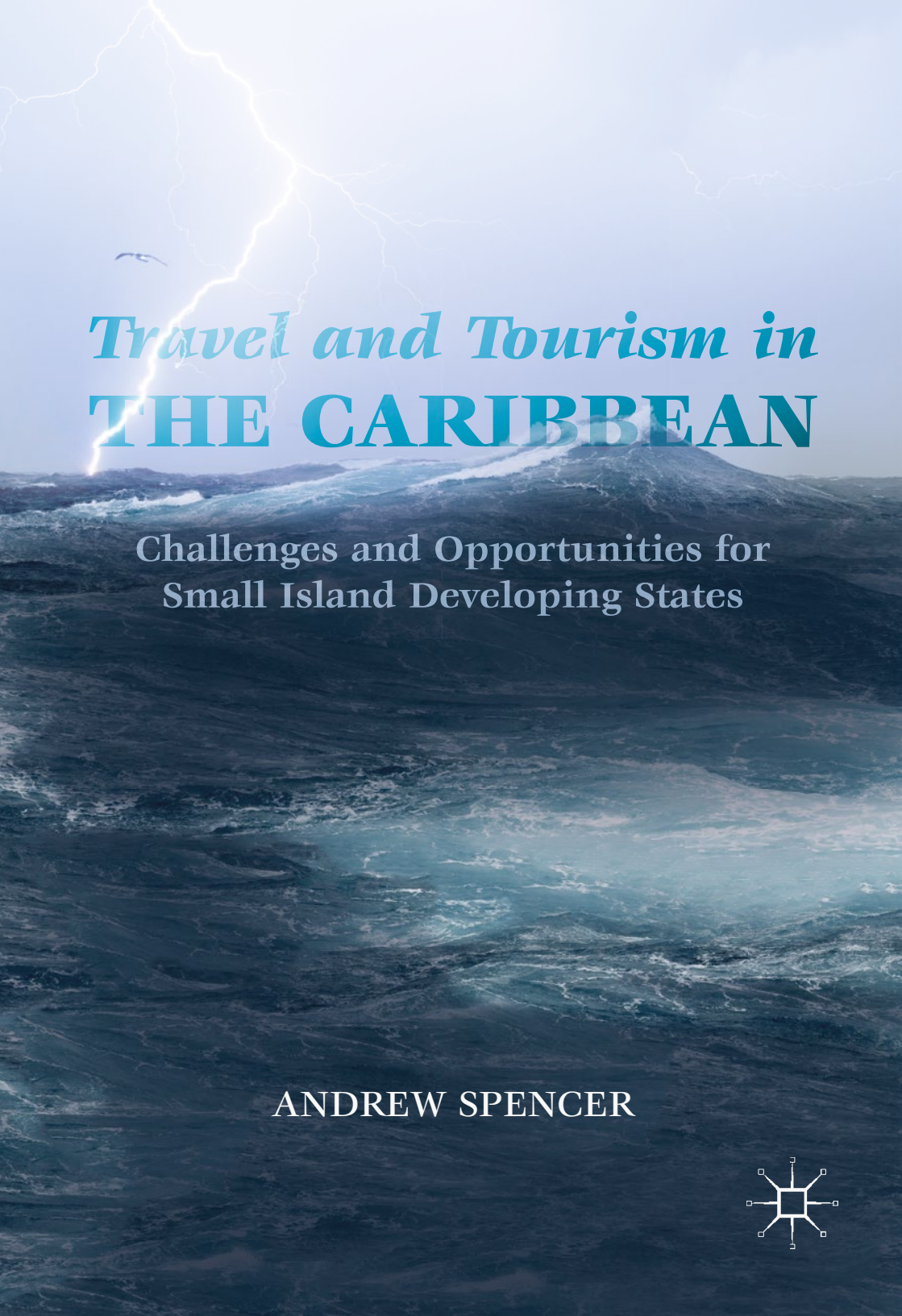
Travel and Tourism in
THE CARIBBEAN
Challenges and Opportunities for
Small Island Developing States
ANDREW SPENCER

Travel and Tourism in the Caribbean

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Challenges and Opportunities for Small Island Developing States

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Foreword

It gives me great pleasure to contribute to Dr. Andrew Spencer's second book *Travel and Tourism in the Caribbean: Challenges and Opportunities for Small Island Developing States.* Dr. Spencer is undoubtedly among the leading Caribbean academics on tourism, having studied the discipline to the highest levels of tertiary education, and having spent many years educating future generations of highly qualified practitioners. However, his academic prowess in the areas of hospitality, tourism, international travel, and strategic management were further tested in 2017 when he was appointed as the Executive Director of the largest agency of the Jamaican Tourism Ministry, the Tourism Product Development Company. It is with a great sense of pride that I report that Dr. Spencer has not only passed new challenges that have been set before him in the execution of tourism policy, but he has also surpassed expectations of local and regional industry players. It is his rare combination of solid academic grounding and a shrewd understanding of the daily realities of the tourism praxis which are mirrored in this work and make it a necessary part of the literature of Caribbean tourism in the twenty-first century.

The work unpacks the ways in which tourism has been and continues to be the lynch pin with which many Caribbean economies and societies have been held together. In Jamaica, tourism remains among the leading earners of foreign exchange, employs hundreds of thousands through direct and indirect employment opportunities, and has done much to sustain other sectors such as agriculture, manufacturing, transportation, and construction to name a few. In Jamaica my administration has been clear on the requisite performance indicators which will accrue to inclusive growth. As such we

have targeted 5 million visitors in five years with earnings of US$5 billion. We are well on our way to achieving this with support from our carefully crafted linkage network which comprises gastronomy, health and wellness, shopping, knowledge and entertainment, and sport. No doubt our structured efforts make us a case for best practice in the Caribbean region.

The book acts as a conduit for Dr. Spencer's reflections on and assessment of the evolution, emergence, and transformative power that tourism has had in Caribbean small island developing states. Indeed, tourism is a key vehicle for the development of human capital in the region. The industry remains a beacon of hope for many, who have witnessed in recent years renewed efforts to strengthen and grow the industry from the bottom up, with less singular focus on large industry players and an increase in opportunities for the common person to build a personal legacy. Efforts at providing equipping communities with the resources to harness and monetize their unique personality and flavour have been prioritized, along with exploring new avenues to increase meaningful and memorable interactions between tourists and locals in mutually beneficial ways. In addition to these considerations, within this work Dr. Spencer has contemplated the future of tourism in the region in light of the opportunities that modern technology brings to the sector, as well as threats that affect the longevity and economic viability of the industry given the realities of specific territories in the region. Undoubtedly, resilience to exogenous shocks, particularly in the form of increasingly ferocious natural disasters and a rapidly changing climate, must be at the top on the list of the region's plans to maintain sustainable futures for a collective Caribbean tourism product. As such, Jamaica has once again taken the lead with the support of the United Nations World Tourism Organization to establish a Global Tourism Resilience Centre and Observatory which will guide the resistance, recovery, and agility of the regions in the face of catastrophic events.

I am pleased to observe the modern examples of initiatives in this work, which do not merely include critical work being done in Dr. Spencer's home country to constantly improve tourism offerings for the benefit of all players, but, importantly, Caribbean-wide and country-specific illustrations which facilitate a comparison of efforts being undertaken across the region to result in a more robust and stronger competitive block. The work lacks neither detail nor explanation, and pulls readers into a comprehensive understanding of Caribbean tourism, which is solidly grounded in relevant theories, but is also accessible, user-friendly, and understandable at every level.

It is my hope that this work will become a part of boardrooms, educational institutions, and households alike; such is its reach, scope, and level of nuance. I look forward to forthcoming publications from Dr. Spencer who, through his daily untiring efforts and prolific writing, aptly captures the vision of a brighter future for the Caribbean region with tourism at the core.

Hon. Edmund Bartlett, C.D., M.P.
MINISTER OF TOURISM – JAMAICA

Acknowledgements

This book has been the result of some years of musing about the state and evolution of Caribbean tourism from various perspectives. Moving from strictly an academic space at the University of the West Indies, Mona Campus, as a lecturer in Tourism Management, to having hands-on experience with training future industry movers and shakers as the Director of the Centre for Hotel and Tourism Management, to now being critically involved in the planning and execution of Jamaica's tourism product as the Executive Director of the Tourism Product Development Company has afforded me several vantage points from which to view Caribbean tourism. Perhaps even more importantly, these various experiences have brought me into contact with so many who have shaped my understanding and theorizing about Caribbean tourism's strengths, weaknesses, opportunities, and threats.

I would like to thank my fearless leader, Hon Edmund Bartlett, Minister of Tourism for Jamaica, not only for his vision for an improved Jamaican tourism industry, but for his infectious and motivating passion for a world-class Caribbean tourism model. To my Chairman, Ian Dear, you have shared your expertise and supported the vision of a world-class tourism product, thank you for the strength of your shoulders. Thank you to my stellar team at the TPDCo who make it their lives' mission to ensure a sustainable tourism product for Jamaica and who have helped to shape my views about the untapped potential of Caribbean tourism. Special thanks as well to industry stalwarts who made themselves available for interviews for this work including Joy Jibrilu, Director General, Bahamas Ministry of Tourism, Julian Patrick Director, Product Development & Community

Tourism, TPDCo, Jamaica and Hugh Riley, Secretary General & CEO, Caribbean Tourism Organization. Thanks as well to the staff of the Jamaican Tourist Board Library particularly Wakene Morgan, who was always willing to provide useful data for this project. I must also express sincere gratitude to my friend and colleague Dr. Dalea Bean who has remained over many years a critical part of my academic, professional, and personal journeys. Your encouragement and assistance with proofreading and editing are greatly appreciated.

Finally, this work would not be possible without the love, care, and undying support provided by my family. My parents, James and Euince Spencer, are the best examples I have of the real meaning of hard work and dedication. Thank you for your prayers and faith in me. To my daughter Rebekah, you are the light of my life and I thank you for always shining brightly. To my wife Diana, you are the reason for everything I do. Thank you will never be enough to express my appreciation for your unconditional love and unfailing support.

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CHAPTER 1

Synopsis of the Tourism Industry Within the Caribbean

For many, the Caribbean is synonymous with tourism. Warm beaches and warm smiles have gained remarkable importance since the 1960s in the post-independence and post-agricultural era of the region. But what is tourism? Tourism is just one form of activity undertaken during a period of leisure. Leisure is defined as "free time" or "time at one's disposal" and therefore can be taken to embrace any activity apart from work and obligatory duties. Leisure can entail active engagement in play or recreation or even more passive pastimes such as watching television or even sleeping. Sports activities, games, hobbies, pastimes, and tourism are all forms of recreation and discretionary uses of our leisure time. Tourism, as one element of leisure, involves the movement of a person or persons away from their normal place of residence: a process that usually incurs some expenditure, although this is not necessarily the case. Someone cycling or hiking in the countryside on a camping weekend in which they carry their own food may make no economic contribution to the area in which they travel, but, nonetheless, be counted as a tourist. Many other examples could be cited in which expenditure by the tourist is minimal. We can say, then, that tourism is one aspect of leisure that usually, but not invariably, incurs some expenditure of income and that, further, money spent has been earned within the area of normal residency, rather than at the destination.

The World Tourism Organization (UNWTO) describes tourism as activities of a person travelling to a place outside his or her usual environment for less than a specified period of time and whose main purpose of

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travel is other than the exercise of an activity remunerated from within the place visited (UNWTO). For the purpose of this text, international tourism will be the focus (travel to a foreign country), though domestic tourism (activities of a resident visitor within the country of residence) is of growing import as countries such as Jamaica channel marketing funds into promoting "staycations" among locals. Traditional holiday and vacation travel has also been buttressed by increased attention to business tourism. The World Tourism Organisation (WTO), for instance, notes that business travellers account for 15% of global overnight visitors and there are signs that other forms of tourism including medical, sport, gastronomic, religious, and other burgeoning models are picking up speed in the region.

Features of tourism vary between and among destinations; however, main elements of the tourism product include accommodation, transportation, attractions and tours, dining, and entertainment and support services. The supply chain comprises the suppliers of all the goods and services that go into the delivery of tourism products to consumers. It includes all suppliers of goods and services whether or not they are directly contracted by tour operators or by their agents (including ground handlers) or suppliers (including accommodation providers). Tourism supply chains involve many components—not just accommodation, transport, and excursions, but also bars and restaurants, handicrafts, food production, waste disposal, and the infrastructure that supports tourism in destinations. Traditional accommodations include hotels, villas, apartments, guest houses. These intimate small-scale properties provide visitors with greater opportunities to "create their own vacation". In more recent times with the advent of Airbnb,[1] private homes afford accommodation to millions of visitors worldwide.

Tourism cannot survive without the ability to travel. The entire industry is hinged on the free movement of persons from one place to another. It is largely due to the improvement of transportation that tourism has expanded. The advent of flight has shrunk the world, and the motor vehicle has made travel to anywhere possible. Linkage by air, sea, and land modes is essential for tour operations as well as the availability of support services such as fuel stations, auto repair, motels, and rest facilities for land travel. Importantly,

[1] Airbnb is the brain child of Joe Gebbia, Brian Chesky, and Nathan Blecharczyk. The idea blossomed in 2007 initially as a way for Gebbia and Chesky to make extra money by renting their loft space to guests. The bed and breakfast idea quickly grew and by 2011, four years after the first air mattress guests, Airbnb spread to 89 countries.

the transportation system of a tourist destination has a distinct impact on the tourism experience which must be carefully managed.

Leisure tourists travel specifically for the purpose of relaxation and enjoying attractions. Considered tourist attractions, these spaces are places of interest where tourists visit, typically for inherent or exhibited natural or cultural value, historical significance, natural or built beauty, offering leisure and amusement. Common attractions include beaches, coral reefs, hiking and camping in national parks, mountains, deserts, and forests. Cultural tourist attractions are also popular and include music festivals, historical places, monuments, ancient temples, zoos, aquaria, museums and art galleries, botanical gardens, the built environment, theme parks and carnivals, living history museums, ethnic enclave communities, and cultural events. Gastronomy festivals and culinary and restaurant tours are also growing in importance for travellers who travel to experience the food and the culture of destinations.

Tourism, like all other supply chains, operates through business-to-business relationships, and supply chain management can be applied to deliver sustainability performance improvements alongside financial performance, by working to improve the business operations of each supplier in the supply chain. The main differences between tourism supply chains and those of other sectors are that tourists travel to the product, and the product that they buy has a particularly high service component. Tourism demand on the other hand is a broad term that covers the factors governing the level of demand, the spatial characteristics of demand, different types of demand, and the motives for making such demands. Cooper defines demand as "a schedule of the amount of any product or service that people are willing and able to buy at each specific price in a set of possible prices during some specified period of time". Tourists create tourism demands. Buhalis (2004) identifies three main types of demand, namely, actual, suppressed, and latent demand. Actual demand, also referred to as effective demand, comes from tourists who are involved in the actual process of tourism. The second type of demand is the so-called suppressed demand created by two categories of people who are generally unable to travel due to circumstances beyond their control. The first group would include those sections of the population who would like to be involved in the tourism process but for some reason or another cannot. Since they may participate at a later date, their situation is referred to as representing potential demand. Deferred demand describes the second

subcategory of suppressed demand in that travel is postponed due to problems in the supply environment. Potential and deferred demands are difficult to measure and it is for that reason that they are rarely taken into account. The third type is latent demand. It relates to the spatial and temporal expression of demand at a specific site, for example, demand for either tourist accommodation or a tourist service at a specific destination.

Globally, tourism remains among the leading income earners. In 2015, international tourist movement and arrivals totalled 1.869 million with earnings of US$1260 billion. Moreover, international tourism accounts for close to 30% of the world's export of services (Cleare 2016). Among the countries that lead in tourism spending are Germany, the United States, and China (Table 1.1).

However, according to Craigwell (2007: 2), the tourist industry in Small Island Developing States (SIDS) has grown significantly over a 16 year period. In 2004, total tourist arrivals to SIDS (both air and sea) was estimated at just over 27 million persons compared to approximately 11 million persons in 1988. Increased tourist arrivals to SIDS have led to a boom in earnings from the industry (Table 1.2).

It is an open secret that contemporary trends in the global economic system dictate that SIDS must strengthen their market positions to guarantee survival, buoyancy, and international competitiveness. In a world where SIDS must compete on a conveniently unlevelled playing ground against larger and more resilient superpowers, and where traditional manufacturing and agricultural sectors are largely relics of a past age, the services industries, particularly tourism, are proving to be the main avenues towards sustaining long-term economic and social growth and stability.

The production of sugar and a host of other economic activities undertaken by free and enslaved people formed the economic backbone of the English-speaking Caribbean from the seventeenth century onwards. In the Caribbean during and after slavery, inns, taverns, and guest houses catered to varying needs of transient soldiers, other foreigners, and members of the local middle and elite class on their intra-island travels. They were operated mainly by coloured and black women, were important to local economies, and are considered as beginnings of the region's service sector (see Kerr 2011). Tourism was therefore pursued by Caribbean states as early as the 1800s, through the utilization of the region's natural year-long summers and largely unmolested bodies of water, flora, fauna, hills, and numerous other natural wonders with which the region is blessed (see Taylor 2003). As Bean and Spencer (2015) highlight, so important

Table 1.1 Top spenders in international tourism

Rank		*International tourism expenditure (US$ billion)*		*Local currencies change (%)*		*Market share (%)*	*Population (million)*	*Expenditure per capita (US$)*	*International departures (million)*			
									Total including same-day stays		*Total including overnight stays*	
		2015	*2016*	*15/14*	*16/15*	*2016*	*2016*	*2016*	*2015*	*2016*	*2015*	*2016*
1	China	249.8	261.1	11.4	11.7	21.4	1383	189	127.9	135.1	–	–
2	United States	114.7	123.6	8.6	7.8	10.1	323	382	130.4	–	74.0	–
3	Germany	77.5	79.8	−0.6	3.2	6.5	83	964	–	–	83.7	–
4	United Kingdom	63.3	63.6	8.8	13.8	5.2	66	970	65.7	70.8	64.2	69.4
5	France	39.3	40.5	−3.5	3.3	3.3	65	627	30.6	–	26.6	–
6	Canada	30.1	29.1	1.3	0.0	2.4	36	802	56.0	53.0	32.3	31.3
7	Korea (ROK)	25.3	26.6	9.0	5.4	2.2	51	520	19.3	22.4	–	–
8	Italy	24.4	25.0	1.4	2.4	2.0	61	411	61.2	62.6	27.9	28.7
9	Australia	23.8	24.9	6.1	6.0	2.0	24	1026	9.5	9.9	9.5	9.9
10	Hong Kong (China)	23.1	24.2	4.7	5.1	2.0	7	3284	89.1	91.8	–	–

Source: World Tourism Organisation (2017)

Table 1.2 Tourist arrivals to SIDS—earnings from industry (2013)

Population		*International tourism*							
		Visitors				*Receipts*			
		Overnight visitors		*Cruise*		*In destination*		*International passenger transport*	
		Per 100 passengers			*% of*	*Per capita*		*% of*	
	1000	*(1000)*	*Population*	*(1000)*	*(US$ million)*	*US$*	*Exports*	*(US$ million)*	*Exports*
World	**7,162,119**	**1,086,000**	**15**	–	**1,193,000**	**167**	**5.1**	**216,000**	**0.9**
SIDS according to UN-OHRLLS[a]	*67,320*	*40,838*	*61*	*> 18 mn*	*53,418*	*793*	*8.2*	*8019*	*1.2*
–Definition DESA	*60,050*	*30,274*	*50*	–	*40,032*	*667*	*6.5*	*6635*	*1.1*
Caribbean	39,058	13,943	36	–	15,213	389	23.5	813	1.3
Antigua, Barbados	90	244	271	534	299	3318	55.0	–	–
Bahamas	377	1363	361	4709	2162	5728	61.8	20	0.6
Barbados	285	509	179	570	912	3203	53.5	19[c]	1.1[c]
Belize	332	294	89	641[c]	351	1057	33.2	–	–
Cuba	11,266	2829	25	3[c]	2344	208	13.1	283	1.6
Dominica	72	78	109	231	82	1138	41.2	–	–
Dominican Republic	10,404	4690	45	424	5065	487	32.0	–	–
Grenada	106	114	108	243[c]	120	1135	63.1	–	–
Guyana	800	177[c]	22[c]	–	77	96	5.0	–	–
Haiti	10,317	420	4	610[c]	568	55	36.6	–	–
Jamaica	2784	2008	72	1265	2074	745	47.6	47[d]	1.1[d]
St. Kitts and Nevis	54	107	197	526[c]	101	1865	39.5	–	–
St. Lucia	182	319	175	594	354	1942	60.0	–	–

St. Vincent, Grenadines	109	72	66	126	92	844	48.1	–	–
Suriname	539	249	46	–	84	156	3.3	8	0.3
Trinidad and Tobago	1341	402[d]	30[d]	49[c]	472[d]	354[d]	2.3[d]	178[d]	0.9[d]
AIMS[b]	10,225	14,834	145		23,285	2277	4.3	5525	1.0
Cabo Verde	499	503	101	–	462	926	64.3	49	6.8
Comoros	735	19[d]	3[d]	–	39[c]	54[c]	44.2[c]	–	–
Guinea-Bissau	1704	–	–	–	9[d]	6[d]	3.2[d]	0[e]	–
Maldives	345	1125	326	2	2031	5887	75.0	25[c]	1.1[c]
Mauritius	1244	993	80	9	1321	1062	21.0	273	4.3
Sao Tome and Principe	193	12[d]	7[d]	–	14[c]	76[c]	43.9[c]	–	–
Seychelles	93	230	248	8[c]	344	3701	31.7	41[c]	4.4[c]
Singapore	5412	11,899	220	–	19,057	3521	3.6	–	–
Pacific	10,766	1497	14		1534	142	16.1	297	3.1
Cook Islands	21	121	587	–	110[e]	5423[e]	56.2[e]	–	–
Fiji	881	658	75	80[c]	716	813	30.9	249	10.7
Kiribati	102	6	6	–	–	–	–	–	–
Marshall Islands	53	5[c]	9[c]	–	4[c]	71[c]	15.1[c]	–	–
Micronesia (Federal State of)	104	42	41	–	23[c]	219[c]	41[e]	–	–
Nauru	10	–	–	–	–	–	–	–	–
Niue	1	7	524	–	2[d]	1373[d]	–	–	–
Palau	21	105	502	–	133[c]	6394[c]	–	–	–
Papua New Guinea	7321	171	2	–	2[c]	0.3[c]	0.03[c]	0.05[c]	0.001[c]
Samoa	190	116	61	–	136	715	54.9[c]	0.2[c]	0.1[c]
Solomon Is	561	24	4	–	69	123	12.1	15[d]	2.8[d]
Timor-Leste	1133	78	7	–	21[c]	19[c]	21[c]	–	–
Tonga	105	48	46	11[c]	41[c]	386[c]	43.8[c]	2[c]	2[c]
Tuvalu	10	1[d]	12[d]	–	–	–	–	–	–
Vanuatu	253	110	44	243	261[c]	1056[c]	69.3[c]	27[c]	7.2[c]

(*continued*)

Table 1.2 (continued)

Population		*International tourism*							
		Visitors				*Receipts*			
		Overnight visitors		*Cruise*		*In destination*		*International passenger transport*	
		Per 100 passengers			*% of*	*Per capita*		*% of*	
	1000	*(1000)*	*Population*	*(1000)*	*(US$ million)*	*US$*	*Exports*	*(US$ million)*	*Exports*
Other SIDS UN-OHRLLS	7270	10,564	145		13,386	1841	42.1	1384	4.4
American Samoa	55	22[c]	39[c]	30[c]	–	–	–	–	–
Anguilla	14	69	483	2[c]	122	8513	87.0	–	–
Aruba	103	979	952	688	1503	14,603	69.4	10	0.5
Bahrain	1332	1069	80	–	1051[c]	798[c]	4.7[c]	691[c]	3.1[c]
Bermuda	65	236	362	340	437	6688	31.4	7[c]	0.5[c]
British Virgin Islands	28	356	1255	367	397[c]	14134[c]	–	–	–
Cayman Islands	58	345	591	1376	480[c]	8333[c]	–	–	–
Curaçao	159	440	277	584	583	3674	25.5	195	8.5
French Polynesia	277	164	59	–	438[c]	1599[c]	34.4[c]	–	–
Guadeloupe	466	418[d]	91[d]	105[c]	583[d]	1265[d]	–	–	–
Guam	165	1334	808	–	–	–	–	–	–
Martinique	404	490	121	94[c]	462[c]	1147[c]	–	–	–
Montserrat	5	7	141	0.4	8	1490	41.0	–	–

New Caledonia	256	108	42	386	152[c]	599[c]	8.1[c]	–	–
Northern Mariana Islands	54	336[d]	631[d]	5[d]	–	–	–	–	–
Puerto Rico	3688	3200	87	1038	3334	904	–	–	–
Turks, Caicos	33	291	878	779	–	–	–	–	–
US Virgin Islands	107	580[c]	545[c]	1999	1013[e]	9522[e]	–	–	–

Source: World Tourism Organisation (2014)

[a]According to UN Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States (OHRLLS) at http://unohrlls.org/about-sids/country-profiles (August 2014)
[b]The AIMS abbreviation refers to the Atlantic, Indian Ocean, Mediterranean, and South China Sea, although there are currently no SIDS in the Mediterranean
[c]Figures for 2013 or for last year with data available: 2012
[d]Figures for 2013 or for last year with data available: 2011
[e]Figures for 2013 or for last year with data available: 2010

was tourism by the 1900s that it was even aggressively pushed during the World Wars (1914–1918 and 1939–1945), contrary to the belief that these periods saw a hiatus in travelling souls. However, it was from the 1950s onwards that there were more robust and consistent efforts to cement the industry as a major pillar of Caribbean economies. This period saw the advent of tourist regulatory agencies, formalization of the mandates of tourist boards and increased spending on airports and sea ports, improvements in transportation, and investment in state-of-the-art hotels for the modern guest. The downfall of preferential trading in traditional products and severing of ties with "mother countries" in the post-colonial age has also forced Caribbean SIDS to rely on tourism as the primary mechanism through which economic buoyancy, social development, and employment for the masses can be assured.

