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Jamaica's Tourism: sun, sea and sand to cultural heritage

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Abstract

Traditionally, Jamaica has been seen and promoted as a sun, sea and sand, winter get-away with foreign-owned, multinational corporations (MNCs) having a controlling interest. Coupled with this, the policies adopted by the state to encourage tourism infrastructural development protected the interests of the MNCs and were seen by many Jamaicans as not being in the best interest of their country. As a result, high levels of resentment existed and at times boiled into open conflict between tourists and the Jamaican working class who viewed tourists as "confused white people." While efforts were made to promote Jamaica's tourism internationally, little was done to promote its benefits locally. Now, Jamaica's tourism industry is at a watershed for even the innovative, largely indigenous and successful "all-inclusive" concept has failed to market Jamaica other than as a sun, sea and sand destination. If Jamaica is to participate actively in global tourism and continue to make its presence felt in the tourism marketplace of the 21st century, indigenous and 'authentic' cultural heritage has to become a part of the tourism product. Also, the tourism industry has to continue to develop avenues through which the Jamaican working class can participate and derive meaningful benefits.

Keywords: Jamaica, tourism, multinational corporation, all-inclusive, cultural heritage

Introduction

Tourism is now and has long been a major industry in Jamaica. It has not, however, always been the same nor can it expect to continue in its current form indefinitely. Change is inevitable and understanding previous developments is one of the best ways to prepare for future possibilities. This study will examine the history of the tourist industry in Jamaica and offer a critical view of the forces of change that will influence future directions.

The development of the tourism industry in Jamaica is characterized by a number of stages and the implementation of some major strategies. Starting in the late 17th century, a few wealthy plantation owners with their families and individual travellers vacationed in the island. Such upper class travel was typical for its time. However, a concerted effort to position Jamaica as a tourist destination only started in 1891 about the time large scale tourism was gaining popularity in Europe and other parts of the world. This was after the island had experienced dramatic declines in its main economic sector, agriculture, and it was recognised that there was a need to diversify the country's economy. The Jamaica International Exhibition in 1891 was seen as a vehicle through which to launch profitable industries, including tourism. However, it was some time, long after the exhibition, that the expected boom in the tourism industry materialized, and particularly after the implementation of a number of incentives and other strategies. One of the incentives that had lasting impact on the industry was the enactment of the Jamaica Hotel Law of 1890 which gave lucrative incentives for the development of hotels.

It was also recognized that marketing and promotion were essential to sustain a tourism industry. Consequently, efforts were made to form a tourist bureau which resulted in the formation of the Jamaica Tourist Authority (JTA) in 1910, the forerunner to the 1922, Tourist Trade Development Board (TTDB) and the 1954, Jamaica Tourist Board (JTB). The mandate of the Authority was to compile and disseminate information on Jamaica as a tourist resort. To this end, it employed various methods to promote Jamaica, primarily as a sun, sea and sand winter-get-away destination. While the JTA had limited success in selling Jamaica to foreigners, it also had great difficulty in selling the tourism concept to the Jamaican 'working class' for they did not perceive the benefits from tourism. As a result, it led to a lack of public acceptance of tourism among some Jamaicans and the development of prejudice. The replacement organization for the JTA and its successor the TTDB, the JTB, continued the marketing of Jamaica as a sun, sea and sand destination.

The Early Days

Starting in the late 17th century, some of the first visitors to visit Jamaica were the wealthy planters and their families who vacationed to escape from the harsh winters in England and to get an overview of their sugar plantations (Booth, 1985; Lumsden, 1991; Martin, 1994; Nelson, 2007; Taylor, 1993, 1987-88). Soon to follow in the planters' footsteps were individual health-seekers from England and North America. Nelson (2007, p.1-2) asserts that, during the 19th century "the West Indies became less important to their European colonisers as slavery came to an end, the sugar economy entered a long period of decline," but European interests in the islands as a destination for tourism persisted. Kingsbury (2005, p.121) argued that "Jamaican tourism began in the late nineteenth century when the island was used and enjoyed as an exotic 'Garden of Eden' health resort by rich American tourists who were transported on steamships owned by banana traders from Boston." According to Martin (1994) and Taylor (1993, 1987-88), the close proximity of Jamaica to North America made it an accessible destination for travellers seeking warm climate and health spas which were being developed. Furthermore, the improvements in transatlantic transportation created opportunities to travel to the region, in particular, the development of steamships which first arrived in the West Indies in 1826. The banana boats coupled with the mail ships provided regular transportation for people who wanted to travel to the West Indies. Although these 'first' visitors were very wealthy, their numbers were few (Booth, 1985).

While the planters lived lavishly when they visited, life was less hospitable for the individual travellers since few facilities existed that catered to their needs (Bigelow, 1851; Lumsden, 1991; Martin, 1994). The conditions at local taverns, inns and lodging houses were deplorable and inadequate. Nelson (2007) claimed that early tourists to the region often stayed with family or friends, but the increased arrivals associated with the advent of steamships, led to the establishment of guesthouses and hotels. It is obvious from these accounts that low number of visitors, and travel and accommodation facilities that were ad hoc in nature and lacking of standards characterized this period. Jamaica's tourism industry then, was in the first two stages of the destination cycle proposed by Butler (1980) or Gee, Choy and Makens' (1984) first stage of the five sociological stages that tourist destinations pass through.

