

TOURISM AND POPULAR PERCEPTIONS: MAPPING JAMAICAN ATTITUDES

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ABSTRACT

The growth path for the Jamaican hospitality industry points in the direction of greater involvement of communities in the creation of new attractions and in the delivery of cultural products and services. Critical to the success of this approach is the attitude of the Jamaican people to tourism and to visitors of all nationalities and backgrounds. Drawing on a series of national empirical studies as well as on other research data, the chapter seeks to map the contours of public perceptions about key issues such as crime and violence, visitor harassment, the all-inclusive concept, Jamaicans in Jamaican hotels, the quality of local infrastructure, and other factors affecting the future of the industry. Among the key conclusions is the need for a more systematic integration of ordinary Jamaicans and Jamaican communities in the marketing and delivery of tourism products and services. And, critical to this approach is an urgent need for innovative public education and industry management strategies. The chapter provides a Jamaican case study with clear implications for building a more sustainable industry in the wider Caribbean region.

Introduction

For the economies of the Caribbean region, tourism and the related hospitality services constitute an industry of immense and growing importance. Arrays of mega-liners cruise the waters of the region on a weekly basis. The Caribbean remains the most popular cruise destination globally, with more than 42% of liners sailing to the region. The nearest competitor, Europe, accounts for just 20% of global cruises.

Yet it is visits by the longer staying 'stop-over' passengers that represent the real measure of stable growth of the industry within the region. Recording a growth rate of 4% in 1999, stop-over arrivals in the Caribbean continues to increase, with Cuba (17%),

the Dominican Republic (14%) and the US Virgin Islands (10%) in the lead.

The regional hospitality industry is thus becoming increasingly competitive. Each territory offers sun, sand and a wide range of good quality hotel accommodation. What will distinguish one destination from the other will be not so much the physical infrastructure, but the special warmth of the people and the uniqueness of the cultural, culinary and environmental attractions. For people to be happy with visitors, they have to be comfortable within themselves and their social environments. While many countries devote millions of US dollars to attract overseas visitor, little or no investment is made in developing public understanding and acceptance of the industry and getting a better understanding of how tourism itself survives. How much do we know of the attitudes of Caribbean people to tourists and to tourism?

Drawing on a series of empirical studies, this article charts the wide range of public opinions, attitudes and perceptions about tourism held by people within and outside of the industry. Using Jamaica as a case study, it provides survey data on such issues as attitudes to visitor harassment, perception of the impact of crime and violence on the industry, views of the impact of all-inclusive properties and the treatment of nationals in their own hospitality industry. In-depth, qualitative studies of specific focus group and interview respondents also help to provide a textured examination of people's perception of this vital industry.

This article makes the case for greater involvement of people at all levels of the hospitality industry and for widening the range of beneficiaries. It also argues for greater planning for the projected growth of the sector and for systematic measures to address a growing resentment about the extremes of wealth and poverty jostling side by side in the main resort communities. This case study has clear implications for building a more sustainable hospitality industry regionally as advocated by Boxill and Maerk (2000: 14-15).

Definitions and Research Methods

The findings of the study reported here result from a national research project commissioned by the Jamaica Tourist Board in 1999

and re-validated by further research in February and March 2001. The study aimed to unearth attitudes of people islandwide, in both tourism resort areas and areas without a history of involvement in the industry. Over the three-month period of the study, a total of 1,025 respondents provided data in the islandwide questionnaire survey. Qualitative data collection was done through focus group discussions, community meetings, and interviews with key stakeholder groups and individuals across the country. A total of nine focus group discussions were held in different parts of the country. Three community meetings and in-depth interviews with 12 industry specialists were also conducted.¹

In this study, the term perception refers to people's instinctive feelings, built up over time. While perceptions can often coalesce into attitude, the latter refers to more consciously held responses that are likely to influence behaviour patterns.

People and the Economics of the Industry

According to an artisan and Rastafarian interviewed in Rio Bueno, Trelawny on Jamaica's north coast, "(H)otels are not the main reason why people come to Jamaica. Good hotels are all over the world. What makes the tourist industry special to visitors is the hospitality of the Jamaican people, and the fresh unique, natural products, music, culture and other services offered by Jamaicans..."

This perspective embodies the growing recognition that tourism is mainly about people and their relationships and interface with other people from all over the world. The focus of the above quoted comment was a call by this active citizen for the tourism authorities to broaden what he perceives as their approach of "playing up to the money gods owning big hotels". He complains of a corresponding neglect of the "creative people" who are also to be seen as real builders of the industry.

The same focus group member, owner of a craft stall, felt strongly that it is Jamaicans like himself, an artistic rastaman, who reflected the authentic base of the tourism industry. He said it was

1 While some key aspects of the findings are presented here, the full study is available in the publication: *People and Tourism: Issues and Attitudes in the Jamaican Hospitality Industry*, Arawak Publications, Kingston, 2001.

thousands of similar Jamaicans who tried to provide a real taste of the country for visitors, who offered unique natural products and warm hospitality to the tourists. These were the people who really represented the Jamaican tourism product and were the ones who were most photographed and displayed on JTB and hotel posters. They are the inventors of the jerk seasoning and of the music and craft so much sought out by visitors. Despite this reality of using such people to sell the industry abroad, the authorities and government made little effort to directly assist these producers.

