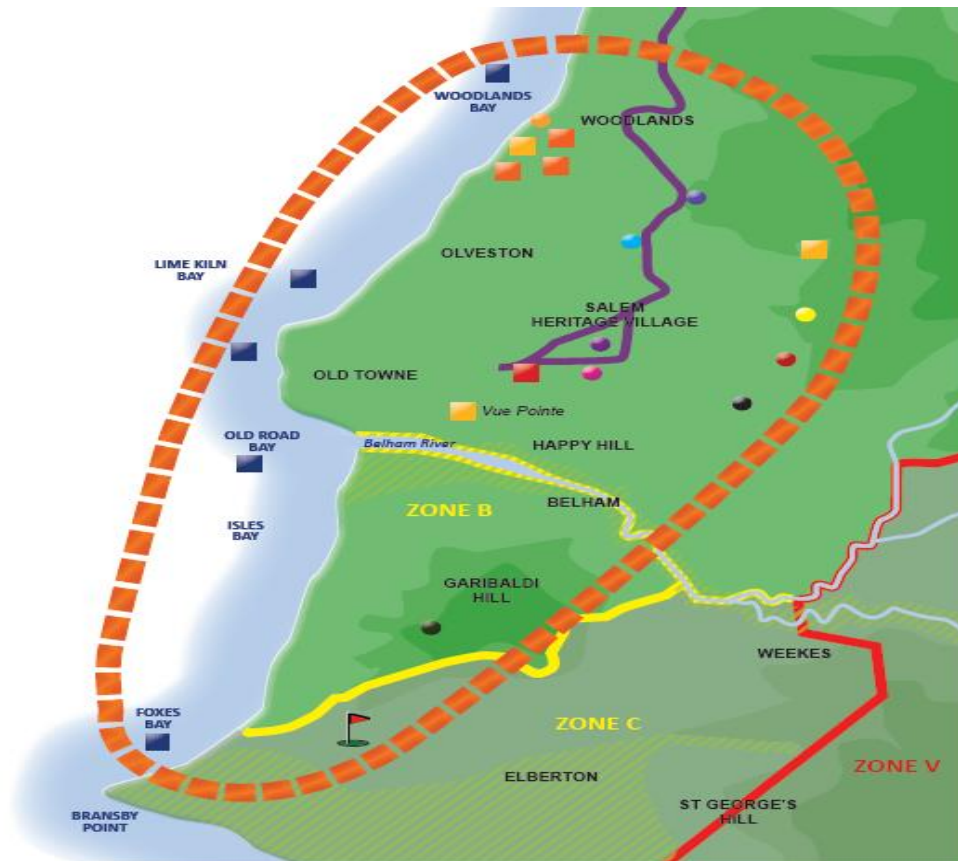
8.4.1 Tourism Product

The tourism product of the West Coast TDA is characterised by:

- Woodlands Bay, Lime Kiln Bay, Isles Bay, and Foxes Bay
- A number of dive sites along the coast
- Belham Valley
- Numerous villas in Woodlands and Olveston
- Olveston House Guesthouse
- Vue Pointe Hotel
- National Trust Botanic Gardens
- Salem village
- Number of restaurants and bars
- Historic buildings, including ruins of a Sugar Mill
- Montserrat Volcano Observatory
- Arrow Heritage Home
- Air Studio
- Cricket grounds
- Tennis courts

8.4.2 Development Concept

For the West Coast TDA, the proposed development concept is to establish the area as a heritage, special interest and activity destination, with Salem Village as the Tourist Centre, as illustrated on Map 8.5, following.



WEST COAST TDA

KEY:

	Dive Sites		Plaza
	Woodlands Beach Facility		View of Plymouth
	Montserrat Trust		Salem Park
	Runaway Ghaut		Montserrat Volcano Observatory
	Boutique Hotels		Air Studio
	Villas		Sugar Mill
	Olveston House		Golf Course

The development initiatives and actions include:

Private Sector Product Investment

- 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 30- room 'boutique' hotel at Woodlands Bay
- Development of villas, associated with the boutique hotel in the Woodlands Bay area
- Development of a 20-room eco-tourism mountain resort, linking with the hiking product
- Development of a 9-hole golf course at Foxes Bay
- Rehabilitation of Air Studios
- Refurbishments to Arrow Heritage Home to cater for increased visitor numbers
- Development of Visitor Attractions
 - Ziplining
 - Canopy walks

Public Sector Product Investment

- Designation of Salem as Heritage Village
 - Creation of central plaza with bars/restaurant creating a focal place for visitors and locals...'peoples place'...with Plymouth's Clock Tower to be the centrepiece
- Volcano Interpretation Centre at the MVO, with café/restaurant facilities
- Moorings and jetty at Isles Bay
- Bird sanctuary and mangrove protected area at Foxes Bay
- Rehabilitation of the Sugar Mill
- Enhancement of Hiking Trails
 - improved trail network with new trails, loops
 - better signage
 - better maintenance
 - monitoring & maintenance program
- Development of the Botanic Gardens as a BioPark
 - Showcase Montserrat's tropical rain forest flora and fauna
- Promotion of Festivals and Events
 - Afro – Caribbean Music Festival

Salem Heritage Village Plaza – a 'Peoples Place'



8.5 HIGHLANDS TDA

8.5.1 Tourism Product

The tourism product of the Highlands TDA is characterised by:

- Hotel at Sweeney'sTropical Mansions Suites
- High spec football stadium at Blakes
- Glendon Hospital
- John A. Osborne Airport
- A few café's/eateries

8.5.2 Development Concept

For the Highlands TDA, the proposed development concept is to establish the area as a mixed activity/leisure destination, with St. John's as the Tourist Centre. As illustrated on Map 8.6, this is to be brought about by a number of development measures and actions to include:



HIGHLANDS TDA

KEY:

-  Dive Sites
-  Airport
-  Hotels
-  Blakes Football Field

Private Sector Product Investment

- Development of an hotel and 18 hole golf course
- Development of villa complex associated with the hotel and golf course
- Development of a Sports Village, including the planned hotel at Blakes football stadium

9. DEVELOPMENT PLANNING – LESSONS FROM RECENT EXPERIENCE AND A COMPARABLE DESTINATION

9.1 LESSONS FROM RECENT EXPERIENCE

Arising from the findings of the review of Montserrat's tourism sector (Ch 4) and what makes for a successful tourist destination (Ch 5) coupled with the experience of recent years, the salient lessons for successful development planning would appear to be:

- a) Need to have a Government approved national tourism policy and plan in place to give not only direction to the various stakeholders in the industry, but just as important from the standpoint of potential investors, to show Government's commitment to the sector.
- b) A focus on action. Too often in the past decade plans have been elaborated but little or no action has followed, leading to a sense of uncertainty among stakeholders and potential investors.
- c) Recognition that the private sector in Montserrat does not have the resources to partner with Government in mitigating risk where major infrastructure projects are involved. It is the role of Government to provide the economic infrastructure and utilities. Commercial enterprise investment is the role of the private sector
- d) Attracting private sector investment to Montserrat for mega flag-ship resorts is exceptionally difficult in today's economic/financial climate. Firstly, there are many attractive tourism investment opportunities in more established tourist destinations such as Anguilla. Secondly, because of uncertainties surrounding the Volcano, poor sea access coupled with sea port exposed to rough seas which can disrupt services for considerable periods during the year, Montserrat would be considered a very risky proposition, offering greater uncertainty with regard to returns and costs than elsewhere
- e) Related to the previous point, depending on one mega tourism development to rejuvenate the industry is, for the most part, a lost cause. Avinash Persaud likened it to the Irish playwright's acclaimed *'Waiting for Godot'*. True, there are the examples of the Four Season's development on Nevis and Trump's development of Canouan resort in the Grenadines. But these are few and far between. In 'frontier' destinations, tourism development tends to be the building up of a 'critical mass' of attractions and accommodation, followed by flag-ship or iconic tourism developments, rarely the other way around.
- f) 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 and product development plans must be drawn up and implemented in tandem with appropriate access transport services.
- g) Fundamental importance of having the economic infrastructure in place before embarking on tourism product development and destination marketing. For Montserrat, this means having good air and sea ports, roads, utilities, telecommunications and health services in place.
- h) 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.
- i) 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, experienced, practical marketing and product development expertise available.

- j) 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.
- k) 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 – no 'joined-up' thinking. Better sector management required is the lesson learnt.
- l) 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.
- m) Don't spread resources too thinly between activities/projects. Better returns are achieved by focussing/concentrating resources on limited (priority) activities/projects.

9.2 LESSONS FROM A COMPARABLE DESTINATION – 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, they both share several things in common.

They are both Small Island Developing States as well as British Overseas Territories with small populations. 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 events. A large number of 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). However, this situation is about to change with the opening of the planned £220m airport in May 2016.

In 2013, about 2,000 tourists (business, VFR, leisure visitors) visited St Helena on the RMS. There were additional visitors from occasional cruise ship calls (1,920 in 2013) and passing yachts (700 visitors in 2013). With no sheltered moorings, few cruise ships are willing to disembark their passengers there.

In Montserrat, 2013 total tourist stayover arrivals amounted to 7,200. There were also 1,377 yacht visitors and 364 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), but as mentioned earlier, this is about to change with the opening of the airport in 2016.

Both islands are also heavily dependent on the British Government, which provided resources for a new airport in Montserrat post Volcano and has funded the construction of the airport on St Helena. 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. The vast majority 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 their respective Diasporas as important contributors for the islands economic recovery.

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... 'Fish where fish are'
- 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 expertise in the tourist generating markets, especially experienced PR and either part-time or contract representation;
- 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; participation at exhibitions aren't always necessary to achieve this;
- Identify and agree exactly what is to be achieved and ensure it is measurable

10. MARKET AND PRODUCT DEVELOPMENT POTENTIAL

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 10.1 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; the 4th November, 2015 Stakeholders' Workshop and meetings with individuals stakeholders as part of the process of this Tourism Master Plan formulation.

Table 10.1 Matrix of Product – Market Potential for Expansion and Diversification

Market Segment	Characteristics	Requirements	Development Potential and Actions
A. Nature Tourism			
<ul style="list-style-type: none"> • birding • botanical • natural history 	<ul style="list-style-type: none"> • moderate use of tourism plant • high spend • seasonal • moderate growth rate 	<ul style="list-style-type: none"> • nature reserves/parks • guides & ground tour arrangements • range of accommodation • good interpretation 	<ul style="list-style-type: none"> • Important potential, but • interpretation lacking, • need for biodiversity tours • up grade the Botanic Garden to BioPark
B. Activity Tourism			
<ul style="list-style-type: none"> • hiking • mountain biking • sea kayaking • zip-lining/tree canopy walks 	<ul style="list-style-type: none"> • moderate use of tourism plant • moderate spend • seasonal • moderate growth rate 	<ul style="list-style-type: none"> • nature reserves/parks • marked trails • activity centre • range of accommodation 	<ul style="list-style-type: none"> • new circular trail to link trail network required • on-going maintenance of trails very important • establish an activity centre
C. Volcano Tourism			
<ul style="list-style-type: none"> • viewing and observation tours • educational 	<ul style="list-style-type: none"> • high use of tourism plant • moderate spend • moderate growth rate 	<ul style="list-style-type: none"> • designated area for viewing • accessibility • good interpretation • range of accommodation • good tour guiding 	<ul style="list-style-type: none"> • significant potential • better presentation and top class interpretation required • maps and other information • better access to viewing sites • Volcano Interpretative Centre to be established at MVO • Implement Plymouth Volcano Reserve
D. Cruise Visits			
<ul style="list-style-type: none"> • small size cruise ships 	<ul style="list-style-type: none"> • low volume • short stay • low environmental impact • seasonal demand 	<ul style="list-style-type: none"> • interesting/attractive/accessible nature sites • historic sites • cultural and heritage experiences • shopping • things-to-see-and-do 	<ul style="list-style-type: none"> • significant potential • provisioning services needed • transport services..taxis/buses required
E. Eco-resorts			
<ul style="list-style-type: none"> • hill and wilderness resorts • wellness/spas 	<ul style="list-style-type: none"> • high spend • high use of tourist plant • all year demand • high growth 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • significant potential but on small scale • number of possible locations available • need for international 'brand' such as Banyan Tree, Sixth Senses • wellness treatment by professionals <ul style="list-style-type: none"> – high quality clinical equipment

Market Segment	Characteristics	Requirements	Development Potential and Actions
F. Residential/Long Stay			
<ul style="list-style-type: none"> • retirees 	<ul style="list-style-type: none"> • villa (ownership/ rentals) • holiday homes with long, frequent visits • high spend • high growth 	<ul style="list-style-type: none"> • seamless access from regional hubs, particularly Antigua • reassurance about safety and services • things-to-do • transparent regulatory framework governing property ownership • medical support facilities 	<ul style="list-style-type: none"> • significant potential • tax incentives to encourage property investment
G. Sports			
<ul style="list-style-type: none"> • matches and training • sporting events 	<ul style="list-style-type: none"> • comprise groupings of participants, fans and passive spectators • high use of tourist plant • short 2 – 4 days • moderate growth 	<ul style="list-style-type: none"> • good and appropriate sporting facilities • range of accommodation • things-to-see-and-do • good local food • entertainment/local ambience 	<ul style="list-style-type: none"> • significant potential based on: • high standard football stadium at Blakes • new 24 room sports hotel adjacent to stadium • sports complex at Little Bay • good quality cricket grounds with pavilion at Salem • Montserrat's well founded reputation for hosting sporting events such as the Volcano Half Marathon and Fun Run
H. Scuba Diving			
<ul style="list-style-type: none"> • diving • snorkeling 	<ul style="list-style-type: none"> • 1 week average stay • high use of tourism plant • high spend • seasonal • low environmental impact 	<ul style="list-style-type: none"> • good quality reefs • range of dive sites • dive shops/dive masters • medical support facilities • range of accommodation • things to-see and do for non-dive companions 	<ul style="list-style-type: none"> • good potential • dive sites need to be identified and mapped • jetty for boats • establish Marine Reserve
I. Yachting			
<ul style="list-style-type: none"> • yachting 	<ul style="list-style-type: none"> • short stay • low use of tourism plant • moderate to high spend • low environment impact • jetties/moorings/marina 	<ul style="list-style-type: none"> • jetties/moorings/marina • on-shore facilities – showers, laundry • things to see and do • shopping/provisioning • fuel/water supplies 	<ul style="list-style-type: none"> • major potential • provision of moorings/pontoons • shore facilities, including convenient ATMs • facilities for water/fuel uplift • improved information on yachting in Montserrat
J. Short Breaks			
<ul style="list-style-type: none"> • (weekends/mid week) • general holiday maker 	<ul style="list-style-type: none"> • 2 to 3 night stay • high spend • high use of tourism plant • off-season • low repeat • intra-Caribbean mainly 	<ul style="list-style-type: none"> • seamless access from hubs • things-to-see-and-do • good food • entertainment/local ambience • interesting attractions • competitive car rental tariffs • events/festivals 	<ul style="list-style-type: none"> • significant potential • tourism product needs development • better range of entertainment • better quality restaurants required with regular opening hours • product needs to be packaged