According to Butler (1980), destination areas pass through five stages: exploration, involvement, development, consolidation, stagnation and decline or rejuvenation. At the exploration stage, there are few visitors and, thus, minimal effect on locals; visitors made their own arrangements; there was an absence of purpose-built tourist facilities; and limited contacts between tourists and locals. At the involvement stage, there is an increase in visitor numbers; the local population becomes involved by providing purpose-built facilities; there is advertising of the destination by a tourism organization; and the infrastructure is improved to

satisfy tourists' demands. Similarly, Gee et al. (1984) argued that destinations pass through five sociological stages: discovery, developmental, conflict, confrontation and destruction. The discovery stage is marked by a low level of visitors and impacts.

The Jamaica Exhibition of 1891

Although it was usual for tourists or travellers from Europe and North America to visit Jamaica from as early as the 17th century, many regard the hosting of the 1891 international trade exhibition in Kingston, as the first state-sponsored effort to develop tourism as a viable source of income for Jamaica (Booth, 1985; Lumsden, 1991; Martin, 1994). The exhibition was held on the Quebec Lodge (site) in Kingston and ran from January 27th to May 2nd (Booth, 1985; Lumsden, 1991; Martin, 1994). The event was promoted locally and internationally by committees that were set up in a number of cities in Europe and North America (Booth, 1985; Martin, 1994). Exhibits came from North America, Europe and other West Indian islands, but the most magnificent exhibit came from Canada, which was the only country with its own separate exhibition building (Booth, 1985; Lumsden, 1991; Martin, 1994). The European countries that were represented included Sweden, Norway, Belgium, Germany, Russia, Holland, Switzerland, Greece, and France. Reports also showed that displays came from as far away as India and Sri Lanka (Booth, 1985). Over 304,000 people attended the exhibition over the 14-week period (Lumsden, 1991; Martin, 1994). It had been hoped that, for first-time, visitors to Jamaica attending the exhibition “would make known the advantages of Jamaica as a winter resort to others and thus lay the foundation for a steady and increasing flow of tourists to the island” (Handbook of Jamaica cited in Booth 1985, p.47; Martin, 1994).

The emphasis of the Jamaica Exhibition was on the development of new and profitable industries, and one focus was to showcase Jamaica as a ‘sunny’ resort destination (Booth, 1985; Lumsden, 1991; Martin, 1994). “There was a great need to develop new industries and money earning schemes if the island was to pull itself out of the economic straits in which it found itself” (Lumsden, 1991, p.17). At the same time, many people did not want to see the economy tied exclusively to any other agricultural product fearing a repeat of what had happened to the sugar industry. Thus, the promotion of Jamaica as a tourist destination was seen as an important strategic move. The exhibition encouraged the development of tourism infrastructure, such as hotels, mainly in Kingston and along the North Coast region of Jamaica (Lumsden, 1991; Martin, 1994).

It would, however, take more than an exhibition for the Jamaican tourism industry to materialize. The exhibition had no startling impact on Jamaica’s economy as a whole, nor was there any “immediate tourist boom and the new hotels slid into bankruptcy” (Lumsden, 1991, p.21). The reasons why a tourism boom did not occur following the exhibition were three-fold (Booth, 1985; Lumsden, 1991). First, guests who visited hotels often discouraged others from

following suit because no set standard or regulation existed in these hotels, resulting in overcharging of guests for very poor facilities and service. Second, there was a lack of promotion and marketing of Jamaica in the tourist-generating regions. Third, there were criticisms of the filthy environment in Kingston and the lack of attractions. This situation arose in spite of the Jamaica Hotel Law of 1890 which was enacted, with the principal aims of assuring adequate and decent lodging for visitors to the exhibition and creating a hotel industry. The Hotel Law cost the country greatly through lucrative incentives for the development of hotels that would be completed in time for visitors to the exhibition (Booth, 1985; Martin, 1994). "This law authorized the government to guarantee the principal plus three per cent interest on all debentures issued by the hotel companies. These new companies would also be permitted to import all their materials duty free" (Booth, 1985, p.43). The Law was not without its critics at the time for it "pledged the island's resources [even] if the hotel went bankrupt" (Booth, 1985, p.43). The foreign investors in the hotels had no compelling reason to make the ventures successful since they were guaranteed a profit on their investment even in the event they went bankrupt (Booth, 1985; Martin, 1994). The Jamaica Hotels Law was, therefore, not in the interest of the country, but catered to a limited number of foreign investors.