Popular involvement in the tourism business, however, is a subject fraught with more complications and contradictions than is immediately apparent. An urban youth, expressing his frustration during another focus group discussion, observed that while people were being asked to be nice to the tourists, any such attempt gives rise to Police charges of tourist harassment.

If we Jamaicans try to be friendly to tourists, other people say we are harassing them or selling them drugs.... They shouldn't use one person to judge all of us. Jamaicans should be free to ask tourists about their country without police harassing us.

In the discussion, there was also recognition that "some people (are) not used to tourists", and an appeal for tourists to be "treated in a good way" ... "They should be comfortable around you, so they will come back, then they will go out and tell other people about how beautiful it is here..." The problem was seen as people who were "not educated about how to market tourism... to know enough about tourism and how they can help the economy ... Some don't know and some don't care..." Another youth said "In non-tourist areas, people treat them (tourists) good... friendly."

The contradiction here is that while many tourists and local residents have mutual desires to interact, there is always a danger of one trying to take advantage of the other in some circumstances. The message in the foregoing comment is the need for every citizen to be educated about how to market tourism, its importance to the economy and why they should care about the industry. In the focus group meeting conducted in Bluefields, Westmoreland, the downside of popular interaction with some visitors was raised:

One member of the group felt strongly that while there is a place for those tourists from the lower-end of the tourism market, this is the sector most involved in the drug and prostitution business. "Most of them come to crash." Other participants pointed out that it was these visitors who brought some income into many rural areas and that not all of them are seeking sex or selling drugs. The challenge is how to manage the interface such that the natural people-to-people contact is maintained, while protecting the visitor from undue pressure and the resident from some of the nefarious activities and demands of some visitors.

Against this background, a small group of senior industry employees and hotel managers from the Ocho Rios resort area provided both a useful summary and a range of suggestions on the key issues affecting people and the economics of the industry. The focus group meeting was held at the Roman Catholic Church in Ocho Rios. Five persons participated. These included two males and three females. The majority of participants were senior managers in large hotels operating in the Ocho Rios area. Job functions included franchise holder/manager, a human resource manager, a senior housekeeper, the proprietor of a gift shop located within a hotel property and a minister of religion whose church members work in a variety of occupations within the industry. Findings from the discussion are summarised below.

There was consensus in the group that Jamaica as a tourist destination can be described as "a paradise" but the growth potential was being compromised by the following concerns:

- Insufficient government investment. This was evidenced by poor infrastructure, insufficient information and education of school children and for the general population about tourism.
- Inadequate amenities for tourism workers. The group highlighted lack of housing and poor transportation services as two very acute problems which affect the productivity, attitude and comfort of workers. Rental accommodation is very high for locals and most new accommodation being built was mainly for tourists. It was stated that hotel workers are not benefiting enough from the National Housing Trust, as their salaries were too low to allow them to build up counterpart funds.

- Tourist resorts are not always friendly. The social and economic deprivation of local people sometimes makes it difficult for them to both appreciate and participate in tourism. There is too sharp a contrast between the facilities for tourists and those for locals. For example, tourists travel in air conditioned buses while local transportation is almost non-existent in many resort areas and neighbouring parishes.
- Problems and developments in tourism directly affect local people but they are not participants in determining the solutions.
- Environmental pollution is very serious, especially pollution of the rivers and sea. This situation was made worse by poor sanitation and solid waste disposal in the town of Ocho Rios.
- There is inadequate sensitivity to the fragility of the tourism industry and how it is to be protected.
- Tourism is often not consciously "fostered", but is rather "allowed to happen", in some instances
- Tourist harassment is a major problem. It is heavily influenced by the lack of employment opportunities for local people. As a consequence all-inclusive properties have become the norm, as it is neither safe nor comfortable for tourists to experience Jamaica outside the hotels.
- Involvement of local people in tourism must be organised and planned. For example, hair braiders should operate from special shops with guidelines for the trade. This would reduce the problem of harassment. Currently, the braiders harass the tourists for business and the police harass the braiders.
- The full potential of the local population is not being exploited by the tourism industry. Training is essential for the tourist industry to equip workers with the appropriate attitudes and skills. Particular reference was made to craft vendors. It was felt that Government should provide more training for them to achieve product diversification and improved product quality.

The following benefits and positives of the industry were also identified in the same focus group discussion:

- Tax payments to the Jamaican Government from tourists, workers and the hotels help the overall economy.

- Purchases by tourists at in-bond shops, craft markets and other places help the local economy.
- Tourism is a major earner of foreign exchange.
- Cultural exchange - Jamaican food, music, dance and other cultural forms are sometimes showcased. Visitors want to experience more than sand, sea and sun.
- The Industry creates employment. People from a wide geographical area come to work in Ocho Rios. Some workers could reportedly earn a basic salary well in excess of salaries of teachers and certain other professionals.
- Opportunities for niche marketing in tourism exist and marketing tours to church groups overseas was one such opportunity mooted. The church is involved in tourism as cruise ship and other visitors attend services sometimes and stay for activities after Sunday services
- Working in the tourism industry raises the expectations of workers and opens their eyes as to how some people live.