Market Segment	Characteristics	Requirements	Development Potential and Actions
K. Excursionists			
<ul style="list-style-type: none"> day visitors - one-day stay 	<ul style="list-style-type: none"> low use of tourism plant low spend 	<ul style="list-style-type: none"> competitive access transport organised tours things to see/interpretation/shopping 	<ul style="list-style-type: none"> significant potential from Antigua, St. Kitts/Nevis, and Guadeloupe improved standards of taxi/tours
L. Weddings & Honeymoon Stays			
<ul style="list-style-type: none"> niche market 	<ul style="list-style-type: none"> high spend 4-7 night stay high use of tourist plant low environmental impact all year demand 	<ul style="list-style-type: none"> attractive church/location for ceremony attractive location for photography wedding venues – accommodation with room for reception wedding planners clear legal situation 	<ul style="list-style-type: none"> important potential clearer and more streamlined regulations improved range of accommodation
M. Festivals/Events			
<ul style="list-style-type: none"> Carnival St. Patrick's Week Afro – Caribbean Music Festival 	<ul style="list-style-type: none"> returning nationals and intra-Caribbean short stay high use of tourist plant low environmental impact seasonal demand high repeat 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> significant potential in attracting international visitors to be more widely promoted and developed outside high season improved range of accommodation
N. Business Meetings			
<ul style="list-style-type: none"> small companies 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> meeting facilities up-scale accommodation restaurants entertainment things-to-see-and-do safety and security spouse/partner/family programmes and attractions 	<ul style="list-style-type: none"> important potential convention/meetings organisational expertise required better air and sea access appropriately sized conference and convention facilities entertainment/things to do

PART IV GROWTH OBJECTIVES FOR ECONOMY AND TOURISM

- 11. TOURISM'S CONTRIBUTION TO THE NATIONAL ECONOMY**
- 12. NATIONAL GROWTH OBJECTIVES AND TARGETS FOR TOURISM**
- 13. TOURISM GROWTH SCENARIOS**

11. TOURISM'S CONTRIBUTION TO THE NATIONAL ECONOMY

11.1 POPULATION, LABOUR FORCE AND EMPLOYMENT

In the 2011 Montserrat census, the population was recorded as 4,922 inhabitants. Since then the population is estimated to have grown to about 5,000 (2015). Of these, about three-quarters 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 2,800, of which about 200 (or 6.5%) are unemployed.

11.2 NATIONAL ECONOMIC ACTIVITY AND VALUE OF TOURISM

Preliminary estimates for 2015 indicate a GDP figure of EC\$168.0M for Montserrat's economy....about the same figure as for 2014. Although the economy has rebounded from the sharp fall in 2010, it has flat-lined over the last five years, as shown on the following table.

Table 11.1: Gross Domestic Product (EC\$M), 2010 – 2015

Metric	2010	2011	2012	2013	2014	2015
GDP @ market prices	150.0	172.0	171.3	163.2	168.1	168.0
GDP @ constant 2006 prices	145.3	153.3	158.7	162.6	166.6	166.6

Source: Statistics Dept MoFEDT&C and ECCB

Value of Tourism

In the national accounts, the contribution for the hotels & restaurants sub-sector was estimated at approximately 4.4% of total GDP in 2015. 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 2015, total stay-over visitor expenditure was estimated at EC\$22.9M, representing approximately 13.5% of the total output of the economy (GDP).

However, it should be noted that tourism receipts are at 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 overstate the sector's contribution to national output. There are no published statistics available on the proportion that direct imports represent. However, on the assumption that direct imports represent just under two-thirds of tourist expenditures, stay-over tourism's direct contribution to GDP is approximately 5%

Tourism Employment

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 in 'paid serviced' accommodation has remained about the same over the last 12 years, the current figure is unlikely to be significantly different from that indicated in the 2003 NTS&P where the "the numbers directly and indirectly dependent on tourism" was 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).

12. NATIONAL GROWTH OBJECTIVES AND TARGETS FOR TOURISM

12.1 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,
- 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.

12.2 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, residents have experienced reasonably stable standards of living over the last few years.

Table 12.1: GDP per Capita at Constant 2015 Prices

Metric	2010	2011	2012	2013	2014	2015*
GDP @ market prices (EC\$ 000's)	150.0	172.0	171.3	163.2	168.1	168.0
GDP @ constant 2015 prices (EC\$ 000's)	147.8	155.9	161.4	165.4	169.5	168.0
Population	5,020	4,924	4,936	4,959	4,976	5,000
GDP per head @ constant 2015 prices (EC\$ 000's)	29,440	31,660	32,700	33,350	34,060	33,600

Source: Statistics Dept., MoFEDT&C, ECCB and Consultant's estimates projections*

Going forward, three possible scenarios are:

- **Scenario A: (Low Growth):** increased living standards by an average growth rate of about 1% yearly, with a similar growth rate in population
- **Scenario B: (Medium Growth):** increased living standards by an average growth rate of about 2% yearly, with a population growth rate of approximately 2.5% yearly
- **Scenario C: (High Growth):** increased living standards by an average growth rate of 3% yearly, with population growth rate of 4% yearly

The increasing population and living standards implications for economic growth are shown on Table 12.2.

Table 12.2: Population and GDP Growth Targets

Scenario	2015	2025	Avg Yearly Growth Rate %
A. Low Growth			
Population	5,000	5,500	1.0
GDP per Capita (EC\$)*	34,000	37,500	1.0
GDP EC\$ (000s)	170,000	205,000	2.0
B. Medium Growth			
Population	5,000	6,500	2.5
GDP per Capita (EC\$)*	34,000	41,000	2.0
GDP EC\$ (000s)	170,000	265,000	4.5
C. High Growth			
Population	5,000	8,000	4.7
GDP per Capita (EC\$)*	34,000	42,500	2.5
GDP EC\$ (000s)	170,000	340,000	7.2

**at constant 2015 prices Note: figures rounded*

Scenario A represents the 'low growth' scenario...basically a small improvement in standards of living, coupled with a small increase in the population

Scenario B represents the 'medium' growth scenario, with an average annual GDP growth rate of 4.5% over the next decade required to support a population of 6,500 people by 2025 with an improving standard of living. Under this scenario, the size of the economy increases by just over half (55%) over the next decade.

Scenario C represents the 'high growth' scenario, with an average GDP growth rate of approximately 7.2% yearly over the next decade required to support a population of 8,000 by 2025 with an increasing standard of living. Under this scenario, the economy doubles in size over the next decade.

12.3 TOURISM SECTOR'S ROLE

The Government of Montserrat sees tourism as a major driver of economic activity sustainable livelihoods for the benefit of all Montserratan residents, 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.

Essentially, 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:

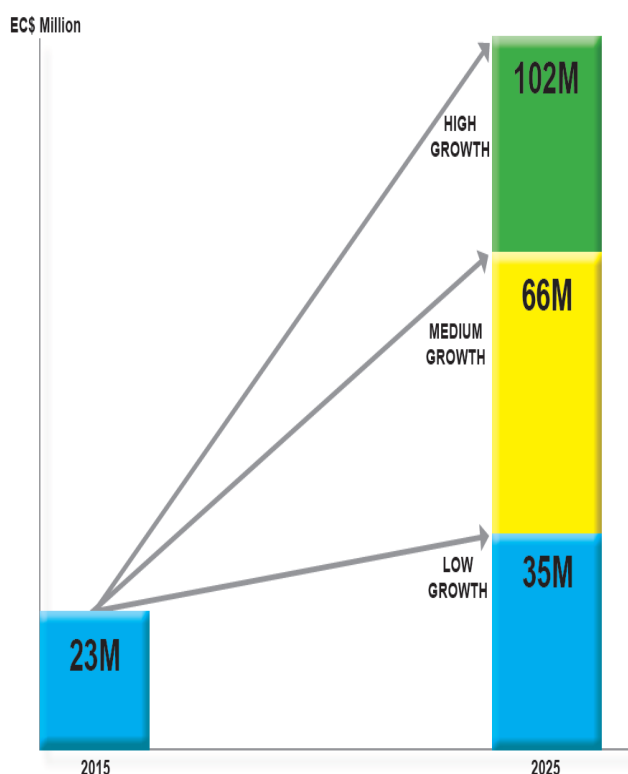
- Creation of job opportunities;
- Income generation;
- Tax revenues for government;
- Improved quality of economic and social infrastructure;
- Improved quality of the natural and man-made environment; and
- Beneficial linkages with other sectors of the economy,.... construction, fishing, agriculture

12.4 GROWTH TARGETS FOR TOURISM

In 2015 tourism spending of EC\$ 22.9M represented approximately 13.5% of GDP (in gross terms). Under the growth scenarios for the national economy as outlined in Section 12.2 above, the projections for the tourism are as follows:

Scenario A: Under the 'low growth' scenario for the economy, tourism is projected to increase its proportion of GDP (in gross terms) from 13.5% in 2015 to 17% by 2025. This implies total expenditure by all visitors increasing from an estimated EC\$ 22.9M in 2015 to approximately EC\$ 35M by 2025, in terms of constant 2015 money values. This represents an average growth rate of 4.3% yearly.

Scenario B: Under the 'medium growth' scenario for the economy, tourism is projected to increase its proportion of GDP (in gross terms) from 13.5% in 2015 to 25% by 2025. This implies total expenditure by all visitors increasing from the estimated figure of EC\$ 22.9M in 2015 to approximately EC\$ 66M by 2025, in terms of constant 2015 money values. This represents an average growth rate of about 11% yearly.



Note: figures rounded

Scenario C: Under the 'high growth' scenario for the economy, tourism is projected to increase its proportion of GDP (in gross terms) from 13.5% in 2015 to 30% by 2025. This implies total expenditure by all visitors increasing from the estimated figure of EC\$ 22.9M in 2015 to just over EC\$ 102M by 2025, in terms of constant 2015 money values. This represents an average growth rate of about 16% yearly

Under the medium and high growth scenarios, tourism will be a 'driver' of the economy in three ways:

- Firstly, through the 'new' direct investment necessary to develop and expand the tourism product.....capital investment in new accommodation, facilities, and infrastructure.... creating jobs and generating incomes in construction, wholesale trade and other services;
- Secondly, through the expenditures by the increasing number of visitors to the island, creating jobs and generating incomes in hotels, guesthouses, restaurants, retail; and
- Thirdly, through the induced new investment in enterprises providing goods and services to an expanding tourism industry.

13. TOURISM GROWTH SCENARIOS

13.1 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, access transport services etc.,. Similarly in Montserrat's case, but unlike most other Caribbean destinations, two 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 and quality and relative cost of access transport services.

13.1.1 The Volcano

Firstly, it has to be recognised that while the volcano has now been quiet for about five 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 ash-fall on the Old Towne area and north of the Belham Valley.

In this respect the pivotal assumption is that developments could be considered in particular parts of Zones A, B and C.

13.1.2 Access Transport Services

New Ferry Service

DFID is in the process of commissioning of an appropriately designed passenger and cargo ferry which will be domiciled in Montserrat to serve the island's economic, security and emergency needs. The estimated cost is GBP 3.6M and is expected to be in service by early 2018.

It is envisaged that the ferry will provide access services for the following distinct market segments:

- (i) Stayover visitors to Montserrat, whether for VFR, business, or conference
- (ii) Stayover visitors for cultural events, sports or church meetings
- (iii) Day visits by residents of neighbouring islands...Antigua, Guadeloupe primarily
- (iv) Day visits by stayover visitors on neighbouring islands...Antigua, Guadeloupe, primarily
- (v) Day visits by cruise visitors to neighbouring islands...Antigua particularly
- (vi) Speciality day tours around Montserrat for groups.

The levels of demand generated from the various market segments will, of course, depend on the size of the markets, the ferry schedules, and cost of travel

13.2 GROWTH SCENARIOS

Two extreme possibilities arise in considering future scenarios for tourism on Montserrat. At one extreme there is the 'low growth' scenario which might be interpreted as what would be likely to happen if, with the exception of the new ferry, no initiatives were undertaken and tourism development continued to be constrained by lack of investment, shortcomings of the existing infrastructure, minimal destination marketing etc.. At the other extreme is the rate at which the industry could grow if sufficient public and private capital investment was available to develop the necessary supporting infrastructure, establish the required tourism operations, train personnel and undertake significant destination marketing campaigns. Between these lie a number of

realistic scenarios reflecting the Government of Montserrat's socio-economic, financial and environmental objectives for the island.