Today, the world's SIDS are among the most tourist dependent in the world. With a total of 16 independent countries, the Caribbean boasts a majority of the world's SIDS groupings (compared to the Pacific Region with 13 and the Atlantic, Indian Ocean, Mediterranean, and South China Sea [AIMS] with 8) https://sustainabledevelopment.un.org/topics/sids/list. Most of these 16 countries have recognized that tourism holds the key to the engine of growth, representing a significant source of foreign exchange earnings and employment both directly in tourism and indirectly in the sectors which support the industry such as agriculture, craft development, entertainment, and transportation sectors to name a few. In terms of the percentage of total employment that is related directly or indirectly to the industry, the Caribbean boasts many countries with high direct and indirect dependence on the tourist dollar. Antigua is among the most dependent nations in the world with over 90% of all employment related to the tourism industry World Travel and Tourism Council (WTTC). Barbados receives more than two-thirds of its foreign exchange earnings from tourism. In the Bahamas, tourism and tourism-related industries account for over 70% of national income and provide employment for at least 60% of the population (Clayton 2009). The total contribution to Caribbean GDP (including wider effects from investment, the supply chain, and induced income impacts) from tourism was US$56.4 billion in 2016 (14.9% of GDP), while direct contribution to GDP in 2016 was US$17.9 billion (4.7% of GDP) (World Travel & Tourism Council 2017: 3). The region has also been experiencing steady

growth of stopover visitors and has welcomed 16.6 million visitors for the first six months of 2017, 800,000 more than for the similar period in 2016, constituting a growth rate of 5.22%. Importantly, tourism in the region grew at an unprecedented rate of 4.2% in 2016, outpacing the global average of 3.9%. Despite challenges, trends such as these have given industry leaders much hope that the tourism product will remain buoyant income generators for Caribbean SIDS. As Jamaican Tourism Minister Hon Edmund Bartlett has expressed,

> "We remain firmly committed and convinced that our tourism industry is on the right track and that we will achieve our growth target of 'five in five' or five per cent annual growth rate in five years," he said. The Minister noted that the tourism sector in the region has traditionally been very resilient and remains one of the most valuable contributors to job creation, poverty alleviation, investments, export revenues, gross domestic product (GDP) and to the economic livelihoods of millions of citizens.

Indeed, since the 1980s, the tourism industry has grown exponentially in the majority of SIDS. According to Craigwell, between the period 1986 and 2004, stopover tourist arrivals in SIDS rose by 10% per annum and visitor expenditure by approximately 11%, with concomitant increases in both direct and indirect contributions to total real output.[2] Indeed, Caribbean countries are most concerned with tracking and increasing the number of stopover visitors. While not underestimating the impact that millions of cruise visitors have on local economies through spending at ports, markets, and attractions, stopover visitors who spend at least one night have a much greater impact on revenue gained by the location visited.

The benefits of tourism to the region cannot be overstated. Tourism is labour intensive and so far the journey towards automation has been slow in the Caribbean. Globally it is among the greatest creators of jobs with vertical and horizontal linkages with numerous industries in local economies. Indeed, the total contribution to employment (including wider effects from investment, the supply chain, and induced income impacts) was 2,319,500 jobs in 2016 (representing 13.4% of total employment) (WTTC 2017: 4).

[2] Research Paper No. 2007/19. Tourism Competitiveness in Small Island Developing States Roland Craigwell p1.

Tourism does not only exist as a stand-alone industry. Indeed, the beauty of tourism is that it often maintains, sustains, and even propels other critical sectors such as agriculture, land, and labour. Tourism not only creates jobs in the tertiary sector, it also encourages growth in the primary and secondary sectors of industry. This is known as the multiplier effect and speaks to how many times money spent by a tourist circulates through a country's economy. Money spent in a hotel helps to create jobs directly in the hotel, but it also creates jobs indirectly elsewhere in the economy. The hotel, for example, has to buy food from local farmers, who will spend some of this money to sustain their business but who will also use the proceeds to sustain families and communities. The demand for local products increases as tourists often buy souvenirs, which increases secondary employment in the craft and creative industries. The multiplier effect continues until the money eventually leaks from the economy through imports and expatriate labour often found in the Caribbean travel and tourism sector. Tourists therefore contribute to sales, profits, jobs, tax revenues, and income. The most direct effects occur within the primary tourism sectors—lodging, restaurants, transportation, amusements, and retail trade. It is for this reason that many Caribbean countries are seeking to develop tourism and maximizing its impact through the strengthening of linkages with other sectors of the economy. This usually requires investment in building productive capacity of agricultural, manufacturing, and service sectors so that they may more efficiently meet the sophisticated demand of the tourism sector. In Jamaica, for instance, the government of Jamaica has embarked on a major initiative to strengthen linkages. This initiative—organized under the "Linkage Hub" project—includes facilitation of consultations and meetings with representatives of the tourism industry, including hoteliers and suppliers from the farming, agribusiness, and manufacturing sectors, and the development of strategies to improve market information and distribution systems. International hotel chains located in the island are also encouraged to use local products. Many large and small enterprises in the accommodation sector are involved in arrangements in which local farmers and community providers supply inputs for food and beverage, entertainment, furnishings, and general hotel operations. The primary objective of the Tourism Linkages Network is to increase the consumption of goods and services that can be competitively sourced locally. According to the Ministry of Tourism the Network also aims to:

- support, facilitate, and monitor the development of efficient marketing and distribution systems for local products and services required by tourism entities
- increase market awareness and intelligence of the targeted sectors through research and analysis
- facilitate and monitor the development of more effective and efficient information and communication systems to support relationship building and trade between local suppliers of goods and services, and tourism entities
- harness and harmonize existing mechanisms and initiatives being undertaken by business associations, ministries, and agencies in an effort to improve the business environment for buyers and suppliers
- contribute and provide support to the development of viable economic and fiscal policies across industries and sectors to strengthen and facilitate linkages
- create opportunities for deeper facilitation of linkages between the entertainment and tourism sectors
- facilitate opportunities for better networking, information sharing, and communication across sectors

Similarly, Barbados has embarked on an Agro-Tourism Linkages Programme to integrate micro and small enterprises into the supply chains of key anchor companies (hotels and restaurants) in the tourism industry. Notwithstanding these positive trends however, the tourism potential of Caribbean SIDS is yet to be fully realized. Small Island Developing States in particular vary greatly in their economic and social performance and their level of international visitor arrivals, but many demonstrate a high level of dependence on tourism in terms of exports and contribution to GDP. Tourism has undoubtedly also been identified as a threat to the region's sociocultural, ecological, and public health and stability. These include socioeconomic polarization, uneven development, ecological degradation, sidelining of local concerns, domination of regional political economies, management and profit repatriation, and structural underdevelopment. Such negative externalities of tourism have the potential to eclipse the potential for equitable social and regional benefits. In terms of human resources, it is no secret that women play an important role in the industry, and are even leading hoteliers. While women account for a substantial number of graduates from local and regional tertiary hospitality programmes, there is the conspicuous absence of women in general

management positions, for reasons to do with endemic patterns of exclusion and personal choices on the part of many women in the field (Spencer and Bean 2013).

Further, this unprecedented growth has resulted in a surplus of accommodations and its subsequent consequences, with inflationary pressures causing dramatic rises in the cost of living, labour and other resource shortages, and slow movement towards sustainable integration of tourism with other sectors. SIDS present three key characteristics that must be borne in mind when considering features of tourism: small size, with implications for pressure on resources and limited economic diversity; remoteness and isolation, leading to challenges for trading but also to a unique biodiversity and cultural richness; and a maritime environment, leading to strong tourism assets but vulnerability to shifts in the natural environment.

While there are many key distinctive challenges for Caribbean SIDS, main considerations include climate change, which is a great threat to many islands and requires a response from the tourism sector; air connectivity, requiring a strong link between tourism and air transport policies; and market positioning, including tourism products' diversification and establishment of niche markets that would contribute to competitiveness and decrease vulnerability. Issues of resilience in the face of "Acts of God" and sometimes more detrimental acts of man continue to hamper competitive positioning in the Caribbean tourism market. As Zappino (2005) and Laframboise et al. (2014) explained, tourism in the Caribbean experienced points of decline, notably initiated as early as 2005 but increasing in intensity in 2008 during the global economic crisis. Their research indicates that price and income were major determinants of tourism flows, along with supply (of airlines and accommodation), and other factors such as hurricanes and terrorism. Indeed, the recent devastation of Dominica, Barbuda, Puerto Rico, and St. Maarten by hurricanes (all of which have a heavy dependence on being open for tourism business) put the region's ability to withstand major forces of nature squarely into focus. Hurricane Maria cost Dominica US$931 million in damages and US$382 million in losses (Government of Commonwealth of Dominica 2017). The Center for Disaster Management and Risk Reduction Technology estimated Irma cost Antigua and Barbuda US$215 million, Puerto Rico US$800 million, and St. Maarten US$2.5 billion.

In addition to the deleterious effects of climate change and natural disasters, Daye et al. (2008) also speak to issues in the industry surrounding brand identity. They note, for instance, that stereotypical and traditional

branding of the region as paradise have limited opportunities for increasing competitiveness and expanding product diversity while in many countries, anti-homosexual sentiments, derived largely from the colonial experience, trickled down to and inhibited gay tourism. The region is ripe for the exploitation of health, culinary, and sport tourism, most of which seem to be lagging in the shadow of the all-inclusive model and "sun, sea, sex, and sand", which still dominate the Caribbean tourism landscape. The challenge for many SIDS, and particularly those in the Caribbean, is how to maximize the reach of these earnings throughout the economy and in sectors without direct links to tourism.

Chambers in Daye et al. (2008) reminds us as well that Caribbean locations face challenges with regard to bridging the gap between locals and tourists, as it was revealed that many "tourism spaces" are still inaccessible to locals, particularly in the informal sector, with males being more affected by those prohibitions. Hierarchies and exclusions are part of the historical fabric of tourism which emerged in the Caribbean as a continuation of service and servitude which characterized the plantation history of the region. Strachan (2002) who scrutinized the notion of "paradise" that continued to be applied to the Caribbean despite its plantation history and remnants which undermine that ideal has, for instance, noted how marketing promulgated that "paradise discourse", determined in large part by imperialism's visioning of the Caribbean as a profit-making space. Strachan, too, asserted that paradise discourse shifted to suit the speakers and their intentions—he claimed that colonialist voices tended to refer to the Caribbean in paradise terms as encouragement for their seeking of wealth or enjoyment, making tourism an essential part of the plantation economy.

Just as social exclusion followed tourism, there was a long-standing relationship between sexual exploitation, tourism, and the spread of diseases as vulnerabilities and tourism dependence added to Caribbean SIDS' susceptibility to HIV/AIDS and other sexually transmitted diseases. In an age of globalization which facilitates critical foreign investment, repatriation of profits to investor nations with high representation from the Global North also remains a concern for many SIDS. Bridging the gap between regional concerns and individual gains is also paramount for the Caribbean block, which boasts a commitment to regionalism through the Caribbean Community (CARICOM) and the Caribbean Single Market and Economy (CSME), but which in reality functions as states all competing for the tourist dollar.

Indeed, work such as this continues the relatively recent but prolific tradition of academic work on Caribbean tourism. Early work such as by Ruth C. Young in the 1997 article "The structural context of the Caribbean tourist industry: A comparative study" focused on the prospects of Caribbean tourism given its links and history in the chequered past of servility and enslavement. She hypothesized that tourism development was closely related to historical experiences, such that countries in more rigid plantation societies developed with parallel forms, whereas democratically oriented countries produced flexible or adaptable forms. She looked at 29 islands excluding Cuba, and the Turks and Caicos Islands which lacked tourist industries. For her research, she identified three dimensions of tourism: comprehensive, luxury, and plantation. Young found that comprehensive tourism made for better business and significant employment. She also pointed out that the economic and political contexts had close ties to tourism—through GDP and funds gained from export agriculture, to political autonomy (which seemingly enhanced economic growth) and political repression (which had significant links to plantation agriculture). In the end, Young concluded that tourism manifested in ways that mimicked the already existing structures and cultures, so that fundamental societal changes had to occur to bring change in the industry.

Robust edited collections have done much to advance the academic field of Caribbean tourism, bringing together diverse perspectives and topics under major themes. Chandana Jayawardena's (2005) collection "Caribbean tourism: Visions, missions and challenges", for instance, focused on four aspects of the industry: visions, missions, challenges, and development. Jayawardena brought together research and industry experts in Caribbean tourism who discussed education, sustainability, competitiveness, culture, transportation, terrorism, natural disasters, information and communication technologies (ICTs), and research. In the first section, "Visions", writers provided insights on the future of a thriving and sustainable Caribbean tourism industry. The University of the West Indies was identified as a crucial player in tourism management and education, and a regional school of tourism and hospitality management was recommended. A policy framework cognizant of the multiple and interconnected components of the tourism industry—environment, business, and development—was also suggested as a way to achieve and secure sustainable development. As a result of tourism's severe environmental and social impacts, researchers determined that it was necessary to devise a plan for

sustainable tourism development. This required a consensus on the meaning of sustainable tourism, as well as regional instruments or policy frameworks and improved management governing tourism and environmental operations. Since cruise tourism represents a significant portion of the tourism industry, its true benefits and statistical data were questioned to reveal nuances in the perceived positive impacts of the sector. All of these areas necessitated intellectual capital and knowledge management to encourage collaboration and cooperation among tourism stakeholders. "Missions" tackled the creation of a new framework to assess the tourism performance of Caribbean countries, revealing Jamaica to be the top performer of nine countries. The section also explored the significance of culture to tourism, and showed that tourism could be used as a means of reviving traditions. The need for reliable and efficient air transportation was also discussed, as well as recommendations for cooperation among regional airlines. Among the challenges identified were terrorism as a result of the decline in tourist arrivals, cessation of flights, and repatriation in Jamaica and the Bahamas following the September 11 attacks. Natural disasters were also identified as challenges to Caribbean tourism, along with the absence of a sound development strategy and effective implementation of ICTs. The final section revealed the importance of community tourism, management of tourist attractions, and marketing to the sustainable development process.

New Perspectives in Caribbean Tourism, edited by Marcella Daye, Donna Chambers, and Sherma Roberts (2008), consists of 13 chapters discussing different aspects of tourism in the Caribbean. The two-part collection is divided into "image, culture, and identity" and "governance". The text establishes itself as a response to the paucity of research on Caribbean tourism written by Caribbean nationals, and places tourism within the social, cultural, and historical context of the region. The first part interrogated how the stereotypical and traditional branding of the region as paradise have limited opportunities for increasing competitiveness and expanding product diversity, though countries like Jamaica have come to be dependent on cultural aesthetics, particularly through Rastafari, Bob Marley, and reggae music. In the same country, anti-homosexual sentiments, derived largely from the colonial experience, trickled down to and inhibited gay tourism. In part two, Chambers discussed how dominant and imperialist views were ignorant of the particularities of developing countries, and informed the directions that Caribbean countries were advised to take to achieve sustainable tourism development. Sustainable development was

recognized as important, and as achievable through vital regional partnerships. However, there remained a challenge to integrating communities as it was revealed that some "tourism spaces" had become inaccessible to locals, particularly in the informal sector, with males being more affected by those prohibitions. Just as social exclusion followed tourism, there was a long-standing relationship between sexual exploitation, tourism, and the spread of diseases. This was discussed using a case study of Grenada, whose vulnerabilities and tourism dependence added to their susceptibility to HIV/AIDS. The book ended with the recognition that tourism education in the region, inclusive of and informed by stakeholders, had to respond to a plethora of sociocultural and environmental issues associated with tourism, rather than simply a focus on increasing profit margins.

Boxill and Ramjeesingh's (2014) tourism reader is a compilation of articles about varied tourism-related themes in the Caribbean. Its nine sections range from the political to sustainable aspects of tourism, with a focus on specific tourism products and offerings. Writers determined that despite the economic benefits to be derived from cultural tourism, it remained marginalized from general tourism discourse and research. Part of this may have been related to the inability of researchers to arrive at a consensus regarding whether or not tourism was a tool for economic growth. Still, focus was placed on the potential for event tourism in Jamaica, as a means of attracting tourists during the off-season. Notably, the discussions on all-inclusive hotels concentrated on the operations aspect of all-inclusive hotels with specific references to their strengths (physical and financial protection/control, efficiency, quantity, and predictability); their weaknesses—less of a focus on quality, inability to properly meet the desires of all guests, and little exposure to culture—and recommendations for improvement. There were also discussions on tourism demand in the Caribbean as it was revealed that options beyond the traditional source markets needed to be discovered. The collection also explored the importance of accurately forecasting tourism demand as a way to continue to meet needs, and achieve economic increase. Naturally, the performance of the tourism sector in the Caribbean was spotlighted using a variety of approaches. This performance was closely related to climate change, as writers in their quantification of climate adjustments argued that favourable conditions encouraged tourist travel while adverse conditions discouraged it. In any case, monitoring and predictions around climate change were seen as crucial to planning for tourism. Interestingly, the editors revealed in their article on cruise tourism that money spent by tourists was

insignificant, and research revealed that demographic factors predicted tourist choice between land and cruise tourism, thereby enabling marketers to better target their material. Air travel to the Caribbean was debated; while writers acknowledged the necessity of regional air transport, they were unable to agree as to whether a single airline was the solution. The last section looked at sustainable tourism—forecasting, planning, diversifying tourism products to include ecotourism and risk management.

Roberts et al. (2015) first located the emergence of Caribbean tourism in the 1960s, after the introduction of neoliberal strategies believed to be able to achieve growth in the region. They then looked at the sectors that supplied tourism, determining government's role in providing infrastructure, political stability and security, legislation for tourism standards, and intergovernmental cooperation and agreements related to travel. Visitor attractions were discussed as central to the success of a country's tourism, constituting the primary reason for many tourists' choice to visit. Therefore, the successful development, marketing, and management of tourist attractions played a significant role in overall visitor experience. Further, the quality, affordability, and availability of accommodation had a marked impact on countries' competitiveness, as this sector was established as the biggest part of the industry. Closely related to accommodation in share of and centrality to the industry was the area of travel, particularly in the context of increased tourist demand which required an assessment of its future in the Caribbean. Ancillary and food and beverage services were also found to have an important role to play in the overall success of a country's tourism industry. In section three, the writers developed their claims about the economic, sociocultural, and environmental impacts of tourism, ending the section with a discussion on sustainable tourism. Tourism was found to have both positive and negative economic and sociocultural effects, while its environmental impacts were largely negative. Section four showed how the Caribbean could use niche tourism to improve competitiveness—marketing to specific markets such as sport, health and wellness, heritage, adventure, nature-based, and agriculture. In the penultimate section, Roberts, Best, and Cameron examined critical issues in tourism, highlighting the integral status of entrepreneurship through different-sized businesses that buoyed tourism in the Caribbean, and provided a roadmap for readers to devise their own enterprise within the industry. Other critical issues such as customer service, marketing, risk and disaster management, and the benefits that stood to be derived from ICTs by the hospitality industry were examined and shown to affect the

quality, competitiveness, and longevity of the industry. In the final section, readers were provided insights into the future of tourism, in the context of external (and internal) economic, environmental, and technological factors. The writers determined that the degree to which these factors had a negative or positive impact rested on the ability of Caribbean countries to respond appropriately.

Tourism competitiveness has also captured the scholarly imagination of leading researchers, including Auliana Poon (1995), Jean S. Holder (1996), Helen McBain (2007), Donna Chambers, and Bryan McIntosh (2008). Craigwell and Worrell (2008), for instance, looked at the competitiveness of larger Caribbean countries by measuring how much of the main international tourism markets of the United States, United Kingdom, and Canada they represented. They focused on price competitiveness and explored the context of Caribbean tourism markets as well as the factors which accounted for the performance of these markets. It is one of the more expansive investigations into Caribbean tourism as it examined 15 countries which included both island and mainland territories. By and large, the majority of tourists to the Caribbean originate from the United States, with Canada and the United Kingdom lagging behind. In terms of the factors that affected competitiveness, Craigwell and Worrell identified competitor price, air transport costs, and domestic prices. Overall, they discovered that price competitiveness was not the ultimate factor in determining the Caribbean's share of the global tourism market, and that it may have been less significant than non-price factors.

The importance of micro studies has also been made evident through work by Cameron and Gatewood (2008) and Ford and Dorodnykh (2016). The Cameron and Gatewood study of the Turks and Caicos Islands in order to uncover feasible and sustainable alternatives for the Caribbean tourism industry other than the traditional and popular sun, sea, and sand tourism, sheds useful insights on the future of Caribbean tourism spaces. They first explained the reasons that mass tourism has come to characterize the region in an effort to explain why heritage or ecotourism has not gained equal status or support. Recognizing the significant role of colonialism, Cameron and Gatewood pointed out how colonialism and slavery resulted in the devaluation of African cultures and peoples, and the celebration of white-centric beliefs and practices. Thus, a challenge was posed to heritage tourism as Afro-Caribbean residents continued to favour white ideals. The "bitter pill" that violence-laden colonial history represented also prevented persons from wanting

to recreate the moments, or rebuild the structures that characterized that era. The writers spoke of the creation of tourism plans that incorporated environmental protection and cultural retention. They identified lack of documentation of records and of cultural practices as problems for the Turks and Caicos Islands' heritage tourism product. However, organizations and government departments were working to revive and recover some of these lost traditions and information.

More recent work by Ford and Dorodnykh (2016) has provided insights on the connection between food production and tourism in Caribbean SIDS, St. Kitts and Nevis, and St. Lucia. They first explained the links between agriculture and tourism by highlighting the significant contribution of tourism to Caribbean countries' GDP (more than half in cases such as Antigua and Barbuda and the Bahamas), and how this growing demand for Caribbean tourism creates a potential market for locally produced food. The writers claimed that Caribbean countries could lower national debt and increase foreign exchange by expanding agricultural production and targeting hotels and other businesses in the tourism industry. Increased food production could also provide social benefits by allowing well-needed government revenue to be invested in social programmes; encourage rural development through job creation; and ensure food security and nutrition. The case studies of St. Kitts and Nevis and St. Lucia revealed high food import bills, paid for mainly by foreign exchange, some of which was gained from the tourism industry. Ford and Dorodnykh identified ways in which both countries could increase their agricultural contribution to tourism, as well as the challenges faced in doing so, which included access to land and inconsistent quality of produce. The writers provided recommendations for policy support, as well as the way forward in improving the ability of both countries to better meet the demands of the tourism sector.

The importance of the cruise industry has been tackled by authors such as Paul F. Wilkinson (2007), Fritz Pinnock (2014), Nathalie Petit-Charles and Bruno Marques (2012), and Jeb Sprague-Silgado (2017). In particular, Robert E. Wood (2000) proposed that cruise tourism could be used in order to underscore and understand the nature of globalization and its processes. In "Caribbean cruise tourism: Globalisation at sea", Wood asserted that the concept of "globalization at sea" was indicative of contemporary globalization. Wood discussed how globalization showed itself at sea: cruise ships often used flags of convenience in order to avoid domestic laws, taxes or regulations, including labour laws and

internationalization of ownership of ships and infrastructure. Multiple nationalities were also represented in ship employees, who were recruited and stratified by occupation, which is typically denoted by ethnicity. Employees originating from developing countries in the Caribbean or in some Asian countries tended to occupy the low-level crew positions, while Norwegian or Italian nationals were at the top as officers. Despite the stratification, the multiple represented nationalities presented useful information on migration decisions, access to information, and state involvement in promoting labour for export. Wood also highlighted the role that "deterritorialization" played in creating a disconnect between space and place such that ships could be equipped to create or mimic real culture or destinations. Wood pointed out that ships also brought elements together in fantasy themes such as on Disney cruise lines, creating visual representations of the entire world. The crew themselves were marketed as exposure to multiculturalism, as their diversity reflected a sort of global unity or coming together. Wood concluded that globalization was an ongoing process, reflected greatly in the Caribbean cruise industry that had little control over enforcement and employment but which still presented usable opportunities for researching a global workforce.

Focus on these and other critical issues in contemporary Caribbean tourism are expanded in this work. This book seeks to explore the distinct nuisances and obstacles that are encountered by the tourism and travel industry within Caribbean small island developing countries. Given the geographical location, economic dependency, and economic climate within these states there are certain situations that are only experienced by this group of states. By exploring the realities that are encountered within the industry, this book explores and proposes the best practices and measures that can be used to overcome the struggle or at least alleviate the hardship faced by the industry within Caribbean SIDS. Oftentimes this is done through the voice of experts in the field in the Caribbean who are currently involved in shaping the direction and futures of Caribbean tourism. In addition, the book seeks to answer what the realties are for SIDS within the tourism industry given that the voice, issues, and accomplishments of these nations are often overshadowed or downplayed by their developed counterparts. By giving voice to the struggles and strengths of this group of islands the work unearths the future of the industry and the way these countries will propel themselves forward within a constantly evolving global industry. This will be analysed in the face of climate change and transforming geophysical landscape, which is the pivotal attraction

and selling point for the tourism industry within Caribbean SIDS. Additionally, the work will explore ICT and its influence on tourism and assess how Caribbean SIDS respond to these developments within the industry given their financial constraints and the constant evolution of these technologies. Importantly, the economic sustainability of tourism and the social milieu within which Caribbean travel and tourism exist are also teased out towards the aim of answering the most pivotal question: What is the future of Caribbean tourism?