Five hotels were built as a result of the 1890 Hotel Law, three in Kingston and two in rural parishes on the North Coast. Of the three in Kingston, two catered to foreign visitors, while the other targeted locals (Booth, 1985; Lumsden, 1991; Martin, 1994). The justification of the two hotels outside of Kingston lay in the hope that visitors to the exhibition would travel out of Kingston and take advantage of the extensive improvements to roads and railway that were made to make the countryside accessible to foreign visitors attending the exhibition. However, by 1895, the terms of the Hotel Law forced the government to acquire the foreign-owned hotels in Kingston, the Myrtle Bank and Constant Spring (Martin, 1994). This became necessary because mismanagement and lack of business plagued the hotels for, "the hotels with all the American management energy and influence [were] disastrous failures" (Booth, 1985, p.49). Ironically, it was foreign managers and staff that were responsible for 'mismanaging' the hotels. This dominance by foreigners in Jamaica's tourism system continued throughout the development of the industry into the 1970s.

Marketing and Promotion

The state had been the main motivator behind the 1891 exhibition as a medium for promoting Jamaica abroad as a 'winter-getaway' tourist destination (Martin, 1994). However, after the exhibition, there was no immediate organized follow-up in promoting Jamaica. The need for a tourist bureau did not appear to be significant in Jamaica given the 'smallness' of the island. Interest and concerns were for the development of 'better' tourist products (attractions, accommodations and attitudes) and in distributing brochures abroad as the sole means of advertising. Though the railway system and rural roads were expanded at the time of the exhibition to facilitate visitors travelling to the interior of Jamaica, finding a way to the beach on the North Coast region was probably the only exploration that visitors engaged in (Lumsden, 1991). While efforts were initially spent on informing visitors locally and abroad, nothing was done to promote the benefits of tourism among the Jamaican 'working class' (Martin, 1994).

The need for a marketing and promotion organization was eventually recognized and in 1903 an attempt was made to form a tourist bureau (Martin, 1994; Taylor, 1987-88). This first attempt produced nothing, but by 1910 the Jamaica Tourist Authority (JTA) a private initiative materialized, the forerunner of the Tourist Trade Development Board (TTDB) and the Jamaica Tourist Board (JTB) (Martin, 1994). The main functions of the JTA were to publicize Jamaica and provide information to visitors and prospective visitors to the island. The mostly 'white' Kingston-based business people who had tourism interests and derived benefits continued to focus the promotion of Jamaica as a sun, sea and sand winter get-away destination. Martin (1994, p.29) contended that the JTA's "primary purpose was to enhance the claims of Jamaica as a health and pleasure resort." The JTA initially operated from Kingston, Mandeville, Montego Bay and Port Antonio in Jamaica and by 1914 it had representation in Canada and the United Kingdom (Martin, 1994; Taylor, 1987-88). The JTA advertised on billboards located in railway stations, stores and other public places, while steamship offices and tourist agencies distributed its brochures on Jamaica (Martin, 1994). One of the materials it published was an illustrated guidebook on Jamaica with data on recommended places to visit and other important information. The JTA also focused its attention on the regulation and licensing of taxis, signs along roadways and the preservation of natural scenic areas. Not satisfied with the seasonality of the industry, the JTA targeted teachers and students abroad, urging them to spend their summer vacation in Jamaica.

Selling the tourism concept to local people was one of the challenges faced by the JTA in the early days of tourism promotion. It was seen as an insurmountable task since the Jamaican 'working class' did not see themselves deriving any benefits from tourism. It therefore led to a lack of public acceptance of tourism and the development of prejudice (Martin, 1994; Taylor, 1987-88). The

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, 1987-88). The feeling of the Jamaican 'working class' towards tourism is summed up in the following excerpt:

Tourist! Cou yah sah! Dem is a confusion set of people. *What we want dem for? – – – An what good dem going to do?* All them idle buckra drive and ride over de mountains in dem buggy and harse wit all dem 'surance, and look down upon we poor naygurs. *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, 1987-88, p.44)

Although these words were uttered over 100 years ago, a large number of the Jamaican 'working class' still feel the same way about the tourism industry. This excerpt illustrates the high level of resentment that existed.

Undaunted by the poor response to the JTA initiatives, the government of Jamaica established the TTDB in 1922. This board was charged with the mandate "to make inquiries and to collect such information of Jamaica as a tourist resort, and for such other purposes as in the judgment of the Board will materially facilitate and increase the tourist traffic to and from Jamaica" (Martin 1994:30). While the former JTA obtained its operating fund from membership subscriptions (Taylor, 1987-88), the TTDB received grants from public funds for its programmes. The TTDB continued with an aggressive advertising and publicity campaign through various methods in Jamaica and overseas.

In 1954, the government of Jamaica abolished the TTDB and established the Jamaica Tourist Board (JTB), a statutory organization with more powers than its predecessors, to promote tourism for the island (Martin, 1994). The JTB operated out of the Ministry of Trade and Industry initially. Presently, it is under the jurisdiction of the Ministry of Tourism (MOT) which provides an annual budget for its operation. Offices are maintained in Jamaica and in some major tourist generating regions in Europe and North America. While membership in the JTA was by individual subscription, the JTB consists of personnel from different segments of the tourism system including hotels, airlines, travel agents and ground transportation. Throughout the 1960s, marketing continued to focus on the sun, sea and sand winter get-away image because few attractions had been developed that provided an alternative experience. This placed Jamaica in direct competition with a number of other Caribbean destinations that were marketing the same packages. Tourists were still seen as foreign 'white' people. The Jamaican 'working class' did not see themselves as tourists vacationing at local hotels because marketing efforts did not target them.