13.2.1 Low Growth – Scenario A

Under this scenario, it is assumed that, with the exception of the new ferry coming on-stream, no other significant initiatives are taken to rejuvenate the tourism sector. In essence, things continue much as they are and in consequence, the likely evolution of tourism to Montserrat is projected to be as follows:

- Stay-over arrivals to increase to just over 13,000 over the period 2015 through 2025, mainly composed of Montserratians returning to visit family and friends
- About 7,000 tourists visiting friends and relatives
- About 4,000 non-Montserratian related stay-over arrivals visiting for
 - general vacation
 - scuba diving
 - hiking tours
 - visit to 2nd home, and
 - short breaks by sports, church, and other special interest groups
- About 2,200 Business and Conference visitorsmore or less same level as at present
- Cruise ship visitors between 3,000 and 4,000 yearly,
- Yachting visitors fluctuating between 1,000 and 2,000 yearly, as in the past decade
- Day-visitors increasing from just over 1,700 at present to about 10,000 in response to the improved sea access.

Spending by all visitors is projected to be about EC\$ 35M by 2025 in terms of 2015 money values, representing an average growth rate of 4.3% yearly over the period

13.2.2 Medium Growth Scenario – Scenario B

The thrust of the Medium Growth Scenario is to re-establish tourism as the 'driver' of the economy, fulfilling the role it had until the volcanic eruptions some 20 years ago.

The product development initiatives designed to attract increasing numbers of stay-over tourists and day-visitors include:

Public Sector Access and Infrastructure Investment

- Coming on-stream of a dedicated fast passenger/cargo ferry from last quarter of 2017, providing 3 crossing daily from Antigua to facilitate stayover and excursionist visitors.
- Provision of a breakwater at Little Bay to provide shelter for the ferry and sheltered moorings for yachts
- Leasing of a Twin Otter to increase and improve air access capacity
- Placement of moorings and construction of required on-shore facilities at Little Bay to attract yachting visitors
- Placement of moorings and small jetty at Isles Bay to attract yachting visitors

Private Sector Product Investment

- Rehabilitation and up-grade of the Vue Pointe hotel with 20 rooms, catering to the vacation, business and small conference/meetings segments of the market
- 24 room hotel at Blakes football stadium
- Development of a 9-hole golf course at Foxes Bay
- Development of a 20-room 'boutique' hotel at Rendezvous Bay
- Development of a 20-room 'boutique' hotel at Woodlands
- Development of a 20-room eco-tourism mountain resort, linking with the hiking product
- 164 new rooms in additional villas, B & B/guesthouse and apartments.
- Rehabilitation of Air Studios
- Refurbishments to Arrow Heritage Home to cater for increased visitor numbers

- New restaurants and cafes
- New car hire/taxis

Public Sector Product Investment

- Development of Visitor Attractions
 - Volcano Interpretation Centre at the MVO, with café/restaurant facilities
 - Museum & Heritage Park at Little Bay
 - Sugar Mill
- Development/Enhancement of Amenities
 - Salem 'heritage' village with plaza, bars/restaurant creating a focal place for visitors and locals with Plymouth's Clock Tower as centre piece
 - Enhancement and development of Little Bay waterfront area, with restaurants /bars creating a focal place for visitors and residents alike.
 - Enhancement to Carr's Bay waterfront with tree planting etc
- Enhancement of Hiking Trails
 - improved trail network with new trails, loops
 - improvements to Runaway Ghaut
 - better signage
 - better maintenance
- Improvements to Dive Product
 - jetty for boats
 - mapping of sites with underwater DVD
 - monitoring & maintenance program
- Upgrade the Botanic Garden as a BioPark
 - showcase Montserrat's tropical rain forest flora and fauna
 - starting place for hiking
- Designation of a Marine Park
- Bird sanctuary and mangrove protected area at Foxes Bay
- Designation of a Plymouth Volcano Reserve
- Designation of a GeoPark
- Promotion of Festivals and Events
 - My Carnival
 - St. Patrick's Day Festival
 - Afro-Caribbean Music Festival

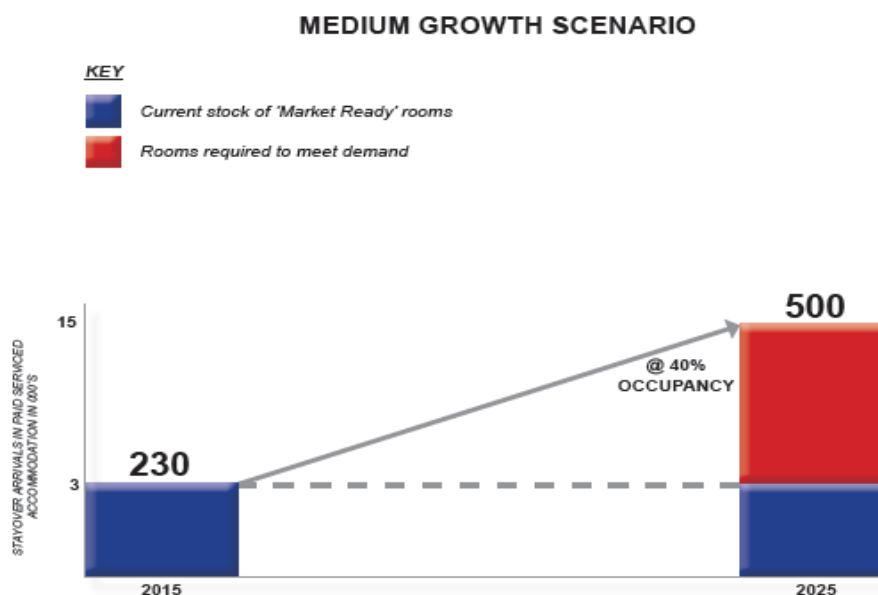
Under this scenario, visitor projections are shown on the following table. The assumptions underlying the projections are described in Annex 26.2

Table 13.1 Scenario B - Tourism Growth Projections

Metric	Numbers	
Year	2015	2025
Total Stayover	8,940	23,000
VFR (staying in private homes)	4,700	8,000
Business/Conference	2,200	4,000
Non-MNI Related Vacation	1,400	8,600
Non-MNI Related Residential	200	400
Other (Sports groups etc)	440	2,000
Yacht Visitors	1,800	10,000
Cruise Visitors	2,600	7,500
Day-visitors	1,740	15,000
Total Visitor Spending EC \$000'S	22,900	66,400
Bednights in 'paid service' acm	22,500	73,000
Rooms Rq'd @ 40% occupancy	155	500
Direct Employment	250	400 to 600

Note: figures rounded

Under this Scenario B, total visitor expenditure is projected to increase from an estimated EC\$ 22.9M in 2015 to EC\$ 66.4M by 2025 in terms of constant 2015 money values, representing an average growth rate of 11% yearly. The number of 'market ready' rooms required by 2025 is 500.



13.2.3 High Growth Scenario – Scenario C

The High Growth Scenario can be interpreted as the rate at which tourism could expand if sufficient public and private sector capital investment was forthcoming to improve the infrastructure, expand the tourism product, increase the accommodation stock, undertake a sustained destination marketing campaign etc.

However, it should be noted that this High Growth Scenario is not the 'the sky is the limit' scenario with unlimited public and private investment funds available. It is a scenario which takes cognisance of:

- Montserrat's limited absorption capacity...in terms of availability of skills, supply side constraints in relation to housing, medical facilities, schools etc
- Limitations on the number of 'green field' sites for development because of location, ownership issues etc
- Lessons of recent experience with regard to tourism development planning, as outlined in Ch 9 earlier, viz:
 - Very limited private sector resources available for investment in Montserrat
 - Private sector in Montserrat does not have the resources to partnership with Government in mitigating risk where major infrastructure projects are involved.
 - Attracting private sector investment to Montserrat for mega or even medium sized flagship resorts is exceptionally difficult in today's economic/financial climate. Firstly, there are many attractive tourism investment opportunities in more established islands such as Anguilla. Secondly, because of uncertainties surrounding the Volcano, the provision of reliable air and sea access, and a sea port exposed to rough seas which can disrupt services for considerable periods during the year, Montserrat would be considered a very risky investment proposition, offering greater uncertainty with regard to returns and costs than elsewhere
 - Depending on one mega tourism development to rejuvenate the industry is, for the most part, 'a lost cause'.

In addition to the public and private sector access, infrastructure and product development investments outlined under Scenario B, the High Growth Scenario would involve the following additional initiatives:

Public Sector Infrastructure Investment

- Improvements to the Jetty at Little Bay
- Improvements to the Jetty at Plymouth facilitating:
 - Emergency landings if seas too rough at Little Bay
 - Access by sea for tours of Plymouth
- Additional moorings for yachts
- Marina and fishermen's village at Little Bay

Private Sector Product Investment

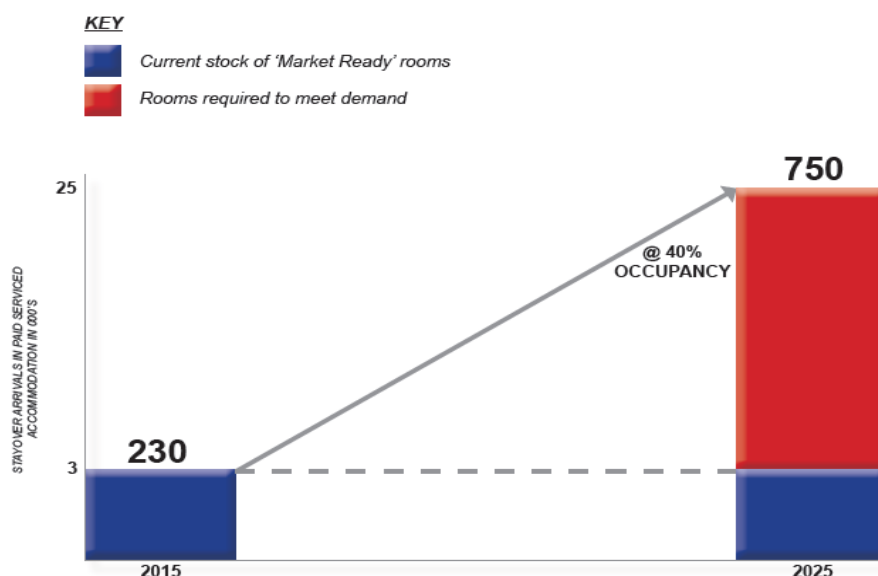
- 18-hole golf course at Blake's Estate
- 250 additional rooms in hotels, villas, guesthouses, B&Bs and apartments
- Additional restaurants, cafes, retail
- Additional car hire/taxis

Under this scenario, visitor projections are shown on the following table.

Table 13.2 Scenario C - Tourism Growth Projections

Metric	Numbers	
	2015	2025
Total Stayover	8,940	32,500
VFR (stay in private homes	4,700	9,000
Business/Conference	2,200	5,000
Non-MNI Vacation	1,400	15,000
Non-MNI Residential	200	500
Other (Sports groups etc)	440	3,000
Yacht Visitors	1,800	20,000
Cruise Visitors	2,600	10,000
Day-visitors	1,740	20,000
Total Visitor Spending EC\$ 000's	22,900	102,400
Bednights in 'paid service' acm	22,500	111,000
Rooms Rq'd @ 40% occupancy	155	750
Direct Employment	250	650 to 850

HIGH GROWTH SCENARIO



PART V STRATEGY AND DEVELOPMENT ACTION PLAN

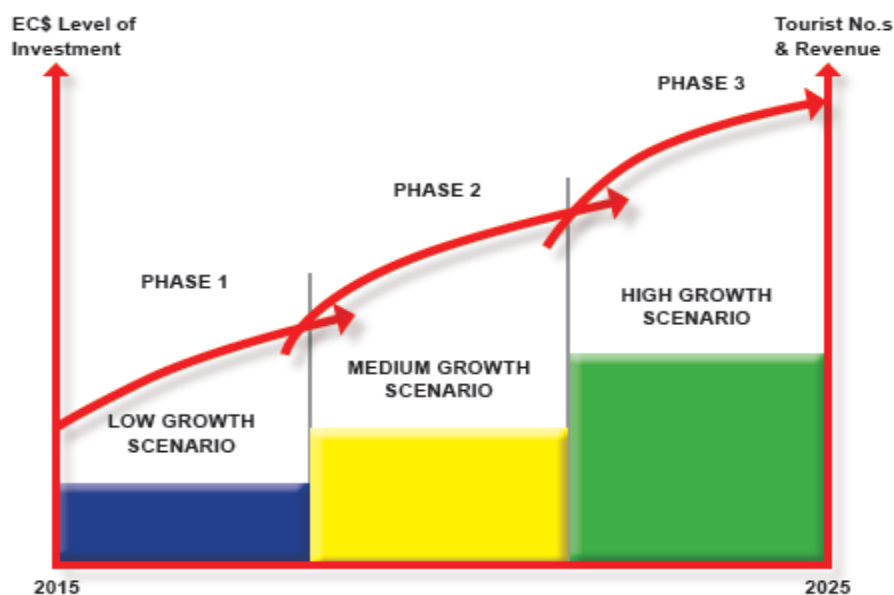
- 14. INDUSTRY GROWTH PATH AND STRATEGY**
- 15. PROTECT AND ENHANCE THE NATURAL ENVIRONMENT**
- 16. DEVELOP AND IMPROVE THE INFRASTRUCTURE**
- 17. DEVELOP VISITOR ATTRACTIONS AND AMENITIES**
- 18. IMPROVE ACCESS SERVICES AND VISITOR FACILITATION**
- 19. EXPAND AND DIVERSIFY THE TOURISM PRODUCT**
- 20. REORGANISE AND STRENGTHEN INSTITUTIONAL ARRANGEMENTS**
- 21. FOCUSED AND COST EFFECTIVE DESTINATION MARKETING**
- 22. UPGRADE QUALITY AND SERVICE STANDARDS**
- 23. INVESTMENT PROMOTION**

14. INDUSTRY GROWTH PATH AND STRATEGY

14.1 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.

Figure 14.1: Industry Growth Path



Initially, the industry will follow the Low Growth Scenario – at least until the new ferry is in services. With this significant improvement 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 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 iconic or world class 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 and Dubai are such examples.