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CHAPTER 2

Climate Change and the Sustainable Development of Tourism Within the Caribbean

Caribbean Small Island Developing States' (SIDS') growing dependence on tourism has called for a close examination of the many variables that can impact sustainability and viability of the industry. For global tourism policymakers, variations in weather and climate top the list of priority areas for forecasting, planning and are, in some circles, a grave concern. Human-induced changes to long-term climate trends have captured the attention of scholars globally in modern times and climate change has emerged as a critical buzzword at the highest levels of global policymaking. Despite much scepticism over the links between human actions, climate variability and the denial of the global warming phenomenon by some (Björnberg et al. 2017), undeniable evidence exists to support the view that extreme weather conditions, rising temperatures, rising sea levels, and melting of polar ice caps are as a result of carbon emissions and other harmful side effects of the global industrial complex. The level of vulnerability to these climate shifts is by no means equally distributed, and SIDS in general and the Caribbean in particular, have been identified as being amongst the most susceptible to the devastating effects of climate change. As Taylor et al. (2012) indicate, the Caribbean's location and geographic features afford it inherent climate sensitivity. Ranging from low-lying cays (Bahamas and Barbuda), mountain ranges with short coastal areas (St. Lucia and Dominica), and a hybrid of coastal areas and hilly interiors (Jamaica and Antigua), various Caribbean islands are poised to suffer from shifts in sea levels and rising temperatures. In this way, weather patterns

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are directly related to the sustainable development of the region. Caribbean states, though having varied topographical and geographic features, share several characteristics that increase their vulnerability to climate change impacts including limitations in size and natural resources, high susceptibility to natural disasters, and heavily developed and densely populated coastal zones (Baban 2003). This sensitivity is complicated by the almost complete reliance on economic drivers that are dependent on stable climatic conditions, namely, tourism and agriculture. As noted in Chap. 1, tourism and travel account for high levels of direct and indirect employment in Caribbean SIDS. Tourism is in turn dependent on pleasant climatic conditions to be feasible. This chapter assesses this critical relationship between Caribbean tourism and climate change as it is recognized that climate change is not a remote future event for tourism. The varied impacts of a changing climate are becoming evident at destinations around the world and Caribbean SIDS are no exception.

Climate change as defined by World Tourism Organization (UNWTO) (2008) is a change in global or regional climate patterns attributed largely to the increased levels of atmospheric carbon dioxide produced by the use of fossil fuels. Global effects of climate change include warmer land and ocean surface temperatures, shrinking glaciers, rising sea levels (from melting ice and thermal expansion of oceans), adverse changes in precipitation, loss of ecosystems, increased number and intensity of tropical and snow storms, heat waves, and extreme drought and flooding (WMO 2016). Though climatic changes have piqued the interest of scientists for decades, tourism interests have taken special and serious note of the links between the industry and climate since the turn of the twenty-first century. The First International Conference on Climate Change and Tourism was held in Djerba, Tunisia, in 2003, and was hailed as the first step towards mitigating negative impacts of climate changes on tourism. More than 150 participants from 42 countries and 6 international organizations gathered at this event that was convened by the UNWTO. The Djerba Declaration recognized the complex interlinkages between the tourism sector and climate change and established a framework for future research and policymaking on adaptation and mitigation. The Declaration recognized that there is a need for adaptation and mitigation measures and included a series of recommendations for international organizations, government, and private sector agencies for collaborative actions at the international, national, and local destination levels. The recognition within the Djerba Declaration of the complex interlinkages between the tourism sector and climate change

and the need to take adaptation and mitigation measures established a comprehensive framework for future research and policymaking. As explained by the UNWTO report of 2007, the Conference agreed that:

- climate is a key resource for tourism and the sector is highly sensitive to the impacts of climate change and global warming, many elements of which are already being felt. It is estimated to contribute some 5% of global CO_2 emissions.
- tourism—business and leisure—will continue to be a vital component of the global economy, an important contributor to the Millennium Development Goals and an integral, positive element in our society.
- given tourism's importance in the global challenges of climate change and poverty reduction, there is a need to urgently adopt a range of policies which encourage truly sustainable tourism that reflects a "quadruple bottom line" of environmental, social, economic, and climate responsiveness.
- the tourism sector must rapidly respond to climate change, within the evolving UN framework, and progressively reduce its greenhouse gas (GHG) contribution if it is to grow in a sustainable manner. This will require action towards mitigating GHG emissions, derived especially from transport and accommodation activities; adapting tourism businesses and destinations to changing climate conditions; applying existing and new technology to improve energy efficiency and secure financial resources to help poor regions and countries.

Importantly, the Declaration recognized not only that climate change would have peculiar and long-lasting impacts on the industry, but that tourism also contributes to the phenomenon, through the use of energy in several activities mainly air and sea and ground transportation and alterations to and erosion of the natural environment to create new attractions and accommodations for the sector. Undoubtedly, the contribution of the aviation sector is significant, accounting for up to 40% of total emissions from the tourism industry. Moreover, airborne emissions may be between 1.9 and 5.1 times more harmful than surface-based emissions (Gössling and Hall 2006). Trotz (2014) reports that travel and tourism account for 5% of global carbon dioxide emissions, and, further, if the global tourism sector's collective emissions were compared to country emissions, travel and tourism would be the fifth largest carbon dioxide polluter worldwide.

Since the Djerba Declaration, a growing body of knowledge has been generated addressing the complex relationships between the tourism sector and climate change with important research activities on this subject. There is now an extensive recognition of the urgent need for the tourism industry, national governments, and international organizations to develop and implement strategies to face the changing climate conditions and to implement precautionary programmes, as well as to mitigate tourism's environmental impacts contributing to climate change.

The Second International Conference on Climate Change and Tourism (Davos, Switzerland, October 2007) was a follow-up milestone event that brought together a wide variety of stakeholders and delivered a clear commitment for action to respond to the climate change challenge. It emphasized the need for the tourism sector to respond to climate change with urgency if it is to develop in a sustainable manner. Focus was placed on mitigating GHG emissions from the tourism sector, derived especially from transport and accommodation activities; adapting tourism businesses and destinations to changing climate conditions; applying technologies to improve energy efficiency; and securing financial resources to assist regions and countries in need.

As a result of these two global initiatives, the response of the tourism community to the challenge of climate change has visibly increased over the last five years. The increasing volume of literature on the impact of climate on tourism demand is due to the recognition that a more precise modelling of tourism demand must include weather and climate, since they are significant influences on the tourism industry. Intrinsically, tourism hinges on pleasant and stable weather to keep guests satisfied. Uyarra et al. (2005) established that warm temperatures, clear waters, and low health risks were the main environmental attributes important to tourists visiting the islands. In addition, the rise in sea level and its consequences on beach coverage (Nicholls et al. 2011), coral reef health (Hoegh-Guldberg et al. 2007), and the proliferation of jellyfish (Purcell 2005) are all being impacted by climatic shifts and can affect a tourist's attraction to tropical SIDS. Appropriate weather is also critical. Destinations that focus on ice-based sports and attractions need to maintain low temperatures to facilitate ice production. Countries like those in the Caribbean whose mainstay includes beach vacations and outdoor attractions need moderately warm temperatures and predictable rainfall. Studies associating climate with tourism indicate that changes in climate are likely to affect the

length of the season for tourists as well as the expected environment. Temperature could potentially have positive implications for the length of the season and/or the environment, while other studies have found results to indicate that it has negative implications for tourism. Lise and Tol (1999), using cross-section data, undertook a cross-section analysis on tourists originating in Organisation for Economic Cooperation and Development (OECD) countries, and found that the optimal temperature for their destination countries ranged from 21 °C to 24 °C. For tourism, therefore, climate change is not a remote event, but a phenomenon that already affects the sector (Table 2.1).

Importantly, climate change will generate both negative and positive impacts in the tourism sector and these impacts will vary greatly by market

Table 2.1 Main impacts of climate change and their implications for tourism

Impact	*Implications for tourism*
Warmer temperatures	Altered seasonality, heat stress for tourists, cooling costs, changes in plant-wildlife-insect populations and distribution range, infectious disease ranges
Decreasing snow cover and shrinking glaciers	Lack of snow in winter sport destinations, increased snow-making costs, shorter winter sports seasons, aesthetics of landscape reduced
Increasing frequency and intensity of extreme storms	Risk for tourism facilities, increased insurance costs/loss of insurability, business interruption costs
Reduced precipitation and increased evaporation in some regions	Water shortages, competition over water between tourism and other sectors, desertification, increased wildfires threatening infrastructure and affecting demand
Increased frequency of heavy precipitation in some regions	Flooding damage to historic architectural and cultural assets, damage to tourism infrastructure, altered seasonality (beaches, biodiversity, river flow)
Sea level rise	Coastal erosion, loss of beach area, higher costs to protect and maintain waterfronts and sea defences
Sea surface temperature rise	Increased coral bleaching and marine resource and aesthetic degradation in dive and snorkel destinations
Changes in terrestrial and marine biodiversity	Loss of natural attractions and species from destinations, higher risk of diseases in tropical-subtropical countries
More frequent and larger forest fires	Loss of natural attractions, increase of flooding risk, damage to tourism infrastructure
Soil changes (such as moisture levels, erosion, and acidity)	Loss of archaeological assets and other natural resources, with impacts on destination attractions

Source: World Tourism Organisation (2008)

segment and geographic region. The implications of climate change for any tourism business or destination will also partially depend on the impacts on its competitors. Rising temperatures and melting snow attractions may have a positive spin-off for tropical destinations, for instance. A negative impact in one part of the tourism system may constitute an opportunity elsewhere. Tourists also have the greatest capacity to adapt to the impacts of climate change, with relative freedom to avoid destinations impacted by climate change or shifting the timing of travel to avoid unfavourable climate conditions. In traditional summer beach destinations (like Caribbean SIDS) the summer season might lengthen, and the winter season might be more appealing to tourists, providing opportunities to reduce seasonality and expand the tourism product. Northern coastal areas might benefit from warmer summers, attracting more tourists and lengthening summer season. Consequently, there will be "winners and losers" at the business, destination, and nation level. However, this should not lull Caribbean SIDS into complacency as effects can be just as devastating to the sun-centric tourism product. For instance, visits to nature reserves, cycling, golf tourism, beach tourism, nautical tourism, or urban/cultural tourism can require certain weather conditions. Shift in travel patterns and particularly higher temperatures in temperate home countries of many tourists may have important implications, including proportionally more tourism spending in temperate nations and proportionally less spending in warmer nations now frequented by tourists from temperate regions. According to the UNWTO (2008) the direct effect of climate change might be significant enough to alter major intraregional tourism flows where climate is of paramount importance, including Northern Europe to the Mediterranean and the Caribbean, North America to the Caribbean, and to a lesser extent Northeast Asia to Southeast Asia.

Warmer temperatures and greater sunshine have been found to influence travel patterns and tourism expenditures in some temperate nations. The climatic factors identified as having the greatest impact on tourism are temperature, sunshine, radiation, precipitation, wind, humidity, and fog (Stern 2006; Hamilton and Lau 2004). These factors are significant both to the tourist's assessment of his or her health and well-being and to the tourism industry. Environmental factors have always been key components when tourists choose a holiday destination and there is also evidence that the weather conditions experienced at the destination have an important influence on overall holiday satisfaction (UNWTO 2008). Climate defines

the length and quality of tourism seasons and plays a major role in destination choice and tourist spending. Scott et al. (2008) in their report commissioned by the UNWTO classified the range of climate change impacts on tourism into the five categories of direct and indirect impacts of climate, possible changes to tourist mobility, destination vulnerability, and social impacts. Forster et al. (2012) concluded that 40% of visitors to Anguilla considered the hurricane season in their decision-making process. Further, the researchers found that respondents were less likely to choose a holiday option when hurricane likelihood and intensity risk increased. The influence of hurricane risk and intensity was strongest with older Americans and vacationers seeking a beach holiday. Indeed, tourists have a great adaptive capacity (depending on three key resources: money, knowledge, and time) with relative freedom to avoid destinations impacted by climate change or shifting the timing of travel to avoid unfavourable climate conditions (UNWTO 2008: 81).

Despite controversies in research regarding the veracity of statistical models in predicting tourist flows under scenarios of climate change (Bigano et al. 2006), strategic planning is needed by the tourism industry as climate is an important resource sought after by tourists. As has been previously indicated, projected changes in the distribution of climate resources are anticipated to have important consequences for tourism demand. As such, the response of tourists to the complexity of destination impacts will reshape demand patterns and play a pivotal role in the eventual impacts of climate change on the tourism industry. Understanding and anticipating the potential shifts in tourist demand will remain critical areas of tourism planning.

Beach tourism remains the dominating market segment, constituting a key part of the economy of most SIDS and Caribbean countries. Coastal and island destinations such as St. Lucia, Bahamas, Jamaica, and Barbados are extremely vulnerable to direct and indirect impacts of climate change (such as storms and extreme climatic events, coastal erosion, physical damage to infrastructure, sea level rise, flooding, water shortages, and water contamination). This high vulnerability often couples with a low adaptive capacity, in SIDS and coastal destinations of developing countries. In many beach destinations the high tourist season coincides with low water regimes in dry seasons, aggravating water management and environmental issues.

Nature-based tourism as seen in Dominica relies on a high diversity of tourism resources (landscapes, flagship species, ecosystems, outdoor

activities relying on specific resources like water level in rivers for canoeing, etc.). These resources are highly variable in space, and will be affected by climate change in various ways. Although ecosystems can be highly vulnerable to climate change impacts, they have greater adaptation when compared to beach tourism, given the wide range of activities that can be developed and conducted in natural areas. Therefore, there are good possibilities to design effective adaptation strategies for ecotourism and nature-based destinations.

Most energy use in tourism, as in many other economic sectors, is based on fossil fuels, with only a fraction of energy being generated through renewable energy sources. There is little doubt that the earth's climate is reacting to the use of fossil fuels and other harmful toxins. Temperature recordings for 2015 broke several records. The year ended the warmest five-year period ever recorded and was the first time in recorded history that the world's annual temperature exceeded the halfway point to the 2 °C (3.6 °F) threshold agreed under the Paris Agreement.[1] The average global temperature has increased by approximately 0.6 °C during the twentieth century. More than that, the rate of increase in air temperature in the Caribbean subregion has exceeded the international mean (Mimura et al. 2007).

Individually, Caribbean and other developing countries do not emit significant amounts of carbon dioxide relative to more advanced economies of the Global North. As Dominican PM Roosevelt Skerrit has explained, the Caribbean is a victim of the emissions of larger and more energy-dependent nations. He noted, "We are shouldering the consequences of the actions of others, actions that endanger our very existence, and all for the enrichment of a few elsewhere" (Skerrit 2017). Though not a large contributor to the global problem, Caribbean SIDS have experienced devastating effects of extreme weather brought on by climate

[1] Paris Climate Agreement is an agreement within the United Nations Framework Convention on Climate Change (UNFCCC). The Paris Agreement's central aim is to strengthen the global response to the threat of climate change by keeping the global temperature rise in this century well below 2 °C above preindustrial levels and to pursue efforts to limit the temperature increase even further to 1.5 °C. The agreement addresses mitigation strategies to reduce greenhouse gas emissions and adaptation strategies necessary to strengthen the ability of countries to respond to climate change threats. The agreement increases transparency through country submissions of intended nationally determined contributions, which detail emission reduction strategies and other climate-related action plans and timeframes for adaptation and resilience building (UNFCCC 2018).

changes. Moore (2010) concluded that extreme weather events could affect the Caribbean hotel infrastructure as well as tourist attractions, while on the demand side a change in climatic features could lead to a shift in visitor patterns. In particular, the study determined that in a worst-case scenario, tourist arrivals could fall by about 1% per year, costing the region about US$118 million to US$146 million in lost revenues per annum. The region has experienced boom in arrivals; however, there have been repeated occurrences of devastating hurricanes to which the region is becoming more and more vulnerable as Table 2.2 indicates.

Table 2.2 Major storms in the Caribbean and countries affected: 2010–2017

2010	Tropical Storm Earl	Anguilla
	Tropical Storm Tomas	St. Lucia, St. Vincent and the Grenadines, Barbados
2011	Tropical Storm Ophelia	Dominica
	Tropical Storm Harvey	Belize
	Tropical Storm Irene	Turks and Caicos Islands, Bahamas, Haiti
2012	Hurricane Ernesto	Belize, St. Lucia, St. Vincent and the Grenadines
	Tropical Storm Isaac	Dominica, Haiti, St. Lucia, Bahamas
	Hurricane Sandy	Bahamas, Haiti, Jamaica
2013	Tropical Storm Chantal	Dominica, St. Lucia, Barbados, Haiti, Jamaica
	Tropical Storm Gabrielle	Bermuda
2014	Tropical Storm Bertha	Dominica, Turks and Caicos Islands, the Bahamas
	Tropical Storm Cristobal	Turks and Caicos Islands, the Bahamas
	Tropical Storm Fay	Bermuda
	Tropical Storm Gonzalo	Anguilla, Antigua and Barbuda, St. Kitts and Nevis
2015	Hurricane Danny	Dominica
	Tropical Storm Erika	Dominica
	Hurricane Joaquin	Bahamas, Haiti, Jamaica, Bermuda, Turks and Caicos
2016	Tropical Storm Earl	Belize
	Tropical Storm Matthew	Barbados, St. Lucia, St. Vincent and the Grenadines, Haiti, Dominica, Turks and Caicos Islands, Grenada, Haiti, Jamaica, the Bahamas
	Tropical Storm Otto	Nicaragua
2017	Hurricane Irma	St. Kitts and Nevis, Anguilla, Antigua and Barbuda, Turks and Caicos, the Bahamas, St. Martin/St. Maarten, Bahamas, Cuba, British Virgin Islands, St. Barthélemy
	Hurricane Maria	Dominica, St. Lucia, Turks and Caicos, Barbados, St. Vincent and the Grenadines, Guadeloupe

Source: CCRIF Annual reports; CDEMA Annual reports; Sullivan (2017)

***Voices of the Present*: Joy Jibrilu, Director General, Bahamas Ministry of Tourism**

The countries of the Caribbean and, in fact, the North Atlantic Basin are being threatened by climate change which produces extreme weather events resulting in the loss of habitats and ocean acidification, food scarcity, declining biodiversity, the loss of human talent and destruction of cultural and historical assets in the natural and built environments—all of which produce significant impacts on the tourism industry. The Caribbean is among the most acutely affected regions of the world from climate change, although it is a small contributor to the pollution caused by global greenhouse gas emissions that create extreme weather events.

The 2017 hurricane season produced 17 major storms and 6 major hurricanes and has been the costliest hurricane season on record with a collective $280 billion in damages to affected states. This has captured the attention, not only of Caribbean governments, but the world, further underscoring the importance of the Paris Climate Accord, an agreement signed by 96 member countries of the United Nations Framework Convention on Climate Change (UNFCCC) which set the agenda for the financing of greenhouse gas emissions mitigation, and adaption in the year 2020.

In 2017 tourism-dependent nations of Barbuda, Puerto Rico, St. Maarten, and Dominica were among those decimated by the category 5 Hurricanes Irma and Maria. Skerrit (2017) reported on the devastation thus:

> Our homes are flattened. Our buildings roofless. Our water pipes smashed. And road infrastructure destroyed. Our hospital is without power. And schools have disappeared beneath the rubble. Our crops are uprooted. Where there was green, there is now only dust and dirt. The desolation is beyond imagination.

Projections also indicate that not-so-slowly rising sea levels in the region are a serious threat to low-lying islands such as the Bahamas. Here, sea level rise could lead to displacement of coastal communities, coastal erosion and loss of land, salination of aquifers, and damage or loss of coastal infrastructure, including airports, major roads, and billions of dollars of tourism superstructure (Thomas and Benjamin 2018). Alarmingly, even

1 metre rise in sea level would inundate 80% of the Bahamas, making it one of the most vulnerable Caribbean islands with respect to sea level rise and storm surge (CCCRA 2012).

The Caribbean must also must bear some responsibility for climate change and embrace mitigation approaches where possible. Reducing regional dependence on carbon-based fuels is the first step. There is a symbiotic relationship between tourism and climate change. Tourism can provide important opportunities to reduce the overall vulnerability of communities to climate change through sustainable development in SIDS, and the capacity of the tourism sector to adapt to climate change is thought to be relatively high due to its dynamic nature. According to Joy Jibrilu, Director General of the Bahamas Ministry of Tourism, countries of the region must prioritize the formulation of long-term and coordinated strategies and policies aimed at strengthening resilience in public infrastructure and the built environment (hospitals, harbours, airports, shelters, electricity grid, water treatment and distribution centres, etc.) in order to increase resilience to natural disasters and climate change.

***Voices of the Present*: Hugh Riley, Secretary General & CEO, Caribbean Tourism Organization**

Caribbean governments have demonstrated a generally clear understanding of the effects of climate change by their attention to the warnings of organizations such as the CCCCC, and their engagement with and vocal support of international protocols aimed at encouraging responsible environmental policies and practices. The Inter-American Development Bank (IDB) has also developed a model focused on Smart and Sustainable Islands, which is being promoted. Its emphasis is on low carbon and climate resilient measures to "smarten" the islands and minimize the impending effects of climate change by aggressively promoting sustainable measures in all sectors, including tourism. Plans are now being developed and implemented to assist the region to adopt a smart climate focus to build resilience and reduce vulnerabilities within the sector and more widely. In 2013, the Caribbean Disaster Emergency Management Agency (CDEMA) sought funding to develop a "Disaster Risk Management and Climate Change Adaptation Strategy and Plan of Action for the Caribbean Tourism Sector".

(*continued*)

(continued)

Any citizen of this region who had misunderstood the effects of climate change on warmer temperatures, rising sea levels, coral bleaching and wildly intensifying weather events, probably got a chance at a clearer understanding when two Category Five hurricanes swept through the region in September 2017 causing widespread death and destruction in a dozen Caribbean countries.

The spate of devastating hurricanes in the region in September 2017 has further highlighted the need for SIDS like the Caribbean states to invest in resilience and to "build back better", using strengthened building standards and codes, and promoting better enforcement of planning regulations after a natural disaster. It is now timely to review and take action related to the 2013 CDEMA Disaster Risk Management Plan (mentioned above) and relevant updates for the sector.

The many complementary initiatives are linked to the United Nations Sustainable Development Goals and integrated into various approaches contained in a Caribbean Tourism Organization Strategic Plan for 2018–2022. The CTO works closely with regional and international partners such as CDEMA, the Caribbean Hotel & Tourism Association and the IDB, to move forward on the sustainable development agenda and its strategic priorities.

The CTO is an advocate of the multi-faceted approach to resilience, totally embracing environmental, socio-cultural and economic resilience. Because tourism is a primary economic driver for most of the Caribbean, reducing that sector's vulnerability is key to protecting the wellbeing of the 40 million people who live in the Caribbean. The CTO strongly believes the Caribbean will continue to be at serious risk as long as the region lacks the capacity to establish 'rainy day' funding mechanisms on which to draw when disaster strikes.

Caribbean governments have realized that climate change adaptation can only be implemented effectively in an integrated policy framework. Coordination between agencies to allow mainstreaming of climate change and sustainable development led to the formation of the Caribbean Disaster Emergency Management Agency (CDEMA) in 1991 (CDEMA 2011). CDEMA is a regional intergovernmental agency for disaster management in the Caribbean Community (CARICOM). The Agency was established initially as the Caribbean Disaster Emergency Response Agency (CDERA)

with primary responsibility for the coordination of emergency response and relief efforts to Participating States that require such assistance. It transitioned to CDEMA in 2009 to fully embrace the principles and practice of Comprehensive Disaster Management (CDM). The agency focuses on all aspects of disaster risk management and takes a comprehensive approach. It addresses both natural and man-made disasters in all sectors and at all stages of disaster management including mitigation, awareness building, prevention, disaster response, and post-impact recovery (Kirton 2013). CDEMA works in conjunction with national disaster offices which have the ultimate responsibility to respond to disasters on a country level. As the frequency and intensity of natural disasters and climate-related negative events increase, regional cooperation and capacity building in disaster risk management become increasingly important.

In addition to the CDEMA, Caribbean governments have met the challenge set out by the Djerba conference, which noted that part of the adaptive strategy and disaster resilience for SIDS should include disaster-specific insurance schemes. In 2007, the Caribbean Catastrophe Risk Insurance Facility (CCRIF) (CCRIF 2010) was formed as the first multi-country risk pool in the world, and was the first insurance instrument to successfully develop parametric policies backed by both traditional and capital markets. It was designed as a regional catastrophe fund for Caribbean governments to limit the financial impact of devastating hurricanes and earthquakes by quickly providing financial liquidity when a policy is triggered. CCRIF helps to mitigate the short-term cash flow problems small developing economies suffer after major natural disasters. CCRIF's parametric insurance mechanism allows it to provide rapid payouts to help members finance their initial disaster response and maintain basic government functions after a catastrophic event. Since the inception of CCRIF in 2007, the facility has made 36 payouts to 13 member governments on their tropical cyclone, earthquake, and excess rainfall policies, totalling US$130.5 million, as illustrated in Table 2.3.

Jamaica is also spearheading the development of the Global Centre for Tourism Resilience and Crisis Management, which is envisioned to spearhead proactive measures to ensure that tourism-dependent nations develop strategies to mitigate against climate change and remain open for tourist business after natural disasters. Specific countries have also made efforts to mainstream adaptability into their tourism policy frameworks. In Tobago where climate change is impacting water management due to increased and longer droughts, small-scale structural adaptations have

Table 2.3 CCRIF payouts: 2007–2017

Event	*Country affected*	*Payouts (US$)*
Earthquake, November 29, 2007	Dominica	528,021
Earthquake, November 29, 2007	St. Lucia	418,976
Tropical Cyclone Ike, September 2008	Turks and Caicos Islands	6,303,913
Earthquake, January 12, 2010	Haiti	7,753,579
Tropical Cyclone Earl, August 2010	Anguilla	4,282,733
Tropical Cyclone Tomas, October 2010	Barbados	8,560,247
Tropical Cyclone Tomas, October 2010	St. Lucia	3,241,613
Tropical Cyclone Tomas, October 2010	St. Vincent and the Grenadines	1,090,388
Tropical Cyclone Gonzalo, October 2014	Anguilla—Excess Rainfall Policy	493,465
Trough System, November 7–8, 2014	Anguilla	559,249
Trough System, November 7–8, 2014	St. Kitts and Nevis	1,055,408
Trough System, November 21, 2014	Barbados	1,284,882
Tropical Storm Erika, August 27, 2015	Dominica—Excess Rainfall Policy	2,402,153
Earthquake, June 9, 2016	Nicaragua	500,000
Tropical Cyclone Earl, August 2016	Belize—Excess Rainfall Policy	261,073
Tropical Cyclone Matthew, September 2016	Barbados	975,000
Tropical Cyclone Matthew, September 2016	Barbados—Excess Rainfall Policy	753,277
Tropical Cyclone Matthew, September 2016	St. Lucia—Excess Rainfall Policy	3,781,788
Tropical Cyclone Matthew, September 2016	St. Vincent and the Grenadines—Excess Rainfall Policy	285,349
Tropical Cyclone Matthew, October 2016	Haiti	20,388,067
Tropical Cyclone Matthew, October 2016	Haiti—Excess Rainfall Policy	3,020,767
Tropical Cyclone Otto, November 2016	Nicaragua	1,110,193
Tropical Cyclone Irma, September 2017	St. Kitts and Nevis	2,294,603
Tropical Cyclone Irma, September 2017	Anguilla	6,529,100
Tropical Cyclone Irma, September 2017	Anguilla—Excess Rainfall Policy	158,823
Tropical Cyclone Irma, September 2017	Antigua and Barbuda	6,794,875
Tropical Cyclone Irma, September 2017	Turks and Caicos Islands	13,631,865
Tropical Cyclone Irma, September 2017	Turks and Caicos Islands—Excess Rainfall Policy	1,232,767
Tropical Cyclone Irma, September 2017	The Bahamas—Excess Rainfall Policy	234,000
Tropical Cyclone Maria, September 2017	Dominica	19,294,800
Tropical Cyclone Maria, September 2017	Dominica—Excess Rainfall Policy	1,054,022
Tropical Cyclone Maria, September 2017	St. Lucia—Excess Rainfall Policy	671,013
Tropical Cyclone Maria, September 2017	Turks and Caicos Islands	419,372
Tropical Cyclone Maria, September 2017	Barbados—Excess Rainfall Policy	1,917,506
Tropical Cyclone Maria, September 2017	St. Vincent and the Grenadines—Excess Rainfall Policy	247,257
Rainfall event, October 18–20, 2017	Trinidad and Tobago	7,007,886
Total for the Period 2007–2017		**130,467,630**

Source: CCRIF (2017)

been implemented by individual accommodation providers and tour operators, which include retrofitting buildings with rainwater collectors, increasing storage tank capacity, converting toilets to saltwater supply, and adding diesel-powered desalination capacity. Importantly, water conservation education for employees and guests is practised in hotels and attractions as well as revised landscaping practices and limited use of pools.