Major Tourism Developments

Foreign-owned MNCs continued to dominate Jamaica's tourism industry even after the island gained independence from Britain in 1962. Opportunities for small local investors in the industry continued to be limited. There also continued to be limited access for locals to the various properties since hotels did not target Jamaicans as guests. The world continued to see Jamaica primarily as a winter get-away destination (Henry, 1987, July 31; Martin, 1994). Few attractions that did not focus on the sun, sea and sand were available for visitors. As a result, Jamaica's tourism industry suffered from a large variation between the tourist season and the off-season with numerous properties closed during part of the year. However, the industry continued to grow in terms of the number of visitors, the amount of accommodation available and revenue. Tourist arrivals moved from 191,303 in 1954 to 396,347 in 1968, while tourists' expenditure moved from US\$28 million to US\$87.8 million during the same period (Martin, 1994). Taylor (1993) claimed that accommodation had a hard time catching up with demand, although the number of beds increased from 5,800 in 1959 to 8,413 in 1969. According to Martin (1994) and Henry (1987, July 31), the factors that contributed to the growth and development of Jamaica's tourism industry in the 1960s were:

- the introduction of air travel to the island which resulted in improved methods of transportation and reduced cost
- the close proximity of Jamaica to the large North American tourists' market
- the rapid growth in disposable income in North America
- the Cuban revolution of 1959 and the subsequent US embargo that included the suspension of travel by US citizens to the island
- the inauguration in 1969 of a national airline, Air Jamaica
- tax incentives and duty-free imports of building materials and equipment for hotels.

The image of Jamaica as a sun, sea and sand tourism destination continued and is evident in its spatial development. The main tourist centres or resort areas (Negril, Montego Bay, Ocho Rios and Port Antonio) were developed along the North Coast because of the white-sand beaches and pleasant weather. Apart from the North Coast centres, Kingston, the capital of Jamaica and a major commercial and cultural centre, also attracted a substantial number of tourists. However, the ability for Kingston to attract international tourists has decreased over the years due to serious social problems in the city. The unattractiveness of Kingston to large numbers of tourists has therefore dealt a blow to the diversification of Jamaica's tourism product.

To encourage accommodation development, which was in short supply in the 1960s, the state offered loans, loan guarantees and lands to developers through the 1968 Hotel (Incentives) Act. The Act was intended to increase the island's

accommodation capacity and use tourism as a means of rural development. Under the Act, approved hotels received a 'tax holiday' of 10-15 years, depending on location. Duty was also lifted on all imported materials and equipment. An analysis of the industry shows the number of beds in the accommodation subsector increasing from 8,413 beds in 1969 to 17,000 in 1979; today it is over 60,000 (JTB, 2009). Thus, it could be concluded that the Act worked in stimulating the growth in the accommodation sector.

A significant aspect of the Act is that new hotels built in undeveloped areas enjoyed a 15-year income tax break, while those in already established tourist centres were given a 10-year break. Henry (1987, July 31) argued that the profoundness of this lies in its discriminatory aspect. The Act discriminates in favour of developers who venture into "area[s] which have tourist potential but are presently undeveloped" (Henry, 1987, July 31). It was intended to promote government development strategies by using tourism as a means for rural development, thus increasing local participation and spreading the benefits of tourism. However, the same could not be said about stimulating growth in new regions of the country. The success of the Act in that regard is doubtful. A case in point is the New Falmouth development on the periphery of Falmouth which started in the late 1960s. It did not go beyond the building of one hotel, the 350-room Trelawny Beach Hotel, now Breezes Trelawny. It was not until 2000 that another hotel, the 96-room FDR Pebbles, opened and by 2001 several other developments were in different stages of development (JTB, 2001).

A study of the tourism sector carried out by the state in the early 1970s revealed the following major concerns (Henry, 1987, July 31):

- Hotels were underutilized because the supply of accommodation exceeded demand
- The level of foreign ownership of hotels was very high
- Import content in the hotel sub-sector was high
- The level of hostility by Jamaicans against tourism and tourists posed a threat to the survival of the industry.

These concerns revealed that all was not well in the local tourism industry.

To address the issues highlighted by the study, the state developed a policy of 'Growth Through Integration' aimed at better integrating the tourism sector with the social and economic life of the country (Henry, 1987, July 31). This policy hoped to achieve the following objectives: increased linkages between the tourist sector and other sectors, government participation in the ownership of hotels, encourage domestic tourism, and foster greater Jamaican participation in the industry.