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.

14.2 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.

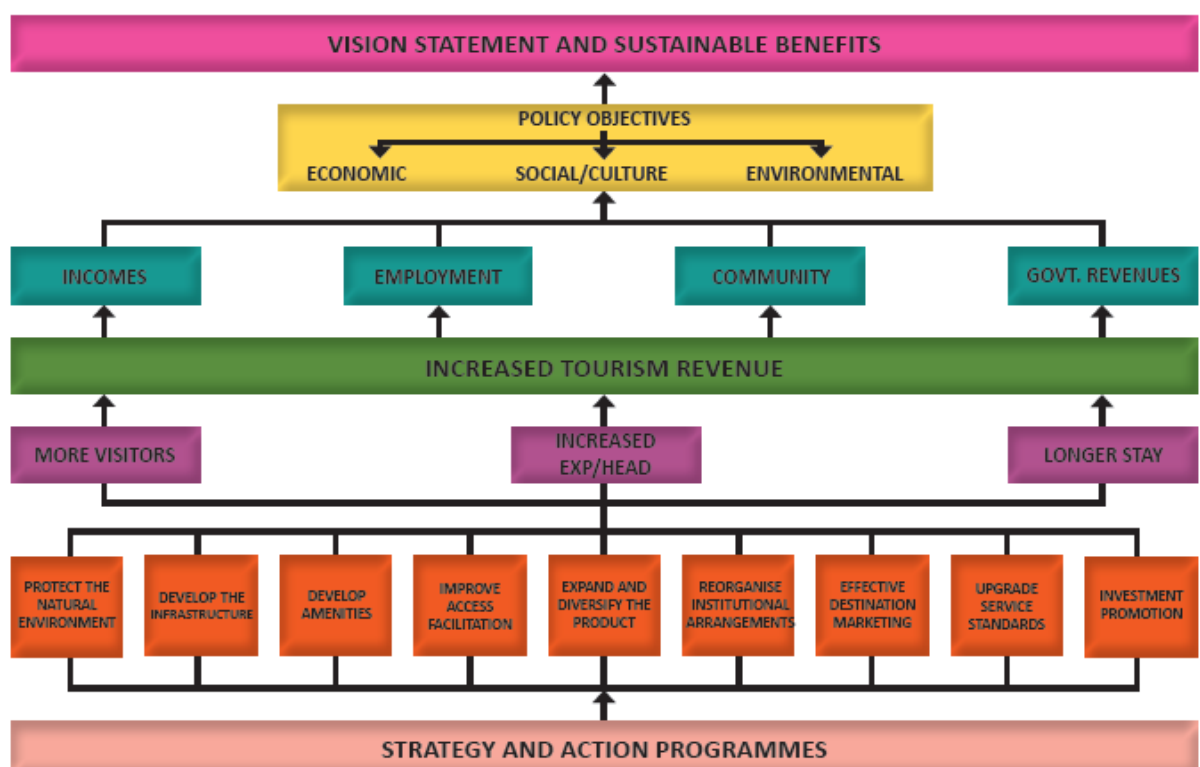
The process of securing these sustainable benefits from tourism revenue is shown on the following chart. To increase tourism revenue there must either be:

- 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 nine strategic initiatives to deal with the issues confronting Montserrat's tourism sector, viz:

- Protect and enhance the natural environment
- Develop and improve the infrastructure
- Expand and diversify the tourism product.
- Enhance visitor attractions and amenities.
- Upgrade quality and service standards.
- Improve access services and visitor facilitation
- Focused and cost-effective destination marketing.
- Reorganise and strengthen the institutional arrangements
- Investment promotion



15. PROTECT AND ENHANCE THE NATURAL ENVIRONMENT

From the tourism perspective, Montserrat should be seen as a large nature park with tourism facilities set within to provide an attractive and unspoilt environment in which to stay and play. As the natural environment is fundamental to Montserrat's appeal, it must be protected and enhanced. Five initiatives are recommended:

- Strengthen the regulatory framework
- Establish a mixed use marine reserve
- Establish a Plymouth Volcano reserve
- Establish a GeoPark
- Increase environmental awareness

15.1 STRENGTHEN THE REGULATORY FRAMEWORK

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)
- Establish clearer, stricter and more effective Environmental Impact Assessment procedures;
- Mitigate adverse impacts arising from uncontrolled grazing, roaming feral and loose livestock, and vegetation clearance for development and agriculture;
- Ensure the removal of beach vegetation, litter and garbage (which attract rats) on key nesting beaches for turtle breeding;
- Mitigate the 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. These issues have been addressed in the Montserrat Mining & Quarrying Industry Report, (Oxford Policy Management & Synergy, May 2011).
- Regulate the built environment. Because the built environment (existing buildings and future developments) has until now remained largely unregulated, it poses a potential threat to the long term wellbeing of the tourism sector. There is need to enforce zoning, building design, construction standards, etc.

Actions and Indicative Costs

The actions here are primarily policy formulation and implementation and only minimal support costs are likely to be involved.

15.2 ESTABLISH A MIXED USE MARINE RESERVE

The coastal waters of Montserrat support a marine ecosystem that is one of the most important natural resources and offer opportunities for fishing, diving, snorkelling, sailing and other water based recreational activities. Besides the major impacts from the volcano, activities and other human impacts on the marine environment can result in damage to habitats and a reduction in species abundance, especially on the coral reef systems. For example, significant adverse effects can arise from activities such as sewage disposal from sea outfalls and ships, boat anchoring, the collection of corals and turtle eggs and from spear fishing. Land based activities, such as land clearance, can also affect the marine environment.

Recognising that a major effort is currently underway by the Ministry, Coral Cay, Waite Institute and other organisations to conserve and develop the valuable marine resource, we recommend the establishment of a pilot marine protected area to be located between Bunkum Bay and Plymouth with a view to addressing:

- marine zoning to accommodate different uses and activities;
- fishing management;
- reef protection
- reef marking and establishment of dive and possible yachting moorings;
- solid waste management
- effluent discharges;
- impact of sand extraction; and
- recreation and tourism.

Actions and Indicative Costs

Technical experts will need to be contracted to investigate and make recommendations for the establishment of a mixed use marine reserve. An indicative budget of EC\$ 50,000 is suggested to cover the fees and direct expenses of the experts.

15.3 ESTABLISH PLYMOUTH VOLCANO RESERVE

A particular attraction for visitors is the volcano. Recognising this, a Plymouth Volcano Reserve should be established 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 (not a sanitized tarred road) to add to the sense of adventure.

Actions and Indicative Costs

Technical experts will need to be contracted to investigate and make recommendations for the establishment of the proposed Plymouth Volcano Reserve. An indicative budget of EC\$ 50,000 is suggested to cover fees and direct expenses of the experts.

15.4 ESTABLISH A GEOPARK

UNESCO Global Geoparks are single, unified geographical areas where sites and landscapes of international geological significance are managed with a holistic concept of protection, education and sustainable development. Many geoparks promote awareness of geological hazards, including volcanoes, earthquakes and tsunamis and many help prepare disaster mitigation strategies among local communities. The Global Geoparks Network (GGN) is a UNESCO activity established in 1998. According to UNESCO, for a geopark to apply to be included in the GGN, it needs to:

- have a management plan designed to foster socio-economic development that is sustainable based on geotourism
- demonstrate methods for conserving and enhancing geological heritage and provide means for teaching geoscientific disciplines and broader environmental issues
- have joint proposals submitted by public authorities, local communities and private interests acting together, which demonstrate the best practices with respect to Earth heritage conservation and its integration into sustainable development strategies.

Actions and Indicative Costs

Technical experts will need to be contracted to investigate and make recommendations for the establishment of the proposed GeoPark. An indicative budget of EC\$ 50,000 is suggested to cover fees and direct expenses of the experts.

15.5 ESTABLISH AN ENVIRONMENTAL AWARENESS CAMPAIGN

The importance of the environment to Montserrat needs to be continually emphasised through:

- media coverage (radio, television and newspaper, website);
- publications and audio-visual productions (production, distribution and presentations);
- schools programme (promotion of the ~~terrestrial~~ marine reserves, involvement of students and teachers);
- community programmes (awareness, adopt a 'reserve' campaign).

Actions and Indicative Costs

The environmental awareness strategy and campaign will be drawn up by the Dept of Environment. A budget of EC\$ 50,000 will be required to cover costs of media coverage, publications, and promotions.

16. DEVELOP AND IMPROVE THE INFRASTRUCTURE

The infrastructure improvement requirements are as follows:

16.1 PROVISION OF A BREAKWATER AT LITTLE BAY

To provide shelter for the ferry and sheltered moorings for yachts and subsequent development of a marina, a breakwater is necessary. It would extend into the sea from Rendezvous Bluff, the precise location to be determined

Actions and Indicative Costs

An indicative cost estimate for planning and construction of the breakwater is EC\$ 25 to 30M (GBP 17 to 20M)

16.2 MOORINGS FOR YACHTS AND FACILITIES

At present visiting yachts anchor at Little Bay and Isles Bay. Although there are some moorings at both bays, there are no suitable or acceptable bathroom/shower facilities or amenities such as ice delivery, garbage removal, laundry, and boat bottom cleaning services.

Placement of moorings and construction of required on-shore facilities at Little Bay and Isles Foxes Bay are required.

Actions and Indicative Costs

Actions required and estimated costs are:

- Placement of mooring buoys;
- Jetty at Isles Bay
- Clean washing and shower facilities;
- Services such as ice delivery, garbage removal, laundry, and hull cleaning services;

Provision of moorings buoys, jetty, washing, shower and other facilities such as, ice delivery, garbage removal, laundry and other facilities: EC\$ 200,000.

16.3 MARINA AND FISHERMEN'S VILLAGE AT LITTLE BAY

With the development of the yachting product, a marina would be warranted to further develop the product, as part of a wider product concept of a fisherman's village.

Actions and Indicative Costs

A development and financial/economic feasibility plan for the construction of a marina and fishermen's village will be required initially. Fees and direct expenses for the formulation of the plan is likely to be in the region of EC\$125,000. The cost of the marina and village is likely to be in the region of EC\$ 20 to EC\$25M.

16.4 IMPROVEMENTS TO THE JETTY AT LITTLE BAY

A number of improvements to the jetty at Little Bay are required to improve embarkation and disembarkation and also to reduce possibility of damage to the new ferry from surges

Actions and Indicative Costs

Improvement costs are likely to be in the region of EC\$ 300,000

16.5 IMPROVEMENTS TO THE JETTY AT PLYMOUTH

To provide for emergency landings if seas too rough at Little Bay and also to provide access by sea for tours to the proposed Plymouth Volcano Reserve, improvements to the jetty at Plymouth are necessary.

Actions and Indicative Costs

Improvement costs are likely to be in the region of EC\$ 300,000

16.6 CONSTRUCTION OF ROAD TO RENDEZVOUS BAY

To facilitate access to Rendezvous Bay, the construction of a road is required.

Actions and Indicative Costs

Engineer's assessment of actions and likely costs required

16.7 IMPROVED ROAD INFRASTRUCTURE AND MAINTENANCE

The areas requiring attention are:

- Access road to the MVO needs to be widened and surface improved.
- 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 to include the roads leading to Garibaldi Hill, Isles Bay beach and the Silver Hills and the road between Blake's estate and Jack Boy Hill. 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 damage and 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.

Actions and Indicative Costs

Engineer's assessment of actions and likely costs required

17. DEVELOP VISITOR ATTRACTIONS AND AMENITIES

17.1 VOLCANO INTERPRETATION AND VIEWING

17.1.1 Establish Volcano Interpretative Centre at MVO

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 Montserrat Volcano Observatory (MVO) provides a viewing platform, a small cinema for viewing a DVD about the volcanic eruptions, a gift shop and refreshments.

Space is very limited, only allowing about 20 persons at any one time and insufficient for large numbers.

The establishment of a Volcano Interpretative Centre (VIC) at the MVO site is recommended. The VIC would combine the Volcano Social History Centre and the MVO Visitor Centre into one interpretation centre. It would also be the centre for guided tours of the proposed Plymouth Volcano Reserve. Café, gift shop and adequate parking would also be provided. The access road also needs to be widened and improved.



Actions and Indicative Costs

- Acquisition of additional land adjacent to the MVO
- Construction of Visitor Interpretation Centre: EC\$ 1,000,000
- Redesign and renovate the Montserrat Volcano Centre: EC\$ 200,000
- 'Fit Out' , design and produce interpretative materials and displays - EC\$ 500,000
- Contract Technical Assistance from an event's organiser and a tour operator specialising in volcano tours to advise on volcano presentation and packaging – EC\$ 100,000
- Training of tour guides and preparation and printing of visitor information maps: EC\$ 200,000

The capital costs would be financed from the revenues generated at the VIC.

17.1.2 Improve Volcano Viewing Sites

The viewing sites at Richmond Hill and (in collaboration with the land owners) at 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, interpretative panels, telescopes, refreshment outlet and access road improvement;
- Richmond Hill site development: .shelter, viewing platform, toilets, litter bins, interpretative panels, 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.