Between 2009 and 2012, the Caribbean Carbon Neutral Tourism programme was piloted in the Bahamas and Belize. The programme assessed the carbon footprint of the tourism sector and evaluated approaches that could effectively reduce that footprint. It also served to identify and develop financial mechanisms able to effectively establish a carbon-neutral tourism product in the Caribbean. Finally, it prepared a programme to access climate financing to be used to integrate climate resilience in the tourism sector (Trotz 2014).

In order for the region to maintain its coveted place among the world's travellers in the face of climatic shifts that threaten to weaken the fabric of the industry, a multifaceted approach must be undertaken which includes the following, as illustrated in Table 2.4. "Soft" coastal protection needs to be undertaken to prevent erosion. These measures include reforestation of mangroves and reef protection. Importantly, integration of climate change factors into regulatory frameworks for tourism development need to be top priority, such as Environmental Impact Assessment for tourism infrastructure and establishments. Efforts need to be placed on reducing tourism pressures on coral reefs by protecting specific areas from swimming, scuba diving, and related water sports. To combat the more harmful effects of extended droughts, accommodations must be mandated to employ water conservation techniques, such as rainwater storage, the use of water-saving devices, or waste water recycling.

Any sustainable plan for climate change resilience must develop practical response plans including water supply planning (in drought-susceptible destinations) and risk assessment and preparedness strategies, and implement early warning systems (particularly for flooding). Training programmes which will build capacity are also key to improving adaptive capacity of authorities and managers of protected areas, especially in biodiversity hotspots of SIDS. Capital also has to be allocated to establish scientific monitoring survey programmes to assess ecosystem changes and take necessary protection measures. Tangible and accessible Codes of Ethics also need to be implemented in a multi-sectorial approach, which would provide a checklist or criteria that a hotel chain can provide to its

Table 2.4 Possible adaptation measures for tourism in small island countries and barriers to implementation

Adaptation measures	*Relevance to tourism*	*Barriers to implementation*	*Measures to remove barriers*
"Soft" coastal protection	Many valuable tourism assets at growing risk from coastal erosion	Lack of credible options that have been demonstrated and accepted	Demonstration of protection for tourism assets and communities
Enhanced design, siting standards, and planning guidelines	Many valuable tourism assets at growing risk from climate extremes	Lack of information needed to strengthen design and siting standards	Provide and ensure utilization of targeted information
Improved insurance cover	Growing likelihood that tourists and operators will make insurance claims	Lack of access to affordable insurance and lack of finance	Ensure insurance sector is aware of actual risk levels and adjusts premiums
Shade provision and crop diversification	Additional shade increases tourist comfort	Lack of awareness of growing heat stress for people and crops	Identify, evaluate, and implement measures to reduce heat stress
Reduce tourism pressures on coral	Reefs are a major tourist attraction	Reducing pressures without degrading tourist experience	Improve off-island tourism waste management
Desalination, rainwater storage	Tourist resorts are major consumers of fresh water	Lack of information on future security of freshwater supplies	Provide and ensure utilization of targeted information
Tourism activity/ product diversification	Need to reduce dependency of tourism on "sun, sea, and sand"	Lack of credible alternatives that have been demonstrated and accepted	Identify and evaluate alternative activities and demonstrate their feasibility
Education/ awareness raising	Need to motivate tourism staff and also tourists	Lack of education and resources that support behavioural change	Undertake education/awareness programmes

Source: Becken, S. and Hay, J. (2007), as cited in UNWTO (2008)

suppliers/providers, to help them perform their services to the sector in an environmentally respectful manner.

The adaptive capacity of tourists also needs to be considered in climate change planning and programme development. For instance, travellers who focus on ecotourism are notably eco-conscious and should be targeted for mitigation and "green" options during the trip which focus on conservation and preservation of natural resources. Measures such as these not only reduce or remove external stresses such as pollution, but also ensure

that tourists feel a part of the process of climate change mitigation rather than having strict measures imposed from external stakeholders. Similarly, active participation of local communities living within or near protected areas in policymaking and management processes is critical to securing buy-in for mitigation strategies and to increase the chances of success of such programmes. Tour operators could play a central role in mitigation, through their capacity in influencing the whole tourism supply chain, and shape demand patterns. They, thus, could play a role in customers' awareness raising and soft mobility product development. Compared to the transport sector, tour operators and travel agents are probably less sensitive to the possible impacts of mitigation policies: they sell complete products where travel forms part of a complex holiday experience, well-being, and pleasure. Innovation is a key factor for effective and timely adaptation.

Naturally, the use of alternative fuels (e.g., biodiesel) and renewable energy sources (e.g., wind, photovoltaic, solar, thermal, geothermal, biomass, and waste) is an important macro strategy that Caribbean SIDS must consider if they are serious about reducing carbon emissions. Integrated emission management (including supply chain management) and wider environmental management awareness raising among the population on recycling are key. This essentially means that tourism policy planners must move outside of tourist-centric spaces to ensure that the wider population practises wholesome techniques which will reduce Caribbean SIDS' negative impact on the environment. To this end, for instance, the Tourism Product Development Company in Jamaica, responsible for all areas of diversification of the tourism offering, is an avid partner in recycling education efforts towards maintaining an ecologically sustainable tourism product. Since 2017, the company has embarked on an island-wide campaign and school competition in partnership with Recycling Partners of Jamaica to encourage children to collect plastic bottles. The initiative also educates children about how plastics may be reused. The most recent competition in 2018 was expanded to include the entire community of Treasure Beach in St. Elizabeth and saw great support from the local population.

In the final analysis, Caribbean tourism interests must be applauded for responding to the very real threat that climate change poses to the viability of the sector. However, more must be done to promote and undertake investments in energy efficiency tourism programmes and the use of renewable energy resources, with the aim of reducing the carbon footprint of the entire tourism sector. We must strive to conserve biodiversity,

natural ecosystems, and landscapes in ways which strengthen resilience to climate change and ensure a long-term sustainable use of the environmental resource base of tourism. Very often, plans are stymied by the transversal nature of the tourism sector which makes coordination difficult (e.g., interministerial, public-private-community relationships). In a region where SIDS are competing for tourist attraction, it is easy to operate in a framework of fragmentation. However, unity is the only method for survival. The impact of climate change on tourism is everyone's business, because tourism is everyone's business.

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CHAPTER 3

Tourism and Economic Realities in the Caribbean

The economic importance of tourism to Caribbean Small Island Developing States (SIDS) and indeed to the wider global economic system cannot be overstated. As has been shown in Chaps. 1 and 2, most Caribbean SIDS depend heavily and some almost exclusively on the tourism industry for economic sustenance. In the Bahamas, for instance, tourism accounts for 70% of national income (Karagiannis and Salvaris 2013). Tourism is far-reaching in the global economic chain because it appears in every sphere of most economies. It involves the movement of persons, the production of goods and services, the development of accommodations and attractions and facilitates the employment of millions directly and indirectly. The Caribbean tourism economy has shown remarkable resilience and growth. In 1970, the Caribbean region welcomed close to 4 million tourists and more than 30 years later this has skyrocketed to over 17.1 million, achieving an estimated rate of increase of around 5% per annum (Karagiannis and Salvaris). Caribbean tourism has weathered the storms of recessions in the 1970s, 1980s, and 2000s, the global oil crisis, international wars, and the September 11 terrorist attack on the United States. Tourism has become the leading growth sector in most economies, as stagnation persisted in traditional agricultural, manufacturing, and commercial sectors. The region has not only thrived where stopover visitors are concerned, but it has remained the premier cruise destination in the world, with its share of world cruise bed days averaging 51% in the last decade. Trends in the contribution of travel and tourism to Caribbean economies

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have been well noted by the World Travel and Tourism Council (WTTC). According to its 2017 report, the direct contribution of travel and tourism to Caribbean GDP was US$17.9 billion (4.8% of total GDP) in 2017, and is forecast to rise by 3.6% per annum, between 2018 and 2028, to US$26.5 billion (5.6% of total GDP) in 2028. In 2017 the industry also directly supported 758,000 jobs (4.3% of total employment). This is expected to rise to 965,000 jobs (5.1% of total employment) in 2028. Visitor exports generated US$31.8 billion (19.8% of total exports) in 2017. This is forecast to grow by 3.9% per annum, from 2018 to 2028, to US$48.5 billion in 2028 (24.2% of total). Undoubtedly, therefore, Caribbean tourism is here to stay and can remain a shining beacon of hope for the economies of these SIDS, particularly if governments are able to support the industry with the necessary tools to diversify and become more resilient to internal and external shocks.

The Tourism Economy

The direct contribution of tourism industry to a country's GDP reflects the internal spending on the sector and is calculated from the total internal spending from the net effect of the purchases made by varied tourism sectors. The indirect contribution includes jobs supported by investments (an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels), spending on attendant support services such as food and cleaning services by hotels, fuel and catering by airlines, and IT services by travel agents. Mention should also be made of the induced contribution which measures the GDP and jobs supported by the spending and reintegration of cash into the local economy by those who are directly or indirectly employed by the tourism industry.

The tourism economy is therefore far-reaching, and for some SIDS all-encompassing; it is a system of correlations emerging during the process of fulfilling tourist's needs and meeting the tourist demand (Panasiuk 2013). Tourism demand is known as the element that influences the organization of the other aspects of the tourism product. Various characteristics and requirements of tourism segments have to be taken into account by the industry in order to organize a competitive tourism supply. This is even more critical in Caribbean SIDS which are competing not only with a global market, but with each other for that critical tourist dollar. The

tourism economy also has a symbiotic and co-dependent relationship with other economic sectors such as agriculture, transportation, construction, and IT, which benefit directly from tourism and which are in turn provide valuable inputs to tourism. Importantly, the development of tourism as a vibrant economic behemoth has forced the classic economic model of labour, land, and capital to shift focus to include service, information, and knowledge which are integral to the production of new economic models (O'Sullivan and Sheffrin 2003). Within the tourist economy exist key assets, which must be present to ensure a workable and sustainable system and keep tourist demand alive and well. These include but are not limited to accommodations, transportation, various tourism services, and information.

Transportation has to be assured by both the infrastructure (roads, motorways, railways, ports, and airports) and the transport organization towards the area (number of flights and trains and proper road conditions). The ease of access to tourism destinations and ease of movement between and among attractions obviously makes the commercialization of the tourism product easier. Tourism services are also critical to the survival of the industry and include all services provided by local and international operators in order to make the tourism assets meet the tourism demand. These may include public services provided by the state and private services which are concentrated in the hands of tourist entities such as accommodations, customer service, airport transfer services, tourist guides, entertainment, events and festivals, among others. The existence of so many varied types of needs of the tourism sector can result in far-reaching positive economic effects in SIDS, which are heavily tourism dependent. Information is often among the most important yet sidelined aspects of the tourism ecosystem. Information is key for the tourism product as it bridges the divide between the holiday motivations of the tourist and the tourism assets of the destination. The information system allows the knowledge of the tourism product, creates a good image of the tourism assets, influences the tourist choice, and creates added value to the tourism supply. In the age of rapidly evolving information technology, this information also needs to be easily accessible, social media ready, sensitive to language and disability needs, and evolving as quickly as new information is available.

However, the economic spin-off of tourism enterprises is not always positive. Dependence on the industry in SIDS can lead to a lack of diversification of local economies and a reliance on a fickle industry susceptible

to exogenous shocks, climate change, and local natural and man-made disasters. Typical tourism models also subject Caribbean economies to dependence on external rather than indigenous resources, making the region vulnerable. Some scholars have also critiqued the relative lack of meaningful linkages between tourism and other sectors of Caribbean SIDS and the repatriation of profits to countries which invest in accommodations, in particular all-inclusive hotels (Crick and Campbell 2013; Smith and Spencer 2013). In many ways, tourism economic models in Caribbean SIDS have mirrored the historical legacy of core/periphery relationship of the colonial era. As former plantation economies, most Caribbean SIDS inherited a system of close relationship with nations of the Global North, which are more powerful and wealthy and more often than not their former colonial masters. The slavery era not only engendered economic dependence on the colonial mother country, but stifled internal economic development and regional cooperation by insisting on exploitative trade relationships with countries outside the Caribbean. This has in many ways continued into the twenty-first century as SIDS in the region tend to be structurally underdeveloped and dependent on external buttressing to survive. This dependence is driven by neoliberal polices, globalization, and free-market ideals, which lead to demands among consumers which cannot be met by local resources. For instance, the proximity to and relationship between Caribbean SIDS and North America, as well as the fact that this region is a main source of tourists for the Caribbean, has led to local demands for goods and services not locally produced (Karagiannis and Salvaris 2013). This in turn has resulted in high levels of importation of foreign goods, and low exportation rates, which increased the debt-to-GDP ratio and further dependence on the Global North for aid and high interest loans.

Tourism, therefore, can be seen as a double-edged sword. On the one hand, the industry has been sustaining and will likely continue to sustain Caribbean SIDS economies, being the fastest-growing economic activity in the region in the last 30 years. On the other hand, the industry sits on fundamentally flawed and weak economies that often utilize tourism as a panacea for a range of economic woes. In addition, critical aspects of the industry including cruise tourism remain unsteady as a beneficial economic staple. Nonetheless, tourism is being heralded as one of the main drivers of growth in Caribbean SIDS economies and, if properly managed, will continue to reap benefits for the region on a whole.

Cruise Tourism

Consideration also has to be given to the importance of the cruise ship industry, which is forecast to outdo stopover business in the next ten years. Indeed, the Caribbean boasts among the largest share of cruise visitors accounting for close to 40% of all global cruise destinations in 2014 (Cleare 2016) with the top Caribbean destinations being the Bahamas, Cayman Islands, the US Virgin Islands, and Puerto Rico as indicated in Table 3.1. The Bahamas in particular had a peculiar case with cruise arrivals constituting over 70% of all arrivals to the islands in 2013. As Tables 3.2 and 3.3 indicate, the Bahamas has remained the consistent leader in cruise arrivals, edging out even Cozumel by a million visitors every year. Cruising has also proven to be critical to the economy of St. Kitts and Nevis. In the 2011/2012 cruise ship season, St. Kitts saw over 500,000 cruise passengers disembark at Port Zante. According to Business Research Economic Advisors (BREA) Economic Contribution of Cruise Lines for St. Kitts during the 2010/2011 cruise season was US$4.9 million while the visitor spending of US$108.90 per passenger accounted for US$61.1 million. The spend of US$46.00 per crew accounted for US$4.6 million (Cleare 2016: 35).

Undoubtedly, cruise tourism facilitates employment of locals, both directly and indirectly. Direct employment opportunities include tour

Table 3.1 Top Caribbean cruise tourism destinations: 2003 and 2013

	2003	*2013*
The Bahamas	2,970,174	4,709,236
Cozumel (Mexico)	203,312	2,751,178
US Virgin Islands	1,079,011	1,375,872
Puerto Rico	1,234,992	1,176,343
St. Maarten	1,171,734	1,779,384
Jamaica	1,132,596	1,288,184
Barbados	559,122	570,263
Dominican Republic	398,273	423,920
St. Lucia	393,240	594,118
Antigua and Barbuda	385,686	533,993
Curacao	279,378	610,186
Bermuda	226,097	320,090
British Virgin Islands	304,338	367,362

Table 3.2 Cruise passenger arrivals: 2015 and 2014

Destination	*Period*	*2015*	*2014*	*% change*
Antigua and Barbuda	Jan–Mar	320,401	270,262	18.6
Aruba	Jan–Apr	264,635	317,623	−16.7
Bahamas	Jan–Mar	1,358,623	1,377,043	−1.3
Barbados	Jan–Mar	217,139	231,144	−6.1
Belize	Jan–Jun	541,887	527,037	2.8
Bermuda	Jan–May	81,896	79,044	3.6
British Virgin Islands	Jan–Jun	276,559	278,327	−0.6
Cayman Islands	Jan–May	814,370	774,980	5.1
Cozumel (Mexico)	Jan–May	1,657,278	1,585,758	4.5
Curacao	Jan–May	300,115	325,005	−7.7
Dominica	Jan–May	177,479	189,400	−6.3
Dominican Republic	Jan–Apr	238,811	259,079	−7.8
Grenada	Jan–Mar	133,072	125,461	6.1
Haiti	Jan–May	356,803	328,258	8.7
Jamaica	Jan–May	742,114	665,556	11.5
Martinique	Jan–May	167,610	117,643	42.5
Puerto Rico	Jan–Mar	526,428	417,011	26.2
Saint Lucia	Jan–Jun	399,746	364,228	9.8
St. Maarten	Jan–Mar	791,537	736,045	7.5
St. Vincent and the Grenadines	Jan–Apr	52,219	54,853	−4.8
Trinidad and Tobago	Jan–Jun	44,949	22,033	104.0
US Virgin Islands	Jan–May	928,980	987,754	−6.0

Source: Data supplied by member countries and available as on July 29, 2015

N.B.: Figures are subject to revision by reporting countries; [P] Preliminary figures

operators, store clerks, taxi drivers, craft vendors, port pilots, port security, and port restaurant staff. Such jobs are created as a result of the industry (usually close to the ports) and are sustained as a result of the vibrant cruise industry. This in turn facilitates buoyancy in the economy as these persons become financially empowered to spend their earnings to sustain their lives, referred to as the multiplier effect.

However, according to statistics from the Bahamas Ministry of Tourism, the 4.7 million cruise visitors spent far less than the 1.3 million stopover visitors for the same year, with cruise passengers accounting for only 18% of income to the islands (Cleare 2016). In addition to this is the very real concern that cruise ships invariably have negative effects on the natural environment (Hyun and Kim 2015). Though many major lines are attempting to go green, with, for instance, the Disney Cruise line receiving an "A" grade for its attempt to mitigate degradation by the Friends of Earth cruise

Table 3.3 Cruise passenger arrivals: 2016

Destination	*Arrivals*
Anguilla	–
Antigua and Barbuda	605,200
Aruba	656,000
The Bahamas	4,690,400
Barbados	595,000
Belize	1,005,400
Bermuda	397,900
Bonaire	221,900
British Virgin Islands	699,100
Cancun	–
Cayman Islands	1,711,800
Cozumel	3,637,300
Cuba	–
Curacao	464,700
Dominica	277,100
Dominican Republic	809,300
Grenada	314,900
Guadeloupe	263,000
Guyana	–
Haiti	707,900
Jamaica	1,655,600
Martinique	276,100
Montserrat	–
Puerto Rico	1,401,900
Saba	–
St. Eustatius	–
St. Kitts and Nevis	951,000
St. Lucia	587,700
St. Maarten	1,668,900
St. Vincent and Grenadines	99,500
Suriname	–
Trinidad and Tobago	82,700
Turks and Caicos Islands	846,900
US Virgin Islands	1,776,700

report card, the environmental footprint of ships cannot be overlooked. Ballast water, grey and black water, chemical pollution, solid waste, and oil are some of the pollutants created and expelled by cruise ships. Air pollution is also a factor, as is noise pollution, which disrupts marine mammals. The conundrum, therefore, for Caribbean SIDS is very real. The cruise

industry is undoubtedly a critical part of the future of sustainable tourism futures; however, the economic benefits to port cities and countries in general is nominal when compared to the impact stopover guests have on local economies. Cruise passengers, according to the Caribbean Tourism Organization (CTO), account for approximately 6% of total tourism expenditure in the region, with the majority of this being spent on duty-free shopping and less on indigenous art, food, and culture.

In an attempt to mitigate some of the more harmful effects of cruising, the Cruise Ship Policy (CSP) adopted in Belize can be assessed as a case which aims to maximize the benefits from the cruise industry, while sustaining the natural resources of Belize. In this policy, a daily visitation limit of 8000 cruise passengers is recommended and an Environmental Compliance and Monitoring Plan has been put in place and must be signed by cruise lines as part of the licensing process. In addition, licensing requires cruise ships to offer passengers excursions owned and operated by Belizean tour operators and conducted by licensed guides. A guideline maximum level of visitation at each attraction/site is well articulated and ensures that the natural ecological resources for which the country is so well known are protected. Entrance fees at attractions and sites are also implemented, and the cruise ship company must develop an orientation programme to inform their visitors of the natural resources and the importance of preserving the environment. Other specifications include anchorage at predesignated sites and harbours, and the use of phosphate-free detergents for cleaning the decks. Policies such as this ensure that cruise lines are held to account for their environmental conduct and socioeconomic responsibility to host nations while maintaining a fruitful and mutually beneficial presence.

Diversification of the Tourism Economy in Caribbean SIDS

In an increasingly competitive marketplace, typical models of "sun, sea, and sand", while still lasting in appeal, are increasingly being accompanied by more modern and unique products which offer a diverse experience to travellers. Indeed, it is important to offer tourists goods and services that are specific to the local area. Whether buying local crafts or enjoying an annual festival, local activities enrich the destination experience leading to more referrals, repeat business, and an enhanced destination brand and image. For instance, shopping is a vital component of any holiday and tourists want to buy goods that are particular to their destination. If they are sold items which are imported from another country, or worse still another

continent, then the authenticity and quality of the destination is called into question and the competitive edge is lost. In the Caribbean, many of the curios are imported, some from Asia. One way to raise tourism expenditure is therefore to provide tourists with high-quality opportunities to spend more while in the destination. To this end, in Jamaica plans are under way to construct five distinct artisan villages in Montego Bay, Falmouth, Ocho Rios, Negril, Port Antonio. These villages will house artists trained at the newly developed Craft Development Institute (CDI) which is mandated to train local artisans in various forms of artistry. Each village will be associated with uniquely themed local products, with a distinct focus in each of the five geographic areas. This will create diversity in offerings to tourists and encourage "village hopping" and more engagement with the local communities and expose tourists to varied attractions near the villages.

Of critical importance to the proper management of the industry is a keen understanding of the distinct categories of markets interested in the Caribbean region and the burgeoning expectations of the new tourist. Traditionally, North America (United States and Canada) has made up the lion's share of the Caribbean tourist market. As Karagiannis and Salvaris (2013: 126) indicate, the United States has always been the largest tourist-generating market for the region, providing over half the total arrivals (stopover and cruise). However, the European market has shown steady growth since the 1990s and new markets such as Asia, Eastern Europe, and South America are being tapped as the new frontier for tourism growth and development. Each market comes to the region with its own tastes and interests which Caribbean SIDS have to facilitate in order to maximize the benefits that will come with each. For instance, holidaymakers from the United Kingdom and other European originating markets are seeking more fulfilling experiences in the destination, and opportunities to venture beyond the confines of their hotel or resort. Ecotourism, health and wellness travel, culinary and gastronomy tourism as well as cultural, community, and heritage-based travel packages are gaining traction with the twenty-first century traveller, particularly repeat visitors who look forward to new and fresh experiences on each trip even to the same destination.

Interestingly, island states have sought to achieve economic growth through a range of service sector activities, including tourism and offshore finance, but also through the provision of "flags of convenience" and passport sales (Connell 2013). In addition, Aruba, Grenada, Antigua, and other Caribbean territories have hosted offshore gambling sites. In general, business tourism has the potential to stimulate the economy through

the continuous flow of foreign exchange, create job opportunities, encourage infrastructural and social development, establish linkages with other industries. In addition, many destinations in the Caribbean have developed critical partnerships in order to organize multi-country holidays. Pairs of countries and territories with substantial reciprocal traffic include Jamaica and the Cayman Islands; Trinidad and Tobago and Grenada; and Antigua and St. Kitts and Nevis.

Perhaps among the most sustainable, however, is the evolution of medical/wellness tourism, which has proven to be an important expansion and diversification model for many SIDS. Tourism has long been associated with improved health, through sale of the concepts of rest and relaxation, as well as the emergence of spas, yoga retreats, and connections with local healing techniques. In Jamaica during World War I, at the time of lowest tourist arrivals to the island, former Mayor of East Front Street city in New Jersey, L.V.F. Randolph, gave a glowing tale of his therapeutic vacation in Jamaica, published by the Plainfield Courier News. He visited in March of 1918 and found accommodations with Mrs. Edgar deCordova at "La Bocage" in St. Andrew. In his letter, reproduced in *The Gleaner* on April 23 he said:

> As this old fellow was somewhat on the invalid list, and therefore of no particular use at home, and as his doctor advised a change from frigid conditions, he hied himself away to Jamaica, the Gem of the Antilles. The scenery in Jamaica is beautiful beyond description … no snow at the highest altitudes. Perpetual summer everywhere … my health has much improved.