Strategies that were implemented to achieve the above objectives included (Henry, 1987, July 31; Martin, 1994):

- Establishing training schemes to provide an adequate number of skilled workers for the industry

- The establishment of the Tourism Product Development Company (TPDCo) with a mandate to improve product quality
- The establishment of the National Hotel Supplies to buy and distribute foodstuff to the hotels and to encourage them to use local goods
- The banning of certain imported items readily available locally in order to strengthen linkages between the tourist sector and other sectors
- The establishment of a domestic tourism programme to encourage Jamaicans to holiday in their own country.

The 1970s also saw a drastic shift in the JTB marketing and promotional campaigns. The aims were to diversify Jamaica's image in the marketplace and to "secure a greater appreciation, at home, for tourism as a legitimate activity for Jamaicans" (Martin, 1994, p.45). A number of programmes were developed to facilitate these aims. Jamaica was now being marketed as a year-round tourist destination with a variety of experiences. The marketing theme 'We're more than a beach, we're a country' was implemented to lead the campaign. This new theme set Jamaica's marketing image apart from most of the other Caribbean islands that were marketed only as beach resorts. It "gave [Jamaica] an additional quality and forced the market to look at Jamaica's other inherent qualities" (Martin, 1994, p.45). Tourists were encouraged to explore 'more' of Jamaica through the 'discover Jamaica program' and the Jippa Jappa festival that took cultural performances into the hotels to enrich visitors' experiences.

In addition, a number of strategies were implemented that created opportunities and encouraged the 'working class' to participate in tourism. Jamaican residents received special reduced rates when they vacationed locally, while companies received tax credits if they gave employees incentives to vacation locally. The Resort Cottages (Incentives) Act of 1972, which gave generous tax and duty relief to developers of accommodations, also helped to induce 'small' local entrepreneurs. These strategies helped to change local attitudes toward tourism because the 'working class' could now enjoy the destinations as well as opportunities to invest in the industry which saw the mushrooming of several boutique hotels. The marketing strategies at this time placed increased emphasis on product improvement, advertising, promotion and public relations.

Another strategy implemented by the state was the restructuring of a number of tourism agencies and the creation of others. One of the new agencies that was to have a profound impact on the tourism industry was the National Hotel and Properties Limited. The mandate of this agency was to buy, lease, construct and manage government-owned hotels (Henry, 1987, July 31; Martin, 1994). This radical policy shift by the government in the 1970s towards direct ownership and operation of hotels was brought on by the closure of several hotels and concern that many more were vulnerable. The closures were due to a sharp

decline in stay-over visitors that resulted in low room occupancy in hotels (Stupart, 1996). The decline in tourist arrivals was attributed to a world recession that affected Jamaica's principal tourists' market, the United States, and because of domestic problems in Jamaica. The state was not legally bound to buy the financially troubled properties, as was the case earlier after the Jamaica Exhibition in 1891. Common sense dictated however, that the state keep the hotels open in order to preserve jobs and maintain accommodation capacity in the event of a recovery in the tourism industry (Martin, 1994).

The establishment of the Ministry of Tourism at the beginning of the 1980s illustrated the seriousness of the commitment of the Jamaican government to tourism. Tourism was seen as being "vital to the economic well-being of [Jamaica]" (Henry, 1987, July 31). The government expected tourism to contribute up to 40 per cent of the island's foreign exchange earnings, a figure that was realized in 1983 (Table 1). Table 1 also shows that in 2008 tourism contributed approximately US\$1,975,519,000 to the Jamaican economy. Since 1980, tourism has shown tremendous growth in comparison to Jamaica's other major foreign currency earners (Figure 1). Tourism has remained the number one foreign exchange earner for Jamaica since 1983 and, as such, is very important to Jamaica's economy.