Actions and Indicative Costs

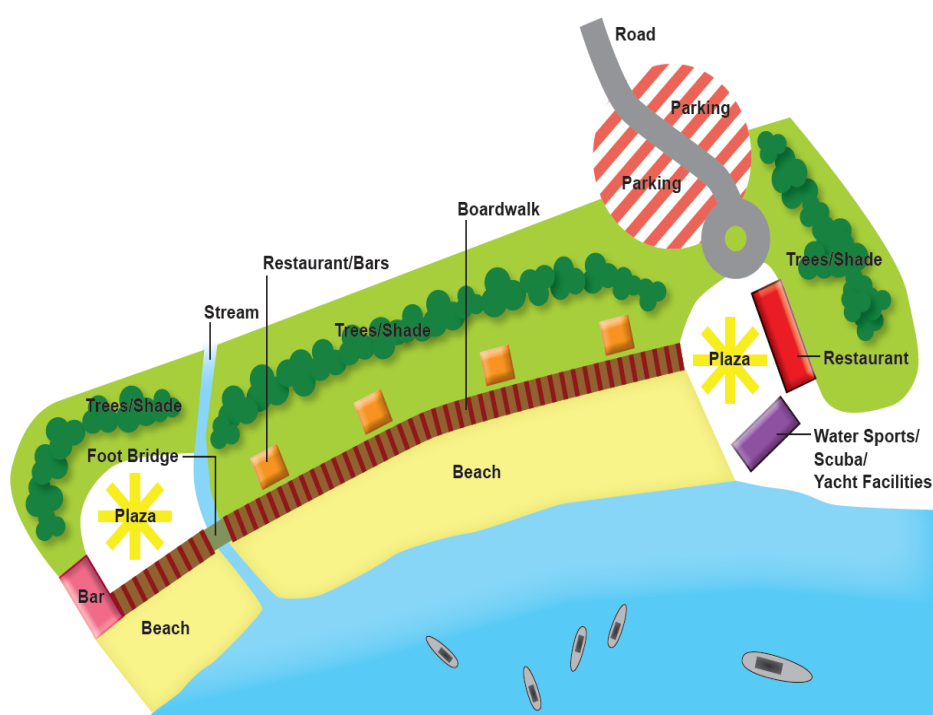
- Garibaldi Hill public/private site development - EC\$ 100,000
- Richmond Hill site development - EC\$ 50,000
- Jack Boy Hill site improvement – EC\$ 30,000

17.2 LITTLE BAY WATERFRONT ENHANCEMENT

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 – a ‘peoples place’. Little Bay has the potential for providing such a physical setting, as the bay itself is visually attractive, distinctive, and inviting. At present users are faced with inadequate facilities and amenities, and a generally ‘scruffy’ environment at Little Bay.

The recommendation is to develop Little Bay waterfront as a ‘Pole of Attraction’, providing an amenity for both tourists and locals, as illustrated on Figure 17.1 which incorporates the existing restaurants and bars.

Figure 17.1 Little Bay Waterfront Enhancement



The proposed 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.

Actions and Indicative Costs

The works and indicative costs are as follows

- Design & supervision: EC\$100,000
- Landscaping/boardwalk: EC\$450,000
- Plaza, car parking: EC\$450,000

17.3 SALEM HERITAGE VILLAGE

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.

Salem village is ideally located to be developed as a 'Pole of Attraction' as it is on the main tourism route, will have a wealth of adjacent attractions (MVO/VIC, Garibaldi Hill, National Trust/BioPark, Isles Bay Beach, restored AIR Studios Museum, restored Sugar Mill and Artists Centre), in addition to the village itself which has historic buildings. Designation and development of Salem as a Heritage Village would lead to the emergence of a more vibrant atmosphere for those who live there as well as visitors.

Salem village has a square, with bandstand, which is used during festivals for parades, band performances etc. On one side of the square there are a number of bars, snackettes and retail outlets. During most of the year, the square is unused.

Our recommendation is that this square be developed into a plaza with fountain, bars, cafes, shops etc....a 'peoples place' for residents and visitors alike. A centre piece in the plaza could be Plymouth's Old Clock Tower, an interesting attraction in its own right, but also providing a link between the past and the present.



Actions and Indicative Costs

Estimated cost for converting the square to an attractive plaza: EC\$ 750,000

17.4 UPGRADE THE NATIONAL TRUST BOTANIC GARDEN TO BIOPARK

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 buxifolia*, 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 ghaud habitat (representing the vegetation found in the island's steep-sided valleys), an orchid house and an Amerindian garden.

The Botanic Garden receives comparatively few visitors and is not generally included in the 'standard' island tour, 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.

What we are recommending is a 'flagship' project comprising the conversion of the Botanic Garden to a *BioPark* which would showcase Montserrat's diverse flora and fauna. Unlike, old-style botanical gardens, the BioPark would offer an interactive experience with nature. This could be similar to the highly successful INBio Park in Heredia, Costa Rica, that is part museum, part educational centre, and part nature park. In addition to watching a 15-minute

informational video, visitors can tour two large pavilions explaining Costa Rica's biodiversity and natural wonders, and hike on trails that re-create the ecosystems of a tropical rainforest, dry forest, and premontane forest.



The BioPark concept would capitalise on Montserrat's major strength - its natural resources – and significantly enhance its overall image. It would attract both stayover tourists and day (including cruise) visitors as well as local schoolchildren from Montserrat and neighbouring islands. It would be unique in the Eastern Caribbean.

The development concept, which would require a site of about 10 acres (4 hectares), would include:

- interpretative room – video presentation on what the BioPark contains;
- exhibition areas with interlinking pathways to showcase Montserrat's rainforest, plants, bird life, etc; as well as its marine life;
- restaurants and retail outlets;
- meeting rooms.

The BioPark would also be a starting point for hiking tours in the Central Hills reserve.

Actions and Indicative Costs

The recommended next step is the commissioning of a feasibility study for the proposed BioPark. Indicative budget for the feasibility and plan is EC\$50,000.

The physical establishment of the BioPark is likely to be done in stages. Preliminary budget for the initial stage is put at EC\$ 500,000

17.5 RESTORATION OF OLD SUGAR MILL

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.



Betty's Hope, Antigua



Morgan Lewis, Barbados

Similar mills have been restored and have become major visitor attractions in other Caribbean destinations, notably Antigua (Betty's Hope) and Barbados (Morgan Lewis) attracting large numbers of visits from their admittedly larger 'populations' of both cruise visitors and stay-over tourists, as well as the local resident population.

At Betty's Hope in Antigua, one of the two wind mills, 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.

The Waterworks sugar mill is in considerable disrepair. However, because it was powered by water, it would, when restored, make it unique not just in Montserrat but within the Eastern Caribbean, thus enhancing its appeal as a visitor attraction.

The location of the sugar mill is also important in that there is sufficient space to incorporate a café, retail outlet and an Arts & Crafts exhibition area.



Actions and Indicative Costs

The recommended next step is the commissioning of a feasibility study for the restoration of the sugar mill, involving preparation of concept plans, design specification, specification of restoration and construction works and associated costs along with a financial feasibility study and project financing plan.

Estimated cost of consultancy is EC\$ 150,000 and preliminary estimate of restoration and construction & fit out of café, exhibition space and service buildings is EC\$ 500,000.

17.6 MUSIC HERITAGE CENTRE AT AIR STUDIOS

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.

AIR Studios Montserrat is in considerable disrepair and remains closed, but that in London continues in operation.

The wider dissemination of this musical history could be made into an important potential tourist attraction. This could be achieved through the establishment of a Music Heritage Centre at the Air Studios, 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.

Actions and Indicative Costs

The recommended next step is the commissioning of a feasibility study for the creation of a Music Heritage Centre at the site of the Air Studios, involving preparation of concept plans, design specification, specification of restoration and construction works and associated costs along with a financial feasibility study and project financing plan.



Estimated cost of consultancy is EC\$ 150,000 and preliminary estimate of restoration and construction & fit out of café, exhibition space and service buildings is EC\$ 500,000.

17.7 RERFURBISHMENT OF ARROW HERITAGE HOUSE

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). Refurbishment of the Arrow house is required to cater for increased visitor numbers.

Actions and Indicative Costs

Estimated cost of consultancy is EC\$ 50,000 and preliminary estimate for refurbishment: EC\$ 50,000

18. IMPROVE ACCESS SERVICES AND VISITOR FACILITATION

Some 23,000 stay-over arrivals and 15,000 excursionists are targeted by 2025 under the medium growth scenario B. Under the high growth Scenario C, some 32,500 stay-over arrivals and 20,000 excursionists are projected by 2025. 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 Bryson's Quay in Antigua and Montserrat. The key elements of this are:

18.1 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).
- Special range of fares to stimulate different niche markets – groups, sports clubs etc.
- 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.
- Appointment of 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.

18.2 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 and/or WINAIR networks.
- 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.
- Appointment 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.

18.3 VISITOR FACILITATION

- Agreement with Government of Antigua for departure tax exemption for day trips to Montserrat
- LIAT and/or WINAIR 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 in-transit 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 Bryson's Quay.
- Improve on-line process of obtaining visa. On-line, visa arrangements are marketed as requiring only 24 hours, but this is not guaranteed
- Provide facility to obtain local currency at Little Bay for visitors arriving by sea as well as yachts people.
- Introduce duty free outlets for departing visitors

19. EXPAND AND DIVERSIFY THE TOURISM PRODUCT

19.1 HOTEL/GUESTHOUSE RESORT VACATIONS

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. In this regard it is worthwhile noting that almost all properties on St. Barts have less than 40 rooms.

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 100 rooms in hotels and guesthouse, 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 units, with facilities for the small meetings market.

In the medium term, Montserrat's best course of action is to develop a 'flag ship' property which will help position Montserrat in the 'higher-end' destination category. As the example of Secret Bay (6 luxury apartment type accommodation) in Dominica has shown, the successful development of a 'flag-ship' luxury resort property can be achieved by a local entrepreneur without reliance on an international brand.

19.2 B&B/INNS/HOME STAY VACATIONS

There is also considerable potential for the B&B/ Inn/ Home Stay accommodation product.

19.3 VILLA/RESIDENTIAL VACATIONS

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.

Currently, there are some 52 villas with approximately 140 rooms on the island. Feedback from the market, as described in Ch 5 earlier is that the quality of villa accommodation is considered excellent; the problem being that there aren't enough villas available.

19.4 SCUBA DIVING

Currently, Montserrat is not included in lists of the best diving destinations in the world and presently attracts comparatively few divers. Nevertheless, the reefs are an important resource, currently subject to very limited use, with the potential to be exploited further. There

are some 13 dive sites with moorings around the island's north-west coast. Currently, an assessment of the reefs is being undertaken by Coral Cay and the preliminary findings are that the reefs are in pristine condition. Redonda (considered to be a very good site) is also used by divers from Montserrat.

There are two PADI-registered dive operators – Aqua Montserrat and Scuba Montserrat.

Two critical factors affect Montserrat's ability to develop the dive market. The first, and obvious one is the quality of the reefs themselves. Feedback from dive experts is that they are considered attractive, but not 'world class' and, with the exception of the Bat Cave off Rendezvous Bluff, no associated unique features. The second factor is that access is not easy.

In Bonaire for example, the attraction is that (in addition to really good reefs) one can walk into the water from almost anywhere on the island. In Montserrat, access has to be by boat. This means higher costs and appealing to the more advanced diver, so the product has to be 'must see and experience'.

In the regard, Montserrat has a number of drawbacks such as few boats; lack of easy access points to the water; few boat launching areas and jetties; and inadequate beach /waterside facilities, such as water, toilets and showers.

The product development possibilities for Montserrat are

- marine reserve with 'volcano' reefs attraction.
- create a 'must see' artificial reef – wreck dive.

Marine Reserve: The creation of a marine reserve would improve the attractiveness of the dive product. This would involve a mapping of the reefs and development of an underwater DVD of the reefs. The effects of the volcano on the reefs could be a unique attraction – certainly unique if the reefs are coming back differently. The designation of a Marine reserve from Bunkum Bay to Plymouth has been recommended in Ch 15 earlier.

Wreck Diving: Unlike other destinations, Montserrat has no offshore wrecks. Proposals have been put forward for the sinking of a ship to serve as an artificial reef. A suitable vessel could be provided by the Royal Navy under the *Ships-to-Reef* programme.

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. A possible 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.

Actions and Indicative Costs

- Provision of launching and jetty support facilities at Woodlands and Little Bay: EC\$ 100,000;
- 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;
- Ship Sinking Feasibility Study: EC\$ 120,000 for initial studies.

19.5 YACHTING

Conveniently located in the middle of the chain of eastern Caribbean islands, Montserrat is an ideal stop-off point for yachts cruising the Caribbean 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. There is a Yacht Club at Isles Bay. Not much more than 400 yachts visit yearly.

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 and facilities 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.

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.

Actions and Indicative Costs

The main recommendations are for (a) the installation of mooring buoys and other facilities/amenities for yachts at Little Bay and Isles Bay; and with an increased number of visiting yachts, (b) the development of a marina and ancillary services

Moorings and Other Facilities

- Placement of mooring buoys at Little Bay and Isles Bay
- Jetty at Isles Bay
- Clean washing and shower facilities;
- Encouragement of amenities such as ice delivery, garbage removal, laundry, and hull cleaning services;
- Facility to obtain local currency at Little Bay
- Improved immigration facilitation on arrival for yacht's people visiting Montserrat
- Increased marketing of Montserrat to the yachting fraternity.

Estimated cost of providing moorings buoys, washing, shower and other facilities such as, ice delivery, garbage removal, laundry and other facilities: EC\$ 200,000.

It should be noted that 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 Tourism Challenge Fund) would have been the first and only mooring business of its kind on Montserrat. Pending approval by the Port Authority, this project is currently stalled.

19.6 HIKING

Most of the trails have become, or are becoming, very overgrown and can be treacherous (especially after heavy rainfall) due to the lack of routine maintenance. Tours sometimes have had to be abandoned either because the trail was heavily overgrown or considered too hazardous. Regular maintenance is paramount to the sustainability of this product.

Formerly, the responsibility for trail maintenance resided with MTB which cleared the following trails once per year: Blackwood Allen, Underwood, Dry Waterfall, Jack Boy-Katy Hill Connector, Duberry-Cassave, Oriole Walkway, Rendezvous Circle and The Cot. Big River is also cleared by the MTB, but not on a yearly basis. The remainder of the Katy Hill Trails System gets no clearing (but this may be treated as a special case, requiring service only once a year, in order to maintain its intrinsic challenge). Although the MNT has the responsibility for trail maintenance, this task could be out-sourced to an appropriate local group. At least three persons need to be employed to ensure that the trails are always clear of debris and that the paths are passable.