Pockets of Hostility

If the hospitality industry relies on the economic clout of the visitors, it also heavily depends on the consent of the host populations. If this often tacit consent is withdrawn, the industry can disappear in a matter of days. The following report of a focus group session of unemployed youths in Flankers, near Montego Bay in April 1999 gives an indication of the hostility that can be generated when people in and around host communities feel alienated.

The Flankers area is a densely populated, depressed and sometimes volatile community on the outskirts of the main resort town of Montego Bay. The community overlooks the Donald Sangster International Airport and is located on the main northcoast road linking urban Montego Bay to other resort neighborhoods such as Rose Hall and Ironshore. This main highway is also the key artery linking Montego Bay to Ocho Rios and Kingston.

The focus group discussion in this community was held one week after a demonstration in the community caused the blockage of the main highway. It also caused severe incon-

venience to normal commuter traffic and airport shuttle services for tourists.¹

The focus group consisted of male residents of the area, four of ages ranging from 18 to 25 years and two more mature men in their mid thirties. All were unemployed and lived by 'hustling' and mutual support. One of the youth was a student at a tertiary level institution.

The main attitude evident in the group was resentment at what they regard as acute neglect of their community. They say that attention is paid to their area only when there is a demonstration or major incident. They feel strongly that the Tourism Industry is organized for the wealthy in society, whom they also see as mainly white or brown people.

The eldest member of the group said: "tourism leave out the vendors, craft people, ghetto youths and poor people in general." Expressing agreement with this, another member complained that the police were the ones who were harassing ghetto youths when they tried to reason with tourists. In response to questions about youths harassing tourists, one of the younger and more aggressive members of the group declared that "more time tourists fi get harass, and rob too, cause a nuff time dem rob we abroad and trick we. Right yah now in Jamaica, nuff a dem tell lie pon youth say youth and youth tief dem. Anything tourist say dem tek as right and truth, no investigation!" While some others in the group nodded support, one member expressed disagreement with robbing tourists and an argument ensued.

These young Jamaican men, with no visible stake in the industry and no perception of a future in it, cannot see why they should protect either visitors or the reputation of a country that did not seem to care about them.

The student in the group explained that the Flankers area did not benefit much from tourism although it was in the middle of the Montego Bay tourism area: "People from Flankers who work in the industry affi give wrong address." He said there was no training or opportunities for men or women. As a result of neglect and deprivation, many people had become hostile to outsiders and aggressive towards the visitors.

1 See 'Flankers: Bomb with a short fuse' in *Observer*, April 13, 1999, page 6.

Alternative Perspectives

Another group session, held in Bluefields in the emerging tourism area of Jamaica's South Coast, provided critical responses about perceptions of the tourist industry and their relationships with local residents. Twelve people participated in this community meeting, including five women ranging in age 19 to 55 years and seven men in the 25 to 50 age-range. Most of the participants were farmers, small business people and social workers, with some indirectly dependent on tourism for a living. The majority of tourists seen by these residents were considered low to middle income visitors from many countries or areas including Jamaicans on holiday from overseas. Following are some excerpts from the meeting report:

Many of them come here on credit, and have to face a big debt when they return home", one participant said. Another observed that many back-packers are seen on hiking trips across the area, some looking to stay with local families.

A more mature woman in the group said that the quality of local accommodation available to these visitors is quite poor. If rural homes and sanitary facilities could be improved with government loans or direct assistance, many more ordinary householders would be able to earn a living from accommodating tourists in their own homes.

Most participants agreed with this but noted that local people should have contact with a mix of visitor types, including those at the upper end of the market who tend to be accommodated more in the larger hotel properties.

One participant drew attention to the need for more community information and education about tourism, especially on the South Coast where the industry is just beginning to develop. He saw an important opportunity for good attitudes to be fostered before the area is more developed and affected by bad attitudes.

Tourism and the environment

On the issue of the environment and the sustainability of the industry, a young participant was concerned about making better arrangements to deal with the environmental impact of tourism in the fragile eco-system of the South Coast, including the beaches,

mangrove and rivers in the area. It was suggested that there should be a direct levy on visitors for development of the environment, the infrastructure and broader measures put in place to ensure that more of the money earned in tourism be spent in tourism-related areas.

Similar concerns were expressed in a panel discussion conducted in Portmore, St Catherine. This community, on the outskirts of Kingston, is regarded as one of the largest residential areas in the English-speaking Caribbean, with more than 250,000 residents. While it is not a traditional tourist resort community, a large number of mainly Jamaican residents visit the beaches and clubs in the area, especially on weekends and on national holidays.