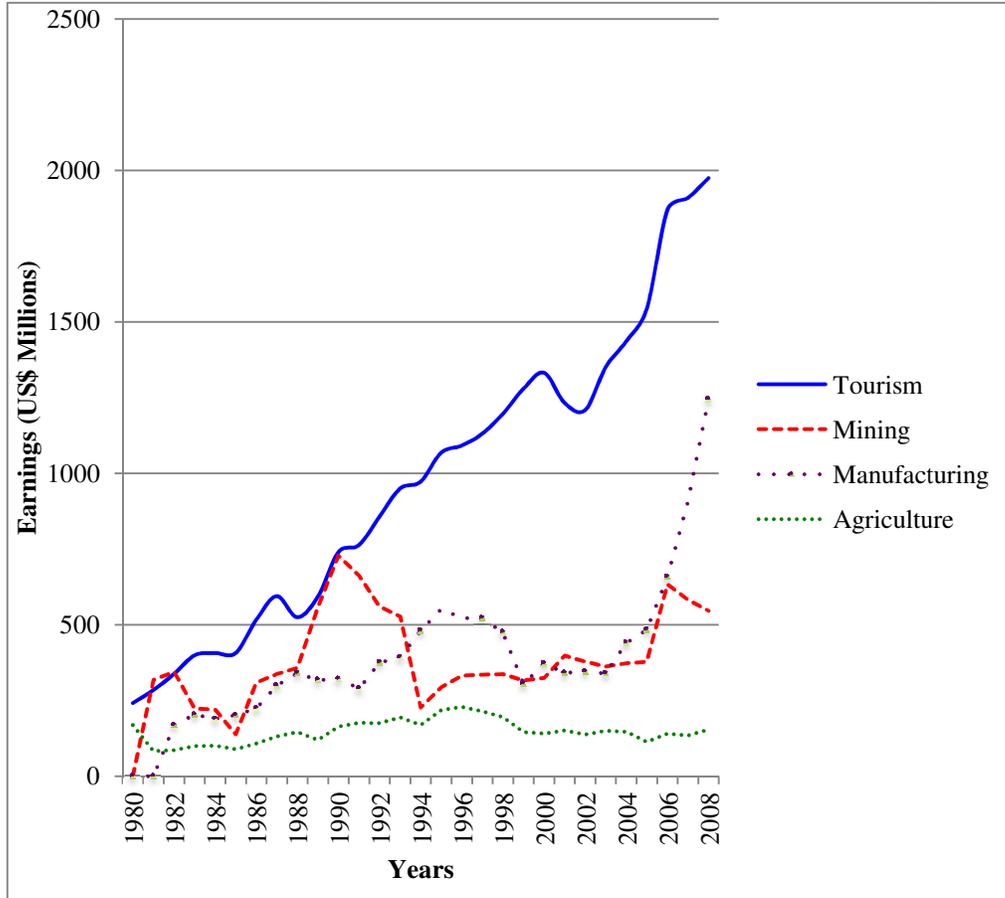
At the beginning of the 1980s, a change in political administration witnessed a move by the Jamaican government out of the hotel operations business by leasing or selling the ones it owned to private interests (Martin, 1994). The shift resulted in increased local participation in hotel ownership and the development and consolidation of a number of indigenous Jamaican-owned multinational corporations (MNCs) such as Sandals and SuperClubs, the largest and second largest hotel chains in Jamaica and the Caribbean respectively (Brown, 2008, December 14). The shift also saw a decline in hotels offering the European Plan (EP) and American Plan (AP) models and a corresponding increase in the 'all-inclusive' model. As a result, throughout the 1980s, 1990s and up to about 2005, Jamaican-owned companies accounted for the majority of all accommodation on the island. These home-grown MNCs can now be found throughout the Caribbean, and Central and South America. Presently, Sandals

Table 1: Jamaica's Major Foreign Exchange Earners (US\$ Millions) 1980 – 2008

Years	Tourism	%	Mining	%	Manufacturing	%	Agriculture	%	Jamaica
1980	241.7		N/A		N/A		169.4		411.1
1981	284.3		319.0		N/A		83.2		686.5
1982	337.8	36.0	345.2	36.8	169.4	18.0	86.6	9.2	939.0
1983	399.2	43.0	223.9	24.1	203.7	22.0	100.5	10.8	927.3
1984	406.6	44.3	220.2	24.0	189.5	20.7	101.2	11.0	917.5
1985	406.8	48.6	138.7	16.6	201.8	24.1	89.3	10.7	836.6
1986	516.0	44.6	309.0	26.7	224.1	19.4	108.7	9.4	1,157.8
1987	595.0	43.6	337.3	24.7	299.4	22.0	132.1	9.7	1,363.8
1988	525.0	38.3	358.9	26.2	340.9	24.9	146.3	10.7	1,371.1
1989	593.0	37.3	557.7	35.1	318.1	20.0	120.0	7.6	1,588.8
1990	740.0	37.9	728.3	37.3	321.0	16.4	164.0	8.4	1,953.3
1991	764.0	40.4	662.0	35.0	290.1	15.3	177.0	9.3	1,893.1
1992	858.0	43.6	559.9	28.4	375.8	19.1	176.1	8.9	1,969.8
1993	950.0	46.0	527.9	25.6	393.1	19.0	195.1	9.4	2,066.1
1994	973.0	52.6	227.0	12.3	480.5	26.0	169.8	9.2	1,850.3
1995	1,068.5	50.0	294.6	13.8	553.4	25.9	218.5	10.2	2,135.0
1996	1,092.2	50.2	332.8	15.3	522.6	24.0	229.0	10.5	2,176.6
1997	1,131.4	51.3	335.6	15.2	522.0	23.7	214.7	9.7	2,203.7
1998	1,197.1	54.3	337.1	15.3	475.6	21.6	195.7	8.9	2,205.5
1999	1,279.5	62.5	316.4	15.5	304.7	14.9	145.9	7.1	2,046.5
2000	1,332.6	61.4	325.4	15.0	372.6	17.2	140.8	6.5	2,171.4
2001	1,233.0	58.0	398.9	18.8	341.5	16.1	151.8	7.1	2,125.2
2002	1,209.5	58.4	378.5	18.3	345.6	16.7	138.0	6.7	2,071.6
2003	1,351.1	61.3	363.0	16.5	339.8	15.4	150.4	6.8	2,204.3
2004	1,436.6	59.9	372.9	15.6	440.7	18.4	147.0	6.1	2,397.2
2005	1,545.1	61.3	378.7	15.0	483.4	19.2	114.2	4.5	2,521.4
2006	1,870.6	56.6	634.2	19.2	658.0	19.9	140.8	4.3	3,303.6
2007	1,910.1	54.1	583.3	16.5	905.4	25.6	134.4	3.8	3,533.2
2008	1,975.5	50.4	546.6	13.9	1,244.8	31.7	154.5	3.9	3,921.4