Actions and Indicative Costs

The cost of undertaking the year-round maintenance of these seven trails, and Big River and Katy Hill only once per year, is estimated at around EC\$ 100,000 per annum. This would increase to EC\$ 110,000 if other trails were added (e.g. Upper Blake's Estate-Jack Boy Hill; Locust Valley (with sugar mill and ruins); MVO Loop-Hope Ridge-Oriole Walkway) and a possible new circular trail that has recently been trialled leading (via an overgrown existing trail) from the East Coast (near Bottomless Ghaut) through Furlong's Estate towards the Centre Hills, and then back to the coast at Bottomless Ghaut (total of three miles/three hours graded medium). In addition, a sum of about EC\$ 20,000 is required for the upgrading of the existing trails (including installation of wooden bridges, hand rails, platforms, etc) to enhance the trails and make them safer for users.

Training (both classroom and practical) and certification of tour guides is also needed on a regular basis.

What is required are:

- Updated guide of the trails, showing loops, linkages
 - cost EC\$ 20,000
- Design, layout of new trails (circular loops):
 - cost EC\$ 25,000
- Upgrading of existing trails EC\$20,000
- Improvements at Runaway Ghaut EC 5,000
- Maintenance of trails: EC\$110,000 per annum
- Training courses: cost EC\$30,000 annually

19.7 SPORTS AND OTHER SPECIAL INTEREST GROUPS

As described in Ch 4 earlier, Montserrat now has some well-appointed sports facilities including the cricket grounds in Salem and Little Bay, the sports complex at Little Bay and the football stadium at Blakes. Athletic events such as the Montserrat Half Marathon attracts considerable interest and participation from neighbouring islands and further afield.

As various countries over the world have shown, sport can be an 'economic driver'. In 1994, Denmark set up Sport Event Denmark, a group commissioned to ferret out sporting events for a country of Denmark's size. A review in 2010 showed it to be highly successful in attracting international sporting events to Denmark. The average daily spend by an international tourist at a sporting event on Danish soil was € 154 and up to 37% of spectators at the events extended their stay in Denmark into a proper holiday

Actions and Indicative Costs

While Montserrat obviously cannot be compared to Denmark, the template for using sport as an 'economic driver' is there. It needs organisation and focused promotion.

Similarly, other special interest groups (such as church based groups, ornithologists) can be attracted.

19.8 GOLF DEVELOPMENT

Prior to Soufriere's second eruption, which covered the Belham Valley in rubble and ash, the Montserrat Golf Club had nine holes with duplicate tees, which allowed 18 holes to be played. The clubhouse acted not only as the administrative centre of the golf course but also as a social centre of the island. The availability of golf was considered 'key' to the success of the villa/residential tourism on which the island relied.

However, it is important to note that the function of the course was primarily as a facility for villa owner and local golfers and, to a much lesser extent, for those staying in the hotels and bed and breakfast. In positioning terms it could be regarded as one step above an absolutely basic facility. It did not function as a tourist attraction in itself.

PGA Design Consulting (a specialist golf advisory company) carried out a number of physical and (indicative) financial feasibility assessments to determine the least-cost option for re-establishing golf at the most preferred or optimum site, taking into account the various constraints of access, threat from volcanic activity, etc. Sites in the Belham Valley, Waterworks, Blakes Estate and Foxes Bay were assessed.

The conclusion was that the least-cost/ financially viable option for developing a 9 hole 'facility' golf course, akin to what existed before in the Belham Valley, was at Foxes Bay. The cost would be about US\$ 3M.

19.9 SOFT ADVENTURE

Soft adventure can cover anything from kayaking to mountain biking. The Montserrat Physical Development Plan proposed 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, ziplines, rope swings and climbing obstacles. It would be a natural complement to the island's already well developed and popular hiking trail network.

Development costs for zipline or canopy tours vary wildly depending on location, topography, and the nature of the facility under consideration. For example, costs for installing a gravity-brake zip line may be as little as EC\$ 10,000 or as much as EC\$ 100,000 depending on terrain, distance of the cable, and anchors, while a canopy tour can cost from EC\$ 50,000 to EC\$ 500,000 or more, depending on the number of tree platforms and ziplines, and other site specific factors. This excludes land costs. Once constructed, a zip-lining facility requires no fossil fuels to run on a daily basis (unless, that is, sky trams and gondolas are involved). However, it should be noted that soft adventure experiences such as canopy walks, sky trams and gondolas depend on 'footfall' for their commercial success. Without growing and sustained visitor numbers either from a large stayover tourist base and/or large volume of day-visitors/cruise passengers, such soft adventure type products can face commercial challenges, as was the experience in Dominica with a 'sky tram'.

Mountain Biking is also a growing adventure sport that is ideally suited to the island's rough trails.

19.10 FESTIVALS

As described in Ch 4 earlier, a number of festivals and related events take place each year in Montserrat. Of these, the two most popular festivals, attracting large numbers of domestic and regional participants, as well as those from the Montserratian diaspora, are *Our Carnival* (which runs from mid-December until New Year's Day) and the annual St. Patrick's Festival (a weeklong celebration highlighting Montserrat's Irish heritage (now reflected in many of the island's surnames and place names) and local culture (including traditional games, masquerade dancers in traditional costumes, fife & drum and string band music).

These (and other) festivals can be packaged and marketed to become (as in Barbados, Dominica, St. Lucia, Trinidad and other Caribbean countries) major attractions – not only for locals but also for international visitors.

However, while Montserrat is one of few islands that have Carnival celebrations in December and therefore less competition from the islands, *Our Carnival* has many similarities with the carnivals held in other islands, including calypso competitions; the Festival Queen and other beauty and talent shows; and the parade of costumed troupes on New Year's Day. It attracts mainly local (including VFR) and regional visitors, who tend to stay primarily with family or friends, and comparatively few stay-over tourists. It is not sufficiently distinctive to attract foreign visitors for whom, in any case, there is at present insufficient accommodation, and

limited air/sea access. In addition, the ferry journey is too long, too unreliable (due to delays/cancellations caused by heavy seas) and far from comfortable. While this will change with the expected introduction in early 2018 of a high-speed ferry, the most promising overseas market presently are those foreign visitors staying at hotels and villas in Antigua.

Concentration on this festival alone will not lead in the short term to any significant increase in stay-over tourists. On the other hand, the potential of Montserrat's St. Patrick's Festival has yet to be fully exploited. The island's Irish connections, its annual St Patrick's Week celebrations and the fact that Montserrat is the only country in the world outside Ireland where St Patrick's Day is a national holiday afford the opportunity to obtain positive international publicity at minimal cost, and to attract considerably more foreign visitors, particularly from the Irish communities in Boston and other cities along the East Coast of the US.

At present, *My Carnival* is not sufficiently distinctive to attract foreign visitors, particularly stay-over tourists for whom it comes at the wrong time of the year when hotels and villas are already quite busy and air seats taken up by returning Montserradians. It will remain largely focused on the local and regional markets until more value can be added to the existing product. Consideration should be given to changing the dates for *My Carnival*, ideally to a 'shoulder' off-peak month.

The same does not apply in the case of the St. Patrick's Festival which is already beginning to attract some overseas visitors (mainly with Irish connections).

Actions and Indicative Costs

It is proposed that:

- *My Carnival* continues to be promoted in the regional and Diaspora markets, including Antigua,
- The Afro-Caribbean Music Festival be rejuvenated
- Further develop the links that have already been established between the Montserrat and Irish St. Patrick's festival organizers in Boston and other cities with significant Irish communities.

Indicative Costs

At present, both *My Carnival* and *St. Patrick's* and other festivals in Montserrat are reliant on sponsorship to fund the organisational costs involved. Additional costs are estimated as follows:

- Promotion and marketing of *My Carnival*: EC\$ 20,000 annually
- Development and promotion of Music Heritage Festival: EC\$50,000 (excluding performers' fees) annually
- Promotion and marketing of the St. Patrick's festival: EC\$50,000 annually

19.11 DAY-VISITOR PRODUCT

There is undoubted potential for developing the 'day-visitor' product – primarily day trips from Antigua, St. Kitts & Nevis and Guadeloupe. 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

The visitor attractions recommended for development in Chs 15 and 17 earlier will address these suggestions, resulting in an attractive excursionist product offer. When developed the list of visitor attractions will include:

- Volcano Interpretative Centre at the MVO
- The Museum and Heritage Park
- Guided tours in the Plymouth area
- Sugar Mill at Waterworks
- BioPark at the MNT
- Music Heritage Centre/AIR Studios and Arrow Heritage Home
- Heritage village and plaza at Salem
- Little Bay Waterfront – swim, refreshments, shops
- Viewing platforms and interpretation panels

Guided tours to the proposed Plymouth Volcano Reserve would be a major attraction not only for day-trippers, but also for stayover tourists and yacht/cruise visitors.

19.12 CRUISE

Cruise tourism has been one of the fastest growing tourism products in recent times. According to the Cruise Line Industry Association, passenger numbers are estimated to have reached 23 million worldwide in 2015 compared with some 13 million people who took cruises in 2008, representing an increase of 70%.

The Caribbean is the world's most popular cruise destination, accounting for some 40% of the industry's global capacity. Montserrat's potential lies in the smaller sized cruise ship segment of the market...the Clipper Class, Sea Dream etc....as the Island has neither the infrastructure nor transport to cater for large ships.

The requirements of cruise ship visitors are basically the same as for the day-visitor as outlined earlier

19.13 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' spa resort to act as a catalyst for the further development of this product. It would also be essential to have good hospital facilities.

20. REORGANISE AND STRENGTHEN SECTOR MANAGEMENT

20.1 INSTITUTIONAL FRAMEWORK

Currently, as outlined in Ch 4 earlier, the airport, the jetty at Little Bay and the operation of the ferry come under the responsibility of the Ministry of Communication & Works. Although there is a port authority responsible for the management of Little Bay port, there is no equivalent for the airport.

Under Scenarios B and C, with commissioning of a sea ferry and, over the 10 year period of the plan, the likelihood of a Twin Otter service, 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.

20.2 STRENGTHEN THE MONTSERRAT NATIONAL TRUST

The MNT will be called upon to play a more prominent role in the development of the tourism sector, particularly in respect of the national museum & heritage park, the trails network, proposed BioPark and the rehabilitation/development of the sugar mill.

The organisation needs to be adequately resourced to undertake these roles.

20.3 THE NEED FOR A NATIONAL TOURISM ORGANISATION

With the dissolution of the Montserrat Tourist Board, the question arises as to whether there is a need to re-establish a national tourism organisation. Our recommendation is that a national tourism organisation should be established for the following reasons:

- There is a vacuum in terms of sector management in the sense that there is no entity taking charge of the development and promotion of the tourism sector. The sector is 'rudderless'....a factor which is discouraging investment in the industry
- Tourism enterprises on Montserrat are individually either too small, too inexperienced or financially constrained to play an active role in promoting the country's image abroad
- The lessons from international experience is that the functions of national tourism promotion are more effectively undertaken by an autonomous, statutory organisation rather than by a ministry. Experience has shown that a ministry's ability to respond to changing market conditions is severely constrained by public sector procedures and regulations
- Another lesson from international experience is that the coordination of industry resources, the avoidance of duplication and the facilitation of public/private sector dialogue and cooperation is best effected through an autonomous, statutory organisation.
- Joint marketing activities with other national tourism organisations is best achieved by having an independent national tourism organisation with similar decision making powers.
- Travel trade intermediaries (tour operators, travel agents etc) are more familiar with the standard operating procedures of national tourism organisations rather than Ministries

Recommendations on the type of national tourism organisation and structure are contained in a separate document.

21. FOCUSED AND COST EFFECTIVE DESTINATION MARKETING

21.1 STRATEGIC APPROACH – DESTINATION MARKETING

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 affordable 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 e-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 and in 2015 to just under 3.2 billion.

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 is essential – how best to reach the customer, understanding the trade channels – tour operator, travel agents etc – and especially today, understanding the web-based social media that can be used not only to communicate with customers, but also to provide market research information.

A **fifth** factor is 'leveraging' the promotional budget by engaging in joint advertising campaigns with market intermediaries (traditional and on-line tour operators, airlines etc) as well as regional destinations (particularly Antigua & Barbuda), to get wider market exposure than otherwise possible.

The **sixth** factor is the strengthening of marketing 'know-how' and skills within the proposed National Tourism Organisation, particularly in respect of destination marketing, e-marketing and marketing planning/research.

The **seventh** factor is that as Montserrat is an off-line destination, access is crucial. The implications of this is that not only must there be the high standard seamless inter modal air-sea access as described in Ch.18 earlier, but the transfer itself must be promoted as re-enforcement of the quality and exclusiveness of the product.

21.2 TARGET MARKETS AND PRODUCTS

A 'golden' rule 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.

Markets	Regional				International			Cruise
Products	Antigua	St. Kitts Nevis	Guade-loupe	OECS	UK	US	Can	
1. Day-Trips	✓	✓	✓	✓				✓
2. Sports/Special Interest	✓	✓	✓	✓				
3. MICE*	✓	✓	✓	✓				
4. Yachting	✓		✓					
5. Volcano	✓	✓	✓	✓	✓	✓	✓	
6. Hiking/					✓	✓	✓	
7. Scuba diving					✓	✓	✓	
8. Leisure/Villa/GuestH					✓	✓	✓	
9. Diaspora	✓			✓	✓	✓	✓	
10. Festivals	✓	✓	✓	✓		✓		

**assuming development of appropriate conference/meeting facilities*

21.3 TRAVEL TRADE INTERMEDARIES

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 and Villa tour operators in the UK.
- Carib World Travel, D & J Forwarders & Tours, Jenny Tours and Ondeck Sailing in Antigua.
- Appropriate tour operators in the US and Canadian markets.

And of course any tour operators who, independently, include Montserrat in their tour programme.