One participant was concerned about the ecological and environmental effect on Portmore of an expanded visitor industry, given the already congested roadways and limited public amenities. Other members of the panel were sympathetic to this view, and insisted that the country and areas like Portmore must be developed primarily for its residents, who could then extend hospitality to visitors. A member of the audience said that we may not have the luxury of doing one or the other and that the facilities of the area may have to undergo accelerated development for both local residents and visiting patrons.

Who is a tourist?

Among the issues on which public perceptions were canvassed was the idea of who is a tourist. This issue turned out to be important as it revealed the biases and misconceptions among the population. In the Portmore focus group, a hotel employee created controversy with his definition of a tourist:

The tourism employee offered a definition of a tourist as a visitor from overseas. He was immediately challenged by others on the panel who argued that if employees approached the industry as a service sector for foreigners only, it was not surprising that Jamaicans often received such poor service in hotels. The hotel employee felt the need to correct his initial definition.

A teacher, who is also a guidance counsellor, said the country's high school curriculum itself defined a tourist as a visitor from overseas. Corrections at the level of the Ministry of

Education were essential. These would foster accurate knowledge and appropriate attitudes to Jamaican vacationers.

Participants from inner city Kingston also had varying descriptions of who is a tourist:

Their images of tourists included: "someone walking around with a camera, asking a lot of questions". Others felt tourists were "high colour people with an accent". A white woman walking downtown, another said, is likely to be seen as "rich", which made some people feel to start "mobbing" her. This shows that there is the assumption that if they are foreign they have money. "Dark skinned tourists have a better chance of getting around without harassment."

Children in Grade 6 at the Negril All Age School debated the question of who was a tourist, during a class discussion as part of the study. It was clear that the majority of these children had benefited from training programmes in schools.

The children were asked who they consider a tourist to be. Two sets of answers emerged from the early stages of the class discussion. Some argued that a tourist was a person who came from overseas to spend holidays. Probed further, those who supported this view said the tourists could be of any race or colour. The other position was that a tourist did not have to come from abroad but was simply a person of any race or colour taking a trip for relaxation, pleasure or health reasons. We then took a show of hand for agreement with one or the other positions. Less than a third of the class (8) agreed with the first position about a tourist being a foreigner visiting a country. A large majority (21) agreed that arrival from overseas was not a necessary feature in defining a tourist. A representative of the latter group gave an example. He said that if he went to Ocho Rios or Kingston for a break with his parents he would be a tourist there. A girl holding the opposite view created some laughter, however, when she told him that he may regard himself as a 'dry land tourist' in Kingston but nobody else would regard him as a real tourist. The class eventually agreed, however that a tourist need not come from abroad.

Synopsis

The views expressed in these focus group and class discussions reflect opinions rarely canvassed about the development of the

industry. Yet they contain perceptions honed by exposure to the day to day life in the industry or resort areas. As can be discerned from the selected excerpts, participants provided varied, direct and sometimes dramatic disclosure of attitudes to the industry among Jamaicans of all strata. The responses also offer details of several important strategies to increase popular involvement by communities and groups across the country. They include localised festivals celebrating the traditions, foods and indigenous products of people in their communities. Other suggestions included forest tours of special environmental reserves such as the Rio Cobre River in St. Catherine. Historical expeditions, youth entertainment nights for tourists using the musical and dramatic talents of inner-city and other young people, and more organized night outs by local and foreign visitors in areas such as Portmore and Port Royal were also suggested.

Survey findings

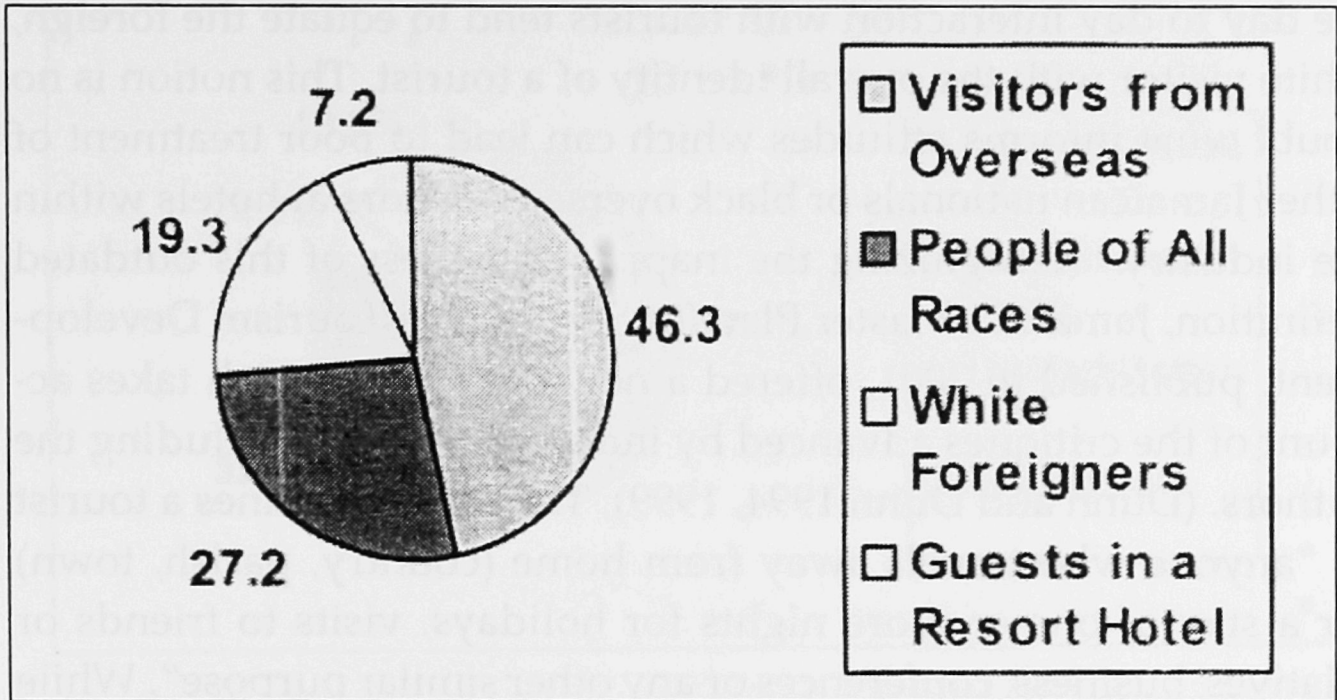
Many of the opinions expressed in the small group, community and class discussions were borne out in the wider survey findings. The survey was administered to 1,025 respondents, islandwide. A quota sample was drawn to reflect the demographic and geographical distribution of the population. The sample also reflected rural-urban diversity and population distribution in tourist and non-tourist areas.