Source: PIOJ (Planning Institute of Jamaica). (1999-2009)

Figure 1
Jamaica's Major Foreign Exchange Earners (US\$Millions) 1980 – 2008



Source: PIOJ (Planning Institute of Jamaica). (1999-2009)

International employs over 10,000 persons and operates nineteen properties, twelve in Jamaica and seven in some other Caribbean islands (Edwards, 2009, September 4). On the other hand, SuperClubs operates nine properties in Jamaica, three in Brazil, one in Panama and two in other Caribbean islands.

The All-Inclusive Model

In 1978, SuperClubs, a Jamaican-controlled multinational hotel chain, initiated the novel 'all-inclusive' model at the Couples Hotel in Ocho Rios. The 'all-inclusive' model, which was adapted for the Jamaican context, was inspired by the concept which was pioneered in 1950 at the Club Méditerranée resort on the Spanish island of Mallorca. The model has been praised for a number of reasons.

'All-inclusive' has increased the share of tourism for the Caribbean and maintained a strong image in the marketplace (Gill, 1994). Poon (1988) argued that it gave the Caribbean hotel sector the competitive advantage by carving out a part of the international tourism market. Although the concept is indigenous and was monopolized by Jamaican-owned MNCs, no radical shift in Jamaica's tourism image occurred. The data shows that the number of beds in Jamaica's main coastal resorts (Montego Bay, Ocho Rios and Negril) increased dramatically over the years while, for the other centres, increase is marginal (JTB, 2009). The sun, sea and sand image still prevailed, even though scope exists for cultural heritage as discussed in a number of studies including the Tourism Master Plan (Commonwealth Secretariat, 2002).

The 'all-inclusive' model is seen as a cash-less 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 (Gill, 1994). The consumer does not have to worry about cash during or after the vacation since the package is prepaid, and the 'all-inclusive' environment is perceived as safe from crime and harassment. It is also popular among travel agents since the commission on transactions is larger. 'All-inclusives' are 'social equalizers', "there are no big-spenders and little-spenders at an 'all-inclusive'.... Whether you're president of General Motors and I'm a baggage-handler...I can order my Johnnie Walker Black the same way you can" (Frank Rance, president FDR Holidays LTD, cited in Gill, 1994, p.37). Since its inception in 1978, the 'all-inclusive' 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 Jamaica (JTB, 2009).

'All-inclusive' is, however, not without its detractors. They see it in the same light as when foreign-owned MNCs had a controlling interest in the tourism industry. It promotes 'enclave' tourism development that is not 'sustainable.' There is limited integration between 'all-inclusive' properties and other businesses and the local communities. Other criticisms levelled against 'all-inclusive' include (Poon, 1988): it results in greater economic leakage; it prevents the tourist dollars from being filtered into the wider community, therefore lessening the multiplier effect; and it prevents guests from experiencing the cultural experience at the destination since they seldom interact with the community.

The Cultural Heritage Turn

The turn of the century marked several developments that impacted the local tourism industry. Chief among these were the growth in the accommodation sector due mainly to the entry of a number of international hotel chains and the publication of Jamaica's first Tourism Master Plan. The Jamaica Tourist Board (2001) statistics showed that, in 2000, the sector had 23,630 rooms. Today it has

over 30,000 rooms and continues to grow. The growth is attributed to the expansion of a number of Jamaican MNCs, including Sandals Resort International and SuperClubs and the entry of a number of other major international brands such as Ritz Carlton, Iberostar, Bahia Principe, Secrets, Fiesta and Riu. With the exception of the Ritz Carlton, the other new entrants are Spanish-owned MNCs based in Mallorca, Spain. Since 2000, these hotel chains have invested approximately US\$1.8 billion in projects in Jamaica, adding approximately 10,000 rooms and creating about 40,000 jobs directly (Edwards, 2008, April 18; Rose, October 25, 2009). The investment of the Spanish hotel chains resulted in a shift in the ownership structure in tourism assets in Jamaica. According to Rose (October 25, 2009) quoting Jamaica's Minister of Tourism, "Foreign investors now own 60 per cent of tourism assets... just a few years [before] it was Jamaicans who held that share."