Montserratian Ground Tour Operators

There are six ground tour operators on Montserrat at the moment – Jemmotte Tours, NamCas, RTT Travel & Tours, Runaway Travel, Scriber Adventure Tours, and Travel World.

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, heritage, festivals 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

21.4 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 the Montserrat tourism website 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.

It is also important that private sector operators have attractive websites, linked to the official Montserrat tourism website.

Driving Customers to the Sites

Promoting the website is fundamental. Referencing the website 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.

21.5 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
- educational trips for journalists, travel writers
 - print media
 - Audubon, National Geographic
- purchasing tours for overseas tour operators
 - one or two 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.

21.6 JOINT PROMOTIONS WITH THE PRIVATE SECTOR

It is recognised that at the moment, the Montserratian private sector is exceptionally small and operators struggle to survive. However, over the period of the plan, the Montserratian private sector will expand – more operators and bigger sized operations.

As the sector expands, the National Tourism Organisation should establish jointly funded promotional campaigns with the various sub-sectors, such as

- jointly funded promotional campaign with the taxi/tour bus operators, and the ferry and airline operators to attract the excursionist market
- jointly funded campaigns with the villa operators.

Moreover, the non-tourism private sector which benefits from tourism (e.g. banks, construction companies) should be tapped to support marketing and product development initiatives.

21.7 JOINT PROMOTIONS

The National Tourism Organisation could leverage its promotional budget through a structured approach to joint marketing efforts between the organisation and selected regional destinations, viz:

- Antigua, with Montserrat being promoted as an 'add-on' to a vacation on Antigua.
- Caribbean Tourism Organisation in respect of the smaller Caribbean destinations.

21.8 MARKET RESEARCH AND STATISTICS

One of the key characteristics 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 are and what their 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 how the Internet technologies can provide research information to collect market information is essential.

The following is research programme is recommended:

Stayover Visitor Exit Survey: This survey should be undertaken among departing visitors. A questionnaire would need to be prepared to gather information on visitor activities, expenditures and perceptions. The survey design should capture both the peak and off peak periods of year.

Cruise/Day Visitor Survey: With the recent resurgence in cruise ship calls, a visitor survey should be carried out to determine their needs in terms of the type of tours they would like, stopping places, length of tour etc.

Yachting Survey: A survey should be undertaken among yachts' people to Montserrat to determine their profiles and requirements as a first step in developing a product to attract this segment of the market.

Website Statistics: Properly collected and analysed, a wealth of information on existing and potential customers can be extracted from the website statistics. In addition, these website statistics can indicate the effectiveness of promotional campaigns to particular niche markets.

22. 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.

22.1 INDUSTRY REGULATIONS

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 TDP 2, 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. (TDP 2 Annual Review, June 2010).

22.2 REGISTRATION AND GRADING

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 national tourism organisation may be appropriate, the setting up of a grading and classification in Montserrat 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, 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 recommend that a system of registration and licensing should be established.

22.3 SERVICE STANDARDS

For the tourism sector, 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. From discussions with stakeholders, the following training interventions (in order of priority) are required for existing employees:

- Customer Handling for all, including Customs & Immigration personnel
- Cookery...basic skills and preparation of sauces
- Tour Guiding, including taxis
- Housekeeping
- Waiting Skills
- Front Office
- Management/Supervisory Skills
- Train the Trainer

The dilemma faced 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 trainers for each of the above priority areas.

The approach adopted under a previous development plan (TDP 2) was the continuation of the short courses that were run in previous years by CHTI and by private organizations. The continuation of this approach would appear to be the most cost-effective option.

Montserrat could also benefit from plans to extend the reach of the Antigua & Barbuda Hospitality Training Institute (ABHTI) to the wider OECS tourism and hospitality community.

Action and Indicative Budget

Short term training courses should be organised, (as under TDP 2). The courses would be funded largely by the participants (or their employers). However, to get the training courses established on an on-going basis, support funding will be required during the initial three years. An annual budget of EC\$ 50,000 is recommended.

23. INVESTMENT PROMOTION

23.1 TOURISM GROWTH DEVELOPMENT FUND

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

Although the Tourism Challenge Fund has 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) DFID has established two Tourism Development Funds to provide grants, soft loans to tourism enterprises.

One fund...the **Tourism Accommodation Growth Fund**....is designed to support enterprises or individuals to improve existing or develop new tourism accommodation on the island. The other fund....the **Tourism Product Enhancement Fund**...is designed to invest in enhancing the tourism product offer on the island.

Although both funds have been set-up on a 'pilot' basis, it is recommended that they are established for a period of three years with increased resources.

PART VI TMP IMPLEMENTATION

24. ORGANISING FOR TMP IMPLEMENTATION

25. TMP IMPLEMENTATION FRAMEWORK

24. ORGANISING FOR TMP IMPLEMENTATION

The development of Montserrat's tourism will not simply happen. It has to be stimulated and directed, and the activities of the various tourism and tourism- related organisations coordinated. Three elements are necessary – a **champion**, a **task force** and a **project management unit**.

24.1 CHAMPION

To get 'buy-in' by all stakeholders, the TMP needs to be championed. The TMP vision, the strategy and the benefits from development need to be constantly articulated and elaborated, and its implementation encouraged by a senior figure in authority.

24.2 TMP TASK FORCE

As described in Ch.4 earlier, there are a number of organisations in both the public and private sectors with responsibilities and active participation in tourism. The many actions that have been identified in this TMP will involve many of these organisations 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 group be created – **the Task Force**. This should be a high-level group, working to a tight terms of reference and within a defined life span with the overall goal of promoting, energizing and monitoring the implementation process.

24.3 TMP COORDINATION UNIT

Recognizing that the members of the Task Force will be senior executives from public and private organisations and having other responsibilities, we recommend the setting up of a TMP Coordination Unit with responsibility to initiate, guide and coordinate the actions required for TMP implementation.

Recommendations on the organisational structures for implementation are contained in a separate document.

25. TMP IMPLEMENTATION FRAMEWORK

25.1 SCHEDULING THE TMP ACTION PROGRAMMES

Government must first decide which development scenario to pursue. The immediate priority for the Tourism Task Force is then the scheduling of the recommended action plans, in terms of their sequencing. Should the tourism product be expanded and standards improved prior to, or after, the establishment of a marketing campaign? Should capacity building and human resource development precede product development and marketing? The greatest consensus appears to be to do all at once. This is not as simplistic as it appears at first sight. Because all the action programmes are so interlinked, trying to identify the best sequence is not a realistic approach. No single measure can bring much benefit without at least some progress in respect of the other actions. In this sense, it is more instructive to view the development of the tourism sector as a process rather than as a sequence of activities.

We see the Action Plan being implemented in three phases:

Phase I:	Organising for Growth: April 2016 – December 2017
Phase II:	Growth Take-Off: January 2018 – December 2019
Phase III:	Rapid Growth: January 2020 – December 2025

25.2 ACTION PLAN

A list of the actions to be taken in implementing the TMP is set out in Table 25.1, relating 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 detailed costings can be determined – for example the proposed waterfront improvements to Little Bay cannot be precisely 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 a first step – the restoration of the sugar mill for example.

It must be emphasised that the Action Plan outlined on Table 25.1 is a framework plan. It will need to be reviewed, revised and updated by the Task Force and TMP Coordination Unit in the light of any changed circumstances.

Component	Organising for Growth 2016 – 2017 Phase I: Milestones	Growth Take-Off 2018 - 2020 Phase II: Milestones	Rapid Growth 2021 – 2025 Phase III: Milestones
A. Arrangements for Tourism Master Plan Implementation	<ul style="list-style-type: none"> Govt. Approval of TMP Publications of Document Set-up TMP Task Force Set-up TMP Coordination Unit Appoint Technical Advisor & Staff to Coordination Unit 	<ul style="list-style-type: none"> On-going review of TMP <ul style="list-style-type: none"> monthly meetings publication of minutes 	<ul style="list-style-type: none"> On-going review of TMP <ul style="list-style-type: none"> monthly meetings publication of minutes
B. Reorganise and Strengthen Institutional Arrangements	<ul style="list-style-type: none"> Legislation to establish NTO Establish Air & Sea Port Authority Appoint Tourism Board Appoint Tourism Director Appoint NTO Staff Establish budget for NTO Strengthen the Montserrat National Trust 	<ul style="list-style-type: none"> Establish budget for NTO Establish budget for MNT 	<ul style="list-style-type: none"> Establish budget for NTO Establish budget for MNT
C. Protect and Enhance Natural Environment	<ul style="list-style-type: none"> Strengthen regulatory framework Establish mixed use marine reserve Establish Plymouth Volcano reserve Establish GeoPark Establish environmental awareness campaign 	<ul style="list-style-type: none"> Environmental Campaign 	<ul style="list-style-type: none"> Environmental Campaign
D. Economic Infrastructure	<ul style="list-style-type: none"> Improve road markings Maintenance repairs to airport terminal & landscaping Improve condition of roads to Jack Boy Hill, and Garibaldi Hill Breakwater at Little Bay Moorings for yachts at Little Bay and Isles Bay Access road to MVO 	<ul style="list-style-type: none"> Hanger & fuelling facilities at airport Improve jetty at Plymouth Road to Rendezvous Bay Improve Jetty at Little Bay Jetty at Isles Bay 	<ul style="list-style-type: none"> Marina and Fishermen's Village at Little Bay

Component	Organising for Growth 2016 – 2017 Phase I: Milestones	Growth Take-Off 2018 - 2020 Phase II: Milestones	Rapid Growth 2021 – 2025 Phase III: Milestones
E. Air & Sea Access and Visitor Facilities	<ul style="list-style-type: none"> Promotional support for developing St. Kitts/Montserrat route Agreement with Govt. of Antigua & Barbuda for departure tax exemption for day-trips to Montserrat Appropriate landside facilities for ferry pax at Bryson's Quay, Antigua Reduce check-in processing for air & sea pax in Montserrat Streamline immigration procedure for yachts New ferry service 	<ul style="list-style-type: none"> 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 streamlined facilitation at V.C. Bird Int Airport for transit pax to Montserrat Lease Twin Otter 	
F. Expand & Diversify Tourism Product			
(i) Accommodation	<ul style="list-style-type: none"> Review regulations/incentive to attract investment in accommodation facilities 	<ul style="list-style-type: none"> Increase supply of accommodation – attract 'flag-ship' development 	<ul style="list-style-type: none"> Attract investors for boutique hotels, B&B, Inns, villa developm't
(ii) Scuba diving	<ul style="list-style-type: none"> Jetty & facilities at Little Bay Monitoring & maintenance of sites 	<ul style="list-style-type: none"> Mapping and underwater DVD of dive sites Monitoring & maintenance 	<ul style="list-style-type: none"> Feasibility study for offshore 'wreck' & monitoring & maintenance
(iii) Yachting	<ul style="list-style-type: none"> Moorings, on-shore facilities 	<ul style="list-style-type: none"> Mooring, on-shore facilitation 	<ul style="list-style-type: none"> Moorings on-shore facilities
(iv) Golf	<ul style="list-style-type: none"> Feasibility study for location of course & real estate 	<ul style="list-style-type: none"> Development of course & associated real estate 	<ul style="list-style-type: none"> Development of course & associated real estate
(v) Festivals and Events	<ul style="list-style-type: none"> Promotion of current and new festivals 	<ul style="list-style-type: none"> Promoting of current and new festivals 	Promoting of current and new festivals
(vi) Hiking	<ul style="list-style-type: none"> Maintenance of trails/signage Upgrade of existing trails 	<ul style="list-style-type: none"> Updated guide to trails Maintenance of trails Training courses 	<ul style="list-style-type: none"> Updated guide to trails Maintenance of trails Training courses

Component	Organising for Growth 2016 – 2017 Phase I: Milestones	Growth Take-Off 2018 - 2020 Phase II: Milestones	Rapid Growth 2021 – 2025 Phase III: Milestones
G. SERVICE AND QUALITY STANDARDS	<ul style="list-style-type: none"> Survey of training needs Short-term training courses 	<ul style="list-style-type: none"> Short-term tourism training courses Legal framework registration of all tourism enterprises Establish Quality Standards 	<ul style="list-style-type: none">
H. DESTINATION MARKETING			
(i) Market Planning		<ul style="list-style-type: none"> Prepare 1-3 year rolling marketing plan updated yearly 	<ul style="list-style-type: none"> 1 – 3 year rolling marketing plan updated yearly
(ii) Web Site	<ul style="list-style-type: none"> Web site restructuring/ development 	<ul style="list-style-type: none"> On-going development/ management 	<ul style="list-style-type: none"> On-going development
(iii) Collaterals		<ul style="list-style-type: none"> Redesign/ printing 	<ul style="list-style-type: none"> Redesign/printing
(iv) Market Representation		<ul style="list-style-type: none"> Appoint representatives/ agencies in Antigua, UK, US 	<ul style="list-style-type: none"> Appoint representatives/ PR agencies in Antigua, UK, US
(v) General Promotional Activities	<ul style="list-style-type: none"> Advertising, educational, trade promotions 	<ul style="list-style-type: none"> Advertising, educational, trade promotions 	<ul style="list-style-type: none"> Advertising, educational, trade promotions
(vi) Niche & Joint Promotions	<ul style="list-style-type: none"> Support to develop gateway for St. Kitts & Nevis Niche Promotions 	<ul style="list-style-type: none"> Joint promotions with Antigua & Barbuda, CTO Niche Promotions 	<ul style="list-style-type: none"> Joint promotions with Antigua, & Barbuda CTO, niche promotions
(vii) Research	<ul style="list-style-type: none"> VES, Day-Visitor, Cruise, Yacht Surveys 	<ul style="list-style-type: none"> VES, Day-Visitor, Cruise, Yacht Surveys 	<ul style="list-style-type: none"> VES, Day-Visitor, Cruise, Yacht Surveys
I. INVESTMENT PROMOTION			
(i) Tourism Development Fund	<ul style="list-style-type: none"> Establish objectives and mechanisms for support to enterprises (loans, equity, grants) 	<ul style="list-style-type: none"> Implementation of enterprise development support to enterprises (loans, equity, grants) 	