Defining a 'Tourist'

Among the questions asked was 'who comes to mind when they think of tourists.' As indicated in Figure 1, the most popular view, represented by nearly half of those interviewed (46.3%), is that tourists are visitors from overseas. Slightly more than a quarter (27.2%) saw them as people of all races. Only 19.3 % saw them as "white foreigners". The remaining 7.2% saw them as guests in a resort hotel.

These findings are consistent with qualitative data, and indicate that a significant section of the public associates tourists with visiting foreigners. The fact that less than ten percent saw tourists as simply guests in a resort hotel suggests that a majority of people still do not see Jamaicans on holiday in resort areas as tourists.

FIGURE 1: JAMAICANS' PERCEPTIONS OF TOURISTS



Such a widely held misconception appears to be aided by the chief tourism marketing agency, the Jamaica Tourist Board itself, whose research definition identifies a tourist as “A visitor staying at least 24 hours in the country”. Any visitor staying less than 24 hours in a country other than the one in which they reside is regarded by the JTB as an “excursionist”. In its Annual Travel Statistics report, the JTB regards a ‘visitor’ as “any person visiting a country other than the one in which he/she normally resides, for not more that one year, and whose purpose of visit can be classified under one of the following headings: **Leisure** — recreation, holiday, health, study, religion, sport, visit family/friends; **Business** — conference, meeting, mission.” There were no definition categories in this JTB official publication for Jamaicans holidaying in Jamaica. The definitions by the JTB appear to be derived from an approach adopted by the United Nations Conference on International Travel and Tourism held in 1963. At that time, a visitor was defined as “any person visiting a country other than that in which he has his usual place of residence for any reason other than following an occupation remunerated from within the country visited” (Inskeep 1991: 18-19).

This outdated definition of close to forty years standing is in urgent need of review, especially in the Caribbean regional context.