Focusing on Jamaica's unpatrolled scenery, lush vegetation, and wonderful food, his review served as a reminder of the original intent of Jamaican Tourist Authorities: that of promoting Jamaica as a wellness destination (Bean and Spencer 2015). More recently a more targeted model of medical tourism has grown with increasing numbers of people travelling for various treatments, including cosmetic surgery and dentistry at cheaper rates than available in the Global North. As Connell (2013: 116) indicates, in the past two decades a form of "reverse globalization" has brought patients from developed countries to the Global South for medical care, for a combination of reasons involving cost, access, service, and quality. While contemporary medical tourism is often regarded as having begun in Cuba, it has been adopted to varied degrees by other SIDS as a result of its economic benefits. The spin-offs from medical tourism are clear: patients pay substantial costs to local hospitals and health centres, while travel

agents, airlines, hotels, and restaurants also benefit from the patient's spending. Importantly, medical tourists/patients rarely travel alone, as assistance is needed in recovery stages. These accompanying friends and family members are also considered part of the medical tourism sector and their spending and mobility can add meaningful value to the supply chain. The fact that medical tourists also need medium- to long-term recuperation time before returning home also redounds to the host country's benefit as well. Medical tourism also has the potential to be a conduit for other related forms of tourism, particularly diaspora tourism. Increasingly, diaspora tourism has become significant in many Caribbean states, as migrants return for nostalgia and kinship (Duval 2003; Connell and Stanley-Niaah 2008). Returning home for healing and wellness purposes has been increasingly part of Caribbean people's pull and return to the region.

The most successful attempts at medical tourism in the region include services in the Dominican Republic, Mexico, and Panama, with the English-speaking Caribbean lagging behind. While Caribbean Community (CARICOM) governments recognize the benefits, many in the region are hardly in a position to provide first-class medical care to locals, and even less so to visitors. There is often the lack of trained staff for an uptake in patients; poor medical facilities, limited funding for public hospitals and health centres, and a lack of sufficient cutting-edge technology have dogged many English-speaking SIDS. Much more would need to be done in the area of equipping local health care facilities before the region can seriously compete. However, some have made valiant attempts to develop the industry including Bermuda, the Bahamas, Barbados, Turks and Caicos, and the Cayman Islands and have been making inroads in specialized niche areas of prostate cancer treatment, fertility treatments, and orthopaedic surgery. St. Kitts and Nevis also developed a US$15 million medical and surgical centre in Nevis. According to Connell (2013), while one objective is to discourage local people from leaving St. Kitts and Nevis for treatment overseas, the hidden motivation was to attract patients from other Caribbean islands and the United States.

In addition to medical tourism, Caribbean SIDS are investing more and more in attractions that highlight the natural environment, indigenous ecosystems, and heritage. Indeed, a diverse national tourism sector grounded in the natural environment and tangible and intangible aspects of our rich heritage will not only capitalize on attractions that already exist in these spaces and can lead to increased protection of natural reserves, but it can also help tap into the allocentric traveller, who is more likely to seek

authentic experiences related to the natural and sociocultural backdrop of their vacation. Travellers from the United Kingdom and other European originating markets tend to seek all-encompassing experiences in the destination, and opportunities to venture beyond the confines of their hotel or resort. Excursions provide memorable experiences and "stories to tell", particularly when based on direct interaction with local people. They can also encourage repeat visits by introducing tourists to other parts of the country and showing that there is more to be seen. Excursions can spread the benefits of tourism, particularly in all-inclusive resorts, and enable tourists to buy directly from craft producers or to contribute through entrance fees to the maintenance of natural and cultural heritage.

However, while ecotourism has been recognized as a viable form of sustainable tourism development based on its ability to engender economic benefits, Caribbean SIDS were slow on the uptake, favouring sun, sand, and sea tourism. From 1992 to 1996, the CTO convened six Caribbean Conferences on ecotourism where it was recognized that despite the growing importance of ecotourism and a general concern for the protection of the environment, "the Caribbean region has, with the exception of a few countries, not made any serious efforts to examine the potentials which this type of tourism may hold for the region or to capitalise on any advantages which the region possesses".

The turn of the twenty-first century, however, brought with it a growth in the appreciation for ecotourism in the region. As stated in the Trinidad and Tobago national tourism policy, for instance, the

> Government recognizes that the environment is an important resource base for tourism. Accordingly, tourism shall be developed responsibly and with due care and regard for the natural and cultural treasures of the country. Government shall ensure that development of the tourism sector is in accordance with the physical environmental policies of the country and evolving international environmental standards.

To this end, the twin island republic has embarked on a policy framework that encourages and promotes knowledge, information, and innovation that complements the natural advantages of Trinidad and Tobago and encourages communities to develop tourism products based on authentic, diverse, indigenous cultural traditions and practices. Concomitant with any such direction is the involvement of local communities in the growth of the tourism sector. It is the objective of many Caribbean governments to engage and empower local communities in the planning and decision-

making process for the development, management, and ownership of tourism products and services. It is important to establish feedback links with the local communities so that concerns regarding tourism visitation can be addressed at an early stage in order to prevent negative repercussions. The people themselves are an intrinsic part of the tourism product and need to be sensitized about the importance of tourism to the economy. Such sensitization will result in visitors feeling welcome and reduce the chances that locals will feel subjected to the prying and intrusive tourist gaze. To comprehensively include local stakeholders in the local tourism product development, for instance, the 2001 Green Paper on the Sustainable Development of Tourism in Barbados pledged to "develop mechanisms for obtaining comments and feedback from the general public on tourism matters". During the development of the Green Paper, an extensive supplement on sustainable development of tourism was published in the print media to inform the general public of the policy components ahead of the public meetings to be held the following month. The Barbados government now holds an annual consultation with key tourism stakeholders to encourage information sharing and address areas of major concern for the sector.

In addition, many countries in the Caribbean region use the annual World Tourism Day on September 29 to raise awareness concerning the positive impacts that tourism has made. Jamaica, Trinidad and Tobago, and St. Maarten all initiate activities in conjunction with World Tourism Day. Examples of activities to put the focus on tourism include street banners, tourism-focused radio talk shows, awards ceremonies, and school activities. In St. Maarten, participants in the Junior Tourism Minister Competition learn about the tourism industry by visiting a cruise ship and touring the new Princess Juliana International Airport. Successful examples of heritage tourism include the St. Lucia Heritage Tourism Programme, which is an initiative of the Government of St. Lucia, jointly funded by the European Commission (EC). Initiated in 1998, to establish heritage tourism as a viable and sustainable component of St. Lucia's tourism product, it has facilitated a process of education, capacity building, marketing, and the promotion of environmental and cultural protection for the benefit of host communities. The programme focuses on public awareness and community mobilization, institutional strengthening and capacity building, and product development. Emphasis is also placed on collaboration with relevant national and regional partners in order to define and market the heritage tourism product, as well as promote the island as a sustainable tourism destination.

Voices of the Present: **Julian Patrick Director, Product Development & Community Tourism, TPDCo, Jamaica**

Destination Assurance and Community Tourism: The Framework for Sustained Competitive Advantage in Tourism for Caribbean Economies

There is a common dialectic within the tourism space globally which interrogates the need for a common approach or solution to the challenges faced by the industry. The search is on for the right ingredients, the intervening practices that will underpin survival and success in a hypercompetitive market. The exigencies of the sharing economy have far outpaced the policy and legislative capacity of most countries, political and regional priorities have dulled the assurance optimisation of others and the ever present circumstance of natural disasters exacts a worrying toll on the mind of tourism interests vis-à-vis vulnerabilities. Within this maelstrom there are two separate but equal concepts that entail and can enshrine the only platform for sustained competitive advantage for Caribbean nations.

Sustainability and Community Tourism

If the consensus amongst scholars is that the "Environment Is the Product" then the urgency of initiatives would undertake a requisite alacrity. Unfortunately, there is very low support for the "line in the sand" measures that are necessary now, today. The tourism product is the ultimate example of death by success, whereby consumption of the product brings it closer to the doorsteps of decline, both in the natural environment and in the cultural modalities that combine to create the Caribbean experience. Whereas the broad area of sustainability intervenes on macro perspectives, the element of community tourism obtains a more granular level of involvement by stakeholders and could lend itself to a gargantuan shift for Caribbean economies along all quantifiable and some non-quantifiable measures of development.

Whether as a facilitator of induced consumption or as a destination comprised of unique experiences, the excavation of this concept requires Caribbean nations to explore all the consequences and circumstances unique to their stories, culminating in a more sophisticated and robust appreciation of the value inherent in their preservation and articulation. Our understanding of this value will unlock mechanisms to protect and monetise these stories. It is my belief that countries which understand these nuances soonest and are agile enough to respond will ultimately be able to create the unique selling positions required to create sustained competitive advantage within the next 15–20 years. The natural migration of the entire flock of tourists will incline invariably to the countries that offer the greater diversity of products.

Marketing

Diversification of the Caribbean SIDS tourism product is only part of the equation however. Successful marketing is key to the long-term sustainability of tourism in the Caribbean. In particular the marketing must fit into specific frameworks and policy directions. In some cases, it may be useful to focus on specific products. St. Lucia, for instance, has had a tremendous impact on the weddings and honeymoon niche market. This success has been based on setting clear objectives, planning and implementing specific marketing campaigns, and building an appropriate brand image, based to a large extent on the natural beauty of the island (Vodenska 2013). The case of St. Lucia indicates that marketing needs to build on the comparative advantages that the Caribbean has over other destinations, particularly in the face of increasing competition from comparable destinations across the world.

Tourism is essentially an export industry, and it is therefore vital that the products on offer reach the quality levels expected by key markets. The marketing of products with a poor quality will naturally have a detrimental effect on the credibility of the national tourism sector. The Quality Assurance Unit at Dominica's former National Development Corporation (now Discover Dominica Authority) developed tourism standards for the full range of tourism sector services: accommodation, food and beverage, hair braiders, taxi drivers, tour guides, travel agencies, vehicle rental, vending, and water sports. These are integrated into the licensing process as part of the 2005 Tourism Regulations and Standards.

Also, fundamental changes are taking place in user behaviour in key markets for the Caribbean as countries move towards knowledge-based, digital economies. Tourism is an information-intensive industry, and developments within information and communication technology (ICT, in particular internet accessibility) are revolutionizing the way the business is being managed. The importance of proper integration of ICT in tourism marketing cannot be overstated. High-tech tourists in high-access countries (which make up the generating markets for Caribbean SIDS) who prefer to interact in the electronic marketplace may not succumb to marketing efforts which are still low-tech. Destination images may be affected when high-tech tourists are unable to sufficiently interact with the destination in cyber space. According to Govers et al. (2007: 19), "covertly induced and autonomous agents, in particular, have a dramatic influence" over destination image in the minds of consumers. These agents include

television, magazines, and the internet. For instance, up to 2010 a significant amount of Jamaica's marketing budget was spent on television advertising (Williams and Spencer 2010), with internet promotion and interaction receiving far less attention. The major implication is that initial television exposure may lead potential tourists who are high-tech in search of information and booking options on the web, which may create a poor destination image when these needs are not met.

Advances in ICT are having major implications for the operations of organizations throughout the tourism value chain. The information storage and data analysis functions are vital for the analysis of tourism statistics, as well as for reservation systems. Moreover, the opportunities provided by the internet for the online sale and distribution of products enable traditional handicraft manufacturers to access new markets. Technology which facilitates knowledge transfer allows for competitive advantage for businesses and the use of ICT in marketing offers highly cost-effective opportunities for tourism marketing by facilitating booking, information distribution, and communication directly with customers and within the industry. The evolution of the internet represents a paradigm shift in the information-intensive tourism industry. It offers highly cost-effective opportunities for tourism marketing by facilitating booking, information distribution, and communication with customers and within the industry. It has also dramatically altered the process of booking holidays, with estimations of the online travel market predicting continued substantial growth rates, as consumer confidence grows and technologies improve. Finally ICT is a powerful tool in business management and its applicability for information management in terms of recording arrivals and forecasting business and inventory management indicates that it is used in all sectors.

It is thus vital that e-business strategies are integrated into the daily operations of tourism enterprises in the Caribbean. Without sufficient allocation of resources and IT training, Caribbean countries run the risk of continuing to be on the wrong side of the digital divide (James 2004). In an age where visitors are booking independent vacations through Airbnb and other bed and breakfast platforms, there is no option but to integrate e-tourism strategies in the broader framework of national ICT policies. Public authorities should be involved in providing the infrastructure and human capacity for ICT relevant to the tourism sector. In addition, national tourism policies must tackle the need for a national enabling environment for the uptake of ICT in tourism including access, capacity

building, and the legal framework. Importantly, ICT skills within the tourism workforce should be encouraged through the teaching of ICT at all levels of the educational system and the use of ICT by tourism Small-Medium Sized Enterprises (SMEs) should be facilitated by providing low-cost access to ICT solutions. This is particularly important in remote ecotourism spaces where connectively may be limited.

A look at the case of Belize indicates how these recommendations have been utilized to good effect. The website Toucan Trail enables visitors to explore Belize and book using ICT while still experiencing the authentic ecology of the island. At www.toucantrail.com visitors have access to small hotels at reasonable rates. The website features a destination guide and a request form that can be used to search for accommodation using pre-defined criteria. A list of properties that match search criteria is developed featuring links to the hotels. Clicking on a link to an accommodation provides a range of information including a photo gallery, list of amenities, reviews from previous guests, as well as contact details for the user to communicate with the chosen accommodation provider.

Product development is an essential part of the marketing mix, and national governments are able to shape tourism product development through a range of policy measures. There is also a need to increase the contribution of national and regional investors to product development, as has been done in the Jamaica Tourism Product Development Company, vis-à-vis foreign direct investment (FDI), thus increasing ownership of the product. In order to mainstream community tourism in its product development, the TPDCo Jamaica has undertaken a plan to develop a transformational Community Tourism Enterprises (CTE) Ecosystem that puts CTE on the map for Jamaica and builds a critical mass of products and generates sufficient press and interest to take off and be sustainable. To this end the TPDCo has undertaken the following:

1. Form market-based clusters around CTEs
    (a) Map market demand and buyers for CTE—priority
    (b) Develop criteria for clusters—pre-paid
    (c) Assess product and governance in short list of clusters
    (d) Identify clusters around CTEs with an anchor attraction/CTE
    (e) Hold preliminary consultations to assess interest, governance, and readiness
    (f) Decide on clusters

2. Cluster development process
    (a) Hold tourism awareness training and assist community to develop a tourism plan and possible tourism cluster cooperative
    (b) Launch competitive call for proposals to assist new and existing operation to apply for funds
    (c) Train new businesses in team Jamaica, business development, and so on
    (d) Support existing businesses with business support services, digital marketing training
3. Enabling environment
    (a) Conduct licensing review and cost/benefit analysis to assess examples from elsewhere
    (b) Strengthen interagency communication
    (c) Support the formation of a community-based tourism (CBT) association, organize domestic study tours
    (d) Improve and update training materials adding innovation and climate elements
4. Marketing
    (a) Develop and implement a CTE marketing brand
    (b) Hold one or more CTE-focused events
    (c) Develop a CTE App
5. Infrastructure
    (a) Leverage Tourism Enhancement Fund (TEF) for roads
    (b) Identify community members to provide other shared services, for example, bathrooms, charging stations
    (c) Develop a signage programme with selfie points
    (d) Include interpretation points

In order to provide an enabling environment for tourism product development, Caribbean SIDS must consider strengthening policy guidelines to ensure that the approach used to promote and approve development projects in the sector is consistent with the national development plan, the national investment policy, and the principles of sustainable development. There is also a need to review on a regular basis the effectiveness and

transparency of the incentives regime to attract tourism sector investment. For example, Antigua and Barbuda found that their investment process was complicated and disjointed. This led to the proposed drafting of the Antigua and Barbuda Tourism Development Act to encode the regime of fiscal inducements and concessions common to all categories of investors. Similarly, the Jamaica Trade and Investment (JTI) organization has a specific tourism sector mandate, because tourism is a targeted sector of the National Industrial Policy. The organization provides guidance to new investors on incentives and opportunities, and gives the investor a one-stop shop for tourism investment information.

Caribbean SIDS have also had to grapple with improvement in social services and tourism-supportive industries in order to improve the economic benefits from travel and tourism. As has been previously explained, air and sea access and internal transportation infrastructures and services are key factors for stimulating economic development, and in particular tourism. In the Caribbean, several port, airport, and road infrastructures and services that have been developed in order to satisfy specific tourist needs are also used by the local population and entrepreneurs. Agriculture also remains a key sector of several Caribbean countries and has a double advantage from tourism development. The first advantage is connected to the consuming of food and beverages by the tourists during their holidays. The second is related to all tourism activities development by local stakeholders connected to agriculture (e.g., ecotourism, rural tourism). In this case, tourism has been useful in order to create new job opportunities, revenues and so on, and SMEs (enterprises/handicraft). Small producers are often enabled to easily market and sell their products to the tourists. The Sandals Chain in Jamaica, for instance, has worked with small farmers to produce exotic vegetables such as Duke Tomato, snow peas, zucchini, and red cabbage for its consumption for domestic use and for the export market. Sandals has also worked with the Rural Agricultural Development Authority (RADA) to provide training in horticultural methods. The project began with only 10 farmers supplying 2 hotels, but has grown to incorporate at least 80 farmers on 5 localities island-wide, supplying Sandals hotels in Negril, Montego Bay, and Ocho Rios.

In Tobago the Travel Foundation works in association with the Hilton Tobago and the Mt. St. George Farmers Association, to conduct a pilot of the Adopt a Farmer's Group Project. This aims to forge greater links between the Agricultural and Tourism sectors and to decrease the dependency

on imported produce. The success of the plan has led to an expansion of the current plan to involve more farmers and hotels in making this an island-wide initiative. The Travel Foundation also operates the Organic School Garden Programme, which involves three primary schools that supply the Tobago Hilton with fresh herbs on a regular basis. Proceeds from the sale go directly back into the school, and the children learn valuable practical skills in agriculture.

Importantly, the tourism sector is perceived as an attractive tax target for governments whose other tax sources are coming under threat. Recently elected Prime Minister of Barbados Mia Mottley announced, for instance, that effective January 1, 2020, the rate of value added tax levied on the tourism sector will move from 7.5% to 15%. Passengers flying outside of the CARICOM region will also pay US$70 and those within CARICOM US$35. This fee will be in addition to the departure tax. It is expected that these measures will raise upwards of US$95 million to support the national budget. One of the most contentious issues in the region is the inequitable treatment of land-based tourists compared with cruise passengers. The former pay significant departure taxes while the latter pay only a token port charge, if anything. Policies are therefore necessary to shift some of the burden from stopover guests to cruise visitors, which the region eagerly attracts.

Pro-Poor Tourism

No commentary on the economic futures being afforded by tourism to Caribbean SIDS would be complete without an overview of pro-poor Tourism, which is grounded in the forging of linkages with the local economy (Ashley et al. 2006). Poverty is a fact of life for many in the Caribbean and although the sector is a major source of employment and a central part of the Caribbean economy, there is potential for tourism to contribute much more to the livelihoods of poor people, particularly in the areas around tourism resorts. In doing so, tourism stakeholders can contribute to national economic goals without compromising their financial interests. This will help the sector to enhance its own security and operating environment, and gain opportunities to upgrade the product and enhance the quality of the tourist experience.

There are many kinds of linkages that tourism companies can develop with local people, some of which have already been discussed in this chapter. Hotels can purchase directly from small and micro businesses,

as well as increase recruitment and training of local unskilled and semi-skilled staff. Hotels and tour operators can also enter into neighbourhood partnerships to make the local social environment a better place to live, work, and visit. And they can support the development of local arts, crafts, cultural products, and tourism services, both by developing new excursions and by encouraging tourists to spend in the local economy. Hotels and tour operators can build reputation, adapt to customer trends that seek more interactive holidays, and secure repeat business. Local linkages also assist to address risks associated with reputation and public image. When staff see their company investing in the local economy, it can boost recruitment and retention and thus customer service. Importantly, working with the communities will increase awareness and skills to promote and preserve the local natural and cultural heritage, thereby contributing to the sustainability of the tourism product and empowering the people themselves to see themselves as part owners of tourism. Invariably also, pro-poor tourism enhances local communities, brings improved infrastructure, and improves water, electricity, and ICT penetration. Finally, the various tourism products have different impacts on the poor. Some, such as rural tourism, ecotourism, and cultural tourism, are considered to have a high impact on the poor especially in terms of job creation, handicraft development. On the contrary, other products (cruise, etc.) have a low (or very low) impact, as they often do not usually involve local communities.

There are numerous benefits that can be accrued from pro-poor tourism models for private businesses as well. For hotels, buying from local producers creates opportunities through utilizing more distinctive products that differentiate the hotel environment and enhance the brand for instance. Profit margins can also be increased through a widening of the range of local activities, which in turn increases motivation to stay and contributes to an extended length of stay and more spending. In Dominica, Dominica Coconut Products began supplying coconut soap to cruise ships after a personal conversation between its proprietor and a top cruise line official. In Barbados, Earth Mother Botanicals produces and sells beauty products made with locally grown herbs and other island produce to the Sandy Lane Hotel and Spa. In St. Lucia, the big hotels were using local floristry services for flowers and flower arranging. In Antigua, Curtain Bluff Hotel maintains a list of suppliers of local produce.

In St. Kitts, Ocean Terrace Inn has a Food and Beverage Manager and world-renowned chef who understand the value of utilizing local produce

and producing first-class appetizers and entrées. This has made the inn a popular choice for dining out and supports the purchase of local produce from small farmers. In Trinidad and Tobago, the Annual Culinary Program aims to strengthen rural communities, attract festival-goers, and blend community-based, export-driven use of local produce with local creativity. Since the programme began, links with local communities have improved and employment rates have increased, as have opportunities for entrepreneurship, revenue generation, and capacity building. In Jamaica, the Sandals Montego Bay START programme offers training positions to young people from the nearby (and volatile) community of Flanker. On completion of their training, apprentices are employed by Sandals or given certificates and recommendations to work in other hotels in the area. An important case also exists in Antigua: at the Curtain Bluff Resort, top and middle managerial positions are occupied by Antiguans. Some have come through tertiary education facilities and some are locals that have a firm grasp of business and have risen through the company via local training programmes. In St. Lucia, the Village Inn & Spa (locally owned) has invested in local staff who have gone on to pursue training opportunities that have benefited the property. The skills gained have been used to enhance the operation of the property or enhance its marketing potential.

While there are numerous cases of successful pro-poor/community-based tourist ventures in Caribbean SIDS, there are some notable challenges which should be borne in mind when embarking on such models. There is the possibility that host communities can be disadvantaged when local shops and service providers are lost in favour of retail outlets geared specifically to the needs of tourists, such as duty-free gift shops and cafes. Of more significance is leakage of tourism receipts, which occurs at different stages of tourist spending (Ajagunna 2014). Karagiannis and Salvaris (2013) argue that there are three levels of leakages in tourism which are not accounted for in figures stated in government statistical reports. The first level relates to direct imports such as building materials and food supplies intended for the tourism industry. Foreign investments and profit repatriation account for the second level of leakage. The third level relates to direct promotion, advertising, and general marketing activities designed to attract increased tourist arrivals.

At times, opportunities to purchase goods and services locally are often not exploited because local people produce goods that could be used in hotels, but the quality, quantity, and reliability of supply are often unreliable. The sheer scale of food and produce necessary to maintain large

hotels often outstrips the production ability of small and local farmers. At times also, local producers are not sufficiently aware of hotel requirements, health and safety regulations, and how to match tourist preferences to the required quality. Added to these issues is that the seasonality of local goods often does not coincide with the tourist season, so goods have to be sourced from other suppliers who have high-tech facilities to produce and/or store goods for long periods of time. Importantly, while local excursions can provide adventure, security and safety concerns cannot be overlooked, particularly in countries with high crime rates such as Jamaica. Tourists also have to be held responsible for their conduct in restricted reserves. For instance, it is important that visitors do not carry diseases to ecological sites, nor take away plant or animal material that is indigenous to the site. They need to recognize the long-term advantages. Begging and hassling by locals who have direct access to tourists can also undermine the quality of the tourism experience and keep tourists away.

Conclusion

Tourism has contributed significantly to the diversification of Caribbean economies; however, the tourism sector can make an even more significant contribution to this process if the linkages between tourism and other sectors of the national and regional economy are fully realized. Linkages permeate through a vast variety of economic activities including construction, manufacturing, as well as service sector activities such as the provision of health and wellness services, consulting, and the creative arts. Stakeholders have also stressed that regional linkages need to be considered by policymakers at the national level, in terms of imports as well as for exploiting the opportunities of this market. Critical sustainability challenges identified with respect to linkages include that a change of attitude is needed nationally and regionally to fully realize the economic potential offered by linkages, and that tourism has to be better integrated into the national and regional economy. Institutional capacity needs to be established at the national level to ensure that there is a permanent knowledge base on building linkages. Forward and backward linkages need to be established between communities and the tourism sector in order to support the development and distribution of goods and services, local arts, crafts, and cultural/heritage products to both locals and visitors. These linkages would also minimize foreign exchange leakages and add to Caribbean countries' domestic tourism thrust. CBT needs to

be strengthened to help realize linkages by bringing local handicrafts and other producers in contact with tourists and preference needs to be given to those nationally and regionally derived materials, products, and services which are supplied on a sustainable basis. Niche tourism markets, which feature a high utilization of goods and services from other economic sectors, such as ecotourism and health and wellness, should be strengthened.

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CHAPTER 4

Caribbean Tourism Public Perceptions and Social Realities

The success of Caribbean Small Island Developing States' (SIDS') tourism product is traditionally, and understandably, measured in economic terms. Contributions to GDP, employment rates, and growth in numbers of stopover and cruise visitors as well as increased spending by tourists are important indicators of the strength of any tourist industry. The ability of the industry to withstand shocks and exhibit resilience in the aftermath of disasters is also an important gauge of the state of travel and tourism. However, concentration on these markers alone will not result in the type of roust and sustainable system towards which Caribbean SIDS are striving. Importantly, taking stock of human capital in the milieu of travel and tourism is paramount to a successful industry. For instance, securing guest satisfaction and safety have traditionally been among the top aims of Caribbean SIDS. However, more recently, focus on residents' or locals' satisfaction with the product has also grown in importance. As Graci and Dodds (2010) have indicated, a lack of stakeholder involvement and buy-in is one of the many challenges faced by island destinations in the attainment of sustainable tourism. What follows, then, is that increasing stakeholder involvement and support for tourism locally ought to begin with a clear understanding of local communities' thoughts and feelings about the industry in general.

