



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

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 of 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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