The entry of the Spanish hotels has been heavily criticized in some quarters. Salmon (2008, September) referred to it as "the second Spanish conquest of Jamaica," having "little regard for local laws, customs and mores" similar to what happened in 1494 when Columbus landed and caused the annihilation of the Tainos. Salmon (2008, September) claimed that they ignore and violate environmental regulations, building codes and permits, bribe public officials and seem to cast a spell on the politicians. Also, they are said to have damaged Jamaica's coastline irreparably. They have been criticized for doing more harm than good to Jamaica's tourism product because they are seen to cater to the "down-market" visitors whereas Jamaica is repositioning itself as a mid to high-end destination ("Spanish hotels do" April 25, 2008). As a result, their operations are said to be dragging down hotel rates. On the other hand, some of the Spanish hoteliers are accusing the National Environment and Planning Agency¹ (NEPA) for being a stumbling block to their developments (Edwards, 2008, April 18; Silvera, 2008, April 19). They claimed NEPA takes an extra-ordinarily long time to issue the relevant development permits.

Another development, the Tourism Master Plan has the potential for a huge impact on Jamaica's tourism industry (Commonwealth Secretariat, 2002). The plan has three main aims: 1) to provide a comprehensive planning framework; 2) to elaborate a vision of the future direction, shape and composition of the industry; and 3) to detail the timing and sequencing of the major programmes, roles and responsibilities of key stakeholders (Commonwealth Secretariat, 2002). The stated objective of the Master Plan is to move the tourism industry from its current unsustainable mode on to a path of sustainability. Moreover, the plan seeks to guide the industry's development by creating a strategic vision for its growth and development and establishing an enabling environment. The five main objectives that were identified to achieve sustainable

¹ The National Environment and Planning Agency is the regulatory agency that issues environment and planning permits for developments such as hotels.

development in the industry are: 1) the development of a sustainable market position based on Jamaica's natural, cultural, historic and built heritage; 2) enhancing the visitor experience through increasing the types and quality of attractions; 3) fostering a bottom-up planning approach to tourism development where communities play major roles in defining, developing and managing the tourism experience; 4) building an inclusive industry that not only benefits a few but one that benefits the Jamaican people and the country as a whole; and, 5) improving the contribution of the industry to the preservation of the natural environment (Commonwealth Secretariat, 2002, p.vi).

In addition, the development of Jamaica's outstanding heritage assets is seen as a central plank in the master plan for it "will help to differentiate Jamaica from the vast majority of Caribbean islands" (Commonwealth Secretariat, 2002, p.96). It is perceived as the key to sustainable development as it should contribute to the product reflecting the culture and aspirations of the Jamaican people. However, at the point it is not known how much cultural heritage will help move tourism towards a path of sustainability. The four major priority areas for the development of the built heritage, based on the criteria of heritage significance, tourism potential, scale and accessibility, are Port Royal, Spanish Town, Falmouth and Seville. According to the plan, these priority sites are of international heritage significance and primary tourism potential. The plan also identified possible heritage themes which include: natural wonders, slavery and emancipation, the Maroons, forts and fortifications, churches, great houses, and industrial heritage among others. Of all the historic towns in Jamaica, Falmouth has the greatest scope to develop its distinctive built heritage into an internationally attractive heritage destination (Commonwealth Secretariat, 2002). The Tourism Master Plan pointed to the fact that parallels have been drawn between Falmouth and Williamsburg in Virginia, which was developed into a very successful tourism attraction. "The strategic significance of Falmouth for tourism is that it would be an internationally recognized heritage asset easily accessible to the majority of sun, sand and sea tourists who visit the north coast" given its strategic location between two major tourists' resorts, Ocho Rios and Montego Bay (Commonwealth Secretariat, 2002, p.106).

Conclusion

One of the purposes of the Jamaica International Exhibition in 1891 was to launch the island's tourism industry. It was deemed necessary because the island was undergoing a dramatic decline in its main economic sector, agriculture. The state introduced lucrative incentives in order to attract foreign investment for tourism infrastructure, which developed mainly in the capital city and along the island's North Coast region. Jamaica was seen and promoted as a sun, sea and sand, winter-getaway destination, dominated by foreign owned MNCs with little effort been made to integrate local entrepreneurs and working class in the industry.

Although the industry experienced tremendous growth over the years, changes to Jamaica's image were insignificant. However, the economic recession of the 1970s and shifts in government policies and philosophies witness the exodus of several foreign owned MNCs that controlled the majority of hotels. Further developments in the 1970s included the growth and consolidation of a number of locally controlled MNCs that contextualized and introduced the all-inclusive vacation experience which has been credited for giving Caribbean tourism a competitive edge.

The turn of the century witnessed several developments that are expected to have lasting impacts on the island's tourism industry. Foremost, a number of foreign owned MNCs of Spanish origin entered the accommodation sector and it resulted in an increase of approximately 50 per cent in hotel rooms. These new entrants have been criticized for causing further environmental degradation of the natural environment. Also, there was the publication of Jamaica's first tourism master plan in 2002. The plan outlines a number of initiatives to prevent further degradation of the environment and to move Jamaica's tourism on a path of sustainable growth. One of the areas of focus of the plan is the development of the country's heritage assets to reposition the island and set it apart from other Caribbean destinations. To this end, four priority sites of international heritage significance were identified which include Falmouth, Port Royal, Seville and Spanish Town. The case of Jamaica proves that deliberate initiatives and actions can be taken to reposition destinations to respond to contemporary trend in the tourism industry.

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