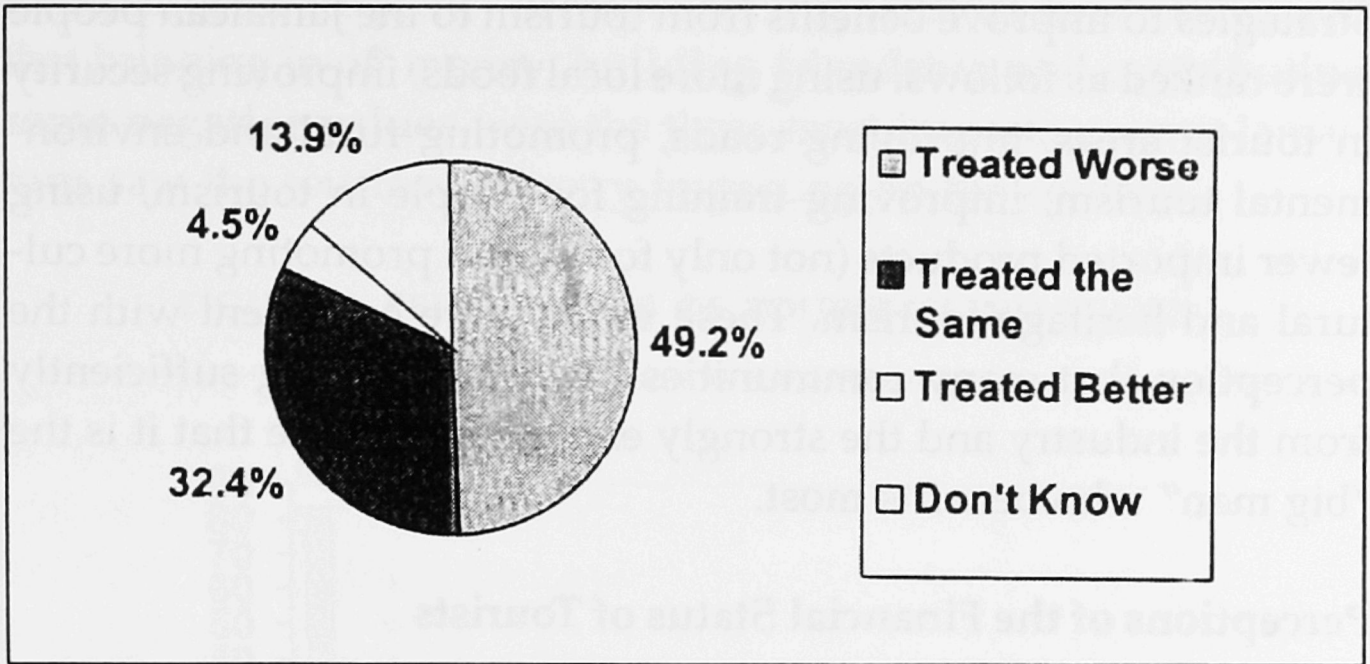
On the basis of its continued use in the local industry, it was not surprising that many of those workers most closely associated with the day to day interaction with tourists tend to equate the foreign, white visitor with the overall identity of a tourist. This notion is no doubt what informs attitudes which can lead to poor treatment of either Jamaican nationals or black overseas visitors at hotels within the industry. Recognizing the inappropriateness of this outdated definition, Jamaica's Master Plan for Sustainable Tourism Development, published in 2001, offered a new definition which takes account of the critiques advanced by industry analysts, including the authors. (Dunn and Dunn 1994, 1999). The Plan re-defines a tourist as "anyone who travels away from home (country, parish, town) for a stay of one or more nights for holidays, visits to friends or relatives, business, conferences or any other similar purpose". While the reference in this definition to 'nights' betrays a continued adherence to older accommodation-based notions of tourism, this new definition represents a significant advance on the approaches described earlier.

Treatment of Jamaicans

Both the qualitative and quantitative data suggest that origin and nationality are key factors that influence perceptions of who is a tourist. Jamaicans make clear distinctions between nationals who take a vacation in resort areas and people from overseas who are of different races and nationalities, who come on a holiday. Jamaicans also continue to be influenced by race and colour in their attitudes to tourists. The data consistently reveal concerns about the poor treatment of black Jamaicans and to a lesser extent other non-white visitors in hotels and resort areas. More than half of those interviewed (53.5%) were of the view that Jamaicans received worse treatment than overseas visitors did. Almost one-third (32.4%), drawn especially from among young people, felt they were treated the same.

The survey data suggest the existence of negative attitudes by the majority of hotel workers towards Jamaicans and visiting people of colour, and that this is cause for concern and remediation.

FIGURE 2: PERCEPTION OF TREATMENT OF JAMAICANS



Perceptions of benefits from Tourism

Most people (86.4%) regarded tourism as very important to Jamaica. Just under a third of the population (30%) reported that they depended directly or indirectly on tourism for a living. Many people (26%) also said that they had family members who worked in the industry.

Despite this finding, only a quarter of those interviewed (26%) felt that their community benefited significantly and another thirty six per cent (36%) felt the impact was moderate. The main perception by thirty eight per cent (38%) was that tourism was of no benefit to their community.

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. Common images of the "big man" were: owners of all-inclusive hotels, large travel companies and airline operators as well as in-bond merchants. Popular images of the 'small man' were: some taxi operators, craft vendors, higglers, farmers, hotel workers and operators of local villas and guest houses.

As indicated earlier, these findings were consistent with the attitudes emerging from the community meetings, focus groups and in-depth interviews and discussions.

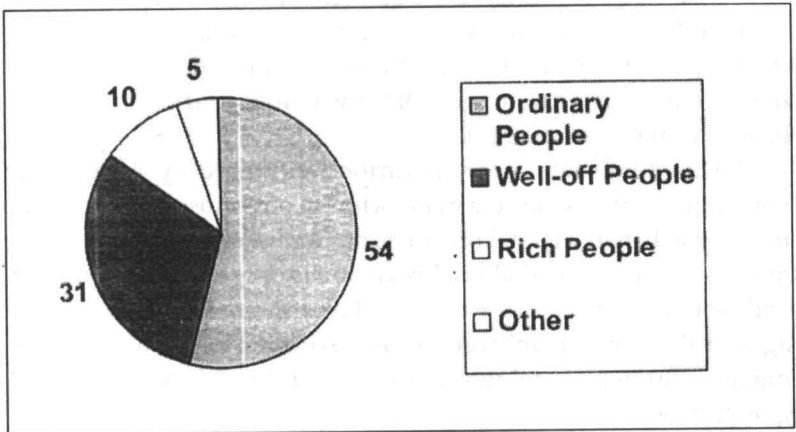
Improving benefits from Tourism

Strategies to improve benefits from tourism to the Jamaican people were ranked as follows: 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 benefiting sufficiently from the industry and the strongly expressed attitude that it is the "big man" who benefits most.