According to Herbert and Christian (2014), increasing attention has been given to residents' and stakeholders' perceptions of the impact of tourism and a significant number of studies have emerged focusing

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particularly on the perceptions and attitudes towards sociocultural impacts (Wall and Mathieson 2006). In fact, a growing number of tourism impact studies have been conducted by measuring residents' attitudes and the effects that are perceived by community residents (Zhang et al. 2006). In addition to identifying residents' perception for improvement of quality of life, identifying residents' attitudes is important in determining the level of public backing for tourism expansion as well as the available opportunities, or in evaluation of perceptions of problems that should be solved (Williams and Lawson 2001). By determining and at times forecasting the attitudes of local populations, programmes can be designed and implemented to minimize conflict between tourists and residents and therefore to pursue the goal of sustainable tourism. Research conducted in this field is considered important because understanding the reasons why the residents do or do not support the tourism industry and its growth will help to establish models for such developments that minimize the negative social impacts and maximize the support for these initiatives (Vargas-Sánchez et al. 2011).

Focus on new types of tourism such as pro-poor, heritage, cultural, gastronomical, and eco-centric models, facilitate far more interaction, and often depend on local populations. In addition, high rates of crime and harassment of tourists harm the tourism product and are usually a result of poor socioeconomic status of host populations and a lack of appreciation of the importance of the success of tourism, both of which can be ameliorated through social intervention. Many Caribbean SIDS also market their islands as idyllic and holistic destinations, where local populations are warm and inviting. Negative encounters outside this paradigm can be damaging to tourist expectations and impact the dollar value of that vacation for the destination. Local unrest surrounding the development of accommodations which may harm local populations or exclude the populace from beach access and other forms of recreation can also make life miserable for tourism investors. For these and other reasons stakeholders have placed importance on gauging and influencing the perceptions of local populations to ensure success in the industry. It is to these issues that this chapter is primarily dedicated and argues that attitude is the hinge on which quality service is delivered and if the local population is not in tune with the industry at all levels the consequences can seriously impede tourism development. All points of tourist contact must be on board not only to ensure that tourism survives, but to ensure that local populations carve out niches to benefit from the contributions from the industry that the industry has to offer.

Perceptions: Theory and Practice

Some theoretical foundations have been suggested as the basis for conceptual development in residents' attitudes towards tourism (Cordero 2008). Social Exchange Theory is one such theory. Within a tourism framework, the Social Exchange Theory suggests that an individual's attitude towards tourism is influenced by his/her evaluation of consequential outcomes to the community. The Social Representations Theory is another theoretical framework that has been proposed for the understanding of community attitudes towards tourism (Fredline and Faulkner 2000). This specifically focuses on assessing everyday knowledge and how this knowledge is used to understand the world in which individuals live and therefore to guide their actions and decisions. While the benefits of tourism to local populations are well established in Caribbean SIDS marketing campaigns, the sector faces peculiar challenges specific to its nature, which can explain negative perceptions some locals may have towards the industry. The industry depends on catering to foreign interests, many of whom are of a different race, ethnicity, class, and even sexual orientation than many in the host population. Specifically for Caribbean SIDS, tourism is considered to be a form of neo-imperialism, harkening to the days of black bodies in servitude to white interests during and after slavery. Tourism encourages investments by international organizations in developing countries to facilitate development, which results in a power/dominance relationship between the core and periphery nations (Sinclair-Maragh and Gursoy 2015).

Indeed, selling the tourism concept to local people in Jamaica was one of the challenges faced by the Jamaica Tourist Association in the early days of tourism promotion. It was seen as an insurmountable task since the Jamaican peasant class did not see themselves deriving any benefits from tourism. It therefore led to a lack of public acceptance of tourism and an inherent mistrust of visitors (Taylor 1987–1988). Xenophobia was the order of the day as locals saw tourists as "prying" into their affairs, yet being too busy to learn about them. As a result, open conflicts and hostility developed between "unwilling hosts" and "guests" (Taylor 1987–1988). The feeling of the Jamaican working class towards tourism is summed up thus:

> Tourist! … Dem is a confusion set of people. What we want dem for? An what good dem going to do? True dem say dey brings we money, but when time we eber see it? All de storekeepers dem in Kingston and the big

> tabern-keeper, dem is the one dat get the money out of dem … An when de tourists come up to de country and see we working in de ground, dem is not goin' to do anything fa we, but take pitcha and laugh at we. Chu! Me bredder, only de buckra dem will profit. (*The Leader*, February 5, 1904, cited in Taylor 1987–1988: 44)

Although these words were uttered over 100 years ago, a large number of the Jamaican working class still express similar sentiments about the tourism industry—that white or upper class (buckra) interests are primarily being addressed through the tourism business.

However, when residents perceive tourism to have positive impacts they are more likely to support its development even with the hovering shadow of colonialism and imperialism. Therefore, writers like Crick (2003) have indicated that successful implementation of a tourism programme often hinges on the internal marketing of tourism to the community. Through community stakeholder engagement the local population is informed of the benefits of tourism with the goal of helping it to better understand tourists and their motives for journeying to the destination in order to get support for the industry. Crick's work highlights at least five possible local responses to tourists including positive feelings held and expressed, neutral feelings, negative feelings held but concealed, negative feelings not concealed, and negative feelings held and expressed.

Studies on locals' perceptions of Caribbean tourism have highlighted critical insights and challenges with maintaining positive perceptions. Chief among the concerns include access to some of the best beaches which are often restricted in principle by the construction of resorts along coastlines, a phenomenon documented by Patullo (2005) in her evaluation of the true cost of tourism in much of the region. Locals are always "welcome" to check in as guests or to purchase a "day pass" to access hotel resorts, their amenities and beaches; however, this is essentially, for most, restricted by pricing. The result is that much of the Caribbean's best beaches are essentially inaccessible to the local population. When destinations use casino gambling as a pillar of the tourism industry, prostitution as well as organized crime are perceived to be part of the package (Holloway and Humphreys 2009; Patullo 2005). Speaking specifically of mass tourism, Holloway and Humphreys (2009) notes tourism's contribution to increased crime in both developing and developed countries.

Dunn and Dunn in their 2002 study of local attitudes to tourism in Jamaica noted the importance of the special warmth of Jamaican people in distinguishing the destination and other SIDS. For people to be happy with visitors, they have to be comfortable within themselves and their social environments and Dunn and Dunn found that the social and economic deprivation of locals made it difficult for them to both appreciate and participate in tourism. They found in particular that many unattached, unemployed, and disenfranchised young Jamaican men, with no visible stake in the industry and no vision of a future in it, did not appreciate why they should protect either visitors or the reputation of a country that did not seem to care about them. This dominant view was further reinforced by the popular perception that it is the "big man" who benefits most and the "small man" who benefits least from tourism. In this hierarchy the "big man" included owners of all-inclusive hotels, large travel companies and airline operators, as well as in-bond merchants. Popular tropes of the "small man" were some taxi operators, craft vendors, higglers, farmers, hotel workers, and operators of local villas and guest houses.

Persons who hold these nihilistic view of tourism have relevant suggestions and strategies for improving benefits from tourism to the locals including using more local foods, improving security in tourist areas, improving roads, promoting rural and environmental tourism, improving training for people in tourism, using fewer imported products (not only food), and promoting more cultural and heritage tourism. These views were consistent with the perception that many communities are not benefitting sufficiently from the industry and the strongly expressed attitude that it is the "big man" who benefits most. These suggestions have not fallen on deaf ears as tourism minister Hon Edmund Bartlett, has reiterated that the tourism sector "must not only generate prosperity and wealth for large hotel owners and service providers but must also help to preserve the natural and cultural resources of the islands" (JIS 2017). Importantly, Bartlett and fellow ministers note that Caribbean tourism must strengthen linkages with other sectors of the economy, particularly the agricultural and manufacturing sectors, and promote broader participation by all Caribbean nationals. To this end, Jamaica's National Community Tourism Policy and Strategy facilitates an invigorated tourism sector in communities that enriches quality of life by ensuring that tourism enterprises return economic, cultural, social, and environmental benefits to the communities in which they operate.

Indeed, successive Jamaican governments have made a concerted effort to build human capital and integrate Jamaicans at every level into the tourism product. The island's Tourism Master Plan of 2002, which has guided the direction of national policy and planning, stressed that a shift was necessary from tourism being regarded as an important industry for Jamaica because of the economic contribution to measuring success by the extent to which the industry can serve as a vehicle for the economic and social upliftment of the Jamaican people. The aim of the Master Plan was to change that perception to make the industry inclusive, reflecting their aspirations, with wide participation from locals.

Internal Marketing and New Perceptions

It is true that the history of Jamaican tourism revealed an emphasis on earning foreign exchange, which led to the neglect of domestic tourism. The low purchasing power of the average domestic consumer made this an unattractive market for the industry and alienated large numbers of Jamaicans. In addition, concerns over safety and security have undermined the range and quality of entertainment on offer to local people. As a result, the Jamaica Tourist Board has consistently engaged in internal marketing through various methods. This is particularly important in a country where high rates of violent crime and harassment have impacted on the level of foreign investment and tourist arrivals to the island. Radio, television, and print ads have stressed that "tourism is our business" and, more recently, the Tourism Product Development Company and Tourism Enhancement Fund have engaged in public education campaigns to show the ways in which harassment of tourists impacts locals lives and economic fortunes. Through TEAM Jamaica training, a mandatory programme for all tourism-related workers, locals are trained to have appropriate attitudes towards foreigners, as well as increased knowledge of Jamaican history and culture. In addition, the Tourism Service Excellence Awards is geared towards promoting performance excellence within the sector. This annual award ceremony encourages Jamaicans to nominate persons and organizations who offer excellent customer service delivery, which is tagged as integral to the continued growth of the Jamaican tourism sector.

Work by Sinclair-Maragh and Gursoy's (2015) in Jamaica indicates that residents have a generally positive perception of foreign direct investments that relate to tourism. All signs indicate that the work of the relevant

authorities is assisting in slightly shifting perceptions from tourism being for "buckra", to being the business of every Jamaican. Since foreign investments are associated with positive attributes such as the stimulation of economic growth, which can lead to the creation of employment opportunities and small business opportunities, residents are likely to view foreign investments as beneficial. However, residents also perceived a disparity in the level of jobs and wages between locals and expatriates in foreign-owned hotels, which tend to reserve managerial-level jobs and highest pay for expatriates. This is not specific to Jamaica, as there exist very real issues of expatriate labour and the corresponding wage disparity in the Caribbean tourism space. Employment of expatriates can result in economic leakage and decrease the economic benefits to the host country (Kusluvan and Karamustafa 2001). Though the expatriates are in the minority, they occupy most of the managerial positions and tend to be the highest paid employees (Mbaiwa 2003). Additionally, when compared to the same level of workers in core countries, workers in developing countries tend to be paid less despite being exposed, in most instances, to labour-intensive production processes (Mbaiwa 2003).

Another concern has to do with the high cost of goods and services in tourist resort areas. Residents who live and work in resort areas in Jamaica (Kingston, South Coast, Negril, Montego Bay, Ocho Rios, and Port Antonio) are faced with high costs as a result of goods and services being priced for tourists. Importantly also, the influx of Spanish-owned hotels in the island has not met with consistent favour by residents. Salmon (2008) referred to it as "the second Spanish conquest of Jamaica", having little regard for local laws, customs, and mores, similar to the 1494 Columbus landing and subsequent annihilation of Tainos. The lack of attention towards environmental regulations, building codes and permits, alleged bribery to officials to bypass legal regulations are also negatively perceived by locals. To counteract these perceptions, there has been a concerted effort to streamline building codes and insist on environmentally friendly plans in the more recently built hotels in Montego Bay and Trelawny. While there is still more work to do to change perceptions and realities of the practices of foreign investors, Jamaican tourism authorities remain committed to striking the balance between the need for capital injection into the industry and maintaining sound sustainable practices.

Interestingly, one of the few studies that has mapped the importance of Jamaican children's perceptions of tourism (Gamradt 1995) has revealed

the range of responses children have towards this important industry. The participants in the study commented on the economic status and the role that has been played by those who visit their nation. Sixteen per cent of the comments generated by the whole group refer to the visitors' wealth and/or generosity. For example, one student explained that "they spend a lot of money in our country and they gave my father work", while another child observed that "they are rich and have plenty of money" (Gamradt 1995: 743). However, the children in the study also pointed out that visitors can carry dangerous diseases, and that they can be "bad", "unkind", and "mean". For the most part, however, the children present positive views, describing Jamaica's foreign guests as "kind", "friendly", "generous", "helpful", "loving". They portray Jamaicans as friendly people who want visitors to have a good time and to come to love Jamaica as they do. Perhaps most importantly, many of the children expressed a belief that tourism is important for Jamaica as a nation.

The study, though somewhat dated, highlights an important facet of tourism policy and planning, that of grooming the younger generation to appreciate tourism directed towards countries that are heavily dependent on the industry. To this end, the Jamaican Tourism Product Development Company has embarked on many projects, which groom and hone tourism-related skills in the country's youth. The organization has sponsored and participated in an island-wide recycling school-based project in tourism areas, which encourages children through competition, to keep their environment free from plastic waste. In addition, in 2018, the entity sponsored a primary-level televised tourism quiz competition, which met with great success. Other programmes which bring young people into meaningful contact with tourism include the Antigua and Barbuda Informal Tourism Cadet Programme, or the Tourism Clubs in Jamaica, which help to provide young people with positive experiences in tourism.

Other examples from tourism-dependent SIDS indicate similar trends to perceptions that exist in Jamaica. Surveys in St. Lucia indicate that though locals see tourism as important and beneficial, most did not see tourism as being owned or managed by locals, but by foreigners. The country's focus on the high-end destination wedding market also facilitates this perception since interaction with locals is not usually part and parcel of wedding packages. Crick (2003) also suggests that while locals who are involved with tourism are likely to know the benefits, those not directly involved are less likely to see it as necessary "suggesting that a large number of St Lucians do not appear to be strongly supportive of the

industry" (164). In order to counteract these notions, officials embarked on a campaign to integrate locals into ownership and partnership in the industry, ensuring that more effort was made to make community tourism paramount. Over the last ten years, therefore, there has been an increase in street festivals and heritage tourism projects, which are community led.

As has been previously noted in this work, the Bahamas is among the leading Caribbean SIDS with a robust tourism industry, which employs many locals and from which Bahamas gains over 75% of its foreign exchange. Overall, locals are aware of the importance of tourism to the economy but according to Crick (2003), however, two factors are of concern to officials. Tourism is seen as a last resort for employment rather than a noble career to which Bahamians should aspire. Those in the jobs tend to see it as a job rather than a profession. The second factor is an apparent slip in the likelihood of return guests. A survey conducted in 2002 noted that 13% of tourists were unhappy with bad attitudes among the Bahamian population (Crick 2003: 165). To counteract this, the Bahamian government has implemented educational programmes in schools to reinforce the importance of tourism for the sustainability of the Bahamian way of life and it trains all employees under the "Bahamahost" programme.

The recent opening of the mega resort Baha Mar, the Bahamian Riviera, also presented an opportunity to gauge the perceptions of locals about the possible impacts on the local population. Baha Mar is a 1000 acre beach resort development, located on Cable Beach, the epicentre of the island's tourism accommodations sector. Built on half a mile of white sand beach, the development is home to four new hotels with over 2200 rooms, the largest casino in the Caribbean (to supersede Atlantis), the largest conference centre in the country, an 18-hole Jack Nicholas Signature golf course, all supported by a multitude of pools, gardens, and commercial spaces. The Baha Mar development is projected to significantly impact the tourism industry in the country with a 2.3 million increase in annual room nights, a 10% growth in GDP, and permanent employment of 8000 Bahamians.

Work by Spencer and Mackay indicates that there is local concern regarding access to the adjacent public beach as well as the reliability of electricity supply due to heavy pressures on the grid. Notably, these concerns transcend age and gender as all sectors of the society believe that the structure will place pressures on the island's utility companies. There is, however, less concern about congestion and on the positive side there is a

perception that crime levels will decrease as locals hold the view that the increased employment will reduce crime levels.

The all-inclusive model of tourism which many Caribbean SIDS have adopted has also received mixed reviews from the regional populace. Since its inception in 1978, the concept has been copied and modified to some extent all over the world and it has become the most dominant form of vacation experience in the region. On the one hand, it is seen as a cashless and class-less experience since guests pay one cost that is inclusive of round-trip airport/hotel transfers and accommodations with unlimited food, drinks, and entertainment. The consumer experiences a cash-free and liberal vacation since the package is prepaid, and the enclosed and sequestered environment is perceived as safe from crime and harassment. It is also popular among travel agents since the commission on transactions is larger. In addition to safety and security, the all-inclusive experience is also seen to be a social equalizer; there are no big spenders and little spenders at these resorts. Hierarches based on race and class are largely dismantled and the community of vacationers enjoy a largely hassle-free experience. The all-inclusive concept is, however, not without its critics. It promotes enclave tourism development that is not sustainable, community-inclusive, or a facilitator of the multiplier effect in the community. There is limited integration between "all-inclusive" properties and other businesses and the local communities. Other criticisms levelled against all-inclusive are that it results in greater economic leakage (Poon 1988), it prevents the tourist dollars from being filtered into the wider community, and it prevents guests from experiencing the cultural experience at the destination since they seldom interact with the community.

Regional studies indicate that the Caribbean SIDS region's major asset is its human capital. Indeed, the socioeconomic advantages and benefits of tourism to the region are largely dependent upon how the local population participates in the industry (Herbert and Christian 2014). Respondents to this 2014 study expressed concern about growth management, active community, and stakeholder involvement and integrated tourism development in the region. Respondents felt that the local populace in most Caribbean countries is not actively involved in the tourism industry. Approximately one-third of the respondents felt that there was an absence of clear political and policy directions with regard to tourism in the region. Concern was expressed for the loss of biodiversity and natural resources and the lack of integrated zoning and land use planning. Although human

capital was identified as a key tourism asset, participants felt that the tourism strategy has not been sufficiently aligned towards local community improvement. This may be due in part to the fact that much of the Caribbean's present tourism amenities are predominantly directed by profit-driven private enterprises and the need for quick returns on large overseas investments. This points to the need for a carefully crafted regional approach to engage the locals at all levels of the industry including the development of a policy framework, mentorships, and succession planning strategies. Marketing of these partnerships is also necessary as many of these synergies do exist, but do not manage to change public perception due to the fact that they are largely hidden from public view.

Training, Education, and Gendered Considerations: Beyond Employment Figures

Importantly, the perceptions that Caribbean people have about travel and tourism include the extent to which they believe they are benefitting from the industry. As such, how people envision their chances at gainful and meaningful employment should be of critical importance to policymakers. At present in the Caribbean the total number of people directly and indirectly dependent on tourism for a living (including taxi drivers, water sports operators, bar workers, restaurants, casinos, souvenir, and other retail shops) is estimated at 1.3 million. Employment figures for the Bahamas illustrate the industry's importance. Tourism supported total employment of 98,000 jobs in 2014 (51.6% of total employment) and is expected to account for 60.6% of total employment (124,000 jobs) in 2025. By 2025 tourism in the Bahamas is forecast to account for 67.9% of total exports (WTTC 2015). The World Travel and Tourism Council (WTTC) further estimates that employment in the travel and tourism economy may account on average for 43% of total employment by 2004 in 12 Caribbean countries. In the region, Antigua and Barbuda has the highest proportion of the population working in the tourism sector with 95% of its total employment reliant on direct or indirect jobs in travel and tourism in 2004. For the narrower travel and tourism industry, the WTTC forecasts that employment will increase by an average of 14% for all Caribbean countries between 1999 and 2019. Jamaica is expected to experience the highest levels of growth—48% in the travel and tourism industry. Employment in the travel and tourism industry is expected to be the most important in absolute

terms in Antigua and Barbuda, Bahamas, Barbados, and St. Lucia. However, in terms of wages and poverty, potential impacts may be less positive or even negative. The average level of wages and the existence of a minimum wage are strongly related to the efficiency of trade unions.

The level of wages in the tourism sector also reflects the average wage in the whole economy and it therefore varies. In Barbados, for instance, trade unions are strong and the minimum wage is higher than in some other Caribbean countries. In the hotel sub-sector in particular, trade unions are powerful and may guarantee some requirements regarding the quality of jobs, wages representing 35% to 40% of hotel costs. Moreover, employment in the tourism industry is seasonal as the Caribbean is primarily a winter destination. It is also important to take into account the irregularity in days of arrivals of cruise passengers, which contributes to uncertainty, underemployment, and poverty. Therefore, increases in the number of cruises in the region are unlikely to make a large impact on employment in the sector.

In many cases, jobs in the tourism sector require low levels of qualifications and training. While this can offer jobs for unskilled labour, it is also consistent with an image of the hospitality industry generally offering low-paying work with little to offer in terms of careers and advancement opportunities. Employment in the hospitality industry is also associated with "women's work" or servility and has little opportunity for real advancement and little job stability. The importance of quality service to the maintenance of successful hotels is unquestionable, however, and, therefore, keeping employees motivated should be important to managers and owners. Overall, motivational factors in the hotel industry are many and varied and include monetary bonuses or benefits; opportunities for advancement and promotion; opportunities for increased job responsibility; recognition from managers, colleagues, customers, and family; challenging work; feelings of accomplishment; development of self-esteem; good working conditions; good work schedules; job security; and being regarded as a good employee. Employees' perceptions of their occupational worth often surround these major indicators but the importance of these ostensibly varies based on the influence of the surrounding culture and environment in which the employee works.

However, information technologies are transforming the travel and tourism industry, requiring increasing numbers of skilled workers and equipment. Training and education will play a role in defining impacts on

tourism on employment since, to take advantage of any emerging employment opportunities, entrants will require skills in the area of cutting-edge technology. Therefore, positive impacts on employment and more generally on the competitiveness of the Caribbean destination will depend on the skill level and professionalism of the workforce. To address these potential detrimental impacts, training provided by public as well as private sector (including tourist operators) for potential workers as well as permanent training for staff appears necessary.

Despite the fact that Caribbean SIDS have been identified as the most tourism-dependent region, education and training in the region continue to lag in concept and in practice. The conceptualization of the industry has not always evolved as traditional career professionals as well as the wider society continue to view the job opportunities provided by the industry as being suitable for a largely low-skilled workforce, and therefore the perception emerges that its education and training do not warrant recognition as a serious academic discipline. In practice, the region's tourism education system, while bearing strong elements as will be highlighted, reveals some fragmentation and some lacunae, which make other regions of the world produce superior tourism and hospitality education and training. These include comprehensive internships and flexibility in programmes such as double majors and minors.

There are numerous tertiary institutions offering tourism and hospitality education which have emerged in the Caribbean over the last three decades. These educational programmes have elements of training through internships as well as practical elements such as food and beverage laboratories. These include the University of the West Indies (UWI), Centre for Hotel and Tourism Management in the Bahamas, which started in 1978. UWI also has tourism programmes at its Mona Campus in Jamaica, St. Augustine Campus, in Trinidad and Tobago, and the Cave Hill Campus in Barbados. Other degree granting institutions include the University of Technology, Jamaica, College of the Bahamas, Sir Arthur Lewis Community College in St. Lucia, Clarence Fitzroy Bryant College in St. Kitts, Antigua State College, Trinidad and Tobago Hospitality and Tourism Institute, Barbados Community College. While the number of outlets has increased, there needs to be a greater emphasis on quality standards for tourism and hospitality education and training to debunk the myth that educators in the field simply provide content that is inferior to more traditional areas of study.

Education in the Caribbean should also have elements that reflect the realities of the region. With a history that is based on a plantocracy in

which white slave owners were served by African enslaved people, it would be remiss to ignore this past in trying to shape the future. The stark resemblance between a colonial past and a tourism future, which the region is likely to witness for a long time, needs to be addressed and properly differentiated in the tourism education system so that the future workers of the industry develop a sense of pride for the profession in which they will engage. They must therefore be taught the distinction between service and servility. Importantly, because industry professionals serve a range of international guests, internationalization of Caribbean SIDS tourism curriculum must also be high on the list of priorities. According to Spencer (2016) tourism education in the region must enable smooth interactions with the myriad of cultures which are served, through studies that foster cultural relativism and appreciation, language immersion, and current, relevant content that weaves together a narrative that is easily understood and coherent. Internationalizing the region's tourism and hospitality programmes will also enable the Caribbean to attract international students, which will provide greater exposure to regional students.

There are also numerous creative niche areas in which students of the Caribbean are working, yet the current structure of programmes in the region typically provides a generic certificate with minor variations such as Hotel Management, Tourism Management, or Hospitality Management. Focusing on new areas of study in Hospitality and Tourism education, mirroring the new directions in which Caribbean tourism is headed, will not only facilitate a more rounded graduate for existing job opportunities, but create critical thinkers and entrepreneurs who will be at the forefront of job creation. These areas should allow for greater coverage of the eight sectors of tourism identified by the Caribbean Tourism Organization (CTO), rather than just the three which have been emphasized in regional programmes. These include:

1. Accommodation
2. Adventure Tourism and Recreation
3. Attractions
4. Events and Conferences
5. Food and Beverage
6. Tourism Services
7. Transportation
8. Travel Trade

The globalization of the hospitality and tourism industry demands that curricula taught in Caribbean universities and colleges address internationalization of hospitality. Moreover, given that the hospitality and tourism industry has dramatically changed over the last five decades, educational institutions are tasked to adapt with the changing environment by providing diverse degree options by exploring numerous and varied specializations. In addition, programmes must have the elements of versatility and flexibility to accommodate the students' desire for attaining a tailored degree. Fundamentally, in this contemporary environment tourism and hospitality undergraduate degree offerings in the Caribbean must be capable of facilitating students of various cultural origins as well as their divergent professional experiences and aspirations; this may be done through Caribbean institutions joining forces with universities in the United States or the United Kingdom. This must be accomplished without reducing the strengths which already exist in Caribbean programmes. They should continue to be regional and action-based in nature so that the Caribbean graduate will be able to manoeuvre a rapidly changing space by being a hands-on critical thinker who understands regional nuances and global practices.