Component	Organising for Growth 2016 – 2017 Phase I: Milestones	Growth Take-Off 2018 - 2020 Phase II: Milestones	Rapid Growth 2021 – 2025 Phase III: Milestones
J. Develop Visitor Attractions & Amenities			
(i) Volcano Interpretation	<ul style="list-style-type: none"> Construction of Volcano Interpretation Centre (VIC) Improve Garibaldi & Richmond Hill viewing Make 'volcano' presentation 'must see' attraction Access Road to MVO 	<ul style="list-style-type: none"> Interpretative material for VIC Tours to Plymouth/training Improve MVO 	
(ii) Little Bay Waterfront	<ul style="list-style-type: none"> Design plan/preliminary development 	<ul style="list-style-type: none"> Implementation/ construction 	<ul style="list-style-type: none"> Further enhancement & maintenance of waterfront
(iii) Beaches	<ul style="list-style-type: none"> On-going maintenance 	<ul style="list-style-type: none"> On-going maintenance 	<ul style="list-style-type: none"> On-going maintenance
(iv) Music Heritage	<ul style="list-style-type: none"> Feasibility and design study Refurbish Arrow Heritage Home 	<ul style="list-style-type: none"> Rehabilitation of Air Studios 	
(v) Sugar Mill	<ul style="list-style-type: none"> Survey, feasibility and design of rehabilitation of mill 	<ul style="list-style-type: none"> Rehabilitation of building & interpretative materials 	
(vi) Botanic Garden & BioPark	<ul style="list-style-type: none"> Seek support for improvements to gardens Better organisation & management 	<ul style="list-style-type: none"> Construction of BioPark 	
(vii) Salem Heritage Village	<ul style="list-style-type: none"> Design plan for Salem 	<ul style="list-style-type: none"> Works to create plaza/ focal point Situate Plymouth Clock Tower 	<ul style="list-style-type: none"> Enhancement of Heritage Village
(viii) Plymouth Volcano Reserve	<ul style="list-style-type: none"> Design Plan for Reserve 	<ul style="list-style-type: none"> Operation and Management 	<ul style="list-style-type: none"> Operation and Management
(x) GeoPark	<ul style="list-style-type: none"> Design Plan for Park 	<ul style="list-style-type: none"> Operation and Management 	<ul style="list-style-type: none"> Operation and Management

PART VII ANNEXES

26.1 MONTSERRAT'S TOURISM PRODUCTS AND ATTRACTIONS

26.2 ASSUMPTIONS UNDERLYING TOURISM GROWTH TARGETS

ANNEX 26.1 MONTSERRAT'S TOURISM PRODUCTS AND ATTRACTIONS

26.1.1 WATER-BASED

(i) Beaches

Montserrat's beaches are shown on the following map. With the exception of Rendezvous Beach the island lacks the conventional white sand beaches to be found in most other Caribbean islands, but instead offers soft, pearl-grey volcanic sand.

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);
- **Isles/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;

- **Foxes Bay** and **Bransby Point** (both in or very close to the Exclusion Zone); and
- **East Coast:** a new beach has been formed on the east coast, close to where Bottomless Ghaut reaches the sea, with access possible for 4x4 vehicles to within a few metres of the beach. Warning signs will need to be placed about the dangers of swimming at this location.



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 need of upgrading; 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 shore line 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 13 are permanently moored dive sites (see Table 26.1). Currently, only 5 of the moored sites are functioning, due to inadequate maintenance.

Dive visitors are also taken to sites around Redonda (officially part of Antigua & Barbuda).

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.

Table 26.1: Dive Sites

1. Fox's Bay (artificial reef)	9. Potato Hill (mooring)
2. Old Road Bay	10. Bat Cave (mooring)
3. Lime Kiln Bay	11. Rendezvous Bay (mooring)
4. Woodlands Bay (mooring)	12. Pot Of Gold (mooring)
5. Woodlands Deep (mooring)	13. Northwest Bluff (mooring)
6. Bunkum Bay	14. Little Redonda (mooring)
7. Virgin Islands (two moorings)	15 The Pinnacles
8. Carr's Bay (mooring)	16. Yellow Hole

Source: Montserrat Division

Lack a suitable launch site for their boats which limits the variety of sites that can be visited.

Map 26.2: Dive Sites



(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.

Leisure activities such as kayaking, day-sail boats (such as lasers, mirrors, squibs, hobby cats, sailboards, canoes, etc) 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, barracuda, kingfish and albacore tuna. There are several fishing boats for hire and two small sea angling operations, (but not on a par with Antigua's 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.

(iv) 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 Montserrat'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 marina at Little Bay).

At present, there are no moorings or jetties for visiting yachts. The poor standard of the only shower facilities (provided in a hut 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\$35 (about US\$14) fee for all yacht arrivals at the port, Customs charge EC\$50 per hour for attendance outside of normal working day hours and at weekends/ public holidays (to cover staff overtime), with a minimum of EC\$100 per call out.

26.2 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. There are many complaints in the former MTB's annual visitor survey about the poor condition of the road leading to this site; and

- (ii). **Garibaldi Hill** 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 unsightly appearance at the summit (litter, overgrown bush, the LIME building and fencing, etc.), and lack of visitor facilities, also need to be addressed.



Richmond Hill is another potential vantage point 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).

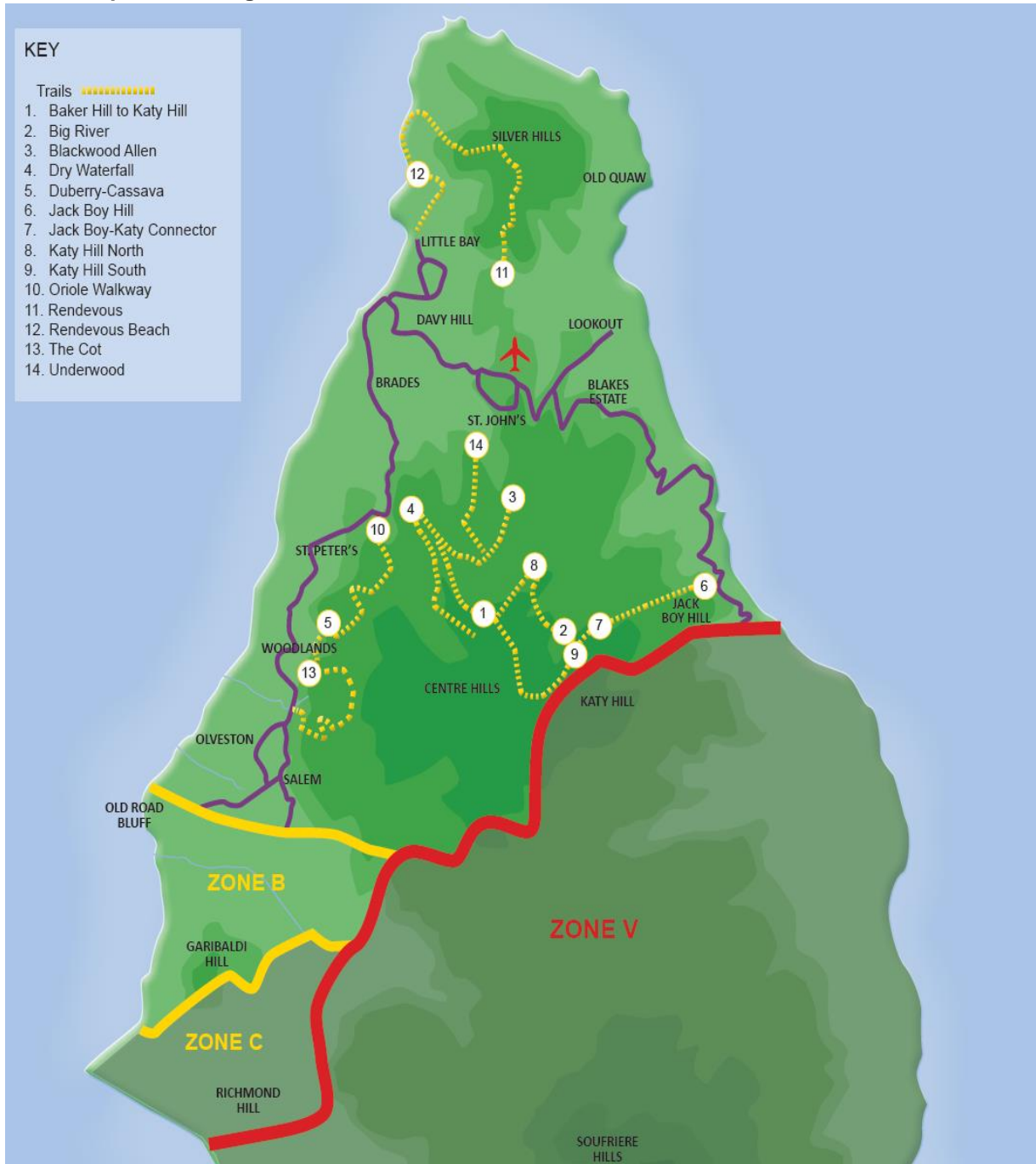
(ii) Hiking

There is a network of fourteen recommended hiking trails (shown on Map 26.3) 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 26.2 Hiking Trails (illustrated on Map 26.3)

1. The Cot (1.6 miles one way; level: light) 2. Duberry-Cassava (0.5 miles; light) 3. Oriole Walkway (1.3 miles; moderate) 4. Dry Waterfall (1.2 miles; moderate) 5. Blackwood Allen (1.2 miles; moderate) 6. Underwood (1.0 miles; light) 7-10. Katy Hill Trail System - Big River (0.7 miles; extreme) - Katy Hill south (1.6 miles; extreme) - Katy Hill North (1.6 miles; extreme) - Baker to Katy (1.0 miles; extreme)	11-12. Jack Boy Hill (0.8 miles; difficult) plus continuation to Katy Hill (0.4 miles; extreme) 13-14 Rendezvous (1.9 miles; difficult), of which Little Bay to Rendezvous Beach (1.3 miles; moderate).
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Map 26.3: Hiking Trails



A drawback of the trail network is that it affords few opportunities for loops, circular hikes.

Although the mapped trails were under management by the former MTB, it is understood that this responsibility has now been transferred to the National Trust using rangers employed by the Department of Environment. Under TDP 2, six trails (Blackwood Allen, Oriole Walkway, Dry Waterfall, Duberry-Cassava, Underwood 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.

(iii) Biking

There is presently only one company offering bike rentals. Some guest houses and villas have their own mountain bikes which guests can use. This is a growing adventure sport that is ideally suited to the island's rough trails.

(iv) 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. As presently packaged, the existing tours do not provide sufficient opportunities for interpretation of the island, opportunities to spend money or variety.

(v) 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 of Montserratians 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 re-initiate the Afro-Caribbean Music Festival at Salem, but this (like all festivals) would need funding support until becoming financially self-sustaining.

(vi) 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.

(vii) 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 Plymouth's War Memorial and Clock Tower (but these have been taken into storage following storm damage). 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 as in the case of Blake's estate where the house is being restored by the present owner – mainly for his own use - although the public could be admitted to certain areas).

(viii) Walking Tours

Under TDP 2, 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 visitor activity on the island, demand for these tours has been very modest, even non-existent in some cases.

(ix) 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 *Rondeletia Buxifolia*, which belongs to 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.

Amerindian Dwelling



Botanic Garden



(x) 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.

ANNEX 26.2 ASSUMPTIONS UNDERLYING TOURISM GROWTH TARGETS

The assumptions underlying the tourism growth projections outlined in Ch. 13 of the report are as follows:

For Scenario A, visitor spending per head for stay-over tourists, excursionists, yacht and cruise visitors is assumed to remain constant in terms of 2015 money values.

For Scenarios B and C

- Stay-over visitors spending increases from an average of EC\$ 2,450 per person in 2015 (excluding air fares and/or sea ferry fares) to EC\$ 2,600 per person under Scenario B and EC\$ 2,700 under Scenario C in 2025, in terms of constant 2015 prices, reflecting a higher tourism product quality offering.
- Yacht visitors spending increases from an average of EC\$ 200 per person in 2015 to EC\$ 250 per person under Scenario B and EC\$ 300 under Scenario C in 2025, in terms of constant 2015 prices, reflecting a higher tourism product quality offering.
- Day-visitor visitors spending increases from an average of EC\$ 200 per person in 2015 (excluding air fares and/or sea ferry fares) to EC\$ 250 per person under Scenario C in 2025, in terms of constant 2015 prices, reflecting a higher tourism product quality offering.
- Cruise ship visitors spending increases from an average of EC\$ 150 per person in 2015 to EC\$ 150 per person under Scenario C in 2025, in terms of constant 2015 prices, reflecting a higher tourism product quality offering.
- 'bed nights' refer to bed-nights in paid serviced accommodation, which represents about 20% of all visitor bed-nights in 2015. For Scenarios B and C, this proportion increases to 30% and 34% 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 12 nights in 2015 to 10.5 nights in 2025, under Scenario B and about 10 nights under Scenario C, reflecting increasing numbers of vacationers who have a shorter length of stay than those visiting friends and relatives.
- Under Scenario B, the number of yachting visitors will primarily be determined by the number of moorings in Little Bay and Isles Bay. Under Scenario B, projected yacht arrivals for 2025 in 10,000. Under Scenario C with a break-water and marina at Little Bay, the number of yacht visitors is projected to be 20,000 by 2025.
- Cruise visitor projections for Scenario B are based on the assumptions of an average ship pax of 300, of which 80% come ashore; 150 crew members of which one-third come ashore and 25 cruise ship calls by 2025. For Scenario C, 10,000 cruise visitors are projected.
- Day trips will come primarily from stay-over tourists in Antigua and to a lesser extent from cruise visitors to Antigua and stay-over tourists to St. Kitts & Nevis.
- 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.