Perceptions of the Financial Status of Tourists

Most people (54.3%) saw tourists who came to Jamaica as 'ordinary working people with limited resources'. In rank order, they were also seen as: 'well-off people with reasonable amounts of money to spend' (31.3%) 'rich people with lots of money' (9.6%) and 'other' (4.8%). The most frequently held view within this group was that Jamaica's tourists are a combination of the three categories.

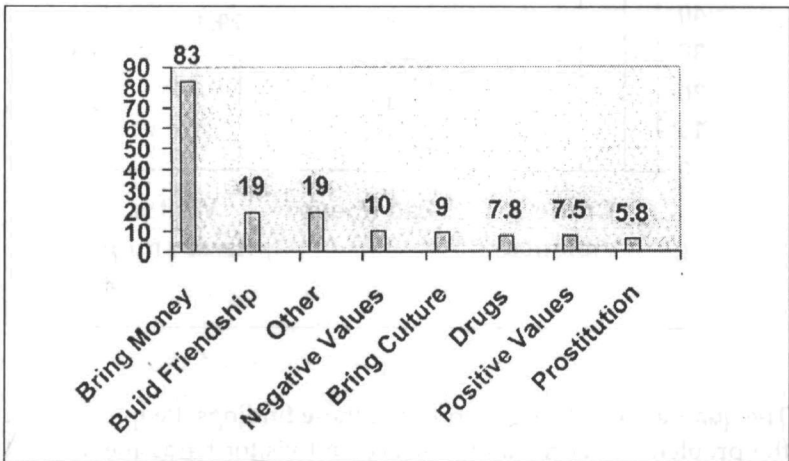
FIGURE 3: PERCEPTIONS OF TOURISTS' FINANCIAL STATUS



Perceptions of Tourists' influence on life in Jamaica

Analysis of the frequency of responses (Fig 4) to this question showed that bringing in of **money, building friendship and contributing some negative values** were the three most important ways Jamaicans saw the tourism industry impacting on the country.