Importantly, any tourism development and planning needs to consider gender, given the peculiarities of the industry for women in particular. Globally the hotel industry is one area that women have flocked to in an attempt to find gainful employment and, as a result, hotels have emerged as a space where complex gender relations and ideologies are manifested. A gender-blind approach to tourism planning has resulted in unwitting marginalization of women leadership roles, despite the high level of training and educational levels of Caribbean women. As Mooney and Ryan (2009: 197) note, "They (females) are horizontally segregated into particular jobs and areas of operation and vertically segregated into jobs regarded as low in skills and consequently low in status." While it is clear that women are exploited economically, it is posited by some that they are also psychologically oppressed and have the perception that their work is largely unimportant and devalued by society. In the Caribbean and Latin America, 35% of the workforce employed in the tourism formal sector is female. However, there are some countries where women are the main tourism workers in the formal sectors, like, for example, in Barbados and Jamaica.

Women dominate in the informal tourism sector where they provide a wide range of services to tourists and dominate in menial, semi-skilled, domestic, and services type occupations. In the food sector of the tourism industry, they are at the bottom of the hierarchy as restaurant helpers,

cooks (not usually chefs), and waitresses—the lowest-paid parts of the food sectors. Their presence is marginal at executive and managerial levels. Therefore, it is important to make sure that women are also able to benefit from jobs requiring higher qualifications and skills, in order to increase the benefits they would have from increased employment opportunities in the tourism sector. This would mainly depend on local governments' ability and willingness to improve women's education and training opportunities.

Despite the general erosion of the separate spheres (private/female public/male) dyad especially in the Caribbean where women have always participated in the workforce, the issue of occupational sex segregation still exists. Sexual division of labour rests on the assertion that males and females are fitted to mutually exclusive, but complementary occupational roles linked to their specialties. Gendered stereotypes that fit women into nurturing roles with a focus on "household chores" are evident in hospitality employment strategies. Male workers are supposed to display masculine emotions—coolness under fire, rationality, and objectivity, which are part of the performance of power. It follows from this that male and female employees may also believe that certain jobs are better suited to their respective gender based on these traits. In hospitality, however, some archetypical feminine traits are valued and, indeed, encouraged for both male and female line staff members who are expected to engage in emotional labour. This concept, developed by Hochschild (1983), speaks to work which is done for wages that requires personal contact with the public, wherein creating a given state of mind in the client or user is part or the entire product being sold. In leading hotel chains, there is a clear recognition that employees must be conscious of the feelings or emotions that they are expected to create in customers. This emotional labour infuses warmth into routine transactions and employees see the need for it since it creates positive feelings and encourages customers to refer the hotel, guaranteeing salaries for the employees themselves (Crick 2001). The very nature of hospitality is that hospitable behaviour is seen as a virtue and includes the desire to ensure the happiness of the guest, in order for him or her to feel genuinely valued and welcomed (Pizam and Shani 2009). When even one guest is not pleased with their service this can have inimical effects on the specific hotel and have negative ripple effects on the country's hotel industry in general.

In an attempt to get a sense of the differences in perceptions of work by male and female employees, data was collected from 93 line level hotel

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There is no doubt that the global tourism industry is a particularly important sector for women. Globally, tourism attracts women in droves, who often enter the industry in low level and menial jobs, but which afford them a higher standard of life and expanded opportunities. However, as in many other sectors, there is a significant gender segregation of the labour market in tourism. The typical gender pyramid is prevalent in the tourism sector, with lower level positions and occupations with few career development opportunities being dominated by women and key managerial positions being dominated by men.

There is no doubt that upper management of the tourism and hospitality industry is dominated by men despite women's higher level of qualification in the area. The main reasons women are not moving to the top of the career ladder are male dominance in the workplace, a lack of role models, and poor self-confidence among women. Importantly as well, advancement in the field often means leaving the familiar to move to a property that offers increased job opportunity. While such practices make it difficult for all those who must balance their work and their family, they make it particularly challenging for women with significant family responsibilities to compete for recognition and promotions.

At the same time, women are in greater numbers in tertiary level educational institutions in general, and this trend is present in tourism studies as well. Therefore women are better trained and equipped to enter the industry with the skills needed to make a valuable contribution to the tourism landscape. The logic is simple; more must be done to facilitate the best and most qualified individuals to take leading roles in this critical industry. The future of Caribbean tourism depends on it.

employees from random departments in five hotels in the Kingston Metropolitan area of Jamaica, which primarily cater to business clientele from the northeast region of the United States. While the findings cannot be generalized across the region, they provide keen insights into the state of employee perceptions about their work and worth in the industry and

the ways in which gender plays a role in the reality of perceptions. Indeed, it was found that gender is a key indicator of differences in employees' perceptions of their jobs and their overall job satisfaction. Employees, for instance, undoubtedly internalized the wider societal views on which jobs are better suited for males and females.

While 71.4% of women were resistant to the notion that some jobs are better suited for them, those women who did think so, as well as most men, overwhelmingly thought that housekeeping and waitressing were better suited for women and bartending and maintenance work were better suited for men. From the sample 94.1% of males chose the hotel industry as a first choice for work while only 26.2% of females viewed the industry as a first choice, the result being that 73.8% of females were not enthusiastic (at least initially) about the prospects of working in the industry. This can be linked to the types of work that are relegated for women in the industry itself. Most were waitresses, receptionists or in housekeeping. While some males were bell-hops and waiters, they were mainly involved in what could be considered higher-skilled professions as bartenders, chefs, cooks, and maintenance technicians, which require more specialized training. This explains why overwhelmingly more males than females said that they opted for their jobs in the hotels. The women, in many cases, ostensibly "stumbled" on their jobs and would require very little extra training. In many cases, too, these jobs were closely linked to emblematic female personality traits, emotional labour, or were archetypical of female domestic duties. The data revealed that both sexes overwhelmingly agreed (90.3%) that female-dominated jobs in the hospitality industry bore striking similarities to housework and males in particular (94.1%) felt that there were "female-centric jobs" in hotels.

Along this vein, when asked if they thought their jobs were lifelong careers 78% of males said they did while 85.7% of females said they did not. Age played a role in this perception, however, as those in the 18–25 year-old group tended to feel that they would move on to different professions eventually, while those in the 26–35 and 36–45 groups were likely to think that they were in it for the "long haul". Interestingly, males consistently hold their work in the business hotel industry in higher esteem than females and this shows that one cannot assess perceptions of hotel employees as if they are a homogenous group. The male employees who, as we have noted, tended to choose to work in the industry had a much greater sense that their jobs were important to the organization. With a

statistically significant difference in this perception, 92.2% of males felt that their jobs were important compared to 35.7% of females.

This greater sense of job importance that men seem to have over their female counterparts follows from the fact that the men tend to be in higher-skilled jobs and invested more in their training for these positions. It is therefore natural that they would think their jobs are crucial to the organization and would also see themselves as less dispensable than women would. While the women were cognizant that their jobs were necessary to the smooth running of the hotels, they were also acutely aware that they were replaceable, since scores of similarly marginally skilled women are in the job market seeking employment opportunities. In addition, the historically negative stigma attached to women's domestic work, which many of their jobs reflected, has led them to perceive that their work is largely unimportant, and makes them feel that their jobs are of somewhat lower value to the industry than men's jobs.

While the demands on family life may play a role in these perceptions, typecasting jobs by gender was also a significant contributor. Perceptions of males in particular revealed that there were feelings that there were male-centric and female-centric jobs in the hotel. While females were not keen on saying that they were better suited for some jobs, they identified, however, that they typically occupied certain jobs, which were not rapidly mobile such as front desk clerk and housekeeper/room attendant. Males, however, held food and beverage jobs which provide for the quickest climb up the ladder. The perceptions of work in the hospitality industry having little opportunity for advancement and job stability is changing for males, many of whom seek to build careers in the field. They steer clear of what they believe to be female-centric jobs and are motivated to invest in making lifelong professions. More, however, needs to be done for females who obviously enjoy some aspects of their jobs, but face challenges in meeting both their long-term physical and psychological needs and which militate against them having fulfilling and satisfying jobs in the industry. This requires a complete restructuring of ideologies about the functions in the hierarchy, in terms of gender-specific roles. Hospitality organizations must tap into the perceptions of their employees who are most important to the success of the organization, debunk the notion that men's work in the industry is inherently more valuable than women's, and move towards meaningful strategies to remove the traces of the sticky floor, on which women in particular, perceive themselves to be.

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CHAPTER 5

ICT and Caribbean Tourism

It is an open secret that we live in a technology-mediated world. Over the past decade, information and communication technology (ICT) has become an invaluable tool in most if not all facets of life. In addition to the overwhelming use for entertainment and leisure, these tools democratize access to goods and services, afford faster and more efficient communication and decision-making, and connect persons across the globe in an instant, all while cutting costs and waste in many organizations. Investment in ICT can spur gains in productivity in a number of ways: it contributes to overall capital deepening, helping to increase labour productivity; technological progress may contribute to faster multifactor productivity growth in the ICT-producing industry. In addition, greater use of ICT outside the ICT industry helps firms and public and private institutions to increase efficiency and develop new products and services.

These and other advantages of ICT are all critical for travel and tourism globally and Caribbean Small Island Developing States (SIDS) are increasingly recognizing the importance of incorporating these tools into their tourism product development and policies. ICT tools used for or during travel have become much faster, smaller, more intelligent, and more embedded in the user's environment. According to Vong (2012), the average traveller visits about 22 travel-related sites prior to booking a vacation. Social media is also taking the industry to new and ever-growing heights. According to Google Think Insights quoted in Scarborough

A. Spencer, *Travel and Tourism in the Caribbean*,
https://doi.org/10.1007/978-3-319-69581-5_5

(2013), in 2010, 11% of leisure travellers used their mobile devices to access travel information. This figure grew to 38% in just two years. Similarly, for business travellers, 40% used mobile devices to book their travel in 2010 and this increased to 57% in 2012. The fast adoption of new mobile technologies generates a tremendous impact on travel and will very likely transform the behavioural patterns of tourism consumption and the tourism experience itself. It is becoming harder to ignore the fact that travellers, particularly from areas with high internet penetration in North America, Europe, and Asia, are equipped with today's cutting-edge mobile technology and often have the expectation that technology will be part of every stage of their travel process. A new world is emerging as a smart world (smart cities, smart destinations), where individuals interact, communicate, collaborate, and share information in new ways. Increasingly, sustainable tourism models are moving beyond traditional considerations to include the level of ICT penetration as a marker of a robust and viable product. This chapter explores the importance of ICT to tourism product development and argues that to remain competitive, Caribbean destinations need new ICT-related development principles, policies, processes, and objectives that will result in attractive tourism products. The progress that destinations have made in integrating ICT into process flows will also be assessed.

ICT and Tourism: The New Frontier

In the case of the Caribbean, the development and diffusion of ICT are crucial to competing effectively in the global world. The services industry is the main pillar of economic growth, and ICT plays a crucial role in a services-oriented economy. For example, destinations and attractions can be efficiently marketed in the tourism industry by using ICT. Caribbean tourist authorities have up-to-date and interactive websites which offer information on the destination, as well as travel advisories, and other important information for visitor safety and satisfaction. Increasingly as well, these countries have invested in social media handles on Twitter, Facebook, and Instagram in order to connect in real time with potential visitors and residents alike. These platforms make it easier to access market and management data, share information, and build trading partnerships. In the area of logistics, ICT can improve efficiency by reducing delivery times and coordinating stock levels through improved monitoring of supply and demand, which in turn enhances customer service and guest satisfaction.

As expressed by Spencer (2014), for developing countries interested in maintaining their tourism product, there is a critical need to explore their readiness, willingness, and ability to adopt new technology into their marketing, sales, and general interaction with an ever-evolving tourism market. Not only have ICTs made it easier for developing countries to market and distribute their products and increase their customer base, but they have also made it easier for investors to access market and management data, to share information, and to build trading partnerships. Moving into the e-business arena has provided opportunities for tourism stakeholders to offer fully developed web portals as comprehensive Destination Management Systems (DMS) that include booking and transaction facilities—thus promoting the opportunity to increase sales and to generate more revenue for the local economy. The Caribbean is competing with developed nations, which have largely integrated ICT in every aspect of the service industry. According to Chevers (2015), American and European hotels have adopted ICT and successfully integrated systems like computer reservation system (CRS), customer relation management (CRM), enterprise resource planning (ERP), supply chain management (SCM), project management system (PMS), knowledge management system (KMS), and office automation system (OAS) and are able to realize the intended benefits.

ICTs have become one of the most effective tools for addressing the imbalance between competing destinations in the global market. For many tourism market sectors and tourism products, marketing and selling via the internet is becoming the accepted and preferred method. Technology used in tourism organizations can be classified into two main sections, namely, vertical (industry-specific) and horizontal (general business) applications, aiming to cover both hardware and software specifications which are of relevance to tourism-related organizations, together with the connectivity requirements among departments, branches, and external partners.

Alzua suggests that destinations and their respective travel and tourism industries need to progress over three different stages of evolution on their way towards achieving economic development. The first stage in this theorization is tourism activity based on factors while the second is based on investment. The third and most ideal stage is one based on innovation. As the sector and the destination evolve, they leave behind the first phase where endowments are the main asset and evolve into a tourism activity starting to produce quality standard services. At this stage, private and

public investment starts to occur for the modernization of tourism activity, and technology stops being a stranger or unattainable. Caribbean SIDS tend to straddle stages two and three, as there is still a heavy dependence on foreign investment and endowments to develop the local tourism economy. However, this is often being combined with more and more reliance on technological innovations.

ICT adoption is facilitating changes in tourism value chains and in the way tourism products are consumed. Trends facing the travel and tourism industries are focused primarily in the following factors: increasing competition, emerging countries and destinations, adoption of technology, and branding and identity building. Research indicates that specific to hotel operations, ICT should be viewed as an amplifier to a hotel's operational structure and management. Thus, if implemented in a poorly managed hospitality establishment its ability to increase the hotel's performance is significantly lessened. On the other hand, the implementation and use of ICTs in properly managed hotels will result in the increase of its performance (Sigala et al. 2004). Guest satisfaction, while not being the only outcome, is the ultimate indicator of whether key objectives are being met. Tourists today are informed and connected, and participate actively in social networks. The proliferation of these media and new forms of communication have led to a better understanding of the products offered as well as of the experiences of other visitors. Technologies undoubtedly play an important role facilitating memorable experiences. Each traveller has his or her individual preferences, demands, and expectations. One of the great dangers is falling into traditional thinking to understand the fragmented tourism demand. Tourists are increasingly having a preference for destinations that provide a complete and personalized choice of all elements that allow them to create their own vacations prior to travel or while on location, through the use of ICT tools.

Marketing of Caribbean SIDS is already undergoing important transformations. Fragmented and personalized marketing is being undertaken based on interests and the focus has shifted from television ads and is far more focused on personal devices: computer, tablet, or smartphone. Customer relationships are also being performed in new ways: destinations are using virtual tourist offices across social networks, and hotels are using tablets and smart TV to interact with customers. Thus, multiscreen marketing is needed with travellers moving across devices to complete bookings. At the same time, the increasing proliferation and adoption of information systems together with other developing technologies (cloud

computing, internet of things, new interaction devices, mobile devices) is generating an unprecedented amount of data. These data are acquired from heterogeneous sources and are often unstructured. One of the major challenges remaining is how to use technology in order to make sense of the data, so that new tourism-related services and knowledge can be generated. This also requires new analytic capacities. This phenomenon is known as Big Data. The effective use of Big Data has the potential to transform the tourism sector, delivering a new wave of productivity growth and consumer surplus. Using Big Data will become a key basis of competition for existing companies, and will create new competitors who are able to attract employees that have the critical skills for a Big Data world.

In addition to the importance of e-business solutions, the importance of ICT in times of major natural disasters and acts of terrorism and crime has now become vital. In the context of disaster risk management (DRM), ICT-based KMSs can help to decide what developments to monitor, what decisions to focus on, and what processes to set in motion automatically, or in advance of an impending hazard. KMSs facilitate the collection, retrieval, dissemination, and storage of information, to ensure that it is available to those who need it, at the time and place it is needed. Access to adequate infrastructure is therefore a prerequisite for organizations and individuals to adopt and use ICTs. Modern technology has become an essential tool as a means of anticipatory warning and post-impact crisis management and in controlling their harmful effects on tourism. While natural disasters in the Caribbean are simply a fact of life as the region is among the world's most vulnerable to hurricanes and other "acts of God", these effects can also be mitigated through improvements in ICT infrastructure and the need to put in place measures to reduce the vulnerability and impact of these hazards on tourism is most critical in this subregion.

Effective DRM relies heavily on information collection, storage, and dissemination in order to accurately determine patterns, which may indicate the onset of an impending disaster, giving early warning information to vulnerable populations (inclusive of tourists). As Williams and Phillips indicate (2014), ICTs are important tools for lessening disaster risks through detection and analysis of dangers, propagation of early warning messages to populations in harm's way, coordinating and tracking relief activities and resources recording, and dissemination of knowledge and experiences, raising awareness. Travellers may be more confident to visit certain destinations over others based on the destinations' innate ICT capability. In the unfortunate circumstance that their stay coincides with a

disaster event, they are much more likely to survive and be in continuous communication with both family abroad and local officials in destinations where ICT infrastructure is present and resilient.

Caribbean disaster management offices have, for instance, used Twitter to propagate warning messages to a wide audience in a timely manner. In cases of earthquake, landslide, floods, and hurricanes, Twitter's ability to spread messages quickly and widely can make it a powerful tool that saves lives. Specifically for tourists, it allows friends and family abroad to track the state of loved ones through their own postings rather than depending on traditional media which, though critical, does not facilitate such personalized information. Twitter can also be used in a post-disaster situation, to publicize the availability of relief services and to act as a gateway to receive requests for emergency assistance. Members of mainstream media are also frequently plugged in to Twitter, and this can be leveraged to amplify early warning messages by passing them along through a broad range of channels.

Bridging the Digital Divide

The notion of the digital divide addresses the degree to which information technology access provides an advantage and disadvantage to some individuals and directly influences tourism distribution. While the digital divide may have been reduced, more recently, Minghetti and Buhalis (2010) still identified that there are multiple technological divides which exist between tourists and destinations within developed countries and between developed and developing countries. This, they claim, will lead to varying levels of digital exclusion. In particular it points to important marketing and communication challenges between tourism generating countries and tourism destinations. Minghetti and Buhalis (2010: 278) articulate that "the study of the digital divide is critical for less technologically developed regions that need to expand their ICT usage to be able to promote their offerings, interact with consumers, and reduce their dependency on intermediaries". The future of tourism for tourism-dependent regions will be determined by competitive approaches and the ability to engage in cutting-edge practices. Technology adoption for sales and marketing, to include interactive social media, is no longer a luxury but a necessity to capture and sustain the travelling market. The new generations of visitors are demanding the use of technology in their daily activities. For example, accessibility to wireless internet is very important, which can

assist with various business processing and simplify the playing of games or sending messages. Effective adoption of ICT in the tourism industry can lead to improved service quality, reduced costs, and improved operational efficiencies (Law et al. 2014). The developing countries and the Caribbean in particular now need to critically assess the position in this virtual tourism space, which is likely to become even more ubiquitous as technology dependence grows.

Since 2000 it has been argued that there are varying levels of internet readiness on the international landscape. Canadians and North Americans in general were keen users. According to Law and Leung (2000) North America and Europe were ahead of most countries in internet penetration. More recently, mega players in technology from Asia, such as South Korea and Japan, have dictated the pace. As Flamm (2013) indicates, the United States ranked outside the top ten countries with the use of smart phones, tablets, and internet protocol television in 2012. Although there is now a smaller disparity between countries, the developing world and in particular the Caribbean typically lags behind both as Table 5.1 indicates. Many Caribbean SIDS operate in a technological context that does not always facilitate full immersion into the ICT pool. The availability of state-of-the-art ICT infrastructure and adequate bandwidth with access to the international information superhighway is crucial. As Table 5.2 indicates, there is no Caribbean country with 100% internet access, with most countries averaging 50–60%. In addition, Jamaica is also reasonably ranked at 83 out of 139 countries in the 2016 Global Network Readiness Index (Baller et al. 2016: 16). This index seeks to evaluate the degree of a society's preparedness and readiness to take advantage of their ICT infrastructure. This increases the ability of Jamaica to take advantage of ICT for the betterment of the tourism product (Chevers and Spencer 2017).

Many of these medium- and low-digital-access destinations still depend on analogue transactions and physical intermediaries to develop their planning processes for stimulating vacations in these destinations. This is very applicable to the Caribbean context which is a relatively low-digital-access destination catering to high-digital-access markets such as the United States and the United Kingdom. Tourism and technology discourse relies, in large part, on the views and attitudes of societies regarding general technology use. As evidenced in the literature more technologically savvy societies will intuitively be more welcoming to technology infusion in the tourism space. Despite the diminishing disparity between nations, there is much to be desired if developing country destinations are

Table 5.1 Caribbean internet users and population statistics: 2016

Caribbean region	*Population (2016 estimate)*	*% population of world*	*Internet users, June 30, 2016*	*Penetration (% population)*	*Users % world*	*Facebook June 30, 2016*
Caribbean	42,401,541	0.6%	18,526,199	43.7%	0.5%	10,972,840
Rest of the World	7,297,757,951	99.4%	3,657,298,614	50.1%	99.5%	1,668,460,690
World Total	**7,340,159,492**	**100.0%**	**3,675,824,813**	**50.1%**	**100.0%**	**1,679,433,530**

Source: https://www.internetworldstats.com/stats11.htm

Notes: (1) Internet Statistics for the Caribbean were updated on June 30, 2016. (2) Population is based mainly on data published by the US Census Bureau. (3) The most recent usage data comes mainly from figures published by Nielsen Online, ITU, Facebook, and other trustworthy local sources. (4) Facebook subscriber data is for June 30, 2016. (5) Data on this site may be cited, giving due credit and establishing an active link back to Internet World Stats. (6) For definitions and help, see the site surfing guide.

Table 5.2 Internet usage and population statistics for the Caribbean

Caribbean	*Population (2016 estimate)*	*% population Caribbean*	*Internet usage, June 30, 2016*	*% population (penetration)*	*Users % region*	*Facebook June 30, 2016*
Anguilla	16,752	0.0	11,557	69.0	0.1	9000
Antigua and Barbuda	93,581	0.2	81,545	87.1	0.4	50,000
Aruba	113,648	0.3	91,532	80.5	0.5	78,000
Bahamas	392,712	0.9	333,143	84.8	1.8	210,000
Barbados	291,495	0.7	228,717	78.5	1.2	160,000
Bonaire, St. Eustatius, Saba	22,303	0.1	20,956	94.0	0.1	20
British Virgin Islands	34,232	0.1	14,620	42.7	0.1	4600
Cayman Islands	57,268	0.1	47,003	82.1	0.3	45,000
Cuba	11,014,425	26.0	3,696,765	33.6	20.0	n/a
Curacao	149,035	0.4	138,774	93.1	0.7	80
Dominica	73,757	0.2	48,249	65.4	0.3	39,000
Dominican Republic	10,606,865	25.0	6,054,013	57.1	32.7	4,500,000
Grenada	111,219	0.3	56,000	50.4	0.3	56,000
Guadeloupe	470,716	1.1	220,000	46.7	1.2	220,000
Haiti	10,228,410	24.1	1,308,290	12.8	7.1	1,300,000
Jamaica	2,970,340	7.0	1,581,100	53.2	8.5	1100,000
Martinique	396,813	0.9	303,302	76.4	1.6	170,000
Montserrat	5267	0.0	2900	21.4	0.0	2900
Puerto Rico	3,578,056	8.4	3,047,311	85.2	16.4	2,100,000
St. Barthélemy (FR)	7209	0.0	1540	21.4	0.0	20
St. Kitts and Nevis	52,329	0.1	37,210	71.1	0.2	35,000
St. Lucia	164,464	0.4	109,370	66.5	0.6	88,000
St. Martin (FR)	31,949	0.1	1100	3.4	0.0	200
St. Vincent and Grenadines	102,350	0.2	65,984	64.5	0.4	59,000
St. Maarten (NL)	40,486	0.1	20	0.0	0.0	20
Trinidad and Tobago	1,220,479	2.9	942,713	77.2	5.1	700,000
Turks and Caicos	51,430	0.1	25,000	48.6	0.1	25,000
US Virgin Islands	102,951	0.2	57,485	55.8	0.3	21,000
Total Caribbean	42,402,541	100.0	18,526,199	43.7	100.0	10,972,840

Notes: (1) The Caribbean Statistics were updated for June 30, 2016. (2) Bermuda is included together with the North American countries according to the United Nations Statistical Division listings. (3) The most recent usage information comes mainly from the data published by Nielsen Online, ITU, Facebook, and other reliable sources. (4) Facebook subscriber data is for June 30, 2016

to keep pace with developed tourist generating markets. Many Caribbean economies, many of which are developing states, have challenges considering the costs to invest in and maintain up-to-date technology. These include the costs of ICT equipment, telecommunication, or installing an e-commerce system. The availability and affordability of ICT services in the Caribbean can therefore be improved with increased competition in the telecommunication industry. Therefore, governments should ensure that a regulatory framework exists which facilitates equal access to the ICT infrastructure. Waller (2006) also warns against the dangers of ICT policies and intervention that are solely implemented by outside forces, which often deepen inequalities, social injustices, and local underdevelopment. Ideally, local players within the sector should be able to develop and offer services through the domestic and international backbone infrastructure. In cases where competition is limited or not possible, the regulator must ensure that conditions exist for users to obtain the bandwidth capacity they need under transparent conditions and at cost-based prices.

Advances in ICT are having major implications for the operations of organizations throughout the tourism value chain. The information storage and data analysis functions are vital for the analysis of tourism statistics, as well as for reservation systems. Moreover, the opportunities provided by the internet for the online sale and distribution of products enable traditional handicraft manufacturers to access new markets. Nevertheless, reliance on ICT raises issues with regard to data protection and safety from external exploitation. This raises another challenge in Caribbean SIDS' ability to capitalize on the benefits of the ICT environment—that of the legal and regulatory framework. ICT opens the door to cyber crimes and external control of sensitive data. The legal enforcement of electronic documents, electronic transactions, and digital signature is essential because it reduces the risks of doing online business. Embarking on major ICT overhauls without the necessary mechanisms to protect users and entities alike can lead to epic breaches. Measures to fight internet crime should be included in the legal and regulatory framework as these increase a country's reputation as a safe environment for tourists in the online space. Currently, the legal and regulatory framework in the region can be characterized as fragmented, lacking sufficient anti-cybercrime legislations. Several reports by international institutions, including the World Bank and the Caribbean Community (CARICOM), have

emphasized the importance of a regional approach for the development of a legal and regulatory framework for Caribbean countries. Importantly, a regional approach is necessary to ensure harmonization of e-legislation and e-regulation among the countries in the region if the region is to be taken seriously as a cutting-edge technological space for tourism and travel to thrive. The Caribbean framework should be in line with international best practices. Moreover, the framework should be flexible to adapt to new ICT developments.