FIGURE 4: PERCEPTIONS OF TOURISTS' INFLUENCE

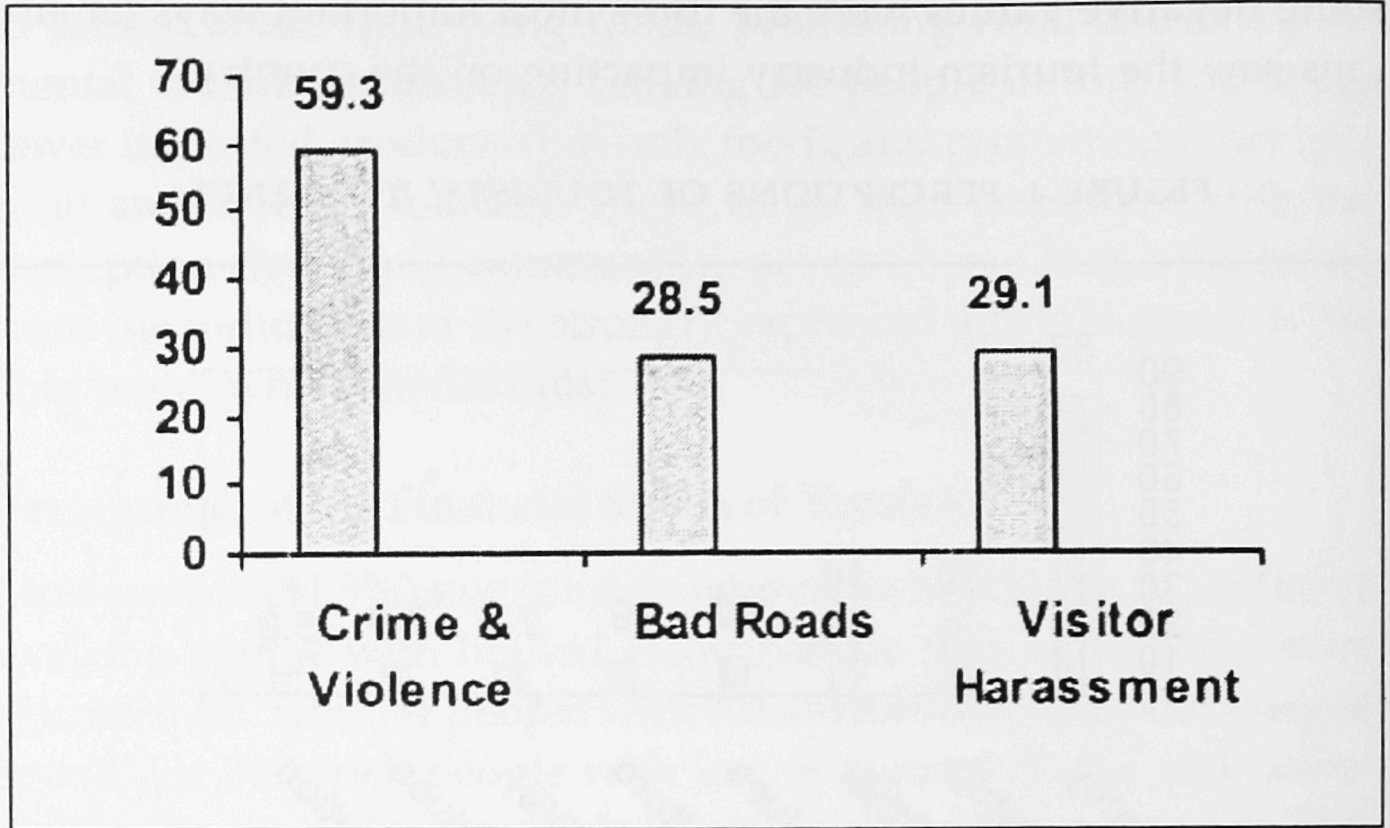


These perceptions, revealed in the survey, confirm the qualitative data findings that money and friendship are the main ways in which people perceive the influence of tourists on life in Jamaica. However, the latter is increasingly being constrained by reduced citizen access to tourists, because of concerns about harassment. There was confirmation that tourism also brings negative values, such as a drug culture and prostitution.

Perceptions of industry problems and solutions

As indicated in Figure 5, crime and violence (59.3%), bad roads (28.5%) and visitor harassment (29.1%) were the three most important problems identified. The main solutions proposed in rank order were: more community education, better street lighting, stiffer penalties for harassers, and more police and resort patrols. The least popular solution was adding more soldiers.

FIGURE 5: PERCEPTION OF MAIN PROBLEMS AFFECTING THE TOURISM INDUSTRY % RESPONDENTS



The qualitative data also supported these findings. People felt that the problems of crime and violence and visitor harassment could be best tackled by increasing education and training opportunities, expanding employment opportunities and diversifying the tourism product to benefit a wider range of communities. There was also the view that basic infrastructure (including roads) needed to be upgraded for ordinary citizens and tourists would also benefit. There was the view that if people feel comfortable in their own 'home', they will welcome tourists.

Perceptions of priority sectors for economic development

While tourism was regarded as very important to Jamaica, the dominant view was that it should not be the main sector. Analysis of frequency responses showed the following priorities: agriculture (48%); tourism (38%); manufacturing (30%); information technology (23%); bauxite (19%).

The qualitative data also confirmed the dominant view that agriculture should be the main sector and that the small business

sector, including new attractions should be developed more extensively.

Industry management and communication methods

Management of the industry received mixed reviews. There was a positive rating by a quarter of the respondents (25.1 %), who felt that the industry was being managed effectively or very effectively. Another 34.9% rated management of the industry as fairly effective. On the other hand, 29.9% of respondents rated the management of the industry as either 'somewhat effective' or 'not at all effective'. These findings suggest that while there is some satisfaction, there is need to re-examine both the management practices and public communication systems among all agencies associated with the industry.

Communication programmes should keep the public more informed about the goals, objectives and achievements of tourism as well as explain more clearly the role of the various agencies promoting tourism. Messages most commonly recalled were: Anti-harassment; One Love... Come to Jamaica and Feel Alright; Spring Break activities and the Reggae Boys. The Jamaica Tourist Board was the agency most frequently cited as the source of these messages. One-third (34%) of those who said they remembered seeing or hearing messages, attributed them to this source.

Conclusions

The results of the study are likely to contribute to a better understanding of Jamaican views, perceptions and attitudes relating to tourism. Among approaches recommended by the report is the need to initiate a collective review of the communication strategies of key tourism agencies and to develop an integrated, communication programme for the industry. Whereas the lion's share of promotional resources has been justifiably placed in overseas advertising, there is also an urgent need for greater resource allocation to in-country public education, as well as training of hotel employees. At the same time, the findings strongly suggest that improved communication strategies and more effective messages will not by

themselves improve attitudes to tourism or tourists, or build a stronger stakeholder base for tourism to flourish. In order to address perceptions of alienation and inequitable distribution of industry benefits, there is a pressing need to restructure the industry itself, to reduce the number of layers of management and expand community and small business involvement in tourism. Greater efforts should be made to encourage more active partnerships between all-inclusive hotels and local businesses, in order to expose hotel guests to more Jamaican attractions in the community.

Poverty eradication, infrastructure improvements (roads, affordable housing, streetlights etc.) and urban redevelopment initiatives were also considered critical to the continued success of the industry. Similarly programmes of public education, skill training and employment creation must complement existing efforts to improve the tourism product.

The industry in Jamaica must be seen as consisting not just of resort pockets or 'tourist areas' but as an integrated national industry, linked to agriculture, music and the creative arts. People felt strongly that government, private sector and NGO partnerships should be developed and strengthened to increase the variety and spread of attractions beyond traditional resort areas. It is only with this approach that the authorities will be able successfully to tackle the pressing problems of security, harassment and hostility by those alienated from the benefits of the industry.

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