Jamaica's Ministry of Tourism, through its Linkages Network, is leading the way in encouraging the tourism sector to make greater use of technology to enhance guest experience. In June 2018 the Tourism Linkages Network partnered with Digicel Business to host "Smart Destination Jamaica: A Preview of the Latest Technology in Tourism", a think tank and forum that discussed and demonstrated some of the latest technological trends globally being employed in the hospitality industry. Minister of Tourism Hon Edmund Bartlett supported the importance of technology as a driving force in knowledge and innovation, and noted that the initiative was intended "to look at how the technologies have been impacting tourism and what it is going to mean for the architecture that will emerge in the tourism space".

For Jamaica, initiatives such as these exist within a policy framework; the Sector Plan for ICT is one of the strategic priority areas of the Vision 2030 Jamaica—National Development Plan. It is one of 31 sector plans that form the foundation for Vision 2030 Jamaica—a 21-year plan based on a fundamental vision to make "Jamaica the place of choice to live, work, raise families, and do business" and on guiding principles which put the Jamaican people at the centre of the nation's transformation. The ICT Sector Plan considers ICT under two main aspects, as a sector in its own right and as an enabler of all other sectors, including economic, social, environmental, tourism, education, and governance sectors. This enabling role of ICT encompasses the concept of technology for development, reflecting the contribution that cutting-edge tools can make to national development in all sectors. The ICT Sector Plan in particular includes linkages with a number of other sectors including education, governance, science, technology and innovation, the cultural/creative industries, and, importantly, tourism and travel. According to the Vision 2030 mandate, the aims for ICT include the following:

1. The attainment of the Millennium Development Goals
2. The integration of ICT at all levels and processes in the education system. This will include early childhood, primary, secondary, tertiary, and lifelong learning institutions as well as teacher training colleges. The average Jamaican will be ICT literate.
3. Attainment of affordable universal broadband access for all citizens, private sector, government, and civil society, thereby eliminating the digital divide. Universal access will extend beyond voice to include internet, computing devices, information literacy, and access to telecommunications services.
4. The establishment of internationally renowned technology parks and research centres to foster innovation in society.
5. Attraction of international companies to establish software development companies or manufacturing plants in Jamaica.
6. Continued enhancement of the legal and regulatory framework to promote industry development, transparency, true competition, consumer protection, and quality standards, based on the dynamic nature of the sector. The enhanced support for competition will attract local and international investors.
7. The establishment of a networked society and economy in which all citizens use ICT in all aspects of their lives, including school, work, home, and church.

In terms of the Eastern Caribbean, Bertin (n.d.) found that there are fairly wide levels of internet adoption and diffusion throughout the tourism industry among those countries. The main area of deficiency, however, is with respect to the smaller accommodation providers, where there is a much lower level of internet presence in guest houses and apartments. While internet adoption is relatively high, most websites and web-based systems still have a limited focus on basic information provision and communication, as opposed to distribution- and transaction-oriented activities. There is therefore much room to graduate from primary tools to secondary and tertiary level ICT engagement. The social and economic advancement in developing countries can undoubtedly be enhanced by the use of new ICTs in public sector organizations in the tourism sector. The first step, however, invariably requires the successful adoption, implementation, and diffusion of these technologies within the relevant organizations. In order to achieve this, due attention must be given to bridging

key dimensions of the "conception-reality" gap or overcoming organizational context variables and inhibiting factors, in the information systems implementation process, of which technology is but one aspect. A broad and comprehensive approach is necessary to enable fundamental changes, at the individual, organizational, and national levels, which would undoubtedly lead to greater levels of social, economic, and cultural progress, as well as, in the process, narrow the digital divide.

Meaningful strides have been made to infuse technology solutions into the "Caribbean Brand" of tourism, however. A good example is the Small Tourism Enterprise Project (STEP), or STEP Caribbean Project, launched in 2008, which is aimed at business development training, promoting the adoption of technology, creating mechanisms for joint promotion of destinations, and helping in the communication and exchange of best practices among small tourism companies and small Caribbean hotels. Driven by the Organization of American States (OAS), it aims at reducing the digital divide of hotels in the use of different technologies, including the use of internet as an instrument for marketing their accommodation and bookings, but also by improving their internal management and accounting processes.

STEP aims to provide business development training, promote the adoption of technology, create mechanisms for joint promotion of destinations, and facilitate communication and the exchange of best practices among small tourism companies and small hotels with 75 rooms or less, in the Caribbean. Their main achievements have been providing, through web portals, tools to strengthen the management and operations of the hotels, and a plan to promote the 13 STEP Caribbean destinations, as well as the hotels affiliated with the programme. It also provides internationally recognized certification tools and programmes; more than 2000 employees of 228 small hotels were certified by the American Hotel and Lodging Association Education Institute (AHLA-EI). It also provides training on environmental issues; staff from more than 140 companies have been trained, and immediate assistance centres have been set up. This supported the creation of the Central Federation of Small Hotels (FCAPH) with over 800 members. Its activities have focused on the use of digital technologies to strengthen regional integration. Their websites contain tools for training and capacity building and the project has been added to social networks such as Facebook and Twitter. The initiative has spread to other Small-Medium Enterprises (SMEs) through a joint effort with the Central American Secretariat of Tourism Integration (SITCA).

The South America STEP Project uses the same model. More than 300 small and medium hotels participate in the project with websites and are on social networks, like the aforementioned one.

Similarly, the Small Tourism Enterprises Network (STEN) was designed as a unified network that integrates public, private, and community sector strategies to provide strategic support to micro, small, and medium enterprises in the tourism industry in the Caribbean. Chief among the tools to achieve this goal is the integration of ICT to bolster marketability and viability of small tourism enterprises in the Caribbean through tools that increased market access, provided more effective communication between the tourism Medium Small and Micro enterprises (MSMEs) and the target market, and facilitated the packaging of "tourism experiences". In particular, ICT has been flagged to support and promote community tourism activities as part of the tourism visitors' experience in a destination. Mechanisms that give community members tools to interact with travellers all over the world are critical to fostering sustainable involvement of local persons in the tourism product. STEN also aims to enhance the competitiveness of the small tourism enterprises in the Caribbean to meet new international standards and expectations of travellers in the digital age. STEN is an inclusive programme, which includes Antigua and Barbuda, the Bahamas, Belize, Barbados, Dominica, the Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago. Programmes like these have already contributed to enhanced marketability and viability of tourism MSMEs in the Caribbean, and an improvement in the use of ICT tools for marketing of MSMEs and to enhance promotion/communication. Importantly, sites, attractions, and community tourism activities are gaining added visibility and patronage on social media platforms.

Plans are also under way for a Single ICT Space for CARICOM to enhance the environment for investment and production by building the digital economy over the period 2014 to 2019. This process led to the articulation of a vision for the Space as "an ICT-enabled borderless space that fosters economic, social and cultural integration for the betterment of Caribbean citizens". This is a valuable step in breaking unnecessary barriers existing amongst CARICOM states in order to allow for the free movement of goods, people, services, and capital, as envisioned by the Caribbean Single Market and Economy (CSME).

This is a step in the right direction, as research has indicated that ICT components have a positive impact on the satisfaction experienced by hotel

guests in both Jamaica and the Bahamas. According to Chevers and Spencer (2017), in Jamaica wireless internet service, telephone service, dining table reservation, in-room television, and skyping facilities are critical due to a larger number of all-inclusive hotels being existent. The implication is that where guests spend a majority of the vacation on property, they expect that ICT systems will create greater ease. According to the same authors, in the case of the Bahamas, where there is a larger number of European Plan (EP) hotels—guests pay for room-only, there were two significant ICT components. These are an automated wake-up system and in-room television. The implication is that guests expect less from a hotel since they spend less time on properties, while searching for food and entertainment options externally.

In the not so distant future, Caribbean SIDS will have to consider how to move to towards smart tourist destinations. These would embody an innovative consolidated space with cutting-edge technology infrastructure that combines the concepts of sustainability, leisure, and technological innovation. The added value provided by the smart tourist destination is the consideration of the visitor/tourist at its centre. Placing the visitor at the centre of developments will facilitate the generation of integrated intelligent systems, improving the integration and interaction with the destination (before, during, and after the travel), creating elements that facilitate the interpretation of the environment, streamline decision-making, and increase the quality of visitor experience and getting real time feedback on goods and services. Travel agents capable of differentiating their services in today's globalized and digital market will be leaders in creating socialized brands in new technological environments.

Therefore, travel agencies have to be ready and willing to move towards the digital age despite what may be perceived as risks. Indeed, an important factor in determining technology adoption is the extent of risk and uncertainty related to the implementation of ICT. For example, firms will be more inclined to do business online if the infrastructure for online payments, delivery, and guarantees is secure. Assets and resources are also prerequisites that influence the decision to adopt ICT. In essence, the availability of financial and human resources can enable an organization to invest and implement the desired technology, embark on system integration, conduct employee training, and develop long-term ICT capabilities for sustainability. It is believed that if administrators perceive ICT to be a strategic tool, then the associated resources will be allocated for its implementation. On the contrary, if administrators lack the vision and foresight regarding the benefits of ICT, then the technology might not

be implemented and if implemented, its implementation might not be effective enough to realize the potential benefits. Work on the leadership factors that determined whether Jamaican travel agents adopted ICT in their operations by Spencer (2013) facilitated a reconceptualization of the leadership element in the technology adoption discourse through an identification of leadership characteristics at each level of technology adoption. The key adoption being investigated was online selling practices and social media adoption was also included as an aspirational level of adoption. Spencer found that technology adoption behaviour in these organizations related to how decisions were made about what technologies to adopt and how to implement and sustain their use. The framework essentially posits that ownership as well as leadership, influenced by previous experiences, affects firm structure such as size, control, and division. Also, they influence creativity and risk taking as elements of entrepreneurship and leadership issues such as motivation, stimulation, charisma, and strategic change. The trickle-down effect is that strategy formulation, implementation, and resource allocation are affected by these elements. Ultimately firm behaviour and activities in terms of input, processes, and output, are influenced and this affects innovation adoption.

Spencer's work revealed that the perceptions of these owner-managers did not generally favour a greater use of internet technology in sales and marketing efforts. They typically felt that such technological investments were high-risk and yielded low returns on investments. Of particular interest was the fact that they were able to identify some potential benefits of using the internet such as speed, convenience, and efficiency but this did not outweigh the perceived psychological risk of becoming too dependent on the internet. This, they felt, would mean that they would lose the strength of their personal interaction with clients. A few exceptional respondents had differing perceptions which led to a greater openness and intention to increase adoption. Their views suggested that the use of multiple platforms was the best approach. In this way personal contact would be maintained for those clients who required this, while new platforms could be created for more technologically savvy customers. From a resource perspective owner-managers indicated that they face human and financial resource constraints. Many owner-managers implied, however, that they did not feel that there were other technologies which they needed but could not have because of limited resources. In simpler terms even if they had the resources they may not be inclined to adopt more technologies. The implication is that the decision of how to allocate

already limited resources is the sole purview of owner-managers. The tendency to prioritize spending in areas other than technology adoption was a reflection of the individual leader's preferences and comfort zone. Most respondents to the study saw that there were potential benefits of greater technology adoption for their firms; however, their own technology understanding and capability influenced adoption decisions.

In the final analysis firm strategy and resources did not sufficiently explain differences in adoption behaviour in the firms. These factors were especially insignificant in explaining why some firms were at different levels of the technology adoption hierarchy as strategies and resource constraints were not heterogeneous enough to answer the question of why some firms were more technologically advanced than others. These internal factors emerged as a product of differences in the leadership of these small, owner-managed travel firms rather than as significant input factors into the decision to adopt newer technologies. Contextual issues such as culture and the digital divide may explain overall industry behaviour but they are inadequate in explaining differences in behaviour among firms within the same society. The constructs assessed were values, norms, traditions, and social interactions. The firms investigated are faced with similar external environments in which to operate and yet they make different choices operationally and strategically. The examination of culture as a factor revealed that firms were operating in a relationship-oriented society where friendships and familiarity influenced business relationships. In addition to a relationship orientation, the national culture had an impact in that it promoted traditionalism with strict adherence to norms within the society.

Conclusion

In order to take advantage of today's global economy and maintain the economic importance of tourism in the region, the Caribbean needs to remain and gain competitiveness. So far, most of the Caribbean countries have based the development of tourism on what their location can naturally provide: nice sceneries, beaches, and, more recently, natural, cultural, and medical resources. However, the region needs to work further on its unique characteristics to become a destination that is articulated intelligently, in a way that fosters productivity and efficiency based on innovation, while preserving its authenticity. Generally speaking, the adoption of ICT changes radically the traditional functioning

and competitive landscape for most industries and sectors. Increased competition and globalization have provided the impetus for hotels to identify methods that will provide a competitive edge. The adoption of ICT has been the preferred method by most hotels to manage the transformation of the hotel industry landscape. ICT facilitates instantaneous access to hotels' products and services by the consumer irrespective of their geographical location. Furthermore, the capabilities which ICT applications possess have allowed hotel management to successfully target consumers worldwide; the rapid growth of mobile computers and web technologies has made this significantly easier. The use of ICT to tailor the tourism product produces an increasing level of guest satisfaction. Therefore, improving customer satisfaction is viewed as imperative for prolonged success and survival.

ICT has changed and continues to change the nature of contemporary tourism. Its major adoption in all parts of the industry is transforming tourism into an information- and knowledge-intensive sector, valid in a globalized economy. Caribbean tourism authorities should recognize the capacity of ICTs to empower their local SMEs and their competitive capacities considering them when designing new policy policies. The benefits of ICT policies to empower destinations include enhanced communication, access to information, increase productivity, acquisition of new skills and knowledge, which are critical for many of those businesses improving their marketing strategies, especially through e-commerce and direct interaction with tourists. Additional resources will be needed to support SMEs modernization and digitalization; launching ICT training programmes; training hospitality students in the area, and improving their online visibility and interaction with the digital traveller. Incorporating innovation and new technologies in the tourism sector must be facilitated by training and skills policies for human resources in the sector—investing in the creation and consolidation of own skills through training. Most Caribbean countries have a large skills gap in this area, to the extent that this know-how is not usually part of the training curriculum of most universities and vocational training in the region, and is much less specifically applied to the tourism sector. It is therefore essential to develop specific policies and programmes in the region to strengthen these skills. Without sufficient allocation of resources and IT training, Caribbean countries run the risk of being on the wrong side of the digital divide. National governments and their regional partners are invited to consider policy guidelines to ensure that ICTs contribute to the sustainability of the tourism sector.

E-tourism strategies should be integrated into the broader framework of national ICT policies and national tourism policies should address the need for a national enabling environment for the uptake of ICT in tourism. Basic ICT skills within the tourism workforce should be encouraged through the teaching of ICT in pre-schools, primary and secondary schools, and adult education, and the uptake and use of ICT by tourism SMEs, including those in remote areas, should be facilitated by providing easy and low-cost access to ICT solutions.

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CHAPTER 6

Concluding Remarks: The Future of Caribbean Tourism

In this work, critical aspects of Caribbean tourism have been assessed in an attempt to track the evolutions, transformations, and possibilities. The work is by no means intended to be the end all and be all as it relates to the implications of this titan of an industry in totality for Caribbean Small Island Developing States (SIDS), as many issues remain outside the scope of this text. Rather, the work highlights important strides that have been made to create sustainable futures for Caribbean SIDS in terms of the service industry, as well as to highlight gaps that are yet to be filled. The work mapped the evolution of the Caribbean tourism product, represented the very real challenges climate change poses to the region and to the industry, unpacked the economic realities that face the twenty-first century tourism product, considered the social face of the industry and stressed the importance of information and communication technology (ICT) to its survival. What remains is to proffer ideas as to the future of the industry for these tourism-dependent nations based on past realities and current experiences.

In embarking on a discourse of the future evolution of the tourism sector in the Caribbean, a number of critical imperatives must be taken into account. These relate to the prevailing macroeconomic challenges; the current social dynamics; the need for environmental sustainability; and issues of natural vulnerability and the looming threats of climate change. It is clear that the long-term prospects for travel and tourism are positive. Globally, the WTTC (2016b) estimates that the global sector's contribution to world GDP will be US$10,986.5 billion by 2026. If the estimated

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growth rate of 4.0% per annum over the next decade materializes, travel and tourism will outstrip growth of many other industries. The WTTC also estimates that over 370,204,000 will be employed in direct or indirect jobs facilitated by tourism by 2026, representing 11% of total employment worldwide (WTTC 2016b). Similarly, the UNWTO (2011) estimates that international tourist arrivals will continue recent year's growth and reach 1.4 billion in 2020 and 1.8 billion by 2030. This is based on an anticipated growth rate of 3.3% per annum from 2010 to 2030.

There is seemingly an endless stream of moving bodies interested in luxury, leisure, and exploration of new lands. The Caribbean has consistently been well-positioned to take advantage of this market share and continues to do well as a holistic destination of choice for millions. In the Caribbean, tourism has been among the main drivers of economic development. The hotel industry, for instance, is a major consumer of finished goods such as buildings, appliances, furniture, food, and beverages.

However, optimism for the future of Caribbean tourism should be balanced by a clear understanding of projected international market growth rates and the resultant anticipated changes in market share. UNWTO (2016) projections are that by 2030, emerging markets (57%) will surpass advanced economies (43%) in international tourist arrivals. However, the lion's share of the market is expected to go to Asia and the Pacific, and to a lesser extent Africa and the Middle East. The Caribbean is expected to receive a smaller share of international tourist arrivals, from 2.1% in 2010 down to 1.7% in 2030 (UNWTO 2016). Of 12 regions globally, the Caribbean is ranked tenth in projected growth both for 2016 and for long-term growth to 2026 (WTTC 2016a). As world tourism grows, the Caribbean's market share is expected to decline. Caribbean countries therefore have good reasons to be concerned about competition. Countries in the Caribbean compete with their neighbours as well as other "sand and sea" destinations, especially in Asia. And there are new threats on the horizon such as Cuba. Many fear Cuba will present serious competition if the United States drops its ban on tourist travel to the island. These projections have not been matched by a reduced dependence on tourism by Caribbean nations, as with each passing year, more and more reliance is placed on tourism for buoyancy in economies in the face on contracting agricultural and mining sectors and cuts in remittances as North America and Europe clamp down on immigration from the Global South.

Although the service industry is already an important and growing sector, it has not approached its full potential for stimulating economic development in the region. As Caribbean regional dependence on tourism increases, so do the uncertainties around the future performance of tourism. It has been shown that the Caribbean tourism product is diverse; some countries have invested in a niche among high-end travellers by providing lavish resorts and yachting ports, while others appeal more to the budget traveller. The number of tourists travelling on cruise ships has increased in recent years, but cruise arrivals have a much smaller economic impact than stay-over visits because food and accommodation are provided by the cruise company, which is generally foreign-owned. As cruise arrivals replace stay-over visits, tourism can become less profitable for SIDS and have a smaller impact on the rest of the economy.

As the work has also indicated, the economies of Caribbean countries are vulnerable to exogenous natural disasters because of their dependence on tourism and the agricultural sector. These two sectors require infrastructure that is highly vulnerable to hurricanes, volcanic eruptions, and earthquakes. While the Caribbean does not emit significant amounts of carbon dioxide relative to advanced economies, the region, nevertheless, must bear responsibility for climate change and embrace mitigation approaches where possible. The cost for inaction is too great and investment in innovative resilience mechanisms is among the top ways in which Caribbean SIDS can remain viable in the market. Reducing regional dependence on carbon-based fuel is a first step. Taken as a part of the collective tourism industry emissions, mitigation strategies are warranted in the tourism sector. Effective mitigation within the sector can be achieved by embracing energy efficiency, using renewable energy sources that reduce dependence on fossil fuel, as well as adopting carbon offsetting strategies. Caribbean tourism must embrace a low-carbon development path so that future development reduces the sector's contribution to climate change while at the same time builds a carbon-neutral tourism product. The future of climate resilience includes creating climate-responsive policies and plans so that development plans and strategies account for multiple climate scenarios; climate-informed decision-making and technology innovations that increase resilience by informing early warning systems; exploiting financial instruments and acquiring climate finance; and stakeholder cooperation and coordinated capacity building to deal effectively with climate-related threats.

Another challenge that Caribbean countries will need to confront if there is to be any future for Caribbean tourism is the high crime rate and tourist harassment that damages the region's reputation as a safe and pleasant travel destination. Particularly in an age of instant messaging and social media, word of mouth about individual negative experiences can have an irreparable effect on an entire attraction and the country by extension. Jamaica in particular has seen spiralling rates of violence and has responded with special zones of operation of security forces in areas, which are hardest hit by crime. While most crime occurs in poor inner-city areas away from tourist destinations, headlines still affect tourist decisions. Problems such as tourist harassment are more frequent and more serious in resort areas surrounded by poorer neighbourhoods. The need for planned sustainable development which focuses on economic and social empowerment of residents is therefore essential for the future of tourism in the Caribbean. Tourism planning can no longer be seen as solely tourist-centric, but must take in to consideration local populations' perceptions of the product, the differential impact of the industry on men and women because of their gender roles, and the impact of the industry on people who actually provide service.

In the future, the economic survival of the Caribbean region would depend largely on the development of a sustainable tourism industry, a concept that marries two ideas of development and sustainability. Achieving a balance is therefore an important strategic goal. Sustainability is often addressed from an environmental perspective. Less frequently this is coupled with sociocultural and community concerns. However, the preservation of the environment, though a necessary condition, is not sufficient for the sustainability of tourism (Jayawardena 2002). In achieving sustainability the needs and hopes of local communities need to be considered. Communities, villagers living near hotels, and employees of tourist establishments should be educated about the benefits of tourism as well as the different cultures that tourists come from. Tomorrow's tourists will lead complicated lives and have a fluid identity. They want to sample the ethnicity of the destination; increasingly, interests in culture, food, and sport are shaping the way people approach their choice of holiday. Consumers have a wealth of choice, which means that they search for value for money. The importance of tourism to each resident in a tourist dependent needs to marketed, so that ownership of the product cannot be seen as residing with the "big man" but

with each person in the society. Without the support of employees and the local community, it is difficult to ensure the satisfaction of the needs of tourism in keeping with their expectations.

Caribbean SIDS will also have to bridge the gap between internal competition and the benefits of marketing the region as a block, which will entail a unified model for development, more efficient air travel opportunities among SIDS, and cooperation rather than cutthroat competition. The idea of marketing the Caribbean under one umbrella brand has been supported by the Caribbean Tourism Organization (CTO) and the Caribbean Hotel Association (CHA) who believe that this is the correct path to take to increase the market share of the region in world tourism. At the same time, there are advantages in segmenting the target market for the Caribbean since the offerings of the region are diverse and many may appeal to a number of different segments. While some SIDS may focus on cruise ship passengers, others may be better suited to all-inclusive tourists. Increasingly, special interest tourists are also being catered to, along with eco-tourists and those that are interested in community-based leisure activities. Indeed, this work argues that community-based tourism development is a major part of the future of the region's tourist offerings, as it not only supports community initiatives, but allows direct tourist dollars to flow into and stay in local communities. The future of tourism in the Caribbean will depend largely on the ability of the region to deliver a high-quality product that corresponds to the changing tastes, needs, wants, and demands of the international traveller. Careful segmentation and niche marketing strategies may result in market broadening and growth.

Importantly, the future of tourism depends on innovation to include the reformation of old products, re-engineering the ways in which old processes were undertaken to increase efficiency, and radical initiatives to include greater use of ICT and other new technology. The tourists' world is shrinking because of technological advances. The ability of the internet to inform and to break boundaries allowing consumers to choose a tourist destination anywhere in the world is increasing daily. With an improvement in the economies of scale brought about by the online economy, travel and tourism are becoming a buyers' market.

Given the long history in the export of tropical commodities, there is the potential to increase linkages with the region's rich agricultural heritage as part of the tourism experience offered to visitors to the Caribbean. Such experiences could include working exhibits of tropical

food processing (sugar, cocoa, cassava), visits to local farms, and specialty food processing facilities (spices, chocolates, coconut candies and oils, rums), and participation in traditional farming and fishing activities. Notable examples include the Jamaican Appleton Rum Tour and the House of Chocolate in Grenada, which attract numerous visitors annually. The agricultural heritage could also be further promoted through the mounting of food festivals in which the highly varied Caribbean gourmet can be presented to visitors.

In the final analysis, tourism has been a tool for social development by potentially eradicating poverty or at least decreasing the high unemployment rates especially in developing nations. The Caribbean development experience over the past four decades suggests that the tourism sector, though with challenges, offers the best opportunity for economic growth. Future development of the tourism sector will depend on the Caribbean enhancing its competitiveness through economic integration and employing strategies for enhancing the value of the current tourism product by strengthening the value chain through linkages with other sectors. Further expansion of the tourism sector into a total service economy by the addition of new services, technologies, and public and private sector investments is also a viable direction in which to proceed. Increasing backward linkages requires increased collaboration and usage of other economic sectors in a tourism destination such that the whole economy is stimulated. Increased linkages with the tourism sector can reduce the level of import content through substitution of foreign imports of both goods and services, with locally produced supplies. Strengthening linkages is therefore an imperative, in the diversification of the sector from its classical sun, sea, and sand model to more strategic niche tourism.

While it is impossible to predict the future of tourism without a proverbial crystal ball, there is enough evidence to suggest that growth, development, and innovation are always on the horizon. The Caribbean tourism product has shown undeniable resilience and strength over the past three decades and is poised to continue to make invaluable contributions to local economies. The sector, however, must be nurtured. Governments, agencies, and individuals alike must be forthright in ensuring that tourism in the Caribbean continues to be a product of which the region can be proud. Tourism is all our business and the returns will be phenomenal and meaningful if investment is made to secure its